Appointment Campaigns

Appointment Campaigns enable an advisor to request that specific students select a specific date and time in which to schedule an appointment instead of the advisor creating appointments for each and every student. It is Navigate’s alternative to posting an advising sign-up sheet on your office door.

To begin, click on Appointment Campaigns under quick links (right-side menu) and follow the setup steps.

Please note: Before setting up a campaign, users should sync their Outlook calendar with SSC Campus. Instructions for Calendar Sync can be found on the www.potsdam.edu/ssccampus web page.
Step 1: Define the Campaign

**Campaign Name:** The name of the campaign only appears to the advisor. This needs to be a name that makes sense to you. **Please note:** Campaigns must have the creator’s last name and the term in the name box.

**Choose Campaign Type:** Select “Advising Appointment”.

**Slots Per Time:** Select “1” unless you wish to advise multiple students at a single appointment.

**Course or Reason:** Select the reason that is most appropriate. **Academic Advising** is typically used for advising campaigns. If you create a campaign for a specific course, you could select that course from the list.

**Choose the Begin and End Date:** This will be the date range in which you want the students to make their appointments.

**Length of the Appointment:** This is where you define exactly how long the appointment will be. Durations include a variety of intervals.

**Appointments Limit:** This will determine how many appointments you wish for the student to schedule. Selecting “1” means that students who no-show or cancel will not be able to make a new appointment using the campaign email link.
Location- Select “My Office”.

Click Continue. You can also Save and Exit and return to the campaign setup at any time.

**Step 2: Select Recipients of Campaign**

Once the Campaign Details are created and the selections are defined, the next step is adding recipients. Here you can use the tabs to search for recipients in several ways.

You have several ways to search for and select your students.

**Invite All My Assigned Students**: Provides users with students that are assigned to me.

**Advanced Search**: Provides users with advanced search filters to find, and select, students.

When you select your students using either option, you will be given a chance to Review Students in Campaign. You can remove students from that list by clicking the box next to their name and selecting “Remove Selected Users” from the Actions Menu.

When you select students from a tab, click Continue to move to the next page. Next you can review what the email message will say and look like.
Step 3: Add Advisors to Campaign

You will need to select yourself as the advisor for the campaign. You may also have the option to select additional advisors to make them available for appointments based on the campaign.

Note: Advisors will need to have availability defined before they can be added to an appointment campaign. **Your availability must be set up for Campaigns and must include the reason you selected for your campaign.** If your name does not appear in the list of advisors, there is an error in your availability set-up. You will need to edit your availability using the tab on your Advisor Home page.

Confused? Contact the SSC for help.
Step 4: Compose your Message

Compose the message that you will send to students in the invitation to schedule a tutoring appointment through the campaign.

Email Subject: The default subject of the email going to the student will be their name followed by “Schedule an Advising Appointment”. You can customize the subject to your liking.

Email Body: There will be pre-populated text in the body of the email. You can edit it as you see fit. Text in { } are merged from student data (name) or links. Do not remove the {$schedule_Link}, it is the link that will allow the student to make their appointment.

You can scroll down the page to preview your email.

Instructions or Notes for Landing Page: This will be your message to the student when they click the link and open the dialog box allowing them to schedule the appointment. For example, you can remind students to bring a copy of their degree audit and an advising form.

Note: This screen will also give you a preview of what the landing page will look like. Click the tab to view the preview.
To preview your email or landing page, scroll down:

Instructions or Notes for Landing Page

Preview Email  Preview Landing Page

How to Schedule Your Advising Appointment

Potsdam STATE UNIVERSITY OF NEW YORK

Please Schedule Your Advising Appointment.

Hello Andrew:

It's time to schedule your Spring 2018 advising appointment. Click the link below to 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://potsdam.campus.eab.com/a/123456

Make sure to bring a copy of your BearDen degree audit and an advising form.
Step 5: Confirm and Send

Please make sure that you review your selected options before you start the campaign. Click Send when you are ready to email the invites to the selected students.

Review the campaign details one more time and then click Send.
What to Expect Once Your Campaign is Live:

The email is sent immediately to your selected students.

You can return to the Campaign home page to view your quick stats (responses, appointments, etc). You can also click on the name of your campaign to see detailed stats on who responded, who hasn’t, which appointments you’ve filed an Advising Report on, etc.

Re-sending Invitations: If you wish to re-send the email to only those students who have not yet made appointments, you can do that by clicking the campaign name and then the tab for Appointments Not Yet Made. Click the students you wish to re-send the email to and select the “Resend Appointment Request” from the Action Menu.