UWSP Navigate How-To:
Creating an Appointment Campaign

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Appointment Campaigns allow staff members to reach out to specific populations of students to encourage them to schedule appointments for a specific purpose. For example, academic advisers use Appointment Campaigns to request that their advisees schedule an appointment for registration advising appointments.

When an Appointment Campaign is sent, students included in the campaign receive an email with a message crafted by their adviser, as well as an auto-generated link which the students can click to be brought directly to a scheduling screen with the adviser's availability.

Before sending an Appointment Campaign, be sure to set up Availability with your desired appointment times, and be sure to enable the "Campaign" selection under, "What type of Availability is this?"

At any point in time while setting up your Appointment Campaign, you may select Save & Exit, to save your Campaign and return later to complete the setup and send out.

Step 1:
To start, click the Campaigns menu icon on the left-hand toolbar.

Help Is Available!

If you have questions, need assistance, or would like to learn more about what Navigate can offer, please contact our campus Navigate Administrator, Greg Lang, at Navigate@uwsp.edu . Greg also offers dedicated one-on-one meetings, training for departments, and other services to help you use Navigate to its full potential. We are here to help!

Step 2:
From the Campaigns menu, under Appointment Campaigns, select "Add New."

Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

Appointment Campaigns

Allows staff to reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

[+ Add New]

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Step 3:

Define your Campaign

Campaign Configurations

Campaign Name *

Care Unit: *

Select Care Unit ⌄

Service: *

Select Service ⌄

Instructions or Notes for Landing Page:

Location: *

Select Location ⌄

Campaign Name: This is only visible to you, and our Navigate admin. Please use the following naming convention: *Your Name, Current Term, Purpose.*
For example: Greg Lang Fall 2024 Registration Advising

Care Unit: This will be Advising, Tutoring-Learning Center, etc.

Service: The available Service that the student will be scheduling for.

Instructions for Landing Page: This message will appear atop the page when the student is selecting an appointment time.

Location: This will either be your department's office, or "Adviser's Office – 'Campus Location'"

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Appointment Configurations

Appointment Limit: *

`1` ✕ ▾

Appointment Length: *

`30 min` ✕ ▾

Slots Per Time: *

`1` ✕ ▾

☐ 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 *

`August 22, 2024` ▾

End Date *

`September 5, 2024` ▾

Launch Date

This Launch Date will be the date that the "Welcome Message" will send. If students are added to your Campaign after this launch date via Automation, the "Welcome Message" will send to that student as soon as they are added.

Launch Date *

`August 22, 2024` ▾

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Step 4:
Click Continue

Step 5:
Add your Students to the Campaign.

To add your assigned students only, select the "My Students Only" box at the bottom of the page and click "Search".

The next page will display students that meet your search criteria. For students you wish to add to the campaign, select the box next to their name, or check the top box to select all.

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If your search results in more than 100 students, be sure to watch for the message atop the student list, asking you to select all beyond the first page results.

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Click Continue

Step 5:

Select Staff (You) for Campaign, then click Continue.

Available Staff

Step 6:

Compose Welcome Message and Nudges that your students will receive.

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First you must add a Welcome Message. This is the initial message your students will receive as a request to schedule an appointment with you. There will be pre-populated text in this menu, but you can edit as you would like.

Nudges

What would you like to say to yo
not scheduled all appointments

+   Add Welcome Message

Try not to remove any of the text with [brackets]; these are Merge Tags which will auto-insert the names of each student for each email, as well as populate a scheduling link for your students to use. As you make changes, you will see a preview of your message on the right-hand side of the page. Your Welcome Message will automatically send on the Launch Date you selected in the Define Campaign menu (Step 3).

(cont.)

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Compose Message

Apply a Template ⓘ

Subject *

{$student_first_name}, Schedule an Advising appointment

Message *

Paragraph | A | A | A | AI | B | I | link | list | list | undo | redo | image | table | Merge Tags

Please Schedule Your Advising Appointment.

Hello {$student_first_name}:

Please schedule an appointment for Registration Advising Appointment at Adviser's Office - Stevens Point. 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!

Gregory Lang
UWSP Navigate Admin
glang@uwsp.edu

Preview Email

Andrew, Schedule an Advising appointment

University of Wisconsin
Stevens Point

Please Schedule Your Advising Appointment.

Hello Andrew:

Please schedule an appointment for Registration Advising Appointment at Adviser's Office - Stevens Point. 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

You can also copy and paste this address into your web browser.
https://uwsp.campus.eab.com/a/123456

Thank you!

Gregory Lang
UWSP Navigate Admin
glang@uwsp.edu

Once you have finalized you Welcome Message, click Save Welcome Message, towards the bottom of the page.

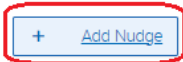Cancel   **Save Welcome Message >**

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Now that you have set your Welcome Message you may optionally add secondary messages, or Nudges, to your Campaign to remind students to schedule with you later in the Campaign. To do so, select Add Nudge. If you set your Appointment Limit to 1, these Nudges will only be sent to students who have not met with you in this Campaign.

Nudges

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

+   Add Nudge

Welcome Message

Send Date: 08/22/2024

Email Subject: {$student_first_name}, Schedule an Advising appointment

Email Message: Please schedule your Advising appointment.Hello...

Compose your Nudge message, select a date to send the Nudge, and then click Save Nudge.

Send Date * ⓘ
◉ Specific Date
◯ Relative Date

| August 22, 2024 | ⌄ |

Nudge Dates:

* Specific Dates:
08/22/2024

* Relative intervals after added to campaign:
N/A

Cancel   **Save Nudge ›**

If you are content with your Welcome Message, and Nudge(s), select Continue at the bottom of the Compose Nudges menu. This will bring you to the final step: review and send out.

(cont.)

Step 7:
Review and Start Campaign

Take a moment to review the Campaign summary. Once you are satisfied, click Start Campaign at the bottom-right of the menu. Upon clicking Start Campaign, your Welcome Message will activate and be sent on your selected Launch Date after which students will begin scheduling their appointments!

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Campaign Summary

Define Campaign

Name:	Test
Instructions or Notes for Landing Page:	Test
Care Unit:	Advising
Location:	Adviser's Office - Stevens Point
Service:	Registration Advising Appointment
Appointment Limit:	1
Appointment Length:	30 mins
Slots Per Time:	1
Scheduling Window:	08/22/2024 - 09/05/2024
Allow Scheduling Over Courses:	No
Staff Reminders:	Email - No	Text - No
Recipient Reminders:	Email - Yes	Text - Yes

Recipients

View 1 recipients

Staff

View 1 staff

Welcome Message

Send Date:	Day added
Subject:	{$student_first_name}, Schedule an Advising appointment
Email Preview:	View Email

Specific Date Nudge

Send Date:	Fri 08/23/2024
Subject:	{$student_first_name}, Schedule an Advising appointment
Email Preview:	View Email

< Back   Save and Exit   **Start Campaign**

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