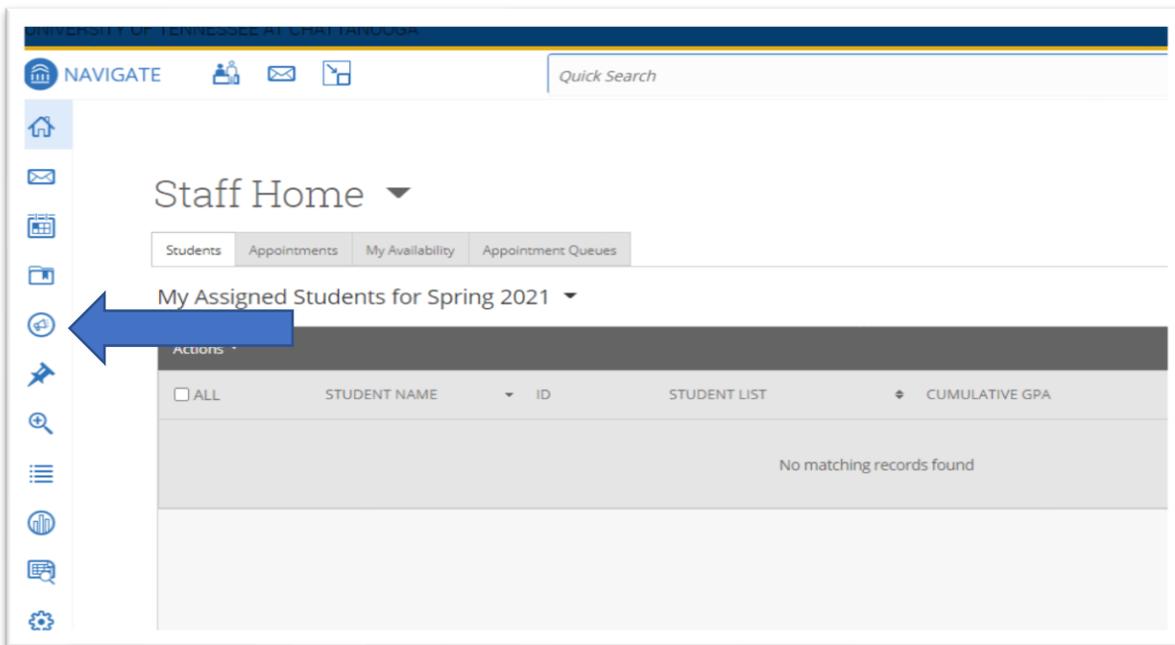
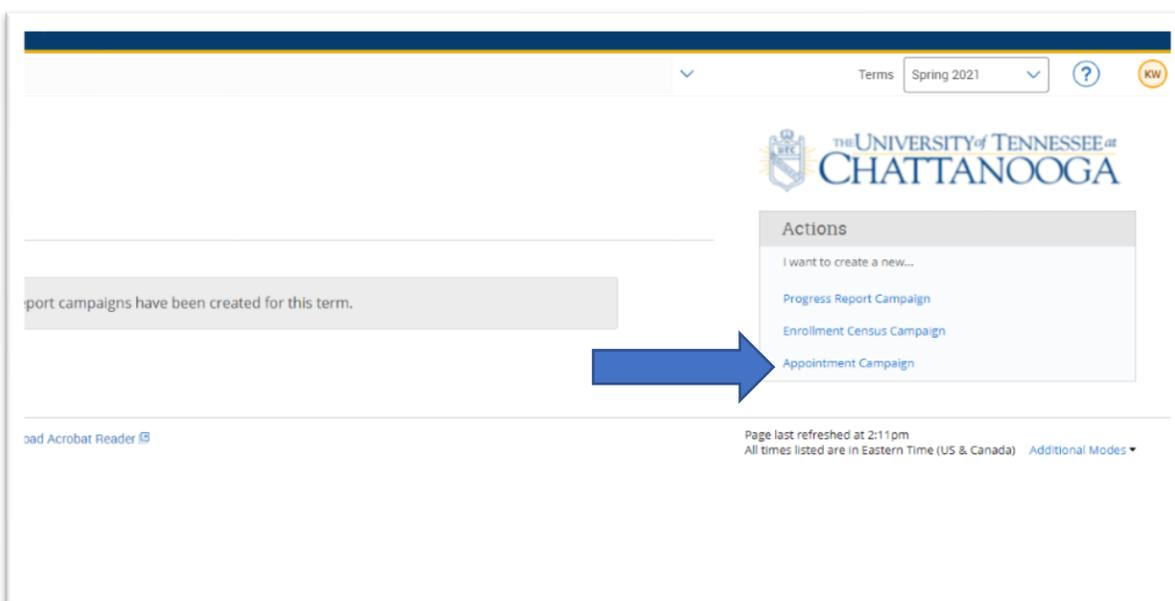


Appointment Campaign

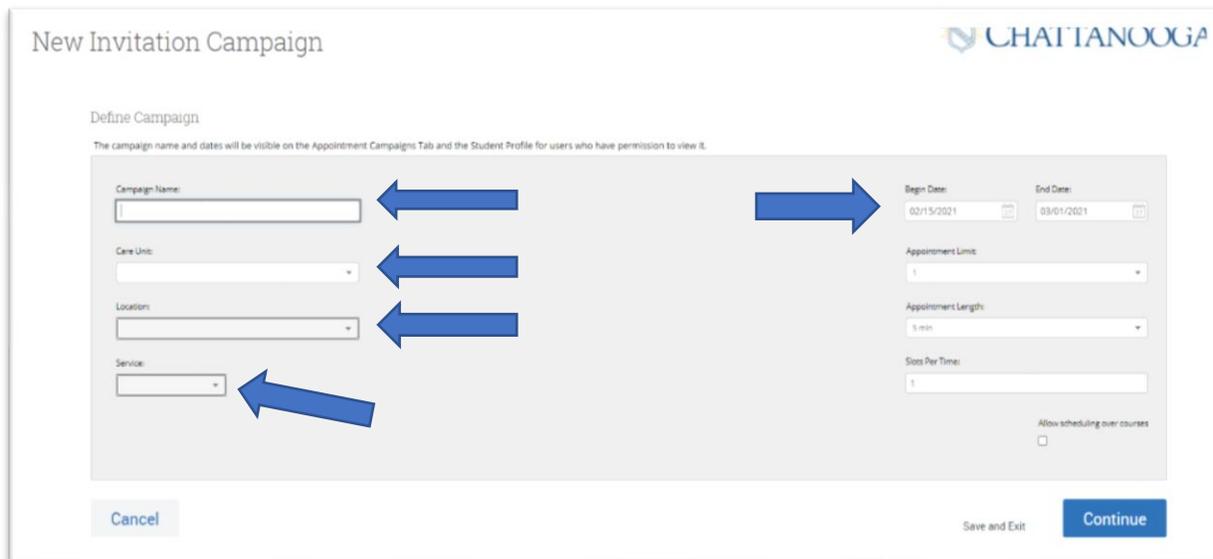
1. From the main home screen, select the “Campaign” icon on the left.



2. On the right side on the page, select “Appointment Campaign” under “Actions”



3. From here, enter a campaign name, the care unit, location and service. Also fill in the start and end date along with the appointment length and limit.



New Invitation Campaign

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: 02/15/2021

End Date: 03/01/2021

Appointment Limit:

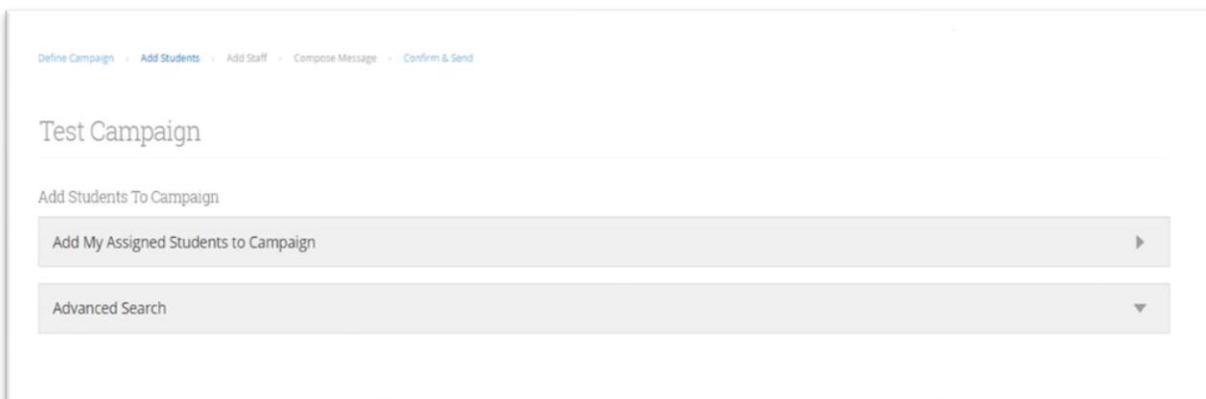
Appointment Length:

Slots Per Time:

Allow scheduling over courses

Cancel Save and Exit Continue

4. You will now need to add students to your campaign. You can do this by directly adding students that are assigned to you, or by searching for students using the Advanced Search feature.



Define Campaign · Add Students · Add Staff · Compose Message · Confirm & Send

Test Campaign

Add Students To Campaign

Add My Assigned Students to Campaign

Advanced Search

Add Students To Campaign

Advanced Search ▼

Saved Searches -

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

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Student List ▲

First Name? <input type="text"/>	Last Name? <input type="text"/>	From Last Name? <input type="text"/>	To Last Name? <input type="text"/>	Student ID? <input type="text"/>
Gender All ▼	Race All ▼	Student List (In Any of These) All <input type="text"/>		Transfer Student ▼

E-mail(s)

Category (In Any of these)?
All ⌵

Tag (In Any of these)?
All ⌵

Enrollment History Enrollment Terms ▼

Area of Study College/School, Degree, Concentration, Major ▼

5. Based on the location you selected, the campaign will ask if you want to add an organizer to the campaign. In most cases you are selecting yourself as the organizer. Organizers shown, will be those who also have availability for the time range selected from the selected location. If you don't see yourself in the list, it is likely because you have not added Availability for meetings, or you need to adjust your location setting.

Add Organizers To Campaign Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input type="checkbox"/>	Stormy Sims	For: Appointments/Campaigns Mon-Fri 9:00am - 4:15pm ET (January 5, 2021 - March 5, 2021)
<input type="checkbox"/>	Samantha Freeman	For: Campaigns Tue, Thu 9:00am - 4:00pm ET (January 21, 2021 - February 26, 2021) For: Campaigns Mon, Wed, Fri 9:00am - 5:00pm ET (January 21, 2021 - February 26, 2021)
<input type="checkbox"/>	Amy Beal	For: Campaigns Tue 10:00am - 4:00pm ET (January 21, 2021 - February 26, 2021) For: Campaigns Wed 9:00am - 4:00pm ET (January 21, 2021 - February 26, 2021) For: Campaigns Fri 9:00am - 4:00pm ET (January 21, 2021 - February 26, 2021) For: Campaigns Mon 9:00am - 4:00pm ET (January 21, 2021 - February 26, 2021) For: Campaigns Thu 9:00am - 4:00pm ET (January 21, 2021 - February 26, 2021)

< Back
Save and Exit Continue

6. This step will ask you to confirm the message sent to students. The message is pre-developed based on the information you entered about the campaign. You may edit the message, however, be careful not to delete or change the info in brackets (e.g. {Student_First_Name}) as this information is automatically imported. You can also add an attachment in this section. You can receive a preview of the message going to students at the bottom of the page.

Test 1

Compose Your Message

{student_first_name}, Schedule an Advising appointment

B *I* [List Bullets] [List Numbered] [Link] [Image] Heading 2 Merge Tags ↩ ↲

Please Schedule Your Advising Appointment.

Hello {student_first_name}:

Please schedule an appointment for Academic Coaching - USTU at Center for Academic Support and Advisement - Virtual Appointments(in-person by request). 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: 7

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

Add Attachment:

Choose File No file chosen

Instructions or Notes for Landing Page

Preview Email Preview Landing Page

Andrew, Schedule An Advising Appointment



Please Schedule Your Advising Appointment.

Hello Andrew:

Please schedule an appointment for Academic Coaching - USTU at Center for Academic Support and Advisement - Virtual Appointments(in-person by request). 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.

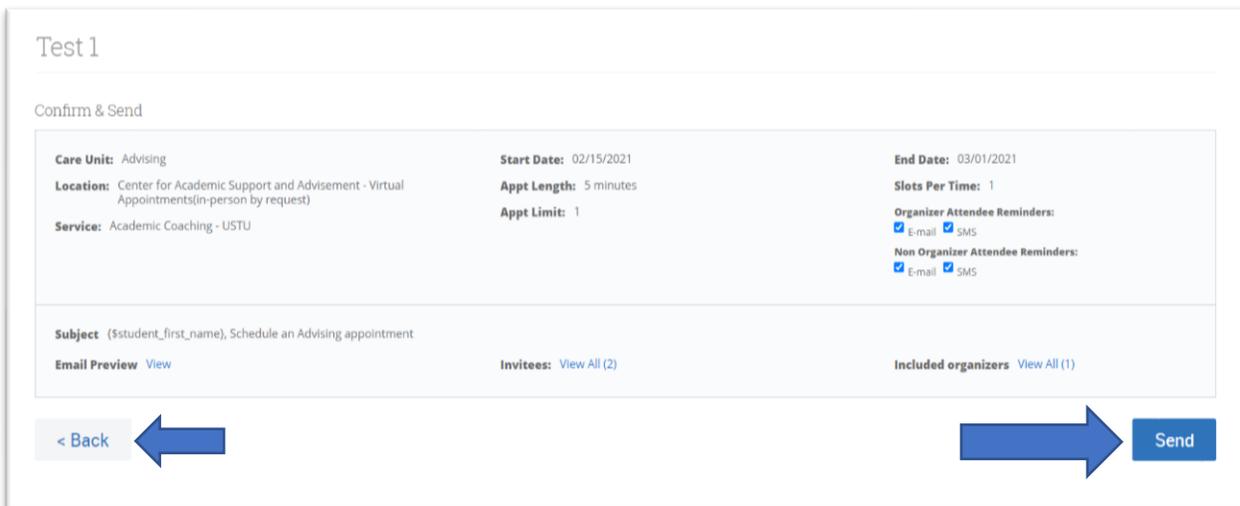
Schedule an Appointment

You can also copy and paste this address into your web browser.
<https://utc.campus.eab.com/a/123456>

Thank you!

< Back Save and Exit Continue

7. On the final screen, it will ask you to confirm all the information about the campaign. Review the information and if everything looks correct, select “Send”. If any of the information seems incorrect, select “Back” and correct the error.



Test 1

Confirm & Send

Care Unit: Advising	Start Date: 02/15/2021	End Date: 03/01/2021
Location: Center for Academic Support and Advisement - Virtual Appointments(In-person by request)	Appt Length: 5 minutes	Slots Per Time: 1
Service: Academic Coaching - USTU	Appt Limit: 1	Organizer Attendee Reminders: <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/> SMS
		Non Organizer Attendee Reminders: <input checked="" type="checkbox"/> E-mail <input checked="" type="checkbox"/> SMS

Subject (\$student_first_name), Schedule an Advising appointment

Email Preview [View](#) **Invitees:** [View All \(2\)](#) **Included organizers** [View All \(1\)](#)

[< Back](#) [Send](#)

You can keep track of the campaign from the main campaign menu.