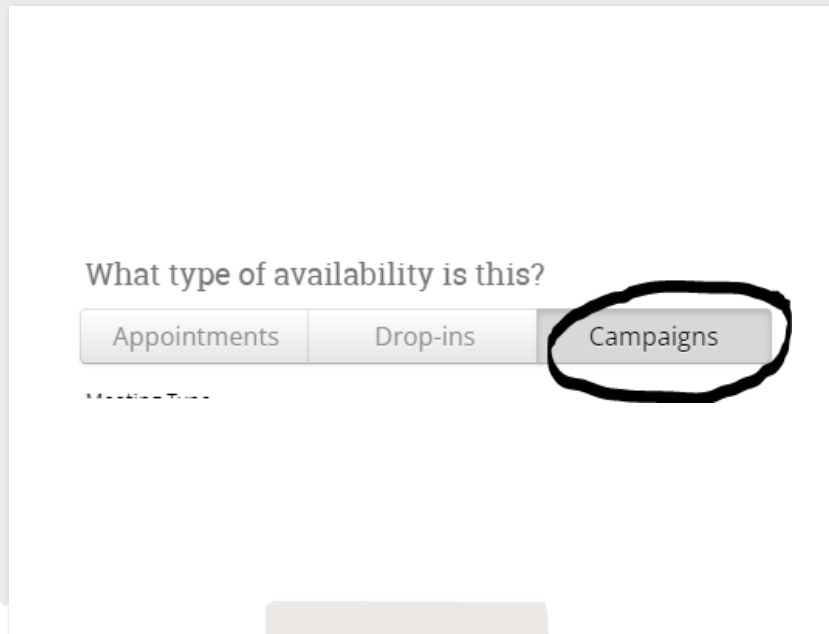


April 4, 2022

CREATING AN APPOINTMENT  
CAMPAIGN



# CREATE CAMPAIGN AVAILABILITY:



What type of availability is this?

Appointments Drop-ins Campaigns

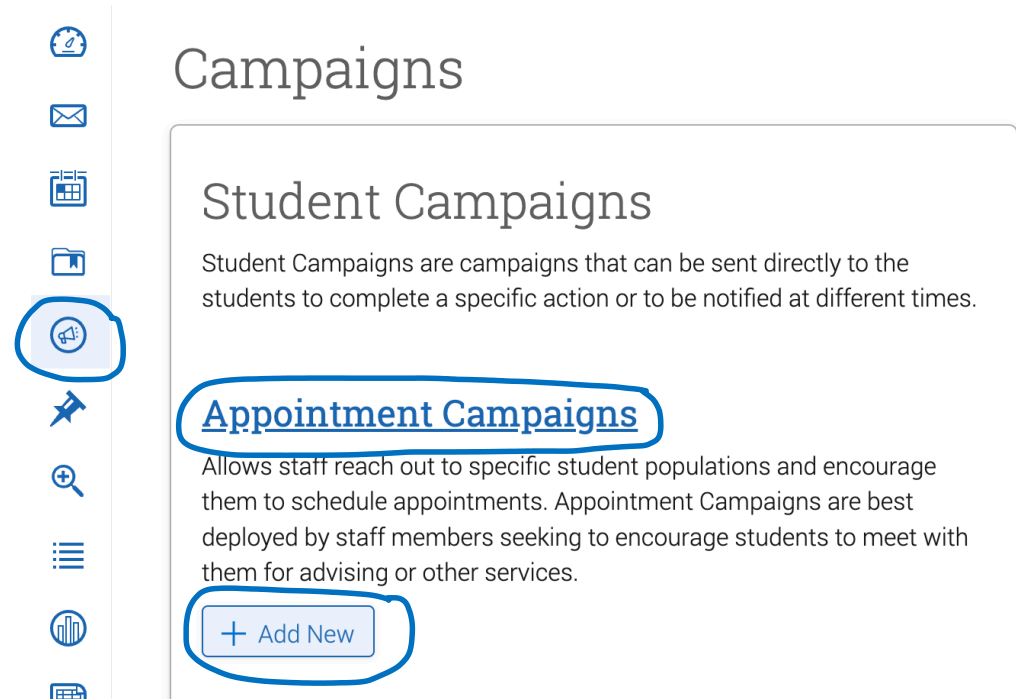
Marketing Time

- 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.



The screenshot shows a sidebar on the left with a vertical list of icons. The icon representing a magnifying glass over a calendar (Appointment Campaigns) is circled in blue. The main content area is titled 'Campaigns' and contains a section for 'Student Campaigns'. Within this section, the text 'Appointment Campaigns' is underlined and circled in blue. Below this, a description states: 'Allows staff reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.' At the bottom of this section, a button labeled '+ Add New' is also circled in blue.

Campaigns

## Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

Appointment Campaigns

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

+ Add New



# BUILDING AN APPOINTMENT CAMPAIGN: CONFIGURATIONS



## New Appointment Campaign

1 Define Campaign — Select Recipients — Select Staff — Compose Nudges — Verify and Start

### Define Campaign

Set up your campaign. Specify your appointment details and timing.

**Campaign Configurations**

Campaign Name

Instructions or Notes for Landing Page:

Care Unit:

Select Care Unit

Location:

Select Location

Service:

Select Service

**Appointment Configurations**

Appointment Limit:

x 1 x

Appointment Length:

x 30 min x

Slots Per Time:

x 1 x

☐ Allow Scheduling Over Courses

Staff Reminders:

☐ Email ☐ Text

Recipient Reminders:

☐ Email ☐ Text

**Scheduling Window**

Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

Start Date

Monday, April 4th 2022

End Date

Monday, April 18th 2022

**TIMELINE**

Objective

Pending Setup...

Recipients

Pending Setup...

Staff

Pending Setup...

Nudge 1

Pending Setup...

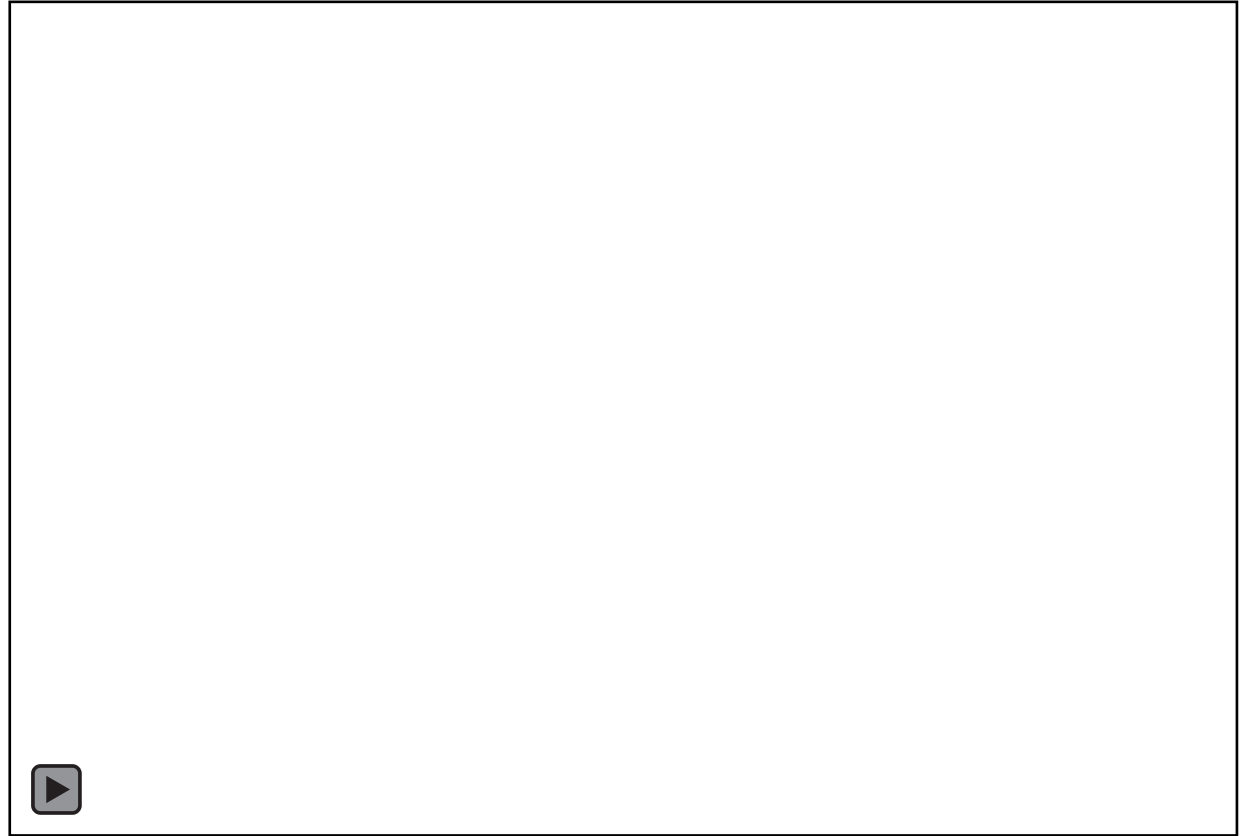
Campaign Ends

Pending Setup...

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



# ADDING STUDENTS CONTINUED

## Add Recipients To Campaign

Saved Searches ▾

Standard User Type:

Keywords: Bobby baylor x

Include Inactive Users x

Search

Modify Search

Actions ▾

<input type="checkbox"/> ALL	STUDENT NAME
<input checked="" type="checkbox"/>	1 <a href="#">Baylor, Robert (Bobby)</a>

Continue >



# REVIEWING CAMPAIGN RECIPIENTS

Review Recipients In Campaign

Actions ▼	
<input type="checkbox"/>	NAME
<input type="checkbox"/>	Baylor, Robert (Bobby)

Actions ▲	
Remove Selected Users	
<input type="checkbox"/>	NAME

Continue >



## Select Staff For Campaign

ID	NAME
<input checked="" type="checkbox"/>	<b>Carroll Crowson</b>

Continue >

SELECT STAFF FOR CAMPAIGN



### 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.

+ Add Nudge

### 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

\*Subject

{student\_first\_name}, Schedule a Student Success appointment

\*Message

**B** *I* Heading 2 Merge Tags

**Please Schedule Your 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 (CASE). 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.

**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

## Preview Email

**Andrew, Schedule A Student Success Appointment**

Baylor University

Please Schedule Your Student Success Appointment.

**Hello Andrew:**

Please schedule an appointment for Meet with Carroll Crowson: Baylor Summer/ at Center for Academic Success and Engagement (CASE). To do so, please click the link, select a time that works with your schedule, and click Save. You will receive a confirming the appointment time and details.

[Schedule an Appointment](#)

Thank you!

If you have questions about the **Navigate** initiative, please email [Navigate@baylor.edu](mailto:Navigate@baylor.edu).

Support

Save Nudge >

**Add Attachment:**

No file chosen

\*Send Date ⓘ

Friday, April 8th 2022



# CREATING A SUCCESS MESSAGE

## Add Success Message

\* Subject

Thank You For Scheduling Your Appointment

\* Message

**B** *I* | Paragraph Merge Tags


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**

 Baylor University

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

If you have questions about the **Navigate** initiative, please email [Navigate@baylor.edu](mailto:Navigate@baylor.edu).

 **NAVIGATE**

 **Support**





# OVERVIEW AND START CAMPAIGN

## Verify & Start

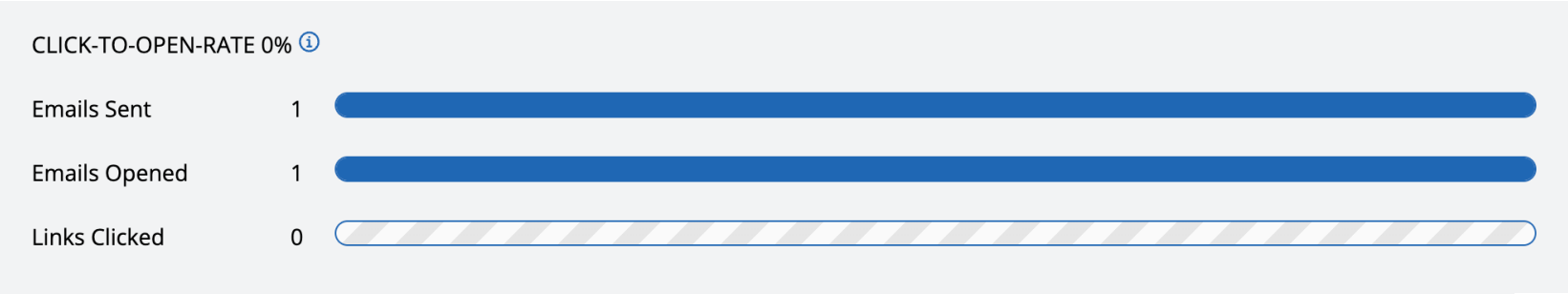
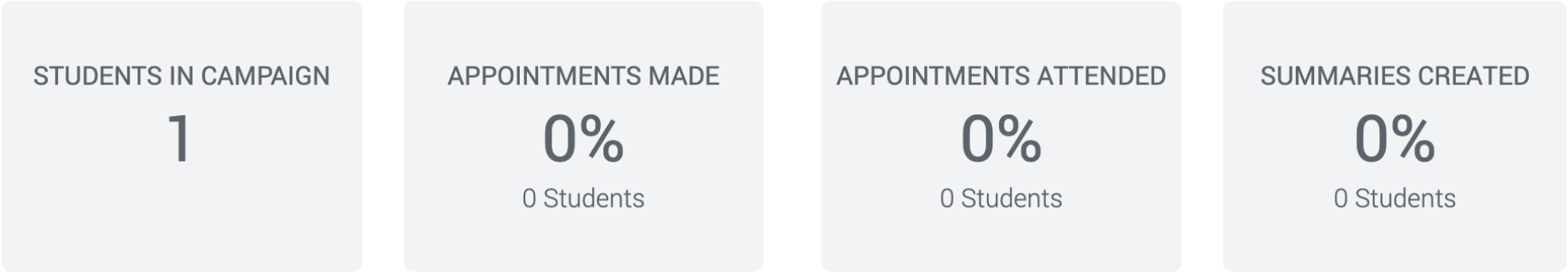
### Define Campaign

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

Start Campaign



# CAMPAIGN MANAGEMENT



Appointments Scheduled	Appointments Not Yet Scheduled	Summaries Created	Eligible Appointments
------------------------	--------------------------------	-------------------	-----------------------

Actions ▲

Send a Message

Add Note

Add Tag

