

To start, select the icon that looks like mountains. It will take you to the Campaign homepage. On the righthand side you can select 'Appointment Campaign' under actions and I want to create a new.

Fall 2019 Campaigns

Appointment Campaigns

Filter by care unit: All care units

NAME	STATS
Advising for Spring 2020 ADVISING 10/29/2019 - 11/13/2019	Appts. Made (76%) ● Reports Created (100%) ● Attend. Rate (76%) ●

UW
UW-LA CRI

Actions

I want to create a new...

Appointment Campaign

The first step is to design the campaign. Please name your campaign with you last name, the semester, and the type of campaign you are running. For example: Stindt_Spring 2020_Fall Registration.

Care Unit: Advising

Location: My Faculty's Office

Service: Academic Planning

Dates: Whenever you'd like students to be able to schedule.

Appointment limit: How many times can a student schedule with you during this campaign.

Slots per time: how many students are you willing to see at a time? Typically 1, unless mass advising.

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.

Campaign Name: <input type="text" value="Last Name_Semester_Type"/>	Begin Date: <input type="text" value="11/24/2019"/>	End Date: <input type="text" value="12/15/2019"/>
Care Unit: <input type="text" value="Advising"/>	Appointment Limit: <input type="text" value="1"/>	
Location: <input type="text" value="My Faculty's Office"/>	Appointment Length: <input type="text" value="15 min"/>	
Service: <input type="text" value="Academic Planning"/>	Slots Per Time: <input type="text" value="2"/>	

Next is to add students to the campaign. You'll likely add all of your assigned advisees, and then be able to review the list. This is where you can remove any students who don't fit the campaign. Examples could be students who are graduating and won't need to register, or students who you have already met with to plan the upcoming semester.

Last Name_Semester_Type

Review Students In Campaign

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

little arrow to remove

Next is to add the organizer, who in this case will be you. If you haven't entered availability (see previous help documents) your name won't show up.

Last Name_Semester_Type

Add Organizers To Campaign

ID	NAME
<input checked="" type="checkbox"/>	NAME

Compose Your Message

{student_first_name}, Schedule an Advising appointment

B *I* Paragraph Merge Tags ↶ ↷

Please schedule your Advising appointment.

Hello {student_first_name}:

Please schedule an appointment for Academic Planning at My Faculty's Office. To do so, please click confirming the appointment time and details.

{schedule_link}

Available Merge Tags: ?

{student_first_name}
Inserts the student's first name

{student_last_name}
Inserts the student's last name

Add Attachment:

Select file to attach



Instructions or Notes for Landing Page

Preview Email Preview Landing Page

Andrew, Schedule An Advising Appointment



Please Schedule Your Advising Appointment.

Hello Andrew:

Please schedule an appointment for Academic Planning at My Faculty's Office. 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](#)

You can also copy and paste this address into your web browser.
<https://uwlax.campus.eab.com/a/123456>

Thank you!

You can edit the email to look however you want, and then preview it below. If you click "Preview Landing Page" you can also see the page that students will see when they click to schedule with you.

- You might want to include your office location in "Instructions for Landing Page", or other pertinent information.
- You can attach files if there is anything you want to share with students before they come to the meeting. Examples could include a sample semester schedule for them to begin preparing for the next semester before meeting with you.

The final step is to review everything. Make sure that the dates are correct, the number of Invitees matches what you expect for students, the appointment length, etc. Don't check any of the reminders, except non-organizer email. Then send!

Last Name_Semester_Type

Confirm & Send

Care Unit: Advising	Start Date: 11/24/2019	End Date: 12/15/2019
Location: My Faculty's Office	Appt Length: 15 minutes	Slots Per Time: 2
Service: Academic Planning	Appt Limit: 1	Organizer Attendee Reminders: <input type="checkbox"/> E-mail <input type="checkbox"/> SMS
		Non Organizer Attendee Reminders: <input type="checkbox"/> E-mail <input type="checkbox"/> SMS
Subject {\$student_first_name}, Schedule an Advising appointment		
Email Preview View	Invitees: View All (43)	Included organizers View All (1)

[< Back](#)

Save and Exit

[Send](#)

After sending you can come back to the campaign page to see what percentage of students have scheduled with you. You can also come here to send a reminder email to students who have not yet scheduled with you. Lastly, you can add any students to the campaign who may have initially not been part of it.