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.

Name your campaign using the Naming Convention.

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

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.

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

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.

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.

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

7. Now you compose your email message or Nudge. To do this, click the Add Nudge button.
8. 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.

9. 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.

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.

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

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!

10. Confirm your Appointment Campaign and click Start Campaign.