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.

Step 1 – Log in:
Log in to www.purdue.edu/boilerconnect.

Step 2 – Create Campaign Availability:
From your Staff Home page, click the “My Availability” tab.

Step 2a:
Click on “Actions” and choose “Add Time”.

[Image of Staff Home page and Available Times section with highlighted actions]
**Step 2b:**
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”.
**Step 3 – 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.

**Step 3a:**
Click on “Appointment Campaign” in the “Actions” block on the right side of the screen.
**Step 3b:**
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.*

**Step 3c:**
Your next step is adding students. If you created this campaign directly from a Watch 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 choose **Add Selected Users and Search for More** from the actions menu.

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.

**Step 3d:**
Once finished, click **Continue** to move to the next page. You will be asked to review the students in the campaign. If these are correct, click **Continue**.

**Step 3e:**
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 Step 2 – Create Campaign Availability.

**“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.

**Step 3g:**
Develop the text you would like the student to receive when you send the appointment campaign. Note: DO NOT change the text in the red boxes. You have the option to view the way the actual email will look by scrolling down. Once you are happy with the message, click “Continue”.

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**Add Organizers To Campaign**

<table>
<thead>
<tr>
<th>ID</th>
<th>NAME</th>
<th>AVAILABLE TIMES</th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>Staff Member</td>
<td>For: Campaigns Mon-Fri 8:00am-5:00pm</td>
</tr>
<tr>
<td></td>
<td>Student</td>
<td>For: Campaigns Mon-Fri 8:00am-5:00pm</td>
</tr>
</tbody>
</table>

Save and Exit **Continue**
Step 4 – Confirm and Send Campaign:
Review all of 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!*