

Appointment Campaign Improvements

Improvements to Appointment Campaigns

Attachments in Appointment Campaign Emails

Initial campaign emails to students can now include documents or images as attachments to help the student prepare for the appointment. If a user adds one or more attachments, the attachment will be included on a list on the Confirm Campaign page. Attachments are sent with the appointment invitation email but are not displayed in other locations with appointment information, such as the appointment request banner students see when logging in to GradesFirst.

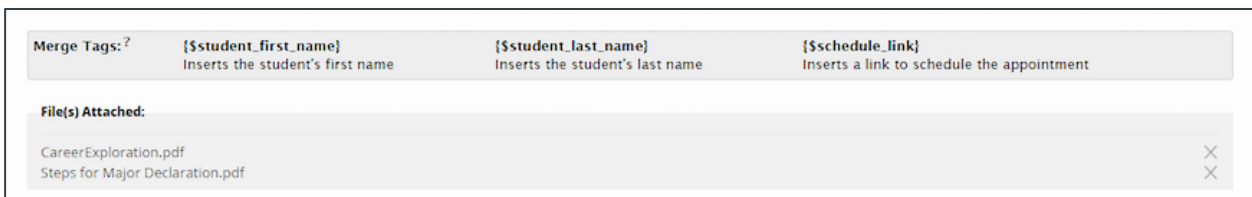


Figure 2. List of Attachments on a Campaign Email

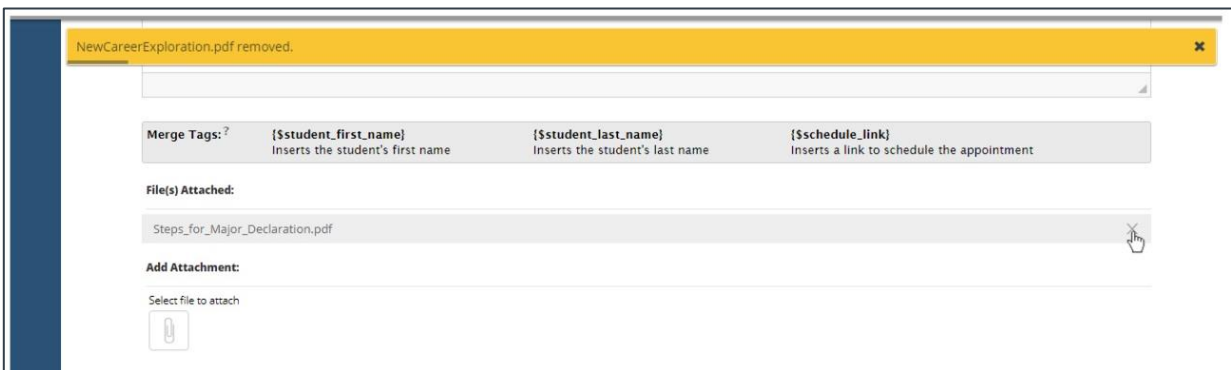


Figure 3. Deleting an Attachment from Campaign Emails

Users can also view, add, or delete attachments when resending campaign emails.

No-Show Students Can Reschedule Appointments

Previously, students who were marked as no-shows to their campaign appointment were unable to reschedule through the campaign link. They can now reschedule a campaign-related appointment through the campaign link.

Option to Include Student Name and/or ID in Appointment Names (MUST HAVE OUTLOOK EXCHANGE OR GOOGLE INTEGRATION)

Members now have the option to include a student's name and ID in an actual appointment name, rather than needing to click into the appointment to see this information. This is configured in the Calendar

Integration Configuration section of the Global Configurations page. The two new fields are **Add student name to the title of synced calendar appointments** and **Add student ID to the title of synced calendar appointments** as shown in Figure 5. If you would like to set up Exchange or Google Integration for your school, please reach out to support@gradesfirst.com.

Calendar Integration Configuration

Exchange Integration Configuration
[Exchange Configurations](#)

Appointment Details for Exchange and Google Integration

- Add student ID to synced calendar appointments?
- Add student name to synced calendar appointments?
- Add student phone number to synced calendar appointments?
- Add student name to the title of synced calendar appointments?
- Add student ID to the title of synced calendar appointments?

Figure 5. New Configuration Options in Calendar Integration Configuration Section

No-Show and Canceled Appointments Appear as “Not Yet Made” in Reports

In Appointment Campaign reports, appointments that have been canceled or are marked as no-shows appear as “Not Yet Made”. Appointments that have been scheduled but not yet attended (because they are in the future), and attended appointments will appear as “Made”.

Appointment Campaigns >

01/16/2018 - 01/30/2018

Appointments Made | **Appointments Not Yet Made** | Reports Created | Eligible Appointments

Actions ▾

<input type="checkbox"/>	INDEX	STUDENT	EMAIL	TOKEN
<input type="checkbox"/>	1	Jocken, Millie	mtallant@eab.com	LS3l8rWKg7

Options

- [Edit Campaign Details](#)
- [Delete This Campaign](#)
- [Export Student List](#)

Campaign Information

Campaign Type
Advising

Figure 6. Appointment Campaigns Report tabs

Export List of Students in a Campaign

Advisors now have the ability to export the list of students included in an appointment campaign from that Appointment Campaign’s Actions menu. Exporting this list at least twice—once before the start of the campaign and once at the end—will allow for easier reporting on campaign results. The exported list includes the student’s name, ID, major, risk level, cumulative GPA and credits earned.

New Student Export List ready!
Your Student Export List has been downloaded. A copy is available in the [Download Center for Reports.](#)

Appointment Campaigns > Spring 2018 - Career Options

11/01/2017 - 01/04/2018

All Appointments Made Some Appointments Made No Appointments Made Reports Created Eligible Appointments

Actions ▾

<input type="checkbox"/>	INDEX	APPT DATE	APPT TIME	STUDENT	STUDENT ATTENDED?	AT-RISK?	APPT CREATED ON	
<input type="checkbox"/>	1	12/21/2017	2:30p-2:35p	Bigs, Shannon	Yes	No	12/21/2017	View Details
<input type="checkbox"/>	2	12/21/2017	3:00p-3:05p	Bigs, Shannon	No	No	12/21/2017	View Details
<input type="checkbox"/>	3	12/21/2017	3:50p-3:55p	Palms, Chad	No	No	12/21/2017	View Details
<input type="checkbox"/>	4	12/22/2017	11:00a-11:05a	Johns, Anthony	Yes	No	12/21/2017	View Details
<input type="checkbox"/>	5	12/22/2017	11:50a-11:55a	Johns, Anthony	No	No	12/21/2017	View Details

Options

[Edit Campaign Details](#)

[Delete This Campaign](#)

[Export Student List](#)

Campaign Information

Campaign Type
Advising

Appointment Reasons
Advising

Location
Jacob Bldg

Default Appointment Length
5min

Figure 7. Export Student Campaign List

	A	B	C	D	E	F	G	H	I
1	First Name	Last Name	ID	Email	Major	Risk	Cumulative GPA	Credits Earned	Number of Appointments
2	Shannon	Bigs	101284042	shannon@whitehurst.edu	English	High	2.5	16	2
3	Henry	Davis	101456568	henry@whitehurst.edu	ex Biology	Low	4	40	0
4	Anthony	Johns	101993612	anthony@whitehurst.edu	ex Biology	Moderate	3	20	2
5	Chris	Kelley	102196285	chris@whitehurst.edu	exa Chemistry	Low	3.9	39	0
6	Chad	Palms	102860315	chad@whitehurst.edu	exa Business	Low	3.8	41	1
7									

Figure 8. CSV with Exported Student List

Custom Email Text When Resending Appointment Campaign Invitations

Advisors can now change the email text when resending appointment campaign invitations, and add or delete attachments. This supports sending different (or more urgent) messages to students who have put off making an appointment.

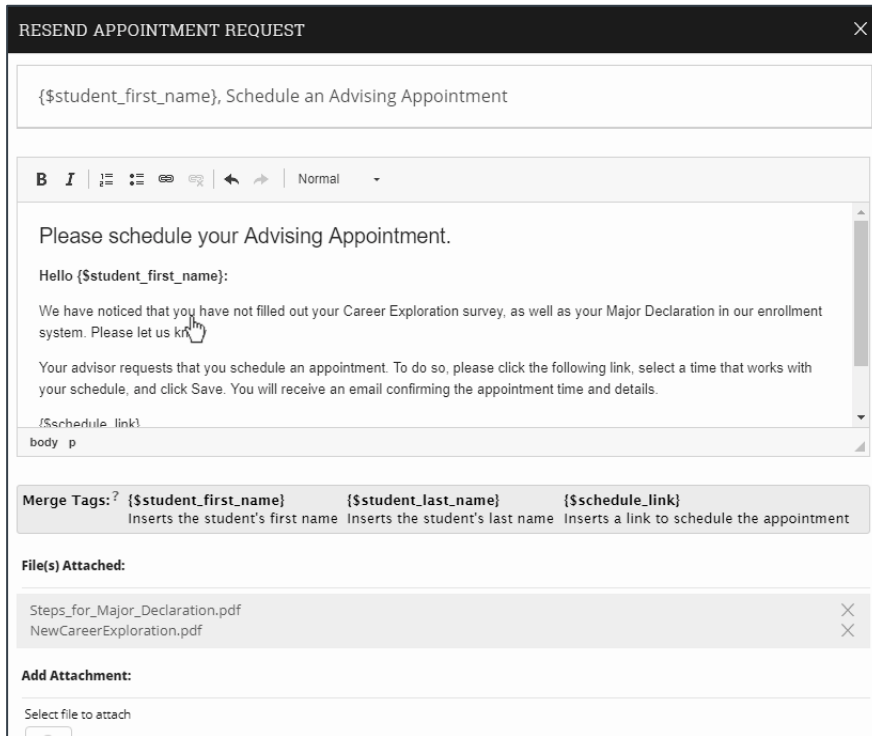


Figure 9. Text Editor on Resending Appointment Invitation Window