April 4, 2022
CREATING AN APPOINTMENT CAMPAIGN
CREATE CAMPAIGN AVAILABILITY:

- Students can schedule through a link sent through an appointment campaign. (Be sure to select “Campaign” as an option in your availability.)
BEGINNING AN APPOINTMENT CAMPAIGN

• Select the campaign icon on the left side of your screen.

• Choose the “Add New” button under the Appointment Campaigns section in the Student Campaigns box.
1. Campaign Name (not visible to students)
2. Instructions for Landing Page: Information Students will see when they click on the link.
3. Care Unit
4. Location
5. Service
6. Appointment Limit
7. Appointment Length
8. Slots per Time
9. Allow Scheduling Over Courses
10. Staff Reminders
11. Recipient Reminders
12. Scheduling Window
ADDING STUDENTS TO CAMPAIGN
Add Recipients To Campaign

Saved Searches

Standard User Type:  Keywords: Bobby baylor  Include Inactive Users

Search  Modify Search

Actions

<table>
<thead>
<tr>
<th></th>
<th>STUDENT NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>Baylor, Robert (Bobby)</td>
</tr>
</tbody>
</table>
REVIEWING CAMPAIGN RECIPIENTS

Review Recipients In Campaign

<table>
<thead>
<tr>
<th>Actions</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NAME</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Baylor, Robert (Bobby)</td>
<td></td>
</tr>
</tbody>
</table>

Actions ▲

Remove Selected Users

Continue ➔
Select Staff For Campaign

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Carroll Crowson</td>
</tr>
</tbody>
</table>

Continue
Nudges
What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

Success Message (Optional)
What would you like to say to your recipients if they complete your objective? This message will be sent within a day of the recipients scheduling all campaign appointments. The success message is for communication purposes only and will not be included in campaign metrics.

COMPOSE NUDGES
2 New Features in this Update
CREATING A NUDGE

Add Nudge

Preview Email

Andrew, Schedule A Student Success Appointment

Hello $(student_first_name):

Please schedule an appointment for Meet with Carroll Crowson: Baylor Summer/Navigate at Center for Academic Success and Engagement (CASES). 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

Thank you!

If you have questions about the Navigate initiative, please email Navigate@baylor.edu.

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

Add Attachment:

Choose File No file chosen

Send Date

Friday, April 8th 2022

Save Nudge
CREATING A SUCCESS MESSAGE

Add Success Message

- **Subject**
  - Thank You For Scheduling Your Appointment

- **Message**
  - [Template]
    - Hi ($student_first_name),
    - Thank you for scheduling your appointment
    - Thank you!

**Available Merge Tags**

- ($student_first_name) Inserts the student's first name
- ($student_last_name) Inserts the student's last name

Preview Email

**Thank You For Scheduling Your Appointment**

Hi Andrew,
Thank you for scheduling your appointment
Thank you!

If you have questions about the Navigate initiative, please email Navigate@baylor.edu.

NAVIGATE
# OVERVIEW AND START CAMPAIGN

## Verify & Start

### Define Campaign

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Squad Test</td>
</tr>
<tr>
<td>Instructions or Notes for Landing Page:</td>
<td>Please make appointment.</td>
</tr>
<tr>
<td>Care Unit:</td>
<td>Student Success</td>
</tr>
<tr>
<td>Location:</td>
<td>Center for Academic Success and Engagement (CASE)</td>
</tr>
<tr>
<td>Service:</td>
<td>Meet with Carroll Crowson: Baylor Summer/Navigate</td>
</tr>
<tr>
<td>Appointment Limit:</td>
<td>1</td>
</tr>
<tr>
<td>Appointment Length:</td>
<td>30 mins</td>
</tr>
<tr>
<td>Slots Per Time:</td>
<td>1</td>
</tr>
<tr>
<td>Scheduling Window:</td>
<td>04/04/2022 - 04/18/2022</td>
</tr>
<tr>
<td>Allow Scheduling Over Courses:</td>
<td>No</td>
</tr>
<tr>
<td>Staff Reminders:</td>
<td>Email - No</td>
</tr>
<tr>
<td>Recipient Reminders:</td>
<td>Email - Yes</td>
</tr>
</tbody>
</table>

Start Campaign
CAMPAIGN MANAGEMENT

STUDENTS IN CAMPAIGN
1

APPOINTMENTS MADE
0%
0 Students

APPOINTMENTS ATTENDED
0%
0 Students

SUMMARIES CREATED
0%
0 Students

CLICK-TO-OPEN-RATE 0%

Emails Sent
1

Emails Opened
1

Links Clicked
0

Appointments Scheduled

Appointments Not Yet Scheduled

Summaries Created

Eligible Appointments

Actions
Send a Message
Add Note
Add Tag