

**Creating a New Campaign**

Creating a “Campaign” allows you to send out a mass-call to selected students to schedule appointments with you for the same purpose. We anticipate this function will primarily be used for you to schedule your advisees for class registration meetings at the end of each semester. You may find other purposes for it as well (and you can establish multiple, concurrent campaigns).

There are multiple ways to create campaigns and define its participants.

To access the Campaign feature from the “Advisor” homepage, you can click either on the “Campaign” icon on the blue ribbon down the screen’s left-hand side, or you can click “Appointment Campaigns” under “Quicklinks” on the screen’s right-hand side. Both navigate to the same webpage for defining your new campaign.

1. Click “Appointment Campaign” on the right-hand side of the screen, under the “Actions” menu. Make sure the “Appointment Campaigns” tab is selected at the top of the screen (you should be directed to it automatically from the previous page).

2. A “New Invitation Campaign” page will appear. Name the campaign and select the type of campaign from the drop-down menu options. So that it is easy to find in a list of campaigns campus-wide, the name of your campaign should always be in the following format: Your Name-Campaign Reason-Current semester. (For instance, Dent-Registration-Fall 2017)

3. Choose how many students may schedule for the same appointment at once with the “slots per time” function.

For “Class Registration Campaigns” please be sure to select Class Registration as your Reason when Defining the Campaign. This is a common error.

4. Use the drop-down menu to select the reason for the campaign appointments.

5. Define the start and end dates for the campaign. Make sure you schedule enough time for all your advisees to make an appointment. Two weeks may not be enough if you have many advisees.

6. Choose the appointments’ lengths and the maximum number of appointments required for participation in this campaign (typically 1). Finally, select the location for the appointment as “Advisor’s Office.”

7. Click “Continue” and you will be directed to a new page that allows you to specify which students should receive emails for scheduling an appointment with you during the campaign. “Invite All Assigned Students” allows you to choose to invite all / some of your advisees, while “Advanced Search” allows you to define another set of students based upon a list you have already created. We’ll address each option below (Advisees: Steps 8-9; Others” Steps 11-12).

*Campaigns for Advisees*

8. Clicking “Invite All Assigned Students” navigates you to your list of advisees. Click the box next to “Name” to select all. Scroll and click the box by a student’s individual name to remove them from the “select all” grouping, or (if you do not select all) to invite only specific advisees. Click “Continue.”

9. On the next page, select yourself as the advisor. Notice your “Available Times” correlates with those times you have previously indicated you are available. If your name does not appear in the list, then there is a discrepancy with you availability reason or your campaign reason.

10. Compose your message. The student’s name will automatically populate, but you may add any other text you wish (ex: “Bring your degree plan.” Or “Come get advised even if you are not ready to register yet.”) Scroll down to see the message as it will appear to the student. Click “Continue,” review your selections and hit “Send.” Your participants will receive an email message with a link allowing them to schedule an appointment with you.

*Campaigns for Others*

11. To schedule with a group other than your advisees, you must first define the group’s criteria under the platform’s “Advanced Search” option and save that list (See separate instructions). To access this previously saved list, select it under “Saved Searches” on the drop-down menu on the left-hand side.

12. Under the “Advanced Search” menu, select your search criteria and click “Search.” A new list of students will appear that you can select in total (Click “All” at the top) or selectively (click each name you want to include in the campaign). Click “Continue.” This will create a list of campaign participants. A new page will appear that requires you to review and confirm your list. Select your intended recipients again and click continue. Then, revert to steps 9 and 10 to finish and send.