Creating an Appointment Campaign
Once you have availability:

- Students can schedule with you through the Student Scheduler.
  - `baylor.navigate.eab.com`
  - `Navigate App`
- Students can schedule through a link sent through an **appointment campaign**.
  - Be sure to select “Campaign” as an option in your availability.
- Students can schedule through your **personal availability link**.
- Staff can schedule for students at the front desk through the **Appointment Center**.
- You can schedule an appointment for a student from the **student’s profile page**.
Appointment Campaigns

1. Select the campaign icon on the left side of your screen.
2. Choose the Appointment Campaign link on the right under Actions.
Appointment Campaigns

Choose the name for your campaign. Students will not see the name, but select a name that will help you remember what this campaign is about.

Select the Care Unit where the reason for the appointment you want students to create resides in your availability.

Choose the location for the appointment.

Select the reason for these appointments.

Choose the range of dates when you want students to schedule with you.

How many times do you want a student to schedule with your campaign link? The system will prompt the student to schedule for as many appointments as you indicate.

How long do you want the appointments to last?

How many students do you want to meet with at a time?

Choose continue.
Use the advanced search or the option “students assigned to me” to populate your campaign. You may find creating a Student List to be useful as you can search for that in the advanced search.

Once you make your selection, choose search.
1. Select all of the students in your results.
2. Choose “Add Selected Users and Search for More” from the Actions drop-down menu.
3. As you scroll down, you will see a gold bar with the number of students added to your campaign.
4. Click Continue to go to the next page.
Appointment Campaign

On the next screen, you will have the opportunity to remove any students you no longer want to be part of the campaign.

SSI Demo

Add Organizers To Campaign

<table>
<thead>
<tr>
<th>ID</th>
<th>NAME</th>
<th>AVAILABLE TIMES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Michelle Gonzlez</td>
<td>For: Appointments/Drop-Ins/Campaigns Mon-Fri 8:00am-5:00pm (Spring 2020)</td>
</tr>
<tr>
<td></td>
<td>Joe Oliver</td>
<td>For: Appointments/Drop-Ins/Campaigns Mon-Fri 9:00am-4:00pm (November 12, 2019 - May 23, 2020)</td>
</tr>
<tr>
<td></td>
<td>Carroll Crowson</td>
<td>For: Appointments/Drop-Ins Mon-Fri 9:00am-5:00pm (Spring 2020)</td>
</tr>
</tbody>
</table>
Appointment Campaign

Please schedule your Student Success appointment.

Hello {$student_first_name}:

Please schedule an appointment for I Need to Talk to Someone at Student Success Initiatives. 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!

Available Merge Tags:

- {$student_first_name} Inserts the student’s first name
- {$student_last_name} Inserts the student’s last name
- {$schedule_link} Inserts a link to schedule the appointment

Add Attachment:

Select file to attach
Appointment Campaign

The “Preview Email” tab will show you exactly what the student will see when you send out the appointment campaign.

The “Preview Landing Page” tab will show you where the “Schedule an Appointment” link will take the student.
This summary page will give the overview of your campaign. Once you click “Send”, the system will confirm that you want to send it one final time.
You can click on any tab, select the students you would like and resend the appointment request message, send a text or email, add a note, or add a tag.