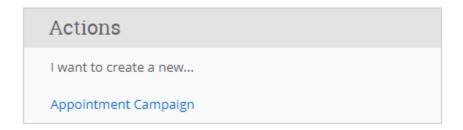


## **How to Start an Appointment Campaign**

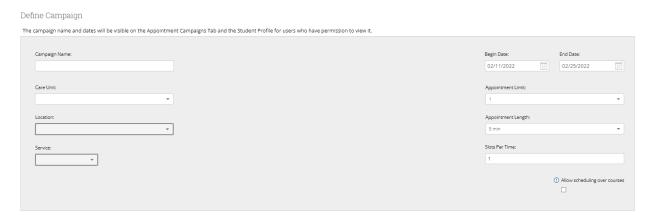
1. To start a Campaign, you will click the megaphone icon in your left hand tool bar.



2. Click "Appointment Campaign" on the left side of the Campaign screen.

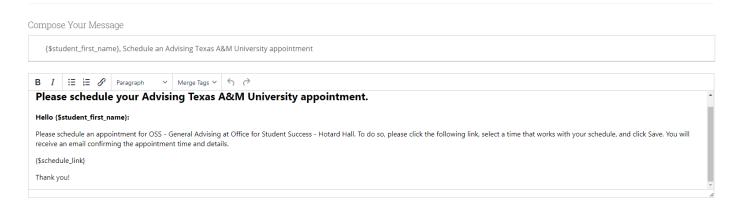


3. The "Define Campaign" screen will populate. You will fill in the boxes you see.



- a. To name your Campaign, use this format:
  - i. [Semester] [Population] [College] [Department]
  - ii. EX: Summer 2019 Gateway TAP
- b. Appointment Limit: how many appointments you want the student to schedule during the Campaign.

- i. Recommended: 1 Appointment
- ii. EX: If there is a limit of 3, a student will keep getting remind to come in until they complete 3 appointments.
- 4. The Appointment Type AND Dates must match your Campaign availability.
- 5. Next, you will add students.
  - a. Students can be added via a watch list by uploading a CSV from Excel.
  - b. Students can be added by using the advanced search using your choice of parameters.
- 6. Next, you will add staff.
  - a. All staff involved in the Campaign will need to make Campaign availability to be added.
  - b. Students will create appointments within the dates given. Students will be able to schedule outside of the constraints established for your location.
    \*If your staff do not have the matching Appointment Type or Dates in their Campaign Availability they will not populate.
- 7. Next, you will need to compose a message to send.
  - a. DO NOT REMOVE the "Schedule an Appointment" link, this will take them directly into the Campaign to schedule.



8. Confirm & Send the Campaign.