

Creating an Advising Appointment Campaign

1. From the advisor home screen, select **Appointment Campaigns** from the Quick Links navigation.
2. This will take you to the Campaigns tab. From there, select **Appointment Campaign** from the right hand side, under **Actions**.
3. This will take you to the first step of creating your campaign, which is to name and define your campaign.
 - 3.1. Name your campaign (Students will not see the name of the campaign).
 - 3.2. Select **Advising** as the Campaign Type.
 - 3.3. Select 1 slot per time.
 - 3.4. Under **Select Course or Reason**, choose the services for which you are available.

NOTE: This must match the availability you have set up on your advisor home page, under “My Availability.” In that screen, you must have selected matching appointment reasons. For example, if in your advising campaign you say you will be available for “Advisement”, you must also have chosen “Advisement” as a service you are available for in your campaign appointment availability.

- 3.5. Begin Date and End Date choose the date range for which you want the campaign to run. If a student tries to schedule outside of that time period, they will receive a message stating that the campaign has expired.

NOTE: This must match the availability you have set up on your advisor home page, under “My Availability.” Ensure that you have created **CAMPAIGN** availability (as opposed to appointment or drop in availability) during the timeframe that you would like your campaign to run.

- 3.6. Appointment Length - How long do you want the appointment to last?
- 3.7. Appointment Limit - how many appointments can the student schedule for the campaign? (default is 1)
- 3.8. Location - Choose your location.

NOTE: Ensure that for the campaign availability you have created under “My Availability” you have selected that you will be available in the same location (Advisor’s office).

- 3.9. Click **continue**.

4. Add students to your campaign. Use the advanced search feature to search for students you would like to participate in the campaign. If you want to ensure that you only return a list of students assigned to you, also click the box beside **My Students Only** next to the Search button.
 - 4.1. Once you run the search, check the box under actions to select all of the students on the list. Or, individually check the names of the students you want to participate in the campaign.
 - 4.2. Click **Continue**.
 - 4.3. Confirm the list of students you will be adding to our campaign by clicking a student's name and the arrow next to **actions** to remove them from the list. Or click **Add more students** to add additional students to the campaign.
 - 4.4. Click **Continue**.
5. If you have set up your availability correctly, your name should be showing on the next screen under **Add advisors to campaign**.
 - 5.1. Check the Box next to your name.
 - 5.2. Click **Continue**.
6. Compose your message to the student
 - 6.1. Create a Subject Line for your email
 - 6.2. In the next box, edit the text for the first line of the email. Default is "Please schedule your advising appointment"
 - 6.3. In the instructions and notes box, add any details about the appointment. For example, "Registration for Spring 2018 will open soon I caution you not to wait until that time to be advised. Please secure an appointment for the coming week."

Note: As you edit these fields, the text in the box below will show how your edits will appear in the message.

 - 6.4. Scroll down to the bottom of the screen. On the left, you will see a snapshot of what the email the student receives will look like.
 - 6.5. On the right, you will see the student landing page, This is where the student will be directed to choose a time for their appointment when they click the link in the their email.
 - 6.6. Click **Continue**.
7. Confirm and Send. Review the details of your campaign. When you are ready, click send to issue the email to students on the list.