Appointment campaigns can be used to target specific groups of students to come in for appointments and will vary based on filters and criteria you select. There are several steps needed to effectively create an appointment campaign.

1. Add Appointment Availability for a campaign. This is done in the same fashion as setting up availability for appointments, you just select the Campaign button instead.

2. To create the campaign, click on the Campaign menu icon on the left side navigation menu, and then on Appointment Campaign.
Setting Up an Appointment Campaign

The first screen you see will allow you to set the **defining characteristics** of your appointment campaign.

A. **Campaign Name:** The name you assign to this campaign that is only seen by you and other professional staff. Please use the naming convention of: ‘Campaign Name – LastName (Location).’

B. **Campaign Type:** The only choice you will need to be sure is selected is Advising.

C. **Slots Per Time:** If you only want one student to sign up for each time slot, leave this at the default of 1. If you would like multiple students to come for a time slot, you can change the number as desired.

D. **Course or Reason:** This is the Student Service you are providing in this campaign. It will be associated with your Location.

E. **Begin/End Dates:** Select the start date and end date for your campaign.

F. **Appointment Length:** This dictates the duration of appointments for your campaign.

G. **Appointment Limit:** This is the number of times a student can make an appointment. This also includes cancellations, so if you want to make sure a student can reschedule for a cancellation, it is recommended you set this to 2.

H. **Location:** Select the location where you will be meeting the students.
Setting Up an Appointment Campaign

4 Once you finish entering the campaign information and click Continue, you will begin to add students to the campaign. There are two methods to do this.

A. **Invite All My Assigned Students:** If you have students assigned to you through Banner, you can choose this option. It will still permit you to manually remove students you may not want to send this to.

B. **Advanced Search:** Using the advanced search feature, you can find any student to add to the campaign. Do note that you can use this search to add students from a Watch List to the campaign.

5 Once you have added all of the students you need to the campaign, a review screen will populate. Using the Action menu, you can add or remove as needed. Once finished, clicking Continue will move you to the next step.
Setting Up an Appointment Campaign

3 The **Add Advisors to Campaign** screen allows you to select advisors and the availability you wish to use. In many cases, this will just be your own availability!

4 A great feature to the **Appointment Campaign** is the ability to **customize the message** that students will receive. Some aspects will be automatically filled in for you, such as **{$student_first_name}** and other merge fields. **Do NOT remove {$schedule_link}** as this provides the link and instructions on how students can sign up for the appointment.
Setting Up an Appointment Campaign

As you make edits to the message, the Preview windows below it will show you the email a student would receive as well as a preview of the Landing Page they would see when they clicked their individual login links.

You can also add notes or instructions for the landing page, which will show for a student when they click on the link.
Finally, you will be asked to review your campaign details and when you hit the **Save/Confirm button**, your campaign emails will be sent out from Pathfinder!