

How to Create an Appointment Campaign

1. Select the Campaigns icon from the Quick Links section on the left of your screen.

2. Click Add New under Appointment Campaigns located in the Student Campaigns box.

3. Define your campaign. When finished, click Continue.

Continue >

Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

Appointment Campaigns

Allows staff reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

+ Add New



Name your campaign using the Naming Convention.

Campaign Configurations

* Campaign Name

Instructions or Notes for Landing Page

* Care Unit:

* Location:

* Service:

Add your **Care Unit**, **Location**, and **Service**. This should match your Availability.

Appointment Configurations

* Appointment Limit:

* Appointment Length:

* Slots Per Time:

☐ Allow Scheduling Over Courses

Staff Reminders: ☐ Email ☐ Text

Recipient Reminders: ☒ Email ☒ Text

Appointment Limit: Number of times you want the link in your invitation to work. Most often once.

Appointment Length: How long want the appointment to last. Range from 5 to 360 min.

Slots Per Time: Number of students in the appointment.

Scheduling Window

Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

* Start Date

Start Date: First day you want to meet with students during the campaign.

* End Date

End Date: Last day you want to meet with students during the campaign.

4. Find students to add to the Campaign by searching them and clicking Search.

Search

New Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail,
Student ID)?

Search for students in the same
way you would in Advanced Search.

Student Information First Name, Last Name, !

5. Select the students that you want to include in the Campaign by clicking on the box next to the name of the student individually OR click the box next to Name at the top of the list to select everyone at once. Then click Continue.

☒ NAME

Select Staff For Campaign

6. You will need to add Staff to your Campaign. Click the box next to your name and then click Continue.

ID	NAME
<input type="checkbox"/>	Liann Tsoukas
<input type="checkbox"/>	Jessica Lynn Watson



+ Add Nudge

7. Now you compose your email message or Nudge. To do this, click the Add Nudge button.

Add Nudge

* Subject

{student_first_name}, Schedule an Advising appointment

* Message

B I | | | | Heading 2 | Merge Tags | |

Please Schedule Your Advising Appointment.

Hello {student_first_name}:

Please schedule an appointment for History General Advising at History Advising: 3702 Posvar Hall. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{schedule_link}

Thank you!

Available Merge Tags

{student_first_name}	Inserts the student's first name
{student_last_name}	Inserts the student's last name
{schedule_link}	Inserts a link to schedule the appointment

Add Attachment:

Choose File No file chosen

* Send Date

Thursday, March 31st 2022

Select the date that you want your nudge email to be sent.

Preview Email

Andrew, Schedule An Advising Appointment



Please Schedule Your Advising Appointment.

Hello Andrew:

Please schedule an appointment for History General Advising at History Advising: 3702 Posvar Hall. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

[Schedule an Appointment](#)

Thank you!

Questions? Please email PathwaysHelp@pitt.edu.

As you make changes you will see a preview of the email you are sending to students as they would see it in their inboxes.

- Make edits to the email that you want to send to students. Make sure that the {schedule_link} tag stays intact. This is how a student can make an appointment with you. Click Save Nudge.

Save Nudge >

- Using Nudges, you can resend email reminder messages to the students who have not yet made an appointment with you. You can add as many Nudges as you want when you set up your Campaign, and they will be sent out on the day you choose. Once you have set up all of your nudges, click Continue.

You can send email reminders in advance for students who have not made an appointment with you using multiple Nudges. You decide the date that you want a new reminder to go out. Just follow the steps above to create as many reminders as you need. Now, you won't have to remember to check!

- Confirm your Appointment Campaign and click Start Campaign.

Start Campaign