Create Appointment Campaign in Navigate360

1. Log into Navigate

UNIVERSITY OF HOUSTON-CLEAR LAKE

Navigate360 | STUDENT SUCCESS  

Staff Home

Assigned Students

List Type: Assigned Students  
Term: Spring 2024 (Default T...  
Relationship Type: All Relationship Types

Actions

- NAME  
- ID  
- STUDENT LIST  
- CUMULATIVE GPA  
- PREDICTED SUPPORT LEVEL  
- CATEGORY  
- EARNED CREDITS
2. Click "Campaigns"

3. Click "Appointment Campaigns"
4 Click "Add New"

5 Click "Enter Campaign Name"
6  Click "Select a Care Unit"

7  Click "Select a Location" and select your location
Click "Select a Service" to choose the service you want students to schedule an appointment for.
Select your other Appointment Configurations. The configurations shown below are recommended under a 1 student per appointment setting. Keep in mind that **Appointment Limit** is how many appointments you want students to schedule during the campaign - please refer to your supervisor or colleagues when entering this number. Many departments set this limit to 3 in case students schedule an appointment but don't attend and need to schedule another one through the link you will send them as part of this campaign. **Slots per Time** Appointments can be individual or group. By adding more than one "slot per time", you can have a group appointment. **Allow Scheduling Over Courses** If checked, this box lets students schedule over course conflicts. **Course conflicts** refer to time slots where the student has class scheduled. **Staff and Recipient Reminders** These checkboxes select what kinds of Appointment Campaign notifications the staff and students attached to the campaign will receive.
10. Set your start and end dates for this campaign. This is the date range that you want students to make campaign appointments for.

**Scheduling Window**
Campaign appointments and events can be scheduled on any date within the scheduling window. For one-time events, select the same date for the start and end dates. Your campaign will begin automatically on the date of your first nudge.

- **Start Date**: June 27, 2024
- **End Date**: April 15, 2024

**Launch Date**
This Launch Date will be the date that the 'Welcome Message' is sent. 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**: April 1, 2024

11. Select your Launch

**Launch Date**
This Launch Date will be the date that the 'Welcome Message' is sent. 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.

- **Start Date**: June 27, 2024
- **End Date**: August 29, 2024
- **Launch Date**: April 1, 2024
12. Click "Continue"

13. Set your student audience for this campaign. We recommend utilizing the "Advanced Search" tool to identify your audience before setting up a campaign and saving the students under a list. If you take the suggested route, you will be able to see your list under the "Student List" field. However, for this example, we will identify our audience as we are building the campaign. I am selecting "Academic Probation" under the "Category" field to select students on probation.
14 Click the "Enrollment Terms (In Any of these)" field and I selected "Spring 2024" because I only want students that are on probation for the current semester (Spring 2024).

15 Click the "My Students Only" field if you only want to see your assigned students.
16. Click "Search"

<table>
<thead>
<tr>
<th>Course Data</th>
<th>Course, Section, Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned To</td>
<td></td>
</tr>
<tr>
<td>Polls</td>
<td>Questions, Choices</td>
</tr>
<tr>
<td>Success Indicators</td>
<td>Predicted Support Level, Success Markers</td>
</tr>
</tbody>
</table>

- Search
- Include Inactive
- My Students Only
Since I do not have any assigned students, I did not generate any results. 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. Once finished, click "Continue" to move to the next page. You are asked to review the students in the campaign if you have added students. If these are correct, click **Continue**.

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Next, you need to choose Organizers for the campaign. You must select yourself.
19 Click "Continue"

For: Appointments/Campaigns
Mon-Tue, Thu-Fri 8:00am - 6:00pm CT
For: Appointments/Campaigns
Mon-Tue, Thu-Fri 8:00am - 6:00pm CT
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Mon-Tue, Thu-Fri 8:00am - 6:00pm CT
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Mon-Tue, Thu-Fri 8:00am - 6:00pm CT

20 Click "Add Welcome Message"

Compose Nudges

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 Welcome Message

There are currently no nudges
21 Draft your welcome message

Subject: $(student_first_name), Schedule an Advising appointment

Message:

**Please Schedule Your Advising Appointment**

Hello $(student_first_name):

Please schedule an appointment for Choose Classes for Next Semester at Business Advising. 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.

Available Merge Tags

(Add merge tags as needed)

22 Click "Save Welcome Message"

Add Attachment:

Choose File: No file chosen

Welcome Message Date:
06/27/2024

Nudge Dates:

* Specific Dates:
N/A

* Relative intervals after added to campaign:
N/A

Cancel Save Welcome Message
23 Set your "Success Message (Optional)"

Email Subject: (Student_first_name), Schedule an Advising appointment
Email Message: Please schedule your Advising appointment.

Success Message (Optional)

What would you like to say to your recipients if they complete your objective? This message will be sent within a day of the recipient scheduling all campaign appointments or events. The success message is for communication purposes only and will not be included in campaign metrics.

Add Success Message

No success message specified for this campaign.

24 Click "Continue"

Save and Exit  Continue

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Page last refreshed at 4:25pm
All times listed are in Central Time (US & Canada)
25 Review "Campaign Summary"

UNIVERSITY OF HOUSTON-CLEAR LAKE

Verify & Start

Campaign Summary

Define Campaign
Name: Sample_probation students
Care Unit: Advising
Location: Business Advising
Service: Choose Classes for Next Semester
Appointment Limit: 1
Appointment Length: 30 mins
Slots Per Time: 1
Scheduling Window: 06/27/2024 - 08/29/2024
Allow Scheduling Over No

26 Select "Start Campaign"

View 0 recipients

View 1 staff

Subject: {student_first_name}, Schedule an Advising appointment

Start Campaign