

Creating an Appointment Campaign for Advisors

1. Create a “Campaign Availability”

- a. You must have at least one Availability setting that is for the “Campaigns” type. It is recommended that you create an Availability specifically for campaigns. It reduces confusion on the part of the students. [Click here for instructions.](#)

2. Navigating to Campaigns: While on the Staff Home screen there are two ways to start a new campaign:

- a. Select “Appointment Campaigns” from the right-hand side Quick Links section. This will take you to the Appointment Campaigns page. Click on the blue “Add New” Button.
- b. Click on the Bullhorn Icon on the right-hand navigation bar, then click on Appointment Campaigns. This will take you to the Appointment Campaigns page. Click on the blue “Add New” Button.

3. Launching a new Appointment Campaign

a. Define Campaign:

- i. Campaign Name: Please include at least your last name, department, and a short description of the purpose of the campaign. This will help the CCNY Navigate team locate the campaign. Example: **B. Smith Fall 2023 Current Student Advising**. (Students will not see the name of the campaign)
- ii. Instructions or Notes for Landing Page: This allows short instructions or reminders that will be displayed on the scheduling page. (“Sign up for 2 meetings for the semester”, “Only sign up for one session”_
- iii. Select the appropriate Care Unit (Academic Advising (undergraduate), Graduate Student Advising, Special Programs, Student Success Initiatives)
- iv. Location- Choose your department.
 1. NOTE: Ensure that you select the same location that you used to set up your campaign availability. (See step 1.)
- v. “Service”, choose the service that you selected in your campaign availability.
- vi. Appointment Limit: how many appointments can the student schedule for the campaign? If you only want to meet with each student once, select 1. However, if you need to see each student several times, select the correct number of meetings.
- vii. Appointment Length: How long will the appointments last. Must match or be less than the default setting for this service. Most service types are set for 30 minutes.
- viii. Slots per time: Select 1 if you want to meet with students individually. For group appointments or events, enter the limit.
- ix. Allow Scheduling Over Courses: **DO NOT SELECT THIS BOX.**
- x. Staff Reminders: Select Email or Text if you would like to be notified when

students make appointments and reminders about the appointments. Most staff and faculty choose NOT to receive these reminders.

- x. Recipient Reminders: We recommend that you select both Email and Text. This will provide students with a confirmation email when they make an appointment and a reminder the day before and a text reminder 2 hours prior to the appointment.
 - xi. Scheduling Window: Choose the date range for which you want students to be able to schedule appointments. These dates must match the availability you have set up on your staff home page, under “My Availability”. If a student tries to schedule outside of that time period, they will receive a message stating that the campaign has expired.
 - xii. Click “Continue”
- b. **Adding Recipients to Campaign:**
- i. If you created this campaign directly from a Student List or Saved Search, you are asked to review your students. If not, an Advanced Search opens.
 - ii. Use Advanced Search filters to find and select students. Click the “Search” button.
 - iii. Select the students that you want to include. To select all students, click the selection box next to “NAME.” **NOTE:** If there are more than 100 students in your section you will need to click on the link in the top center of the list box to select all students. See below:

Unsaved Student Search Save

Course: Registered in ANTH-10100 Introduction to Anthropology (5), From: 2023 Spring , To: 2023 Spring x

Search Modify Search

Actions ▾

100 items on this page are selected. [Select all 120 items.](#)

<input checked="" type="checkbox"/> NAME	ID
1. <input checked="" type="checkbox"/> Ahmed, Tahsin	24334700
2. <input checked="" type="checkbox"/> Abousalham, Anas	24358444
3. <input checked="" type="checkbox"/> Abraham, Alex	24297182
4. <input checked="" type="checkbox"/> Addison, Michelle	24092571
5. <input checked="" type="checkbox"/> Ahmed, Adil	24298822
6. <input checked="" type="checkbox"/> Ahmed, Daud	23917828
7. <input checked="" type="checkbox"/> Ahmed, Tawhid	24182967
8. <input checked="" type="checkbox"/> Alam, Ashraf	24354363

- iv. Click “ Continue”
- v. The “Review Recipients in Campaign” screen will appear. Here you can remove any students from the recipient list. Just select the box next to their name and then select “Remove Selected User” in the Action menu.
- vi. Once the list is set, click “Continue”.

- c. **Select Staff for Campaign:**
 - i. Click the box next to your name.
 - ii. Click continue.
- d. **Compose Your Messaging:** On this screen, you will be able to create a variety of messages to invite students to schedule their appointments. A “Welcome Message” is required, and it is recommended that you create at least one “Nudge” or reminder.
 - i. **Welcome Message:** This is the original email that alerts students about the campaign and invites the student to schedule an appointment.
 - 1. Click “Add Welcome Message”
 - 2. On the editing screen you will see a template on the left-hand side. You can use this text or create your own. Any edits you make will show in the preview on the right-hand side of the screen.
 - a. NOTE: DO NOT remove the {schedule_link} tag. This creates the link the students will use to schedule their appointments.
 - 3. You can attach a document to the Welcome message.
 - 4. Select a date for the Welcome Message to be sent.
 - 5. Click “Save Welcome Message.”
 - ii. **Nudge:** Send a reminder a few days after the Welcome Message. We recommend you send this message as a text message. This
 - 1. Click “Add Nudge”.
 - 2. Nudge Type: select “SMS”
 - 3. Compose your text on the left-hand side of the screen. NOTE: You are limited to 160 characters which include the scheduling link. Keep an eye on the character count on the preview screen on the right-hand side of the screen.
 - 4. Select a send date. NOTE: The system will only allow one message to be sent on any given date.
 - 5. Click “Save Nudge.”
 - iii. Click “continue.”
- e. **Confirm & Send:** Review the details of your campaign. When you are ready, click “Start Campaign.” Please note that our experience is that students will begin to schedule appointments immediately.