# CardSmart Training

Adding Students to a Campaign

Use these instructions if you have already created and sent out your campaign, but realize you need to add a student(s) to the campaign.

1. **Select Your Campaign:** From your home screen, select "Appointment Campaigns" from the Quick Links box on the right side of the screen or select the campaign icon from your toolbar on the left.

2. **Edit Campaign Details:** Select the campaign you would like to add the student(s) to. From the Options box on the right side of the screen, select "Edit Campaign Details."

3. **Edit the "Student Select" section**: In the Details for Appointment Campaign Box, click "Edit" the Student Select section. At the bottom of that screen, click "Add More Students."
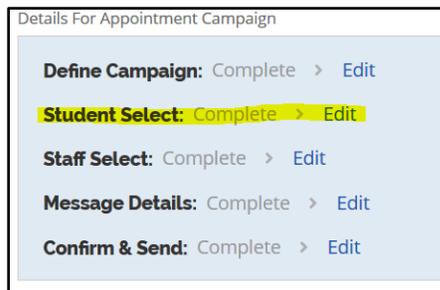
4. **Advanced Search: Add the Student(s):** If you are adding one student (or just a few students) to the campaign, you can enter them by Student ID. Enter their ID number into the Student ID field under the Advanced Search option. Then click "Search."

Check the box next to the student's name, and then select "Add Selected Users and Search for More" from the Actions drop down menu. Select "Modify Search" to add more students or "Continue" if you are done adding students.
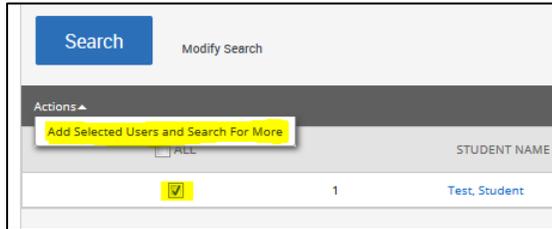

Once you have added your additional student(s), you will be asked to "Review Students in Campaign." You can go back to "Add More Students" from this screen or click Continue to move on.

This will bring you to "Add Advisors to Campaign." Click Continue. You are not changing this part of the campaign.

"Compose Your Message" will come next. Click Continue. You are not changing this part of the campaign.

5. **Send the Campaign to the Student(s) You Added:** On the "Confirm and Send" screen, you will see that the campaign lists the total number of students in the campaign. You may worry that you're going to re-send the campaign to every student. That's not the case. Click "Send." You will be asked if you want to "Invite Only New Students" or "Re-send All Student Invitations." The key is to invite only the new students.
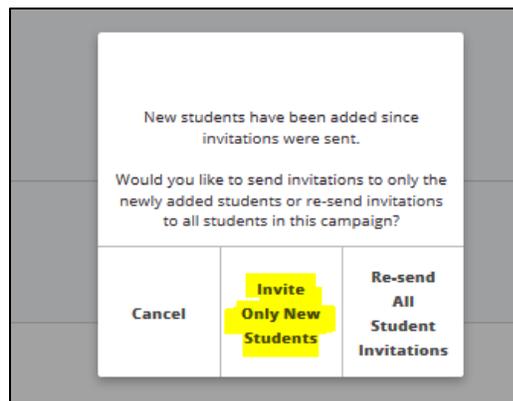
Click "Invite Only New Students" and the campaign is on its way to that student.

NOTE: If you have a group of students you need to add to the campaign, it may be easiest to create a tag for that group of students.