

Navigate: How to Run an Appointment Campaign

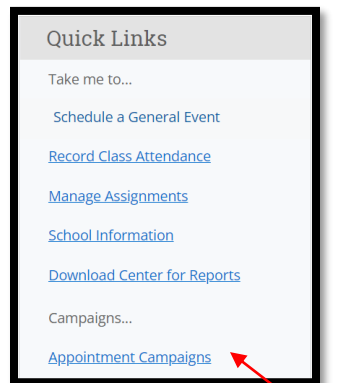
Appointment Campaigns allow you to invite a group of students to schedule an appointment with you for a specific reason. While there are many reasons you might conduct an Appointment Campaign, most faculty and staff use this feature for advising.

1. Once you have logged-in to Navigate, make sure that your Navigate Calendar is synced to your electronic calendar and make sure that your appointment availability is set up for **Campaigns**.

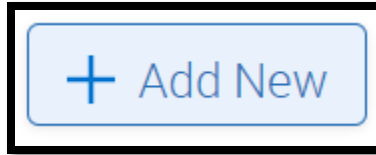


Available Times							
Actions ▾							
SELECT	DAYS OF WEEK	TIMES	DATES	LOCATION	PURPOSE	CARE UNIT	
<input type="radio"/>	Mon, Tue, Wed, Thu, Fri	9:00a-4:00p	Forever	Biology Department	Academic or Career Advising For: Campaigns	College of Arts & Sciences	Edit

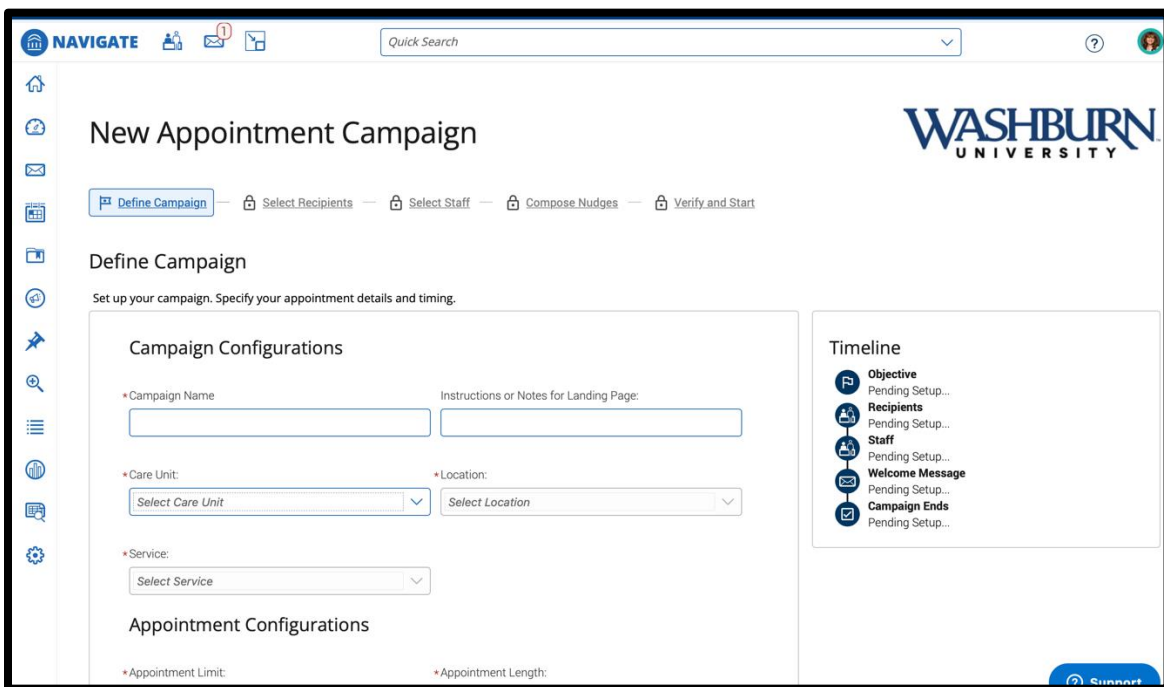
2. Click on the **Appointment Campaigns** link, in the **Quick Links** box



3. Now, click on the **Add New** button



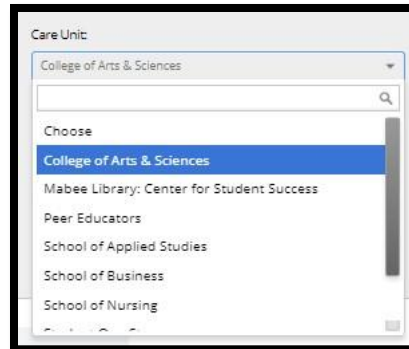
4. A form will appear on your screen, fill out each box as instructed



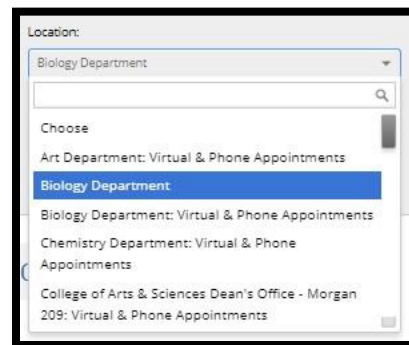
- a. Your **Campaign Name** should be created using this naming convention: Last Name, First Initial_Your Campaign Name_Term Code (Term Codes contain the current year, followed by **10** for spring terms, **20** for summer terms, and **30** for fall terms) ex. Foreman, C_Fall Advising_202010



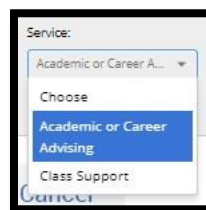
b. Your **Care Unit** refers to your academic college/school or other campus unit



c. Your **Location** refers to your department



d. Your **Service** should be your purpose for the **Appointment Campaign**



- e. Your **Appointment Limit** refers to how many times the student can schedule an appointment with during this campaign

*Appointment Limit:

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

*Appointment Length:

- g. **Slots Per Time** should be set to **1**, unless you would like to have multiple students schedule for the same time slot

*Slots Per Time:

- h. If you are using this campaign for class check-in appointments that take place during class time, click the **Allow Scheduling Over Courses** checkbox, otherwise, please leave it unchecked

Allow Scheduling Over Courses

- i. Select your desired reminders

Staff Reminders: Recipient Reminders:

Email Text Email Text

- j. Adjust your **Start Date** and **End Date** to reflect how long you would like your campaign to be active (two weeks is the recommended time frame)

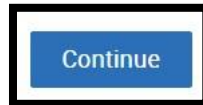
Scheduling Window

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

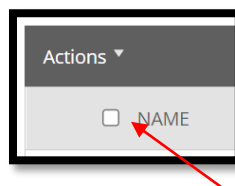
- k. Click the continue button on the lower right-hand side of the form



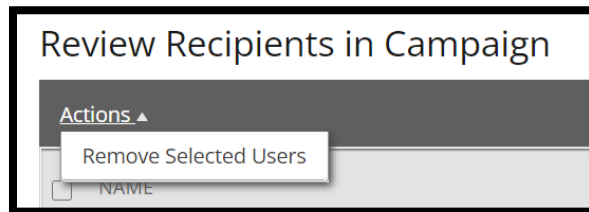
I. The next screen will ask you to **Add Recipients To Campaign**

- i. Use the various search criteria provided to find your desired group of students (make sure to have the current semester selected from the **Enrollment History** section), then click **Search**

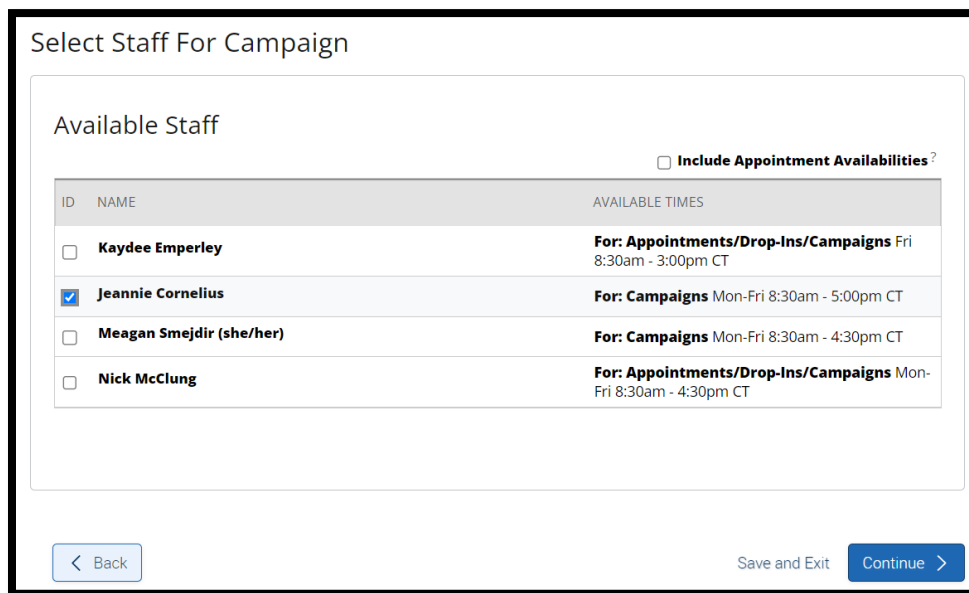
m. Select the **Check All** box at the top of the list to add all search results to your campaign



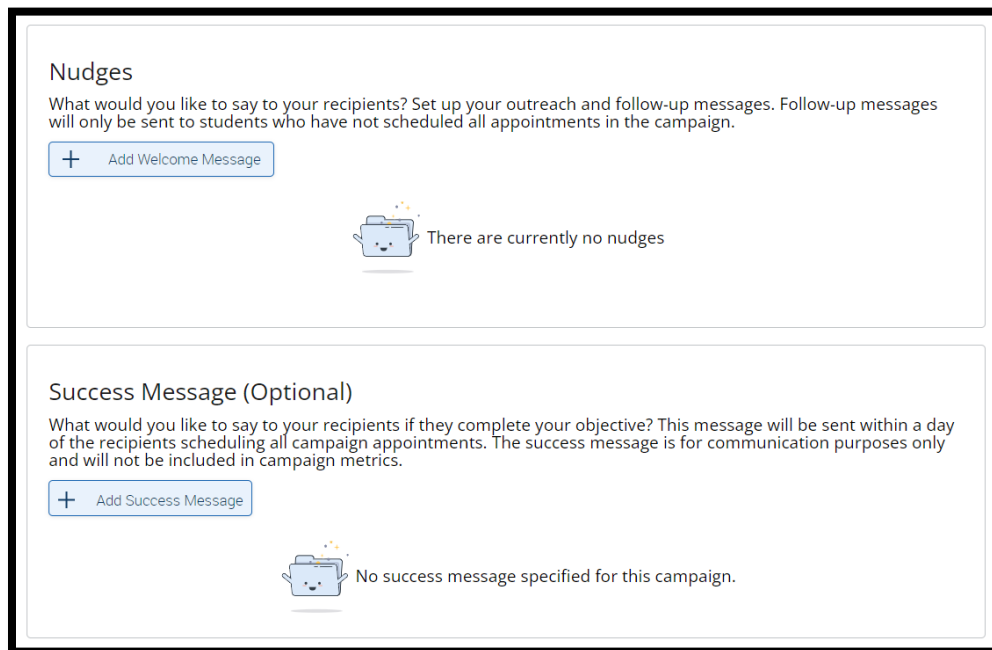
- n. **Review Recipients in Campaign**, if you have certain students you do not need to meet with, click the check box next to their name, then click the **Actions** button in the dark gray bar, and select **Remove Selected Users**, then click **Continue**



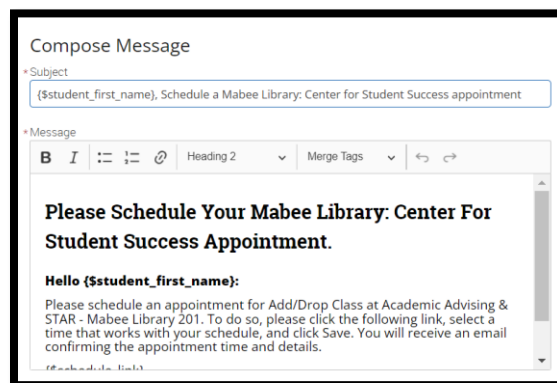
- o. On the **Select Staff For Campaign** screen, select the check box next your name, and click **Continue**



- p. The next screen prompts you to **Compose Nudges**, **Nudges** are the emails that are sent to your student with the campaign link. You may compose more than one nudge to be sent as a reminder. All nudges have a customizable send date. In addition, a **Success Message** may be sent to a student confirming that they have scheduled their appointment. Click the **Add Welcome Message** or **Add Success Message** (depending on which one you are working on)



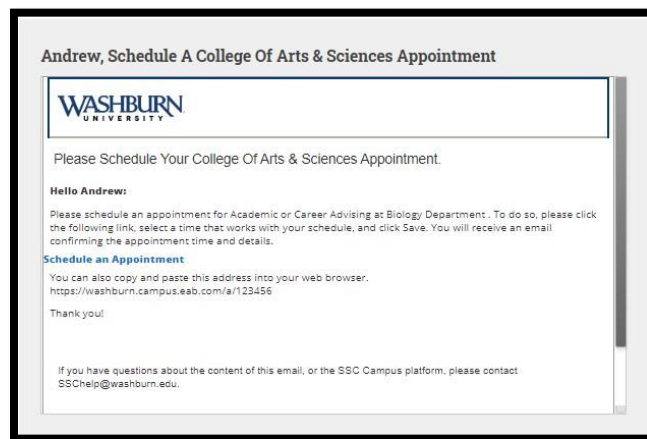
- q. All text is customizable, but do not delete any text found in {brackets}, as these will auto-populate the student's first name as well as the link to schedule the appointment



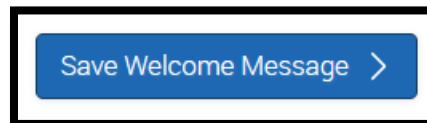
- r. Select your desired **Send Date**

A screenshot of a web form element labeled '* Send Date' with an information icon. Below the label is a dropdown menu with a blue border, currently displaying 'January 11, 2023' and a downward-pointing chevron icon.

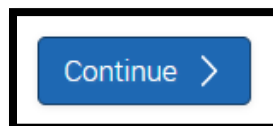
- s. A preview of your Nudge can be found on the right-hand side of the screen



- t. Click **Save Welcome Message** or **Save Success Message** (depending on which one you are working on)



- u. When you have finished composing your desired nudges, click **Continue**



v. On the final screen, review the details of your campaign, and click **Start Campaign**

Verify & Start

Campaign Summary

Define Campaign	Name: Foreman, C_Advising_202310 Care Unit: Mabee Library: Center for Student Success Location: Academic Advising & STAR - Mabee Library 201 Service: Add/Drop Class Appointment Limit: 1 Appointment Length: 30 mins Slots Per Time: 1 Scheduling Window: 01/11/2023 - 01/25/2023 Allow Scheduling Over Courses: No Staff Reminders: Email - No Text - No Recipient Reminders: Email - Yes Text - Yes
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Recipients [View 3 recipients](#)

Staff [View 1 staff](#)

Welcome Message	Send Date: Wed 01/11/2023 Subject: {Student_first_name}, Schedule a Mabee Library: Center for Student Success appointment Email Preview: View Email
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Success Message	Subject: Thank You For Scheduling Your Appointment Success Message Preview: View Email
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[← Back](#)
Save and Exit: [Start Campaign](#)

When a student has scheduled an appointment, you will receive an email notification, and the appointment will auto-populate onto your electronic calendar as long as you have gone through the process of syncing your calendar.