



## 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](http://www.purdue.edu/boilerconnect).

### Create Campaign Availability:

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

#### Staff Home

Students | Appointments | **My Availability** | Appointment Queues

My Assigned Students for Fall 2019 ▾

Actions ▾	STUDENT NAME	ID	WATCH LIST	CUMULATIVE GPA
<input type="checkbox"/>	1			2.80
<input type="checkbox"/>	2			3.18
<input type="checkbox"/>	3			2.97
<input type="checkbox"/>	4			2.63
<input type="checkbox"/>	5			3.50
<input type="checkbox"/>	6			3.76
<input type="checkbox"/>	7			3.55
<input type="checkbox"/>	8			3.05



Actions

I want to...

[Issue an Alert](#)

Quick Links

Take me to...

[School Information](#)

[Download Center for Reports](#)

[Campaigns...](#)

[Appointment Campaigns](#)

Upcoming Appointments

You have no upcoming appointments.

Click on "Actions" and choose "Add Time"

#### Staff Home

Students | Appointments | **My Availability** | Appointment Queues

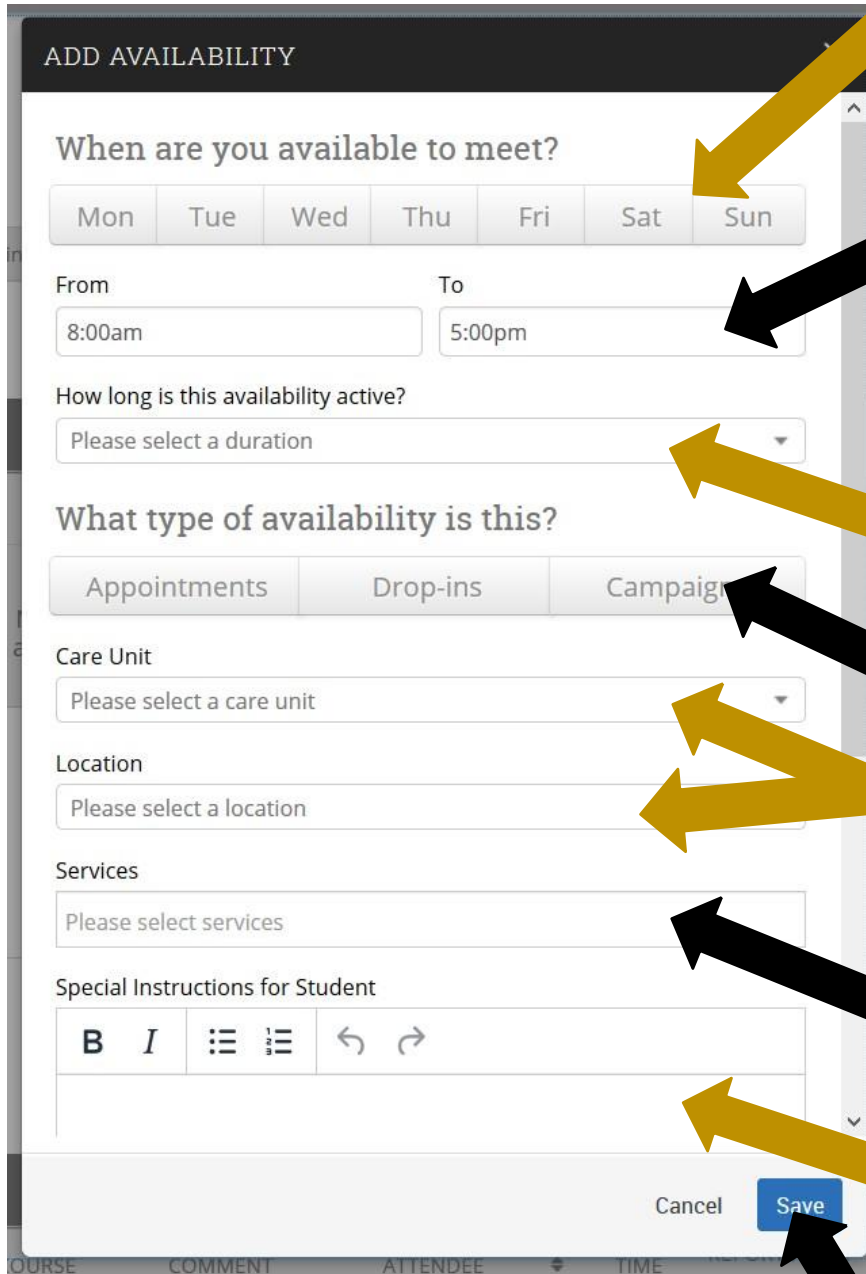
#### Available Times

Actions ▾

- Add Time**
- Copy Time
- Delete Time

DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT
No available times have been listed. To add a time, click the "Add Time" button.					

Set up your appointment availability



**ADD AVAILABILITY**

**When are you available to meet?**

Mon Tue Wed Thu Fri Sat Sun

From: 8:00am To: 5:00pm

How long is this availability active?  
Please select a duration

**What type of availability is this?**

Appointments Drop-ins Campaigns

Care Unit  
Please select a care unit

Location  
Please select a location

Services  
Please select services

Special Instructions for Student

**B I** [List Icon] [List Icon] [Undo] [Redo]

Cancel Save

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.

Staff Home

Students | Appointments | My Availability | Appointment Queues

#### Available Times

SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	
<input type="radio"/>	Mon, Tue, Wed, Thu, Fri	8:00a-5:00p	Forever	Burton D. Morgan Center for Entrepreneurship (MRGN 220D)	Non-Major Advising For: Campaigns	Academic Advising	<a href="#">Edit</a>

Actions

I want to...  
[Issue an Alert](#)

Quick Links

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[Download Center for Reports](#)  
[Campaigns...](#)  
[Appointment Campaigns](#)

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

## Appointment Campaigns

[View All Campaign Types](#)

Filter by care unit:

[+ Add New](#)

View only my campaigns

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.*



### New Appointment Campaign

1 Define Campaign — Select Recipients — Select Staff — Compose Nudges — Verify and Start

#### Define Campaign

Set up your campaign. Specify your appointment details and timing.

##### Campaign Configurations

Campaign Name:  Instructions or Notes for Landing Page:

Care Unit:  Location:

Service:

##### Appointment Configurations

Appointment Limit:  Appointment Length:

Slots Per Time:

Allow Scheduling Over Courses

Staff Reminders:  Email  Text      Recipient Reminders:  Email  Text

##### Scheduling Window

Campaign appointments can be scheduled on any date within the scheduling window. Your campaign will begin automatically on the date of your first nudge.

Start Date:  End Date:

##### TIMELINE

- Objective Pending Setup...
- Recipients Pending Setup...
- Staff Pending Setup...
- Nudge 1 Pending Setup...
- Campaign Ends Pending Setup...

Be specific

Must match availability service

This is what the student sees when they open the Appointment Campaign notification

Number of appointments a single student can schedule\*

Number of students per appointment slot

Cancel Save and Exit [Continue >](#)

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.

### New Search

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID)  Type

Student Information First Name, Last Name, Student ID, Category, Tag, Gender, Race, Watch List

Enrollment History Enrollment Terms

Area of Study College/School, Degree, Concentration, Major

Performance Data GPA, Hours, Credits

Term Data Classification, Term GPA

Course Data Course, Section, Status

Assigned To Advisor

Success Indicators Success Markers

My Students Only  Include Inactive

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](#).

Add Organizers To Campaign  Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
<input checked="" type="checkbox"/>	Staff Member	<b>For: Campaigns</b> Mon-Fri 8:00am-5:00pm
<input type="checkbox"/>	M	<b>For: Campaigns</b> Mon-Fri 8:00am-5:00pm

[< Back](#) Save and Exit [Continue](#)

### “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.

The screenshot shows the 'Appointment Campaign: Graduation Checklist' interface. At the top, there are navigation tabs: 'Define Campaign', 'Verify Recipients', 'Select Staff', 'Compose Nudges' (active), and 'Verify and Start'. Below the tabs, the interface is split into two main sections: 'Add Nudge' and 'Preview Email'.

**Add Nudge Section:**

- Subject:** A text box containing the merge tag '{student\_first\_name}. Schedule an Advising appointment'.
- Message:** A rich text editor with a toolbar (bold, italic, link, unlink, heading 2, merge tags, undo, redo). The message content is: 'Please Schedule Your Advising Appointment. Hello {student\_first\_name}: Please schedule an appointment for Mandatory Advising at Central Advising Building. 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:** A table listing merge tags and their descriptions:

Merge Tag	Description
{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:** A section with a 'Choose File' button and the text 'No file chosen'.
- Send Date:** A dropdown menu currently set to 'Monday, March 14th 2022'.

**Preview Email Section:**

- Subject:** 'Andrew, Schedule An Advising Appointment'.
- Image:** A cartoon character of a blue building with a face and arms, representing the 'NAVIGATE' logo.
- Text:** 'Please Schedule Your Advising Appointment. Hello Andrew: Please schedule an appointment for Mandatory Advising at Central Advising Building. 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 Thank you!'.
- Footer:** 'Any Additional Questions? Please contact your assigned Advising Center for additional information regarding this email. NAVIGATE'.

At the bottom right of the interface, there are 'Cancel' and 'Save Nudge' buttons.

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 they 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.



*Training & Resources*

*Updated April 2022*

**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!*