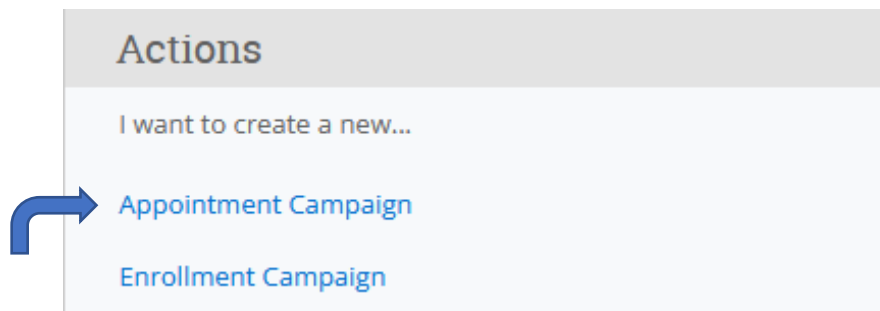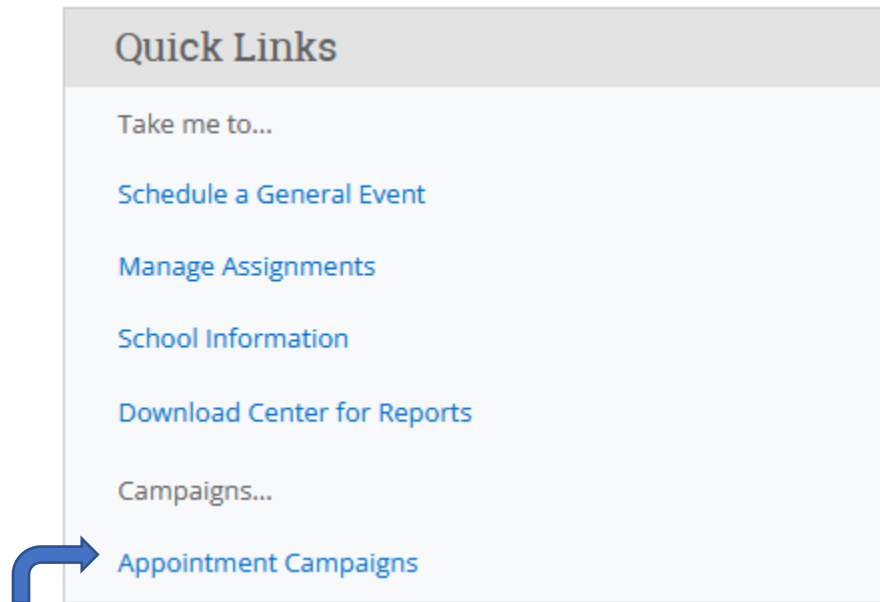## Launching an Appointment Campaign in Navigate

To begin:

- Click appointment Campaigns in the Actions or Quick Links menu

Define the Campaign:

- In this step, you will set the criteria for your Appointment Campaign
- Campaign Name: This is visible to the person creating the campaign and any other users who have access to view campaigns, but it is not visible to the student
- Suggested format for Campaign name:

  Term, Population, Purpose

  Term, Population, College, Purpose

New Invitation Campaign ⬇ GREEN F

Define Campaign

The campaign name and dates will be visible on the Appointment Campaigns Tab and the Student Profile for users who have permission to view it.

Campaign Name:

Care Unit:

Location:

Service:

Begin Date: 02/28/2022   **End Date:** 03/14/2022

Appointment Limit: 1

Appointment Length: 5 min

Slots Per Time: 1

ⓘ Allow scheduling over courses ☐

Cancel   Save and Exit   Continue

- **Care Unit**: Select the Carte Unit the Appointment Campaign will be associated with

- **Location**: Select the location where the appointment(s) will be held

- **Service**: Select the Student Service that will be associated with the campaign

- **Course or Reason**: Add the reason or associated course for the campaign in this area. This will only appear if the 'Service' is tied to a course

- **Begin & End Date**: These are the dates you want students to start and stop making appointments associated with this campaign

- **Appointment Limit**: This will determine how many appointments you wish for the student to schedule during the campaign (It is typically 1 for registration)

- **Appointment Length**: This is where you define exactly how long the appointment will be. Durations begin at 5 minutes and will be determined by your entry

- **Slots per Time**: Appointments can be individual or group. By adding more than one 'slot per time", you can make a group appointment. Otherwise, if you wish to meet with students individually, leave it at 1

Add Student to the Campaign:

- Your next step is adding students. If you created this campaign directly from a Watch List or Saved Search, you will be asked to review your students. If not, the Advanced Search screen will open.

- You have several ways to search for and select your students

  Invite All My Assigned Students: Adds all students assigned to you to the campaign

  Advanced Search: Use the Advanced Search filters to find and select students. After starting the search, you will be presented with a list of students. Select the students you wish to add and then choose **Add Selected Users and Search for More** from the actions menu. Once finished, click Continue to move to the next page. You are asked to review the students in the campaign. If they are correct, click continue.

See chart below:

Add Staff to Campaign

- You will need to select yourself as staff for the campaign. You also have the option to select additional staff to make them available for appointments based on the campaign

NOTE: Staff will need to have availability defined before they can be added to an appointment campaign. If you do not see staff you wanted to add, make sure their calendars and availability are up-to-date.

Compose Your Message

- Your next step is to compose the message you will send to students. This invitation to schedule an appointment through the campaign will appear in a preview below the message and include information about how to use 'Merge tags'.

- **NEVER REMOVE THE SCHEDULE LINK FROM THE EMAIL BODY**

Fields used in the message composition are:

- **Email Subject:** The topic is the subject of the email going to the student.
- **Instructions or Notes:** This is specific to the landing page students are taken to when they click on the link in their email to choose the date and time of their appointment.
- After you have finished composing your message, it's time to send out your campaign!

Review your campaign details, invitees, and advisors on this page. Select how your organizers and attendees get reminders about appointments.

Confirm & Send

Care Unit: Academic Services

Location: 2420 M Street

Service: Academic Advising

Start Date: 12/09/2020

Appt Length: 15 minutes

Appt Limit: 1

End Date: 01/22/2021

Slots Per Time: 1

Organizer Attendee Reminders:
☑ E-mail ☐ SMS

Non Organizer Attendee Reminders:
☑ E-mail ☐ SMS

Subject ($student_first_name), Schedule an Academic Services appointment

Email Preview View

Invitees: View All (1000)

Included organizers View All (2)

< Back

Save and Exit

Send