Creating Appointment Campaigns

How to create appointment campaigns

Creating an Appointment Campaign

1. **Before Getting Started:** After creating appointment availability, an Appointment Campaign is an advisor’s mechanism to proactively outreach to specific students for appointments. Since generally students are not logging into the platform, this is the device to prompt students to self-select a day/time to schedule an advising appointment.

   □ Before proceeding with the Appointment Campaign, it is important for advisors to first create their availability within the platform. More on Creating Appointment Availability in other BHSC Advisor Resources.

2. **Step One:** Navigate to the Advisor Home page and click on Appointment Campaigns. Or, hover on the main fly out menu and navigate to the Campaigns page directly.

3. **Campaign Name:** Enter the desired Campaign Name. For example, an advisor might run a *Spring 2017 Registration Campaign*.

4. **Campaign Type:** Select *Advising*.

5. **Slots Per Time:** Select *1*.

6. **Course or Reason:** Select the Advising Appointment Reason (Student Service) that is applicable to the campaign, such as *Advising*. 

   ![New Invitation Campaign](image)
□ **NOTE:** Please note that it is necessary for the Appointment Reason (Student Service) and the Appointment Location to correspond to what was used when creating your availability.

7. **Begin/End Date:** Select the begin/end dates of your Campaign.

8. **Appointment Length:** Select the length of time for the appointments within your Campaign.

9. **Appointment Limit:** Select 1 (unless it is desired to allow students to attend multiple sessions within a Campaign.)

10. **Location:** Select the Location that you have created availability for, such as *Advisor’s Office* or *Major/Department Advisement Office*.

11. Click Continue.

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**Add Students To Campaign**

1. **Invite All My Assigned Students:** This step gives advisors the opportunity to select assigned advisees for the Campaign and to remove any assigned students from the Campaign as well.

2. **Advanced Search:** This step gives advisors the opportunity to utilize the filter capability within Advanced Search for a strategic Campaign. For example, an advisor might select all students within a major/college within a certain GPA or credit completion threshold.

3. After selecting students desired, **Click Continue**.

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**Add Advisors To Campaign**

4. **Select Yourself:** This Campaign step gives advisors the opportunity to confirm which advisor is involved in the Appointment Campaign. **Don’t be alarmed when you see other advisors – it simply means that they also have availability created for the same location!** While the platform design allows for certain users to select other advisors for Appointment Campaigns, this is not common business practice at UD nor how the functionality will likely be utilized. **For the vast majority of cases, this step is simply confirming yourself as the involved advisor. Click Continue.**

   □ **Include Appointment Availabilities** – If you don’t see yourself listed within the Campaign options, check the Location/Services for your availability. Click this box in case you established availability with the purpose reason of *Appointments* instead of *Campaigns*.

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**Compose Your Message**

5. **Create Message:** This Campaign step gives advisors the opportunity to add a Subject heading – e.g. “It’s time for Spring registration!” and add any other details the advisee may need within the instructions. At the end of the **Compose Your Message** section, the platform allows the advisor to see the student’s view of the Campaign details. **Click Continue.**

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Update 4/4/2017
Confirm & Send

6. **Review Campaign Details:** This last Campaign step gives advisors the opportunity to review the details of their entire campaign and make any desired adjustments before sending the Campaign to the selected students. Once hitting send, the platform asks advisors if they’re sure they want to send out the campaign invitations and once confirming, the Campaign invitations will be sent. A congratulatory confirmation appears once the invitations have been sent. **Click Send.**
Adding Additional Students to a Campaign

7. **Edit Campaign Details:** After a Campaign has been created and sent, it is still possible to edit the Campaign. Most commonly, this would be done in order to add additional students to that Campaign. Go to the Campaign screen and click on the Appointment Campaign Tab and click on the title of the Campaign you desire to edit. Click on the right-hand Edit Campaign Details link. To add additional students, click Edit for Student Select.

8. **Add More Students:** Click the Add More Students link. Use the Assigned Student list to add additional assigned advisees or Advanced Search option to add other/non-assigned advisees to the Campaign. Continue through the Campaign steps as prompted through the platform.

**Resending Appointment Campaign to Students**

9. **Resend Appointment Request:** After a Campaign has been created and sent, it is possible to resend the Campaign to students that have lost the link or not yet created advising appointments. Go to the Campaign screen and click on the Appointment Campaign Tab and click on the title of the Campaign you desire to resend. Click on Appointments Not Yet Made Tab. Select the student(s) desired to resend the link and click the Actions dropdown and select Resend Appointment Request. Continue through the Campaign steps as prompted through the platform.
Tracking Student Attendance in Appointment Campaigns

10. **Submit an Advising Report:** After sending the Campaign and starting to meet with students, advisors are encouraged to submit Advising Reports in order to accurately capture if a student has attended within the Campaign. Without doing so, the Campaign will report the student as having Not Attended.

As a reminder, when filing an Advising Report for an appointment that is already scheduled within the platform, advisors should navigate to the Recent Advisor Appointments tab (vs. creating an ad hoc report) in order to have the advising report associated with the actual Campaign appointment.