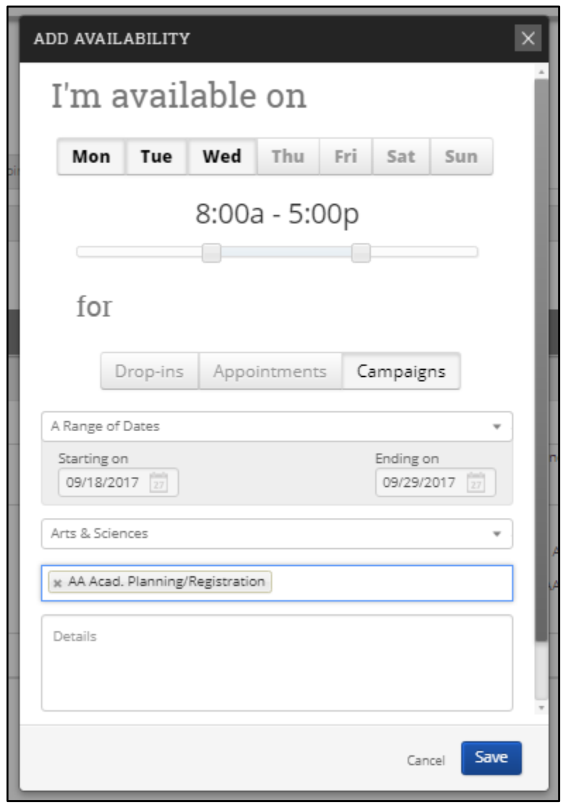
CardSmart Training

Setting Availabilities and Sending Appointment Campaigns

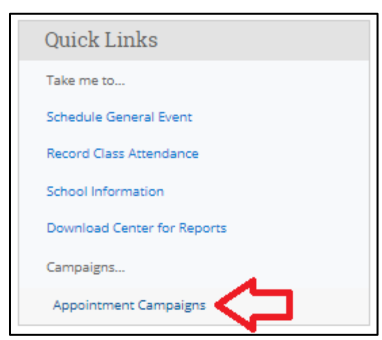
Note: CardSmart allows you to run multiple campaigns/availabilities simultaneously using student services/reasons. You will want to talk to your Advising Center director about the agreed-upon student services/reasons for various campaign types.

1. Set your available times and days to meet with students: From your Advisor Home page, click the "**My Availability"** tab. Click the "Actions" drop down and select **Add Time**.



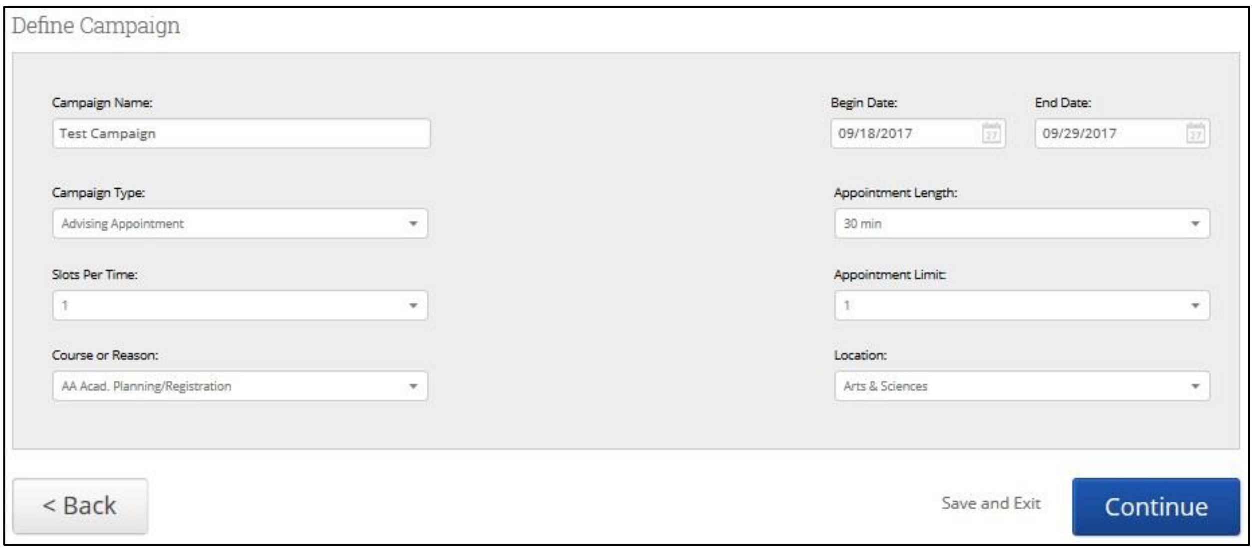
2. Add your availability:
   a. Select the days you are available: Mon, Tues, Wed, for example. Using the slider, enter the time you are available; for example, 8:00a-5:00p.
   b. Select **Campaigns** because you are entering your availability for a specific campaign. (Do not select Drop-Ins or Appointments.)
   c. Under **Duration**, select "A Range of Dates" and enter the specific dates of your campaign. For example, starting on 9/18 and ending on 9/29. (Do not select "forever".)
   d. Under **Location**, select your department; for example, Arts & Sciences.
   e. You must select a **Student Service**. Later, when you set the appointment campaign, this student service selection must match the "Course or Reason" entry for the campaign. Here, the student service example is "AA Acad. Planning/Registration."
   f. Click **Save**. Your availability has been set. Now you're ready to create and send out an Appointment Campaign matching your set campaign availability.

3. Creating & Sending the Appointment Campaign: Select **Appointment Campaigns** from the Quick Links box on the right side of the Advisor Home page.

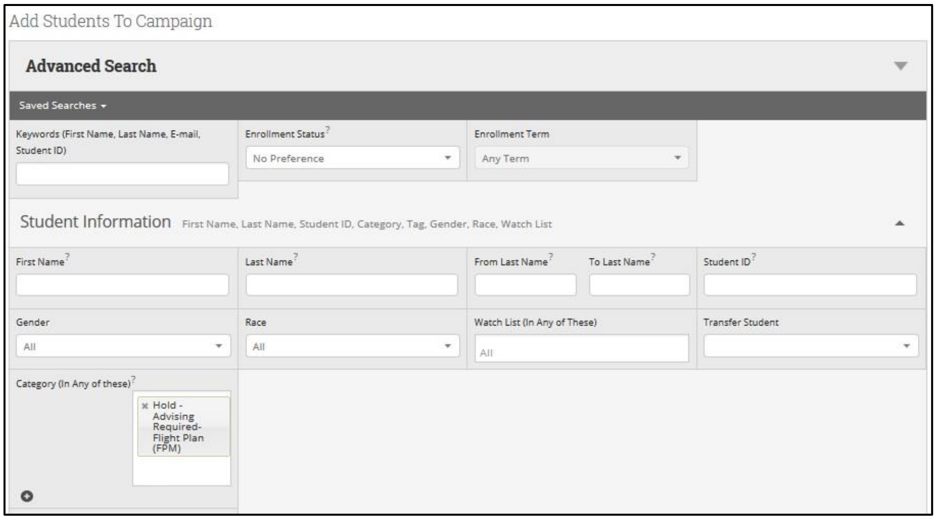


4. Select **Appointment Campaign** in the “Actions” dialog box on the right side of the screen.

5. In the following steps, you will define your campaign:
   a. Enter the **Campaign Name**, such as “Test Campaign.”
   b. Enter the **Campaign Type** by selecting “Advising Appointment.”
   c. **Slots per time** will be “1” (this is the default).
   d. Enter the **Course or Reason**. **This must match Student Service you selected when you set your Availability**. For this example, it must be “AA Acad. Planning/Registration.”
   e. Enter the **Begin Date** and **End Date** for your campaign, matching the dates you selected for this campaign in your availability.
   f. Set your **Appointment Length**. (i.e., 30 minutes).
   g. **Appointment Limit** defaults to “1” so that you have one appointment at a time.
   h. Set the **Location** for your appointment. For example, Arts & Sciences.
   i. Click **Continue**.

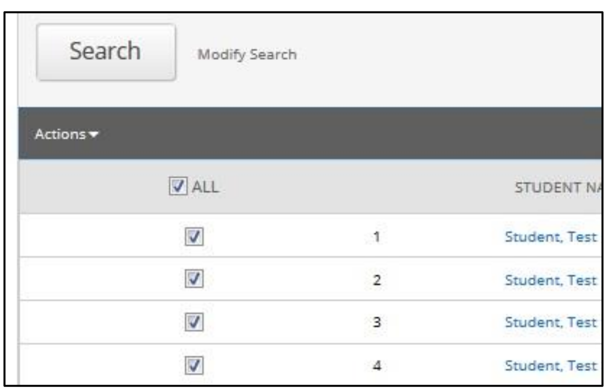


6. Add Students to Campaign using Advanced Search:
   The “Add Students” step of creating a campaign will bring you a screen identical to the Advanced Search. When performing an **Advanced Search**, you can look for students in a variety of ways. Two common ways are by Category and Assigned Advisor. You can also filter for only your assigned students by clicking “My Students Only” at the very bottom of the search. For example, enter the category “Hold – Advising Required – Flight Plan (FPM)” to search for students with flight plan holds. Make sure to check the Enrollment Status drop down at the top of the search and enter an enrollment term if you want to limit your search to currently enrolled students.



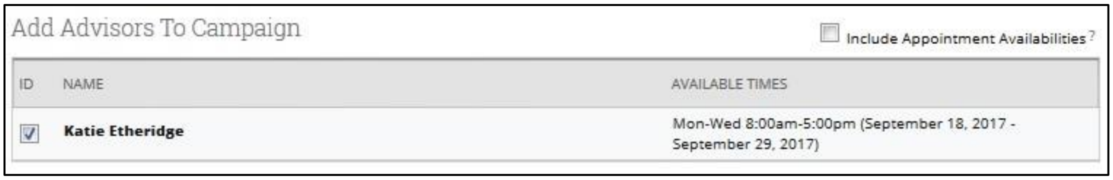
Another frequently used option is to search by the Course Data, such as “Gen-101”. Check the box next to “My Students Only” to only view your students enrolled in GEN 101 for the upcoming semester. Click **Search**.

A list of students will appear, and you can select “All” or check the box next to the students you wish to include. Click **Continue** if these are all the students you would like to include in the campaign or click the “Actions” drop down and select **Add Selected Users and Search for More** to continue adding.

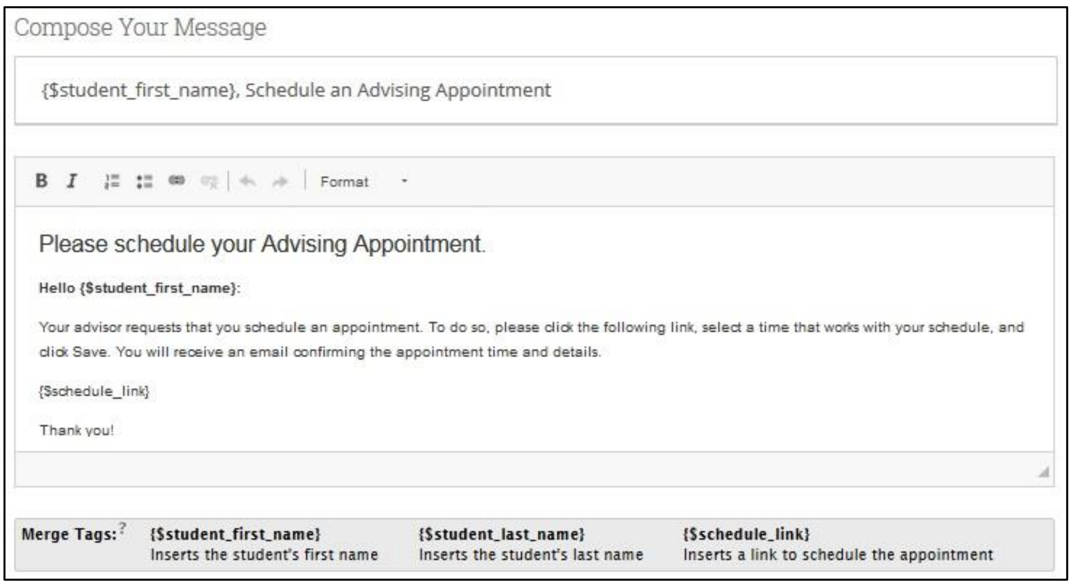


7. You will be given an opportunity to **Review Students in the Campaign**. You can remove some or add more, if needed. When ready, click **Continue**.

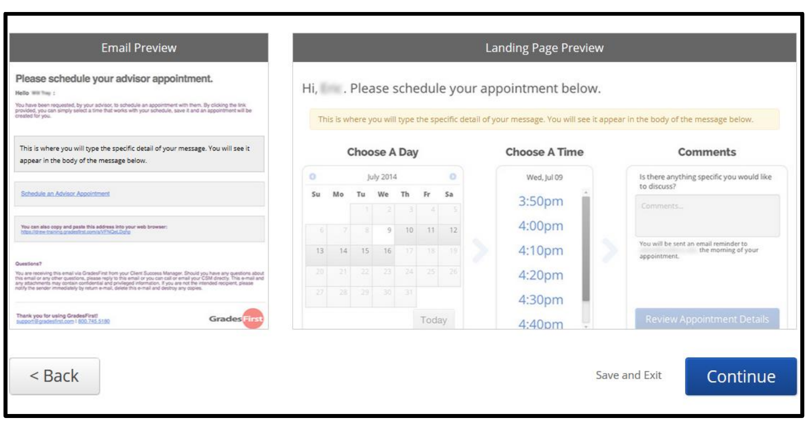
8. You will need to **Add Advisors to the Campaign**. Select the advisors who are taking part in the campaign. Click **Continue**.



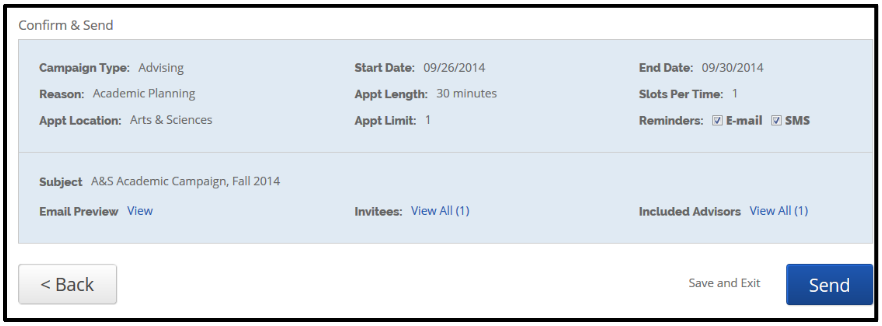
9. Compose your Message to the students in your campaign. CardSmart has a default template for the email subject and body, but the text can be edited. Enter the subject of your campaign email in the first box. Write your specific message in the second box. Using the Merge Tags will allow you to include a personalized message for each student (first and/or last name). Be sure to leave or include the "Schedule Link" because that is what students will use to schedule their appointment.



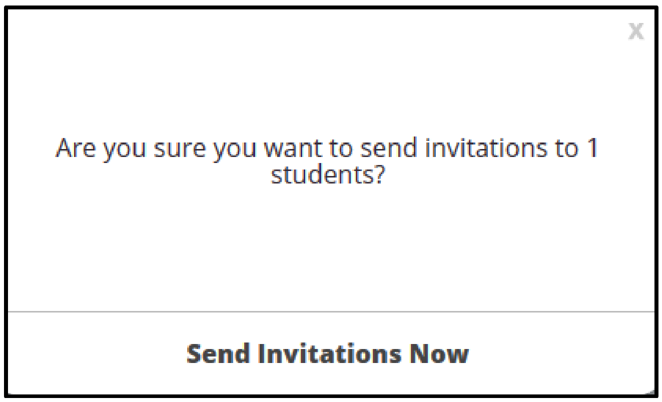
10. Scroll down and you will see an **Email Preview** and Landing Page Preview for the Campaign. Click Continue.



11. Confirm & Send. Review the details of your Campaign and then click Send.



12. You'll be asked to confirm one more time before clicking Send Invitations Now.



Your students will receive an email from you with a link to schedule an appointment. Once they schedule the appointment, it will show up on your calendar in CardSmart as an Advising Appointment. The student will also receive confirmation and reminder emails regarding the appointment.

To check the progress of your campaign, you can log into CardSmart, select Appointment Campaigns, then My Campaigns. You can then select the campaign to review its information.

Once created, appointments set using the Appointment Campaign feature behave like all other traditional advisor appointments in CardSmart. Once the appointment time has passed, it will show up under Recent Appointments on your CardSmart homepage. From there, you can mark the student as a no-show or enter the visit notes by filing an Advisor Report.