Navigate Creating Appointment Campaigns

About Appointment Campaigns

Appointment Campaigns let staff reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best employed by staff members seeking to encourage students to meet with them for advising or other services.

Campaign Requirements

In order for Appointment Campaigns to work successfully, you must have both calendar sync *and* availability set up, as well as have the ability (permissions) to create appointment campaigns. You will also need to have access to **Advanced Search** to create a list of students for your campaign.

Calendar Sync

Make sure to set up Calendar Sync between Outlook and Calendar. Access our **Syncing an Outlook Calendar to Navigate (PDF)** available in the [Navigate Resource Site](#).

Set up Availiablity

To set up your availability, refer to the **Setting up Your Availability (PDF)** guide.
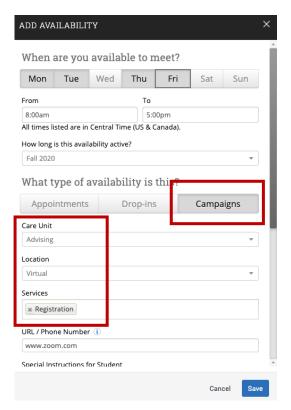
Specifically for Appointment Campaigns, ensure you have enabled the **Campaigns** option within your Availability. Select the correct Care Unit, Location, and Services that are available for the specific campaign.

Create an Appointment Campaign

Search for Students

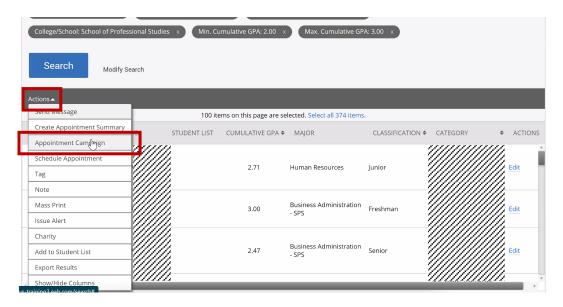1. Use the **Advanced Search** feature to look for the student demographic to issue out a campaign.

   Ex: students who are enrolled in Fall 2020, and those who have not yet enrolled in the Spring 2021 term. I want to focus on students that are in SPS, and a specificc GPA betwen 2.0 – 3.0.
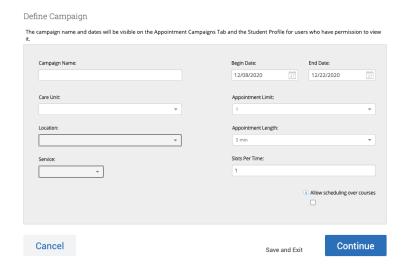
2. Select all students, go to **Actions**, then **Appointment Campaign**.

Appointment Campaign Setup

Define Campaign

Complete the following fields:

Field Name	Description
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. Make sure that you adhere to your institution's naming policy, otherwise other users will not be able to evaluate the impact of your campaigns. We recommend you use the following naming convention: **Department_Program (Optional)_Your-Last-Name_Appointment-Campaign-Title** Ex: SOM_MBS_Lang_30 Minute Appointments
Care Unit	Select the Care Unit the Appointment Campaign will be associated with
Location	Select the location of where the appointment(s) will be held. *You cannot select multiple locations. You would need to create a campaign per location.
Service	Select the Student Service that will be associated with the campaign.
Course or Reason	Add the reason or associated course for the campaign here. This will only appear if the Service is tied to a course.
Begin and End Date	These are the dates that you want students to start and stop making appointments for the campaign. On the Student side, once the campaign ends if the student didn't make an appointment, the link would be inactive and they would no longer be able to set up an appointment through that campaign.
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. Durations begin at a 5 minute length and will be determined by your configuration.
Slots per Time	Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment.
Allowing Schedule Over Courses	Check this box to allow scheduling over courses. Students will be able to schedule over organizer classes as well as their own. This does not include calendar sync events or other conflicts – this feature ONLY allows students to schedule over courses for themselves and the organizer.

Review Students in Campaign

You can see a list of all students who got pulled in based on the Advance Search results; make sure to reselect the list and click **Continue.**

	Acost
☑	Acost
☑	Agred
☑	Aguer
☑	Aguila
☑	Alexa
☑	Almei
☑	Altam
☑	Alvare
☑	Angui

< Back   Add More Students   Save and Exit   **Continue**

Add Staff

If there are other people who have set up availability for campaigns, you would see a list of all available people, so they can also be included in the campaign to set up appointments.

Add Organizers To Campaign

☐ Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
☐	**Sara**	**For: Appointments/Campaigns** Tue 8:00am - 5:00pm CT

< Back   Save and Exit   **Continue**

Compose your message

You will have the opportunity to review and edit the message that will be delivered to students, as well as add an attachment if necessary. You will see a preview of the message the student will receive below. Once it's finalized click **Continue**.

Compose Your Message

{$student_first_name}, Schedule a Health Professions appointment

| **B** | *I* | :≡ | ≟ | 🔗 | Paragraph ⌄ | Merge Tags ⌄ | ↶ ↷ |

Please Schedule Your Health Professions Appointment.

Hello {$student_first_name}:

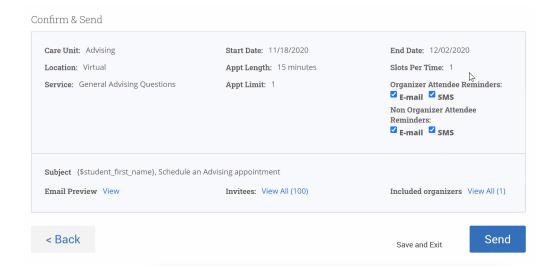Please schedule an appointment for Academic Support at Virtual. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{$schedule_link}

Thank you!

| **Available Merge Tags:** ? | **{$student_first_name}**
Inserts the student's first name | **{$student_last_name}**
Inserts the student's last name | **{$schedule_link}**
Inserts a link to schedule the appointment |

Add Attachment:

📎 Choose File No file chosen

Confirm & Send

Review the details before you send it. Determine if you want the students to receive a reminder before their scheduled appointment via email or text.
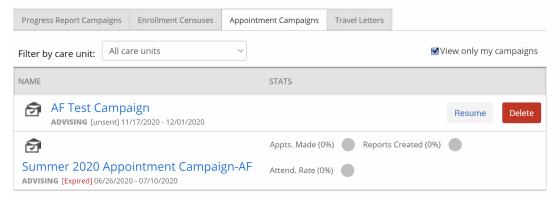
Confirm & Send

Care Unit: Advising	**Start Date:** 11/18/2020	**End Date:** 12/02/2020
Location: Virtual	**Appt Length:** 15 minutes	**Slots Per Time:** 1
Service: General Advising Questions	**Appt Limit:** 1	**Organizer Attendee Reminders:** ☑ **E-mail** ☑ **SMS** **Non Organizer Attendee Reminders:** ☑ **E-mail** ☑ **SMS**

Subject {$student_first_name}, Schedule an Advising appointment

Email Preview View	**Invitees:** View All (100)	**Included organizers** View All (1)

< Back   Save and Exit   **Send**

Review Campaign Results

Once a campaign is sent, you can revisit the **Campaigns** tab see details of how your campaign performed. View information like:

- How many appointments were made
- How many people attended appointments
- How many reports were created as part of the appointments made

Spring 2020 Campaigns

Progress Report Campaigns	Enrollment Censuses	Appointment Campaigns	Travel Letters

Filter by care unit: [All care units ▾]   ☑ View only my campaigns

NAME	STATS		
📨 **AF Test Campaign** **ADVISING** [unsent] 11/17/2020 - 12/01/2020			[Resume] [Delete]
📨 **Summer 2020 Appointment Campaign-AF** **ADVISING** [Expired] 06/26/2020 - 07/10/2020	Appts. Made (0%) ⚪ Reports Created (0%) ⚪ Attend. Rate (0%) ⚪		

❓ Additional Resources

Navigate Help Center: https://support.gradesfirst.com/hc/en-us

My Availability: https://support.gradesfirst.com/hc/en-us/articles/360014072874-My-Availability

Common Availability Issues: https://support.gradesfirst.com/hc/en-us/articles/360059267693-Common-Availability-Issues

Campaigns: Appointment Campaigns: https://support.gradesfirst.com/hc/en-us/articles/360011092253-Campaigns-Appointment-Campaigns

Common Appointment Campaign Questions: https://support.gradesfirst.com/hc/en-us/articles/360058489214-Common-Appointment-Campaign-Questions

Launching a Campaign: https://support.gradesfirst.com/hc/en-us/articles/360014085734-Launching-a-Campaign#apptcampaign