



## 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.

The screenshot shows a grey header with the word "Actions" in blue. Below the header is a light blue box containing the text "I want to create a new..." followed by a blue link that says "Appointment Campaign".

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

### Define Campaign

The campaign name and dates will be visible on the Appointment Campaigns Tab and the Student Profile for users who have permission to view it.

The screenshot shows a form titled "Define Campaign" with the following fields:

- Campaign Name:
- Care Unit:
- Location:
- Service:
- Begin Date:
- End Date:
- Appointment Limit:
- Appointment Length:
- Slots Per Time:
- Allow scheduling over courses:

- 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.

Compose Your Message

{student\_first\_name}, Schedule an Advising Texas A&M University appointment

**B**
*I*
☰ ☰
🔗
Paragraph
▼
Merge Tags
▼
↶
↷

**Please schedule your Advising Texas A&M University appointment.**

**Hello {student\_first\_name}:**

Please schedule an appointment for OSS - General Advising at Office for Student Success - Hotard Hall. 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!

- 8. Confirm & Send the Campaign.