Creating Appointment Campaigns

What are Appointment Campaigns and why would you use them?
Appointment Campaigns enable advisors to request that specific students select a specific date and time in which to schedule an appointment. This allows you to search for a group of students (high achieving, probation, warning, first gen, murky middle, graduating seniors, first semester students, students who need an appointment to get a RAN, etc) and send them a direct message with a link to setup an appointment. Through a campaign, you are able to monitor if a student made an appointment, view all of the reports on appointments and keep track of who you saw within the group.

You can start Appointment Campaigns in multiple ways. **Option 1:**

**Step 1:** To Access Campaigns: Click on the graph icon on the left red bar in EAB or click on the Appointment Campaigns link under Quick Links on the right of your screen.

**Step 2:** Click on Appointment Campaign under Actions to the right of your screen.

**Option 2:** From an Advanced Search – See handout on Advanced Search, if you do not know how to do an Advanced Search.

**Step 1:** Run your search and click on the box next to ALL. If your search has more than 1 page, you will need to make sure to click on the blue words “Select all xxx items.” In the middle of the screen. *(See Tip 1.)*

**Step 2:** Click on Actions and on the drop down menu choose “Appointment Campaign”. Make sure that the yellow bar on the next page has the number of students that you expected. *(See Tip 2.)*
**Step 3 Define your Campaign:**

**Campaign Name:** Campaign Name is visible to the person creating the campaign and any other users who have access to view campaigns, but not visible to the student.

**IMPORTANT:** Iowa State University naming convention: [Semester] [Population] [College] [Your Last Name]

**Example:** Fall 2018 Probation ENGR Van Winkle

AGLS – College of Agriculture and Life Sciences  
BUS – College of Business  
DES – College of Design  
ENGR – College of Engineering  
HS – College of Human Sciences/School of Education  
LAS – College of Liberal Arts and Sciences

**Care Unit:** Select 1-Campus Appointments

**Location:** Select the location of where the appointment(s) will be held. *Tip: Start typing your location*

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

**Begin and End Date:** These are the dates that you want students to start and stop making appointments for the campaign. *Tip: You can setup Campaigns in advance and send them later.*

**Appointment Limit:** This will determine how many appointments you wish for the student to schedule during the campaign.

**Appointment Length:** This is where you define exactly how long the appointment will be.

**Slots per Time:** Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment.
If you did not start from an Advanced Search, you will complete that here (see above under “Option 2).

If you started from an Advanced Search, Review the Students in your Campaign, add more students, remove students and then click Continue.

**Step 4 Add Organizers/Staff to Campaign:**

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

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

Add organizers to the campaign and click Continue.

**Step 5 Compose Your Message:**

Your next step is to compose the message that you will send to students.

*Tip 1: DO NOT REMOVE THE SCHEDULE LINK FROM THE EMAIL BODY.*

You can click on the Merge Tags to personalize your email message.

You can add an attachment to your email campaign.

In the area on the bottom of the page, you can add Instructions or Notes for the Landing Page (the page that the Schedule Link takes the students to when they click on it).

You can also preview your Email Campaign and the Landing Page (the page that the Schedule Link takes the students to when they click on it).

When you are happy with your email, click Continue.
Monitoring your Campaign

To monitor your campaign, you can click on the campaign icon on the red bar to the left of the screen. Find the campaign name that you are looking for and you can see information on appointments made, reports created and attendance rate.

To look at more details on your campaign, resend the campaign invite and more, click on the Campaign name and there will be tabs across the top that you can monitor and use the “Actions” area to do more on each tab.

Step 6 Confirm and Send:
Review your campaign details, invitees, and organizers on this page.

Click send when you are ready to email the invites to the selected students.

Note: When a student makes an appointment through the campaign email, that appointment will automatically be associated with your campaign. When they attend the appointment and you complete a report on that appointment, it will automatically be associated with the campaign.