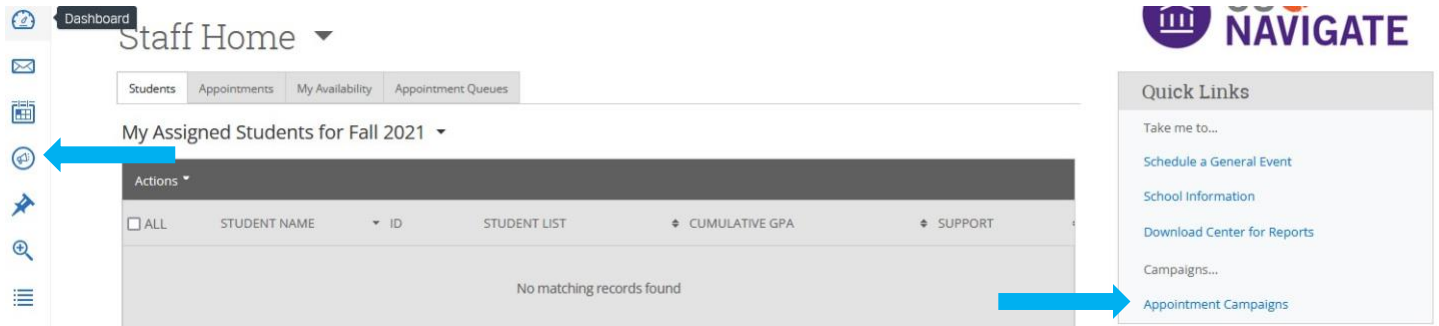# CU Navigate Training | Advisor Role
Creating a Campaign

*Create Availability before creating your campaign

From your Staff Home, choose from ⊙ the side menu or **Appointment Campaigns** under **Quick Links.**

Under **Actions** choose I want to create a new **Appointment Campaign.**

Fill out each box and choose **Continue** (Notes: Service and Dates must match your availability).

Add students to your campaign by choosing Add My Assigned Student to Campaign, searching for your students using the filter or choosing a previously made Student List, and click **Search.**

Add Students To Campaign

Add My Assigned Students to Campaign ▶

Advanced Search ▼

Saved Searches ▾

Keywords (First Name, Last Name, E-mail, Student ID)?

Student Information   First Name, Last Name, Student ID, Category, Tag, Gender, Race, Student List ▲

First Name?	Last Name?	From Last Name?	To Last Name?	Student ID?

Gender	Race	Student List (In Any of These)	Transfer Student
All	All	All	

Select the students you wish to add. Click **Actions** and **Add Selected Users and Search for More** and click **Continue.**

Actions ▲
Add Selected Users and Search For More
Show/Hide Columns

ENT NAME   ▾ ID

☑   1   [redacted]   [redacted]

Review your students and click **Continue**.

Click the box next to your name (if you do not see your name, make sure you have set up your availability correctly) and click **Continue**.

Add Organizers To Campaign   ☐ Include Appointment Availabilities?

ID	NAME	AVAILABLE TIMES
☑	[redacted]	**For: Campaigns** Mon-Wed 9:00am - 2:30pm ET (December 2, 2021 - December 17, 2021)
☐	[redacted]	**For: Appointments/Drop-Ins/Campaigns** Thu 9:00am - 11:00am ET (August 13, 2021 - May 13, 2022)

Make any edits to the subject and body of the message sent to students. Do not remove anything in the brackets {}. Click **Continue.**

Compose Your Message

{$student_first_name}, Schedule an Academic Advising appointment

| **B** | *I* | ⦂☰ | ⦂≣ | 🔗 | Heading 2 ⌄ | Merge Tags ⌄ | ↶ ↷ |

Please Schedule Your Academic Advising Appointment.

Hello {$student_first_name}:

Please schedule an appointment for General Advising at Behavioral, Social & Health Sciences 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.

{$schedule_link}

Thank you!

Available Merge Tags: ?	{$student_first_name} Inserts the student's first name	{$student_last_name} Inserts the student's last name	{$schedule_link} Inserts a link to schedule the appointment

Add Attachment:

📎 [Browse...] No file selected.

Review your campaign details and click **Send**.

Confirm & Send

Care Unit: Academic Advising	**Start Date:** 12/02/2021	**End Date:** 12/17/2021
Location: Behavioral, Social & Health Sciences Advising	**Appt Length:** 20 minutes	**Slots Per Time:** 1
Service: General Advising	**Appt Limit:** 1	**Organizer Attendee Reminders:** ☐ E-mail ☐ SMS **Non Organizer Attendee Reminders:** ☑ E-mail ☑ SMS

Subject {$student_first_name}, Schedule an Academic Advising appointment

Email Preview View	**Invitees:** View All (17)	**Included organizers** View All (1)

[< Back]   Save and Exit   [**Send**]