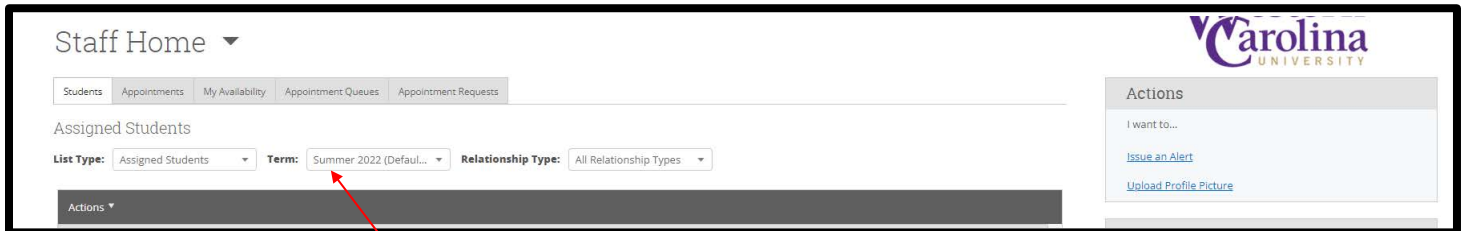# Navigate: How to Run an Advising Appointment Campaign

1. Appointment Campaigns allow you to invite a group of students to schedule an appointment with you for a specific reason. While there are many reasons you might conduct an Appointment Campaign, most faculty and staff use this feature for advising. Once you have logged in to Navigate and adjusted your term,

Make sure that your Navigate Calendar is synced to your electronic calendar (for instructions on how to synch your calendar Click Here, and make sure that your appointment availability is set up for **Campaigns** (for instructions on how to set up your availability, Click Here)

2. Click on the **Campaigns** icon on the left-hand side blue bar

3. Now, under **Appointment Campaigns** button, click **Appointment Campaigns** and then **Add New**

Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

Appointment Campaigns

Allows staff to reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

+ Add New

4. A form will appear on your screen, fill out each box as instructed.

a. You can use the **allow scheduling over courses** to allow students to schedule an appointment on advising day even if they have a class during that time.

b. Your **Care Unit** refers to your office or school

c. Your **Location** refers to your office or department
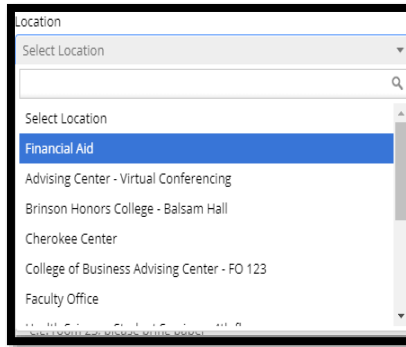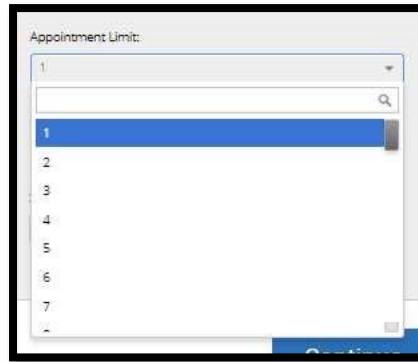
d. Your **Service** should be your purpose for the **Appointment Campaign**
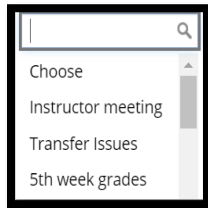
e. Adjust your **Begin Date** and **End Date** to reflect how long you would like your campaign to be active (two weeks is the recommended time frame)
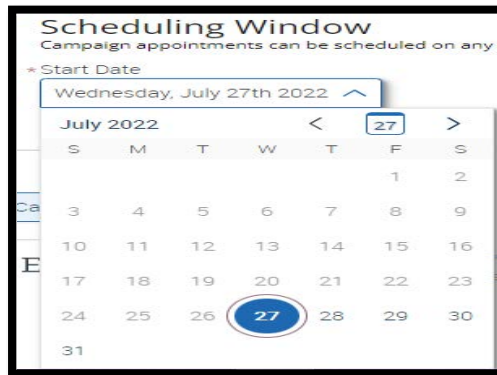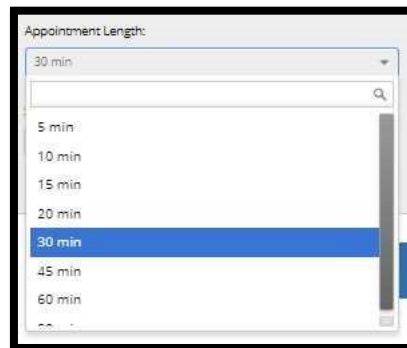
f. Your **Appointment Limit** refers to how many times the student can schedule an appointment with during this campaign

g. Set your **Appointment Length** to the amount of time you would like scheduled for each appointment

h. **Slots Per Time** should be set to **1**, unless you would like to have multiple students schedule for the same time slot
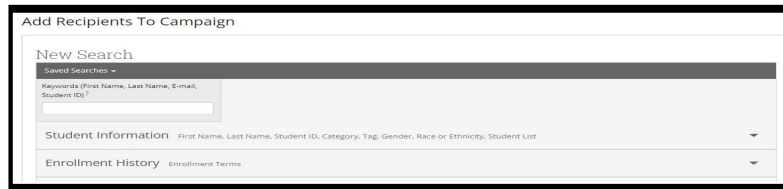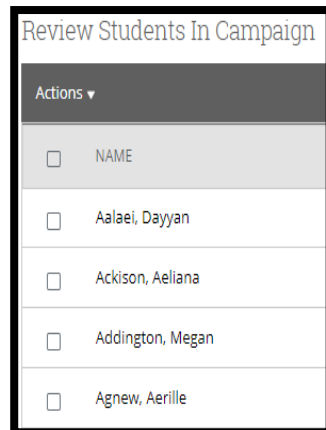
i. Click the continue button on the lower right-hand side of the form

j. The next screen will ask you to **Add Recipients To Campaign**, search for your list of students. If you would like to invite another list of students, select **Advanced Search** and choose your criteria.

k. **Review Students In Campaign**, if you have certain advisees you do not need to meet with, click the check box next to their name, then click the **Actions** button in the dark gray bar, and select **Remove Selected Users**

l. On the **Select Staff for Campaign** screen, select the check box next your name, and click **Continue**

Add Organizers To Campaign		☐ Include Appointment Availabilities?
ID	NAME	AVAILABLE TIMES
☑	**Steve Zwilling**	For: Appointments/Campaigns Mon-Fri 9:00am - 4:00pm ET (July 19, 2021 - August 2, 2021)

m. The next screen prompts you to **Compose Nudges**, select **Add Nudge**, then Compose Message All text is customizable, but don't delete any text found in {brackets, as these will auto-populate the student's first name as well as the link to schedule the appointment. You can add more than to send the message by adding more nudges.

Compose Your Message

{student_first_name}, Schedule a College of Arts & Sciences appointment

B   *I*   ☰ ☷ 𝒫   Paragraph   ∨   Merge Tags ∨   ↰ ↱

Please schedule your College of Arts & Sciences appointment.

Hello {Student_first_name}:

Please schedule an appointment for Academic or Career Advising at Biology Department. 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.
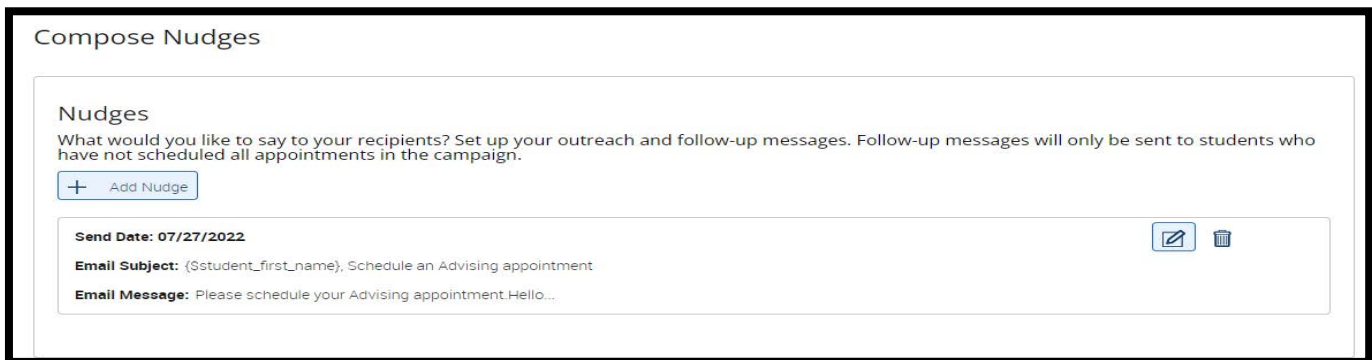
{Schedule_link}

n. Scroll down below the **Compose Your Message** box to review your email

Andrew, Schedule An Advising Appointment

Please Schedule Your Advising Appointment.

Hello Andrew:

Please schedule an appointment for Registration at Advising Center - Virtual Conferencing. 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<p> You can also copy and paste this address into your web browser.
 https://wcu.campus.eab.com/a/123456</p>

Thank you!

o. Click **Continue**

Continue

p. On the final screen, review the details of your campaign, and click **Continue.**

Compose Nudges

Nudges
What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

+ Add Nudge

Send Date: 07/27/2022

Email Subject: {$student_first_name}, Schedule an Advising appointment

Email Message: Please schedule your Advising appointment.Hello...

When a student has scheduled an appointment, you will receive an email notification, and the appointment will auto-populate onto your electronic calendar and theirs.