# *Adding a Student to a Campaign When They Didn't Use Your Campaign Link*

Sometimes students will not using your Appointment Campaign link to schedule their appointment, but you want their appointment to be associated with the campaign. Follow the instructions below after you have met with the student to associate a non-campaign appointment with a campaign.

Student used a different Service (reason for appointment) than you used in your campaign
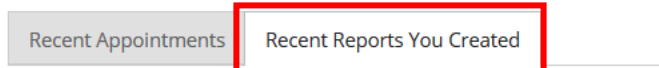
- From your Advisor Home page select the ***Appointments*** tab.
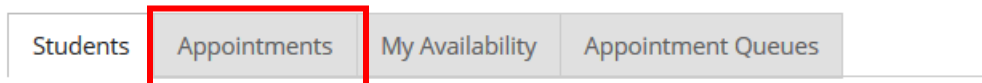
- Navigate to the ***Reporting*** section and click on the ***Recent Reports You Created*** tab.

- To the far right side of the screen in the row with the name of the student the report was created for, click on ***Details***

- At the bottom of your ***Appointment Report for Student Name*** screen, click on ***Edit Report***.

- Make sure the ***Service*** (reason for the appointment) matches the service you established for your Campaign. You may need to <u>ADD</u> the correct service to the existing reason. *Do not remove the existing service.*

Add the appropriate service to the existing service. Do not delete the existing service.

- Click on **Save This Report** at the bottom of the page.

- Navigate to your **Appointment Campaign** and click on the **Eligible Appointments** tab.

- Click in the check box to the left side of the student's name.

- Click the down arrow next to **Actions**, and select **Associate Appointments.**

- A pop-up screen will appear asking you to confirm that you want to add this person to your Campaign. Select **OK**.

These appointments will be added as part of this campaign. Do you wish to continue?

OK   Cancel

The student will then be moved to your **Appointments Made** tab.

Student used the same Service (reason for appointment) that you used in your campaign

There may be occasions when a student has scheduled an appointment with you, and they selected the same service (appointment reason) that you set up when establishing your campaign. When this happens, the student will automatically appear on your **Eligible Appointments** tab. It is good practice to make sure you check this tab before you take the steps outlined above.

- Navigate to your **Appointment Campaign** and click on the **Eligible Appointments** tab.

| Appointments Made | Appointments Not Yet Made | Reports Created | Eligible Appointments |

This grid will display all eligible appointments that have been scheduled outside of the campaign link. Eligible appointments only include appointments containing the same location, service, and students selected when creating the campaign.

Actions ▾

- Click in the check box to the left side of the student's name.

| Appointments Made | Appointments Not Yet Made | Reports Created | Eligible Appointments |

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Actions ▾

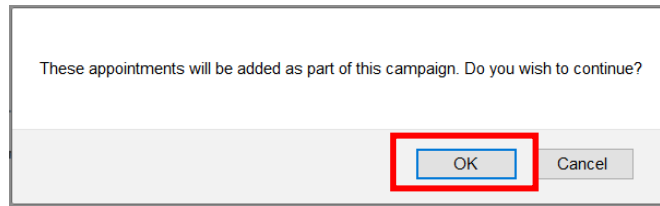|	INDEX	DATE	STUDENT	ORGANIZER	REASONS / COURSE
☑	1	10/03/2017 09:30 AM The student's name appears here		Whiteley, Daniel	EDU CODO In

- Click the down arrow next to **Actions**, and select **Associate Appointments.**

creating the campaign.

Actions ▲

Associate Appointments

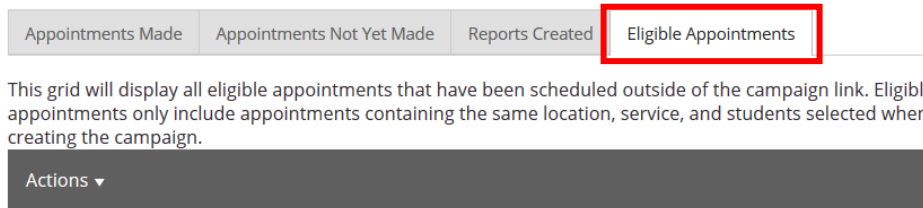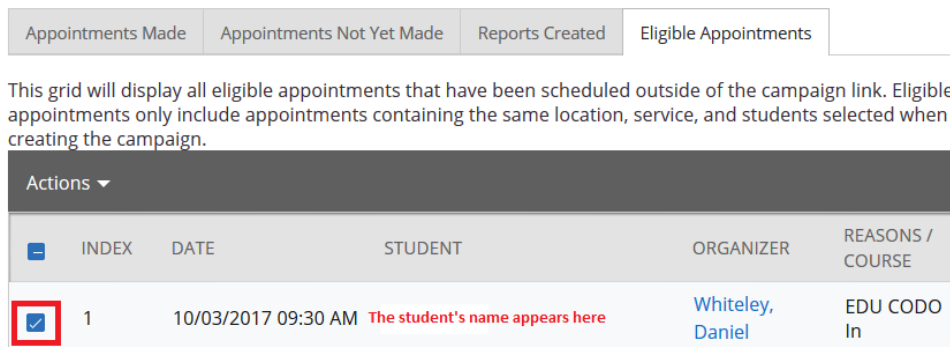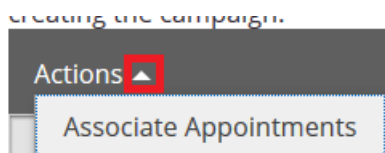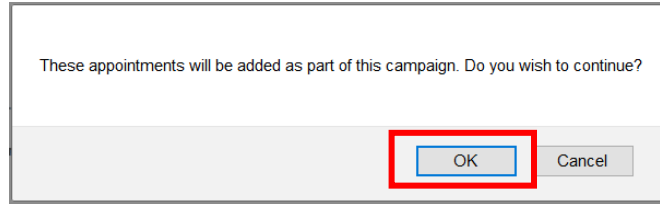- A pop-up screen will appear asking you to confirm that you want to add this person to your Campaign. Select *OK.*

These appointments will be added as part of this campaign. Do you wish to continue?

OK   Cancel

The student will then be moved to your *Appointments Made* tab.