

GradesFirst - Creating a Campaign for Scheduling Student Advising

Once you have created your availability in GradesFirst, the next step is to create a campaign for your advisees. This will generate an email with a sign up page based on your availability that your advisees will use to sign up for an advising session.

1. After logging into GradesFirst, click **Appointment Campaigns** in the upper right corner.



2. Click **Appointment Campaign** again.



3. Enter the details for your advising campaign.
 - A. Type a unique name for the **Campaign Name**.
 - B. Choose the beginning and ending dates for the advising period.
 - C. Set the **Appointment Length**. 60 minutes is recommended.
 - D. Leave **Slots Per Time** and **Appointment Limit** as 1.
 - E. Change the **Course or Reason** to Advising.
 - F. Set the **Location** to Faculty Advisor's Office.
4. When all details have been entered, click the **Continue** button.

Define Campaign

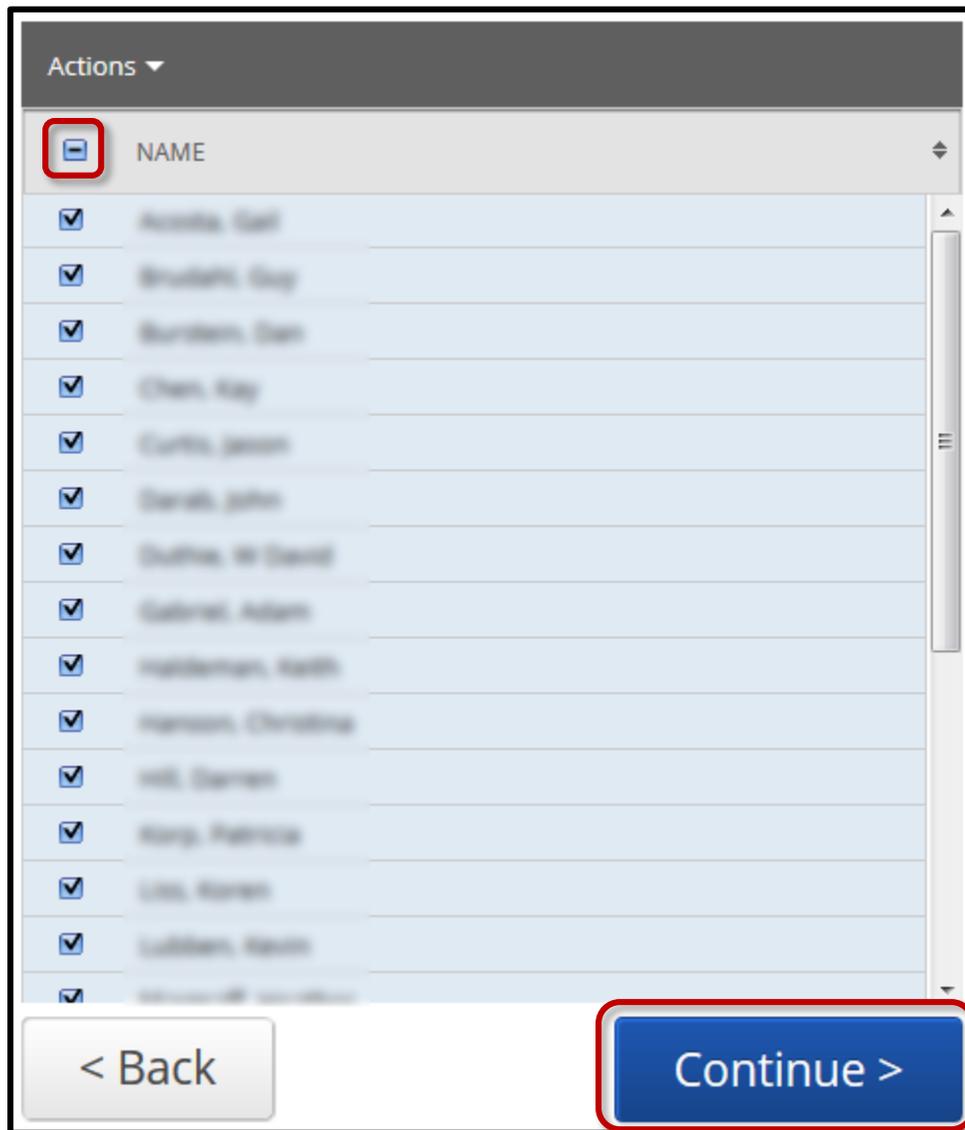
| | | |
|---|---|--|
| Campaign Name: <input type="text" value="Fall 2016 Advising"/> | Begin Date: <input type="text" value="05/25/2016"/> | End Date: <input type="text" value="07/21/2016"/> |
| Campaign Type: <input type="text" value="Advising"/> | Appointment Length: <input type="text" value="60 min"/> | |
| Slots Per Time: <input type="text" value="1"/> | Appointment Limit: <input type="text" value="1"/> | |
| Course or Reason: <input type="text" value="Advising"/> | Location: <input type="text" value="Your Faculty Advisor's Office"/> | |

5. Under the Assigned To category, select **My Students Only** and click the **Search** button.

Assigned To Advisor, Tutor, Professor, Coach

| | | | |
|--|--|--|--|
| Assigned to Advisor? <input type="text" value="All"/> | Assigned to Tutor? <input type="text" value="All"/> | Enrolled with Professor? <input type="text" value="All"/> | Assigned to Coach? <input type="text" value="All"/> |
|--|--|--|--|

6. A list of your assigned advisees will appear. Click the button at the top of the list to select all students. Click the **Continue** button.



The screenshot shows a window titled "Actions" with a dropdown arrow. Below the title bar is a header row with a blue square button containing a minus sign, followed by the text "NAME" and a vertical double-headed arrow. Below the header is a list of 15 student names, each preceded by a checked checkbox. At the bottom of the window are two buttons: a grey button labeled "< Back" and a blue button labeled "Continue >". The blue button is highlighted with a red border.

7. The list of students will appear again for review. Click the **Continue** button to proceed.



The screenshot shows a list of five student names, each preceded by an unchecked checkbox. Below the list are four buttons: a grey button labeled "< Back", a grey button labeled "Add More Students", a grey button labeled "Save and Exit", and a blue button labeled "Continue". The blue button is highlighted with a red border.

8. Place a checkmark next to your name and click the **Continue** button.

Spring 2016 Advising

Add Advisors To Campaign

Include Appointment Availabilities?

| ID | NAME | AVAILABLE TIMES |
|-------------------------------------|---------------|---|
| <input checked="" type="checkbox"/> | Glenn Elliott | mon, wed, fri 8:00am-9:00am (Fall Semester, 2015) mon, wed, fri 12:00pm-1:00pm (Fall Semester, 2015) |

[< Back](#) [Save and Exit](#) [Continue](#)

9. An email template will display. You will want to include a **Subject** and **Instructions or Notes**. The student's information and campaign link will automatically be added to the email.

Spring 2016 Advising

Compose Your Message

Spring 2016 Advising

Please schedule your advising appointment.

Students will need to use the link provided

Please schedule your advising appointment.

Hello [student first name],

You have been requested, by your advisor, to schedule an appointment with them. By clicking the link provided, you can simply see
will be created for you.

Students will need to use the link provided

Schedule an Appointment (campaign link)

You can also copy and paste this address into your web browser.
[campaign link]

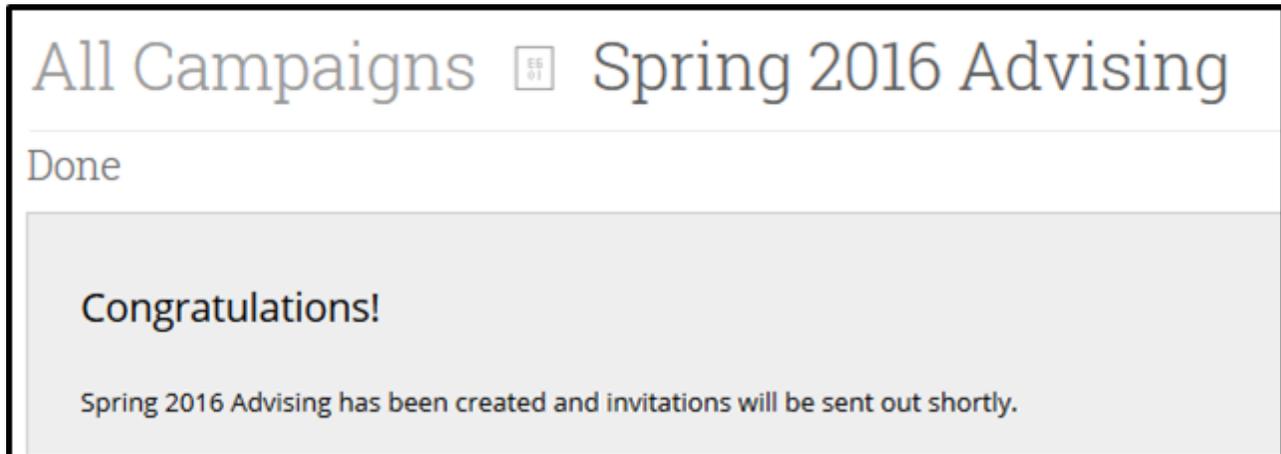
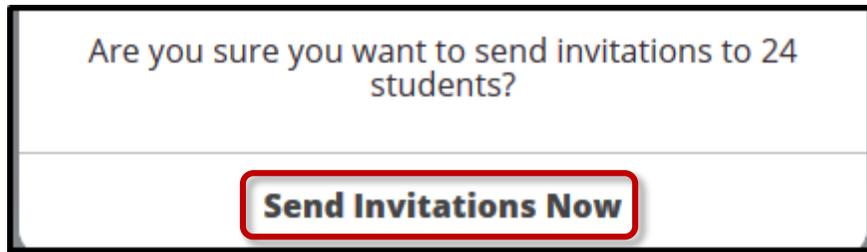
10. An Email Preview (left) and campaign link Landing Page Preview (right) will display at the bottom of the page. Click the **Continue** button to proceed.

The screenshot displays two side-by-side preview windows. The left window, titled "Email Preview", shows a message with the subject "Please schedule your advising appointment." and a "Schedule Advising Appointment" button. The right window, titled "Landing Page Preview", features three sections: "Choose A Day" with a calendar for July 2014, "Choose A Time" with a time selector set to 3:50pm, 4:00pm, and 4:10pm, and "Comments" with a text input field. At the bottom of the interface are three buttons: "< Back", "Save and Exit", and a blue "Continue" button highlighted with a red border.

11. You can review the details on the Confirm & Send page. Be sure to check the **SMS Reminders** (text messaging) reminders option as students are more likely to respond to these types of messages. Students will be able to opt out of SMS messages if they would prefer not to receive them. If you are satisfied with the settings, click the **Send** button.

The screenshot shows the "Spring 2016 Advising" "Confirm & Send" page. It contains a summary of campaign details: Campaign Type: Advising, Reason: Advising, Appt Location: Faculty Advisor's Office, Start Date: 10/16/2015, Appt Length: 60 minutes, Appt Limit: 1, End Date: 11/30/2015, Slots Per Time: 1, and Reminders: E-mail SMS. The "Reminders" section is highlighted with a red border. Below this, the subject is "Spring 2016 Advising 2", and there are links for "Email Preview", "Invitees: View All (24)", and "Included Advisors: View All (1)". At the bottom are three buttons: "< Back", "Save and Exit", and a blue "Send" button highlighted with a red border.

12. You will be prompted again to confirm the invitations. Click **Send Invitations Now**.



13. Below is a sample email that students will receive in their inbox. Your students will click the link “Schedule Advising Appointment” to get started.

