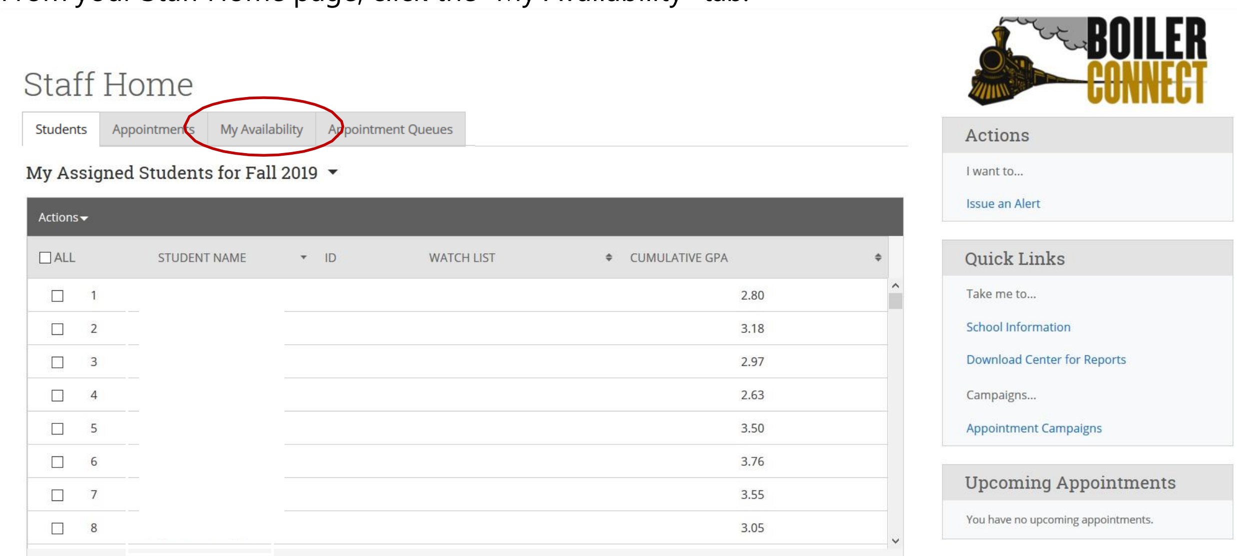
Training & Resources *Updated April 2022*

Creating Appointment Campaigns

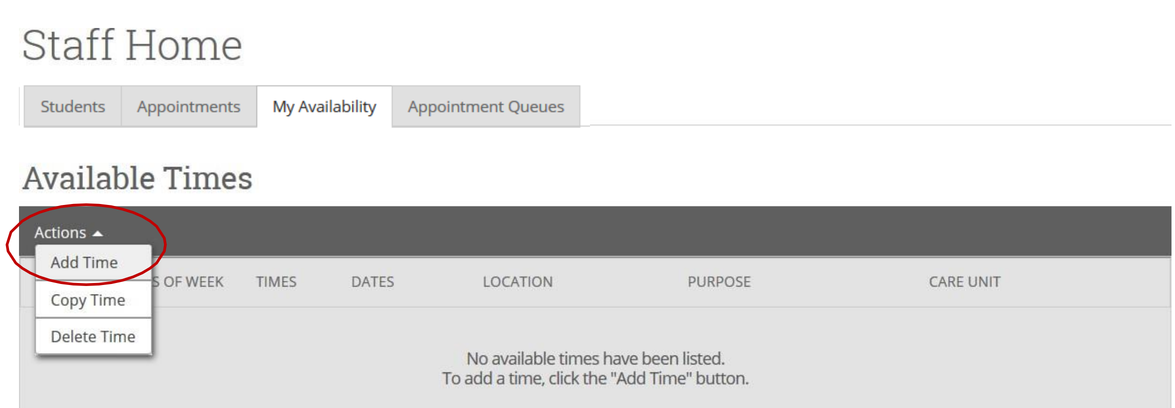
Overview:
An Appointment Campaign is an important feature that allows staff members to reach out to specific populations of students to encourage them to schedule appointments. This functionality is commonly used when you have identified a population of students in need of additional support, and you are sending them a request to schedule an appointment with you.

Log in:
Log in to www.purdue.edu/boilerconnect.

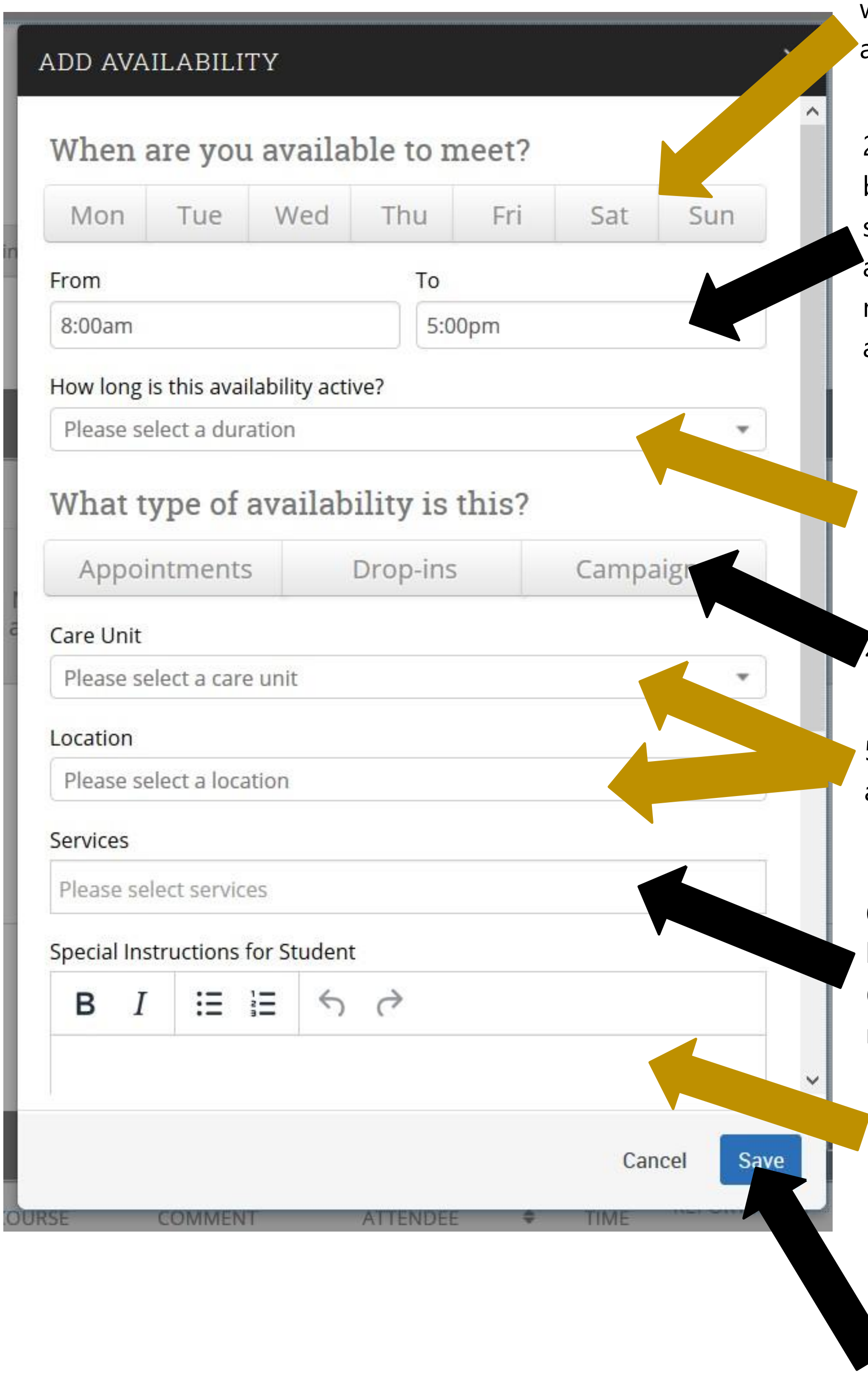
Create Campaign Availability:
From your Staff Home page, click the "My Availability" tab.



Click on "Actions" and choose "Add Time"



Set up your appointment availability



1. Select the days of the week you want to be available for appointments.

2. Choose the time frame you want to be available for appointments. The systems "talks" to Outlook, so appointments will not be able to be made at the same time as something already scheduled on your calendar.

3. Select your availability duration.

4. Select "Campaigns"

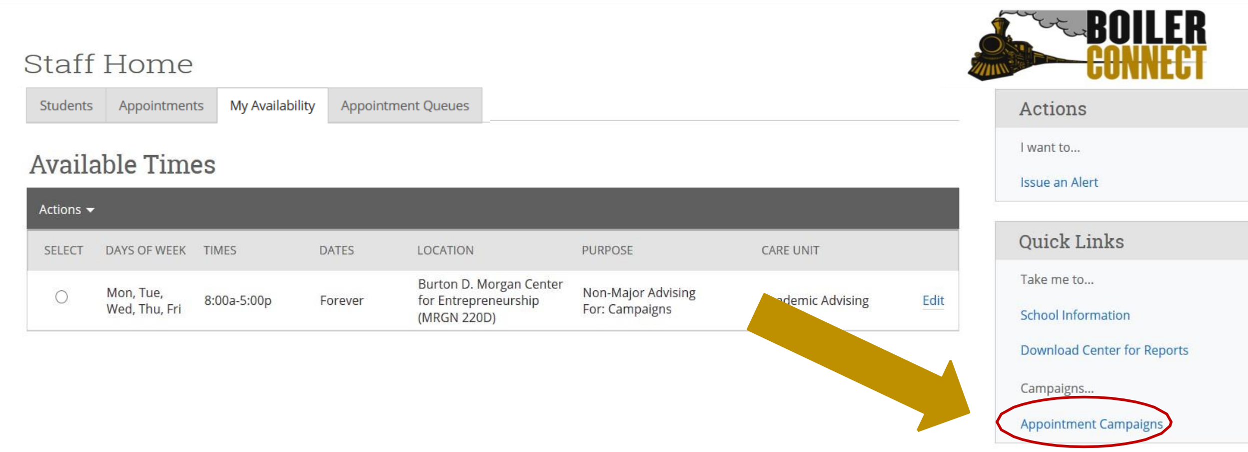
5. Select the appropriate Care Unit and Location for you.

6. Select the service(s) students will be receiving in this appointment (example: non-major advising, registration).

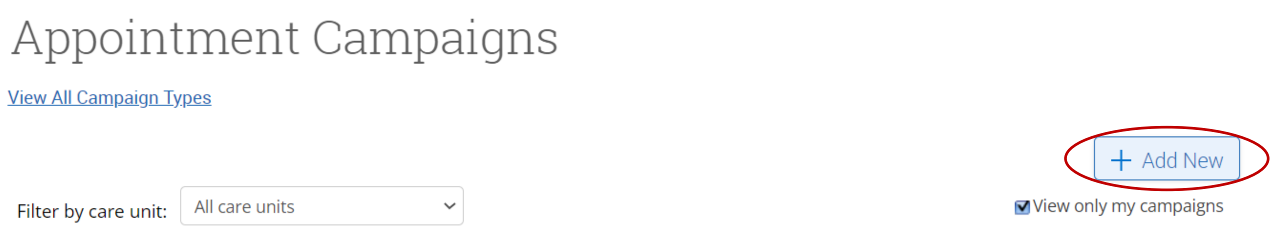
7. Include any special instructions (example: Allison's office is located in YONG 517. Please swipe in on the kiosk in the lobby upon arrival.).

8. Click "Save".

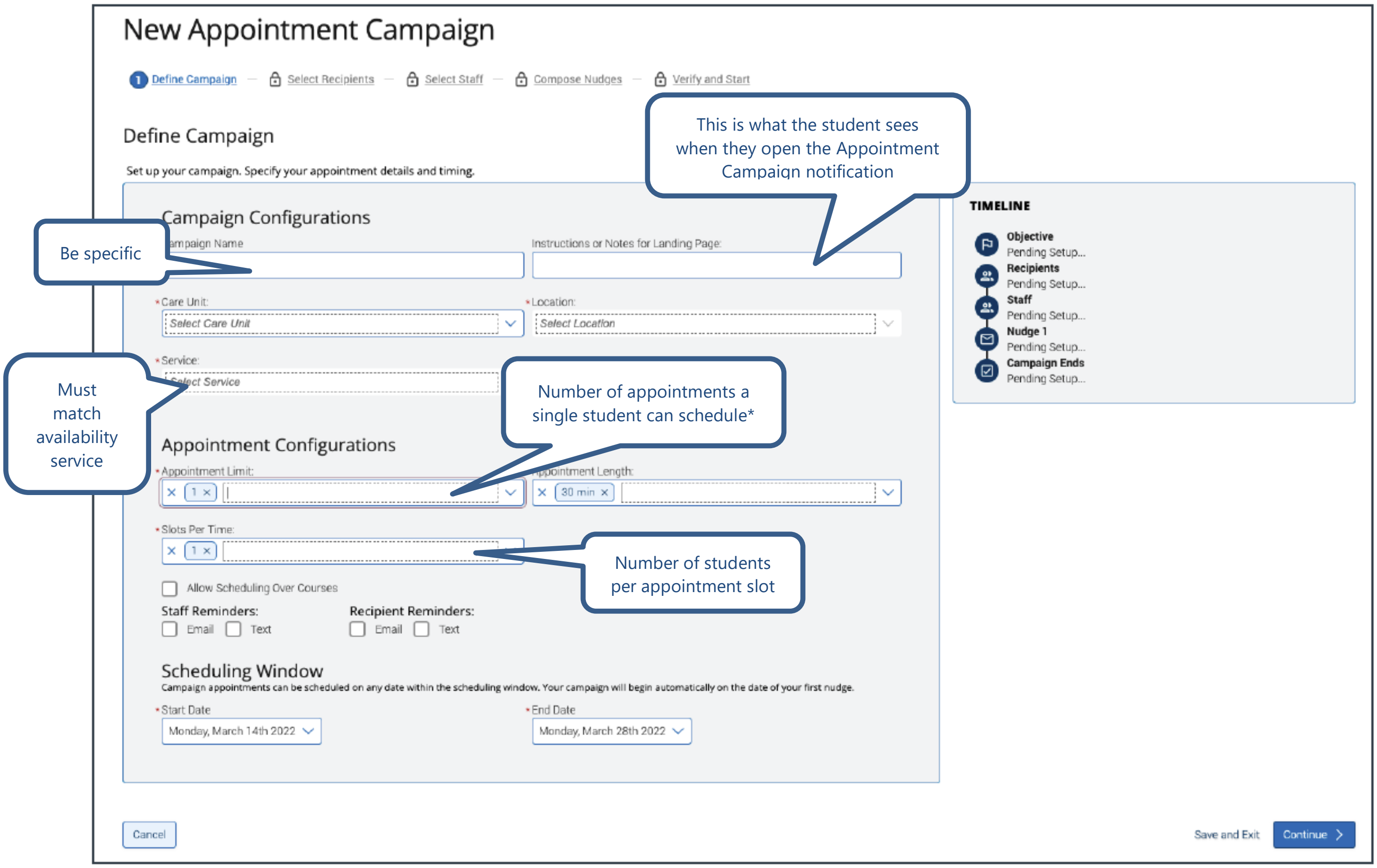
Creating an Appointment Campaign:
From your Staff Home page, click on "Appointment Campaigns" in the "Quick Links" box on the right side of the screen.



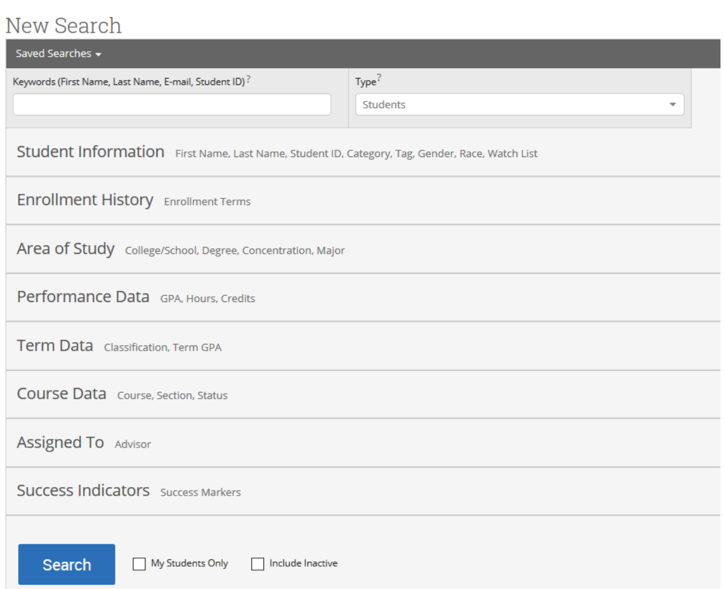
Click on "**+Add New**" button on the right side of the screen.



Define your campaign by selecting the appropriate information for you.
**Note: Choosing more than one for the Appointment Limit will prompt students to schedule an appointment until they have fulfilled the total number set as the limit. Example: limit is set to 3, student will be prompted to schedule an appointment until 3 total appointments have been scheduled.*



Your next step is adding students. If you created this campaign directly from a Student List or Saved Search, you will be asked to review your students. If not, the Advanced Search screen will open.



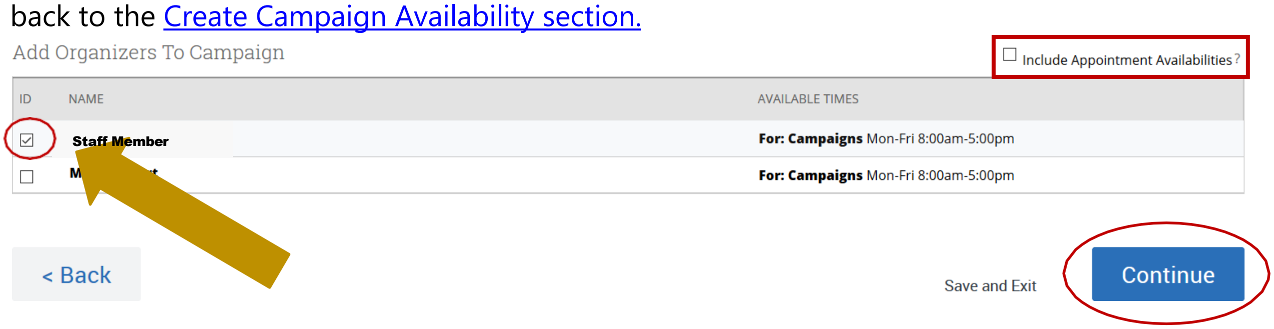
You have several ways to search for and select your students.

- **Invite All My Assigned Students**: Adds all students assigned to you to the campaign.
- **Advanced Search**: Use the Advanced Search filters to find and select students. After starting the search, you will be presented with a list of students. Select the students you wish to add and then click the blue **Continue** button near the bottom right of the screen.

You can remove students from the campaign if needed. For example, if you met with one of the students already and don't need them to come in during the campaign period, they can be removed.

You will be asked to review the students in the campaign. If these are correct, click **Continue**.

Add applicable staff to the campaign by checking the box to the left of their name. Often this will only be you. If you do not see the name of the staff member you are trying to add, refer back to the [Create Campaign Availability section.](#)



"Include Appointment Availabilities?" – To Check or Not to Check

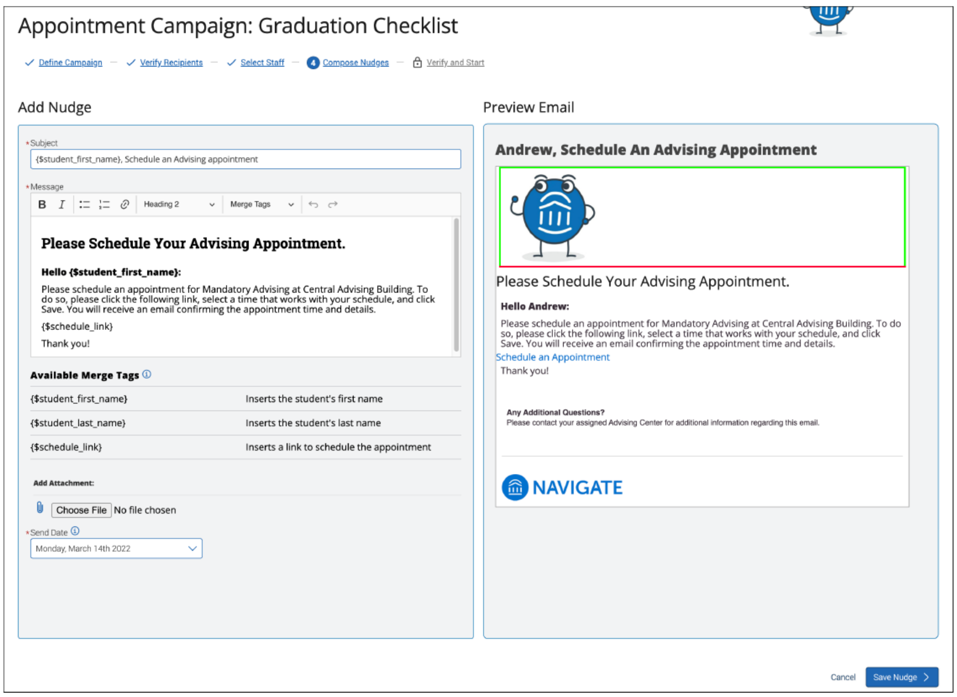
If this box is checked, a student will be able to schedule appointments for any open time matching the organizer's pre-set Appointment Availability AND Campaign Availability. If the box is not checked, the student will only be able to schedule appointments for any open time matching the organizer's pre-set Campaign Availability.

Develop the text you would like the student to receive when you send the appointment campaign, as well as any follow up nudge emails for students who delay in scheduling their appointment.

The Nudge feature replaces the previous *Compose a Message* functionality. Each nudge is an email sent to individuals in your campaign recipient list. Nudge emails are sent the morning of the date chosen when creating the nudge. The first nudge email is what officially begins the Appointment Campaign.

The option to create a nudge(s) will appear after the campaign is defined and the list of students is created. To create a nudge:

1. Enter a **subject line** and **customize the message**. Available Merge Tags are listed under the Message text box and work exactly the same as they did previously. A preview of the message is shown in a panel to the right of the message composition panel. Files can be attached to this message.
2. Choose a **send date**. This is the date the email nudge will be sent. The nudge with the earliest date will essentially start your Appointment Campaign.
3. Click **Save Nudge** to continue. Multiple nudges can be created.



You also have the option to create a Success Message. This is an email sent the day after the recipient completes the objective (typically the scheduling of an appointment). The success message is for communication purposes only. Click **Add Success Message** to begin creating a success message.

Things to Note About Nudges:

- An unlimited number of nudges can be created
- Only one nudge email can be sent per day, and they must be scheduled to take place between the start and end date of the Appointment Campaign
- Users can edit/delete nudge emails until the are sent
- Users can continue to create additional nudges until the Appointment Campaign ends
- The nudge functionality is for email messaging only at this time

After you are finished creating nudges and your success message, click **Continue** to go to the *Confirm & Send* page.

Confirm and Send Campaign:
Review all the final campaign information. Click **"Send"** to begin the campaign and send the appointment email and link out to the included students.

Be prepared!
Your calendar will fill up fast with appointments – so be sure your calendar is ready!