

**Advising Campaign -
Release 1 Hands-On
Training: April 26–May 2**

**For Georgia Tech Undergraduate
Advising Community:**

Launch May 1st, 2023



Agenda

1. Welcome & Introductions
2. Overview
3. Terminology/Glossary
4. Creating Advising Campaigns
5. Add Students to a Campaign using Reports
6. Managing Appointment Campaign Responses
7. Manually updating Campaign Responses
8. Extend the End dates on a Campaigns
9. Clone a Campaign
10. Send List Emails
11. Advisee/Student Portal View
12. Advisee Case record view on SAL
13. Track Campaigns using Dashboards
14. Reports - How to view, create and clone reports
15. Support Resources

Advising Campaign Project & Training Team

Advisor Trainers & SMEs

- Angela Elleby
- Daurette Joseph
- Briana Lampert
- Emmie Cass
- Chris Lundy
- Tracy Boothe-Miller
- Pauline Glenn
- Shirley Manchester

Additional SMEs

- Kristi Mehaffey
- Barbara Howard

Technical Support

- Russell Wallis
- Devki Kumayan
- Shilpa Kuppuli
- Veena Kommagoni
- Tran Vu Tran

Project Management

- Kimberly Wynn White
- Beth Spencer
- Andrew Jarrett
- Vicki Johnson

Advising Campaign Project Overview

PROJECT DESCRIPTION/BUSINESS DRIVER

Business Problem:

Advisors need an easy-to-use campaign feature to track and perform outreach to students who need to come in for required advising within the system. Advisors currently use spreadsheets and tools outside of Advisor Link impacting productivity.

Lack of campaign functionality is sighted by the Advising SWOT analysis as a weakness requiring a solution.

Business Goals:

- Provide advisors a flexible, user-friendly tool in Advisor Link to add a group of students to a new or existing campaign in minimal clicks that scales to meet the advisor's number of students
- Provide advisors with capabilities for personalized and scalable messaging to students related to these campaigns, including reminders
- Provide advisors the capability to ensure students have taken action on campaigns they are a member of
- Deliver training to end-users to effectively utilize capability

PROJECT SCOPE

Design and implement within Student Success Hub (Advisor Link) the standard Campaign functionality based on the prototype demonstrated and approved by OUE Leadership and supported by the Advising Community. This project will **deliver baseline functionality** to include:

- **Targeted Calls to Action**

Advisors can quickly identify a population of students to book appointments with them, filtering by any student characteristic.

- Create an advising campaign
- Add campaign members (students) from a report
- Update campaign member status
- Notify students about campaign and request to schedule relate appointment

- **Automated Student Responses**

Advisors have visibility into which students have taken action in real-time, without manual intervention.

- Review campaign member status and changes during the campaign '

- **Data Visualization**

Advisors can view their calls to action holistically, making data driven decisions on where and how to act.

- Track campaigns using reports and dashboards

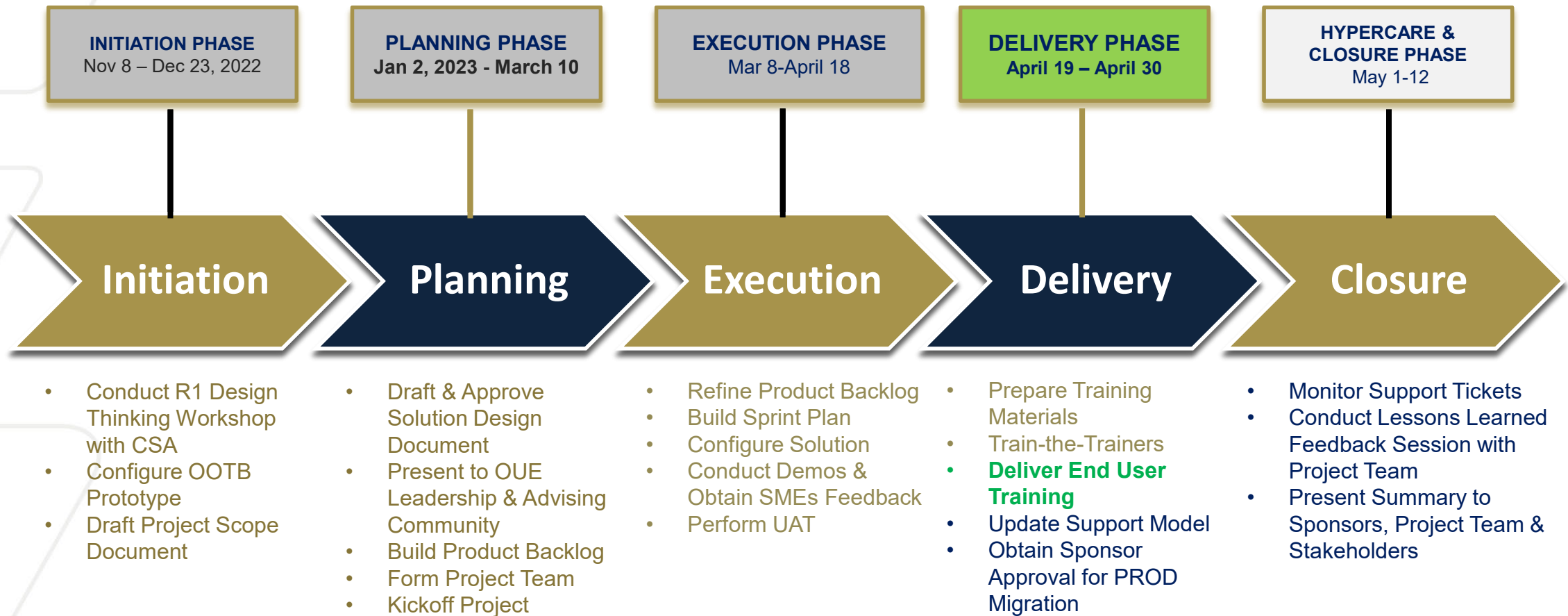
- **Personalized Messaging**

Advisors can send mass emails to these populations of students utilizing merge fields and templates, within Salesforce limits.





- **Advisor Training**

Advisors can use the capability, know where to find job aids and how to request support.

Project Timeline



Terminology

Term	Description
Advisee Record (Case) 	A type of Case record that holds advising-related data for a student, such as notes, advising appointments, and Tasks. Technically, it's an advisee Case record. But that's quite a mouthful, so we often shorten it to "advisee record."
Campaigns 	A functionality within Salesforce that allows mass communication for a call to action. A Salesforce campaign is an engagement initiative you plan, manage and track within Salesforce
Campaign Members 	Are the contacts (Students) that are included in a campaign
Task/Activity 	Salesforce Activities track the interactions of your advisees with you or any To-do(s) pending at their end.

Terminology

Term	Description
Campaign Member - Status	
Invited	This is a default status for Advising Appointment Campaign. Once a student is added to a campaign, their member status is set to "Invited".
Attended	This status means that a student has "Attended" an appointment that was created upon receiving a task notification from a Campaign. The status automatically updates at the end of the appointment date, unless the advisor manually changes the status value.
Cancelled	The "Cancelled" status is showed after a scheduled appointment is cancelled by a student on the portal, or an advisor cancels the appointment manually. Once the campaign appointment is cancelled, the student campaign member status returns to "Invited" and the task to schedule the appointment reopens.
No Show	This status shows that a student was a "No Show" on a scheduled appointment. Once the advisor marks "No Show" on Appointment Manager, it automatically reflects as "No Show " on the Campaign Member status, and the task to schedule an appointment reopens for the student.
Scheduled	The "Scheduled" status shows a Student has booked an appointment through the Student portal. The task is completed after the student schedules the appointment.

Access to the QA Sandbox

This is a Hands-on training workshop designed to engage attendees with the **basic features** of Advising Campaigns.

- Please log into the QA/TEST instance: <https://gatech--qa.sandbox.lightning.force.com>
- This QA/TEST instance is available from April 26 to May 19th, 2023
- You are encouraged to practice the HOTS (hands on trainings) exercises during and after today's workshop so:
 - To become familiar with the functionality in Test
 - To better identify the type of support you need
 - To better serve and engage with your students

Advising Campaign Support Office Hours	
May 1	3:00 – 4:00 PM
May 2 – May 5	11:00 AM – Noon
May 8	3:00 – 4:00 PM
May 9 – May 12	11:00 AM - Noon

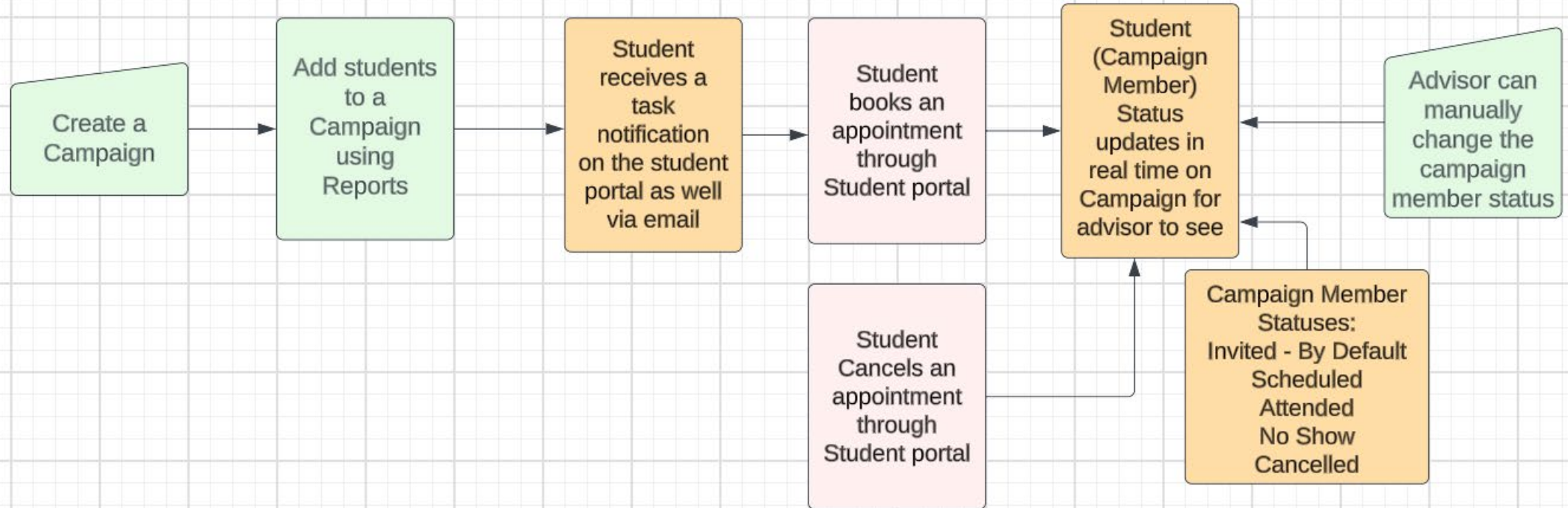
Navigation

Create an Advising Appointment Campaign

Please log into the QA/TEST instance:

<https://gatech--qa.sandbox.lightning.force.com>

Advising Appointment Campaigns Process



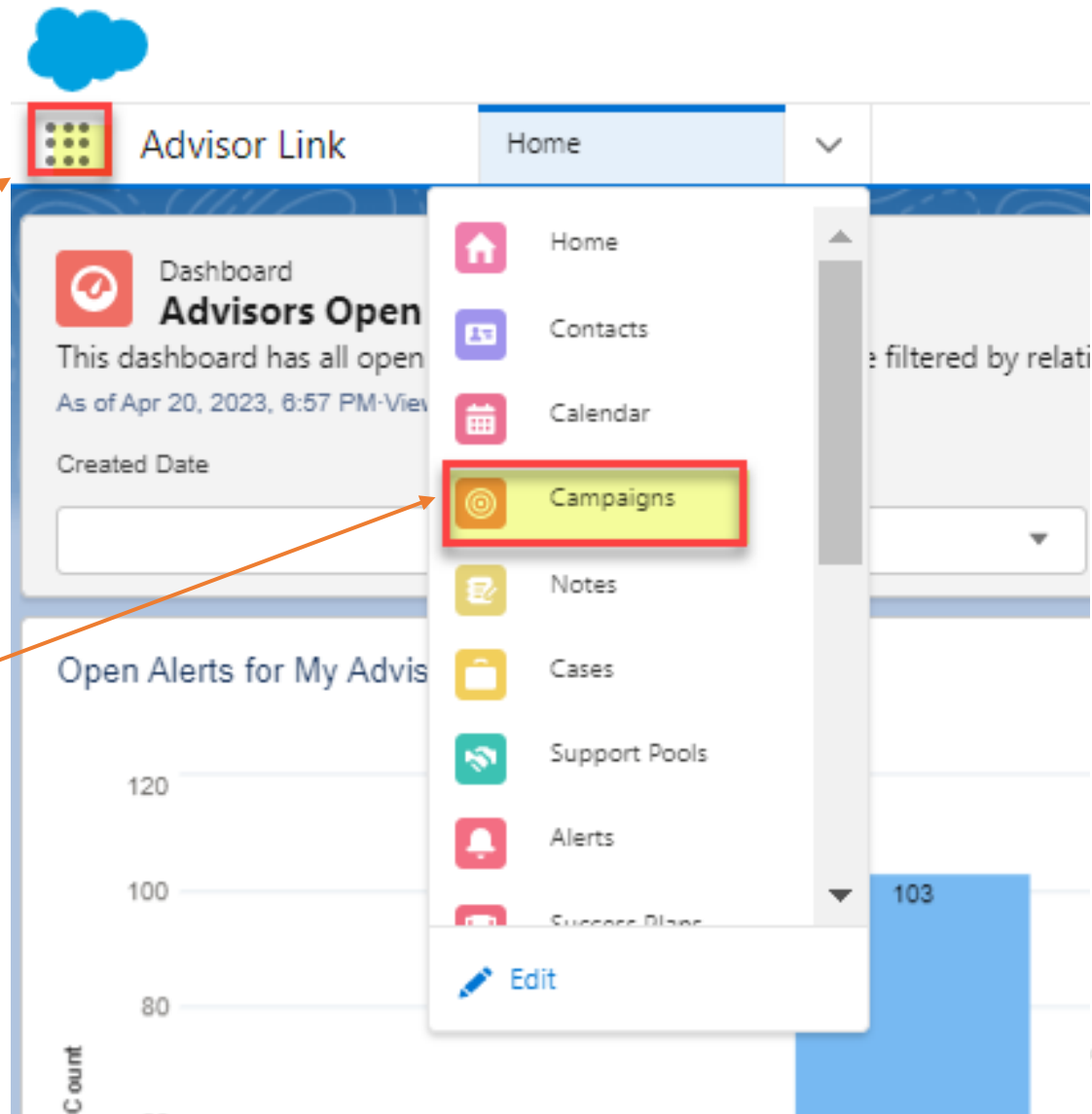
Create Advising Appointment Campaigns

1. Log into the Advisor Link App

2. Go to Apps, type in Campaigns

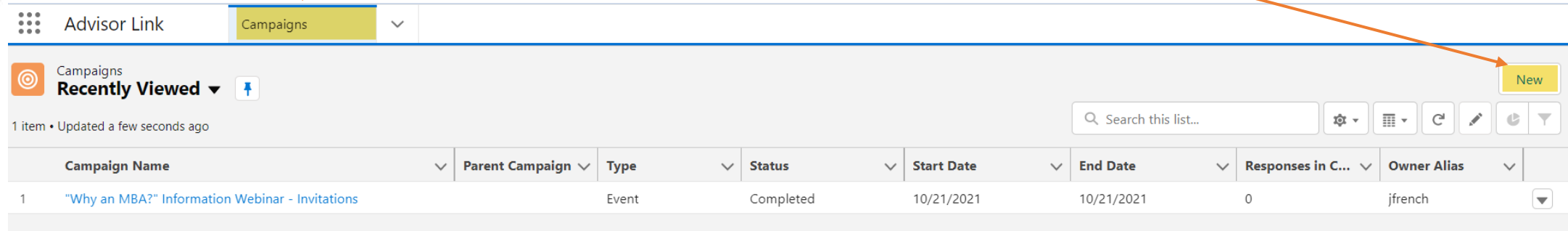
OR

3. Go to the Navigation Menu, Select Campaigns



Create Advising Appointment Campaigns ... Cont'd

Once on Campaign tab, Click **New** on top right to create new advising campaigns



The screenshot shows the 'Campaigns' tab selected in the top navigation bar. Below the navigation bar, there is a header for 'Campaigns' with a 'Recently Viewed' dropdown and a 'New' button on the right. A search bar and several utility icons are also present. Below the header is a table with the following columns: Campaign Name, Parent Campaign, Type, Status, Start Date, End Date, Responses in C..., and Owner Alias. The table contains one row with the following data:

Campaign Name	Parent Campaign	Type	Status	Start Date	End Date	Responses in C...	Owner Alias
1 "Why an MBA?" Information Webinar - Invitations		Event	Completed	10/21/2021	10/21/2021	0	jfrench

Create Advising Appointment Campaigns ... Cont'd

On a new Campaign page Add:

1. Campaign Name:
2. Type : **Advising Appointment**
3. Check Active box
4. Description

Add Appointment Information:

1. Appointment Advisor
2. Appointment Topic
3. Appointment Sub-Topic
4. Start Date
5. End Date
6. Custom message if any.

Click SAVE

Note: A new campaign will not be saved if the "End Date" is the same as Today's date or the "Start Date".

The screenshot shows a web form titled "New Campaign: Advising". It is divided into two main sections: "Campaign Information" and "Appointment Information".

Campaign Information:

- Campaign Name:** A text input field with a yellow highlight and an arrow pointing to it from the text "1. Campaign Name:".
- Active:** A checkbox with a yellow highlight and an arrow pointing to it from the text "3. Check Active box".
- Campaign Record Type:** A dropdown menu set to "Advising".
- Type:** A dropdown menu set to "--None--" with a yellow highlight and an arrow pointing to it from the text "2. Type : **Advising Appointment**".
- Description:** A text area with a yellow highlight and an arrow pointing to it from the text "4. Description".
- Parent Campaign:** A search input field with the placeholder "Search Campaigns..." and a magnifying glass icon.
- Campaign Owner:** A text field displaying "Devki Kumayan".
- Program:** A search input field with the placeholder "Search Contacts..." and a magnifying glass icon.

Appointment Information:

- Appointment Advisor:** A search input field with the placeholder "Search People..." and a magnifying glass icon.
- Appointment Topic:** A search input field with the placeholder "Search Topics..." and a magnifying glass icon.
- Appointment Subtopic:** A search input field with the placeholder "Search Topics..." and a magnifying glass icon.
- Start Date:** A date input field with a yellow highlight and an arrow pointing to it from the text "4. Start Date".
- End Date:** A date input field with a yellow highlight and an arrow pointing to it from the text "5. End Date".
- Custom Message:** A text area with a yellow highlight and an arrow pointing to it from the text "6. Custom message if any."

At the bottom right, there are three buttons: "Cancel", "Save & New", and "Save". The "Save" button has a yellow highlight and an arrow pointing to it from the text "Click SAVE".

Create Advising Appointment Campaigns ... Cont'd

An error message will show up if:

1. End date is same as Start Date
2. End date is Today's Date

Appointment Information

Appointment Advisor: Tracy Miller

Start Date: 4/24/2023

Appointment Topic: Academic Advising

End Date: 4/24/2023

Appointment Subtopic: Registration

Custom Message

Campaign Statistics

Contacts in Campaign: 10

Created By: Tracy Miller, 4/24/2023, 3:31 PM

Created By: Tracy Miller, 4/24/2023, 3:53 PM

Cancel Save

Review the following errors

- The Campaign's End Date can't be the same as the Start Date.
- The Campaign's End Date should be greater than Today's Date.

Create Advising Appointment Campaigns ... Cont'd

An error will show up if any of the following fields are missing from a Campaign

1. Appointment Advisor
2. Appointment Topic
3. Appointment Subtopic
4. Start Date
5. End Date

Appointment Information

Appointment Advisor Start Date

Appointment Topic End Date

Appointment Subtopic Custom Message

Campaign Statistics

Review the following errors

- Appointment Advisor, Appointment Topic, Appointment Subtopic, Start Date, and End Date are required for Advising Appointment campaigns.

Cancel Save

Locate Your Campaigns – Various Ways to Locate Your Campaign

- On a Campaign tab look for **List Views**
- Search using name on search bar

- Recently Viewed
- My Advising Campaigns
- All Advising Campaigns

The screenshot shows the 'Advisor Link' interface with the 'Campaigns' tab selected. A search bar labeled 'Search lists...' is highlighted. Below it, a dropdown menu titled 'RECENT LIST VIEWS' is open, showing several options. A table on the right side of the screen displays a list of campaigns with columns for 'Type' and 'Status'.

Type	Status
Advising Appointment	
Advising Appointment	
Advising Appointment	
Advising Appointment	
Advising Appointment	
Advising Appointment	
Advising Appointment	
Advising Appointment	
Advising Appointment	
Advising Appointment	
Advising Appointment	
Event	Planned

HOTS: Hands On Training Session (Demo)

Create a Campaign

Validate Start and End Date

Validate Topics /Subtopics

Find Your Campaign



HOT: Exercises (5 minutes)

1. **Create** an Advising Campaign
2. Add Campaign Name, **Advising - Summer Registration**
3. **Save** the Campaign after adding all the fields
 - ✓ Appointment Advisor: **"Your Name"**
 - ✓ Appointment Topic- **Academic Advising**
 - ✓ Appointment Subtopic- **Registration**
 - ✓ Start Date/End Date
4. **Find** newly created Campaign, Advising –Summer Registration

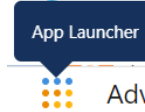
Add Students to an Advising Appointment Campaign Using REPORTS

Add Students to Appointment Campaign from REPORTS

1. Go to Navigation Menu and Select Reports

Or

2. Go to App Launcher and type in Reports



3. Once on Reports tab, search for the report by one of the following:

a) Tabs on Left – ALL reports & search bar on top right of the page

b) Go to All Folders (Undergraduate Campaign Folder) & look for a specific subfolders if available (GT Campaign Reports Library) and find the report manually or use the search bar at the top right of the page

The screenshot shows the Advisor Link interface. The navigation menu is open, highlighting 'Reports'. The 'App Launcher' is also visible. The 'Reports' tab is active, showing a search bar and a table of reports. The 'All Folders' view is selected, showing a list of folders and reports. The 'Undergraduate Campaigns Reports' folder is highlighted.

Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	"Complete" Accounts	CoB Data Checks	Alex Vibber	8/28/2019, 9:41 AM	
Created by Me	# of Individuals-Sign up for UpdatesForm	GTPE Reporting Reports	Claude Douglas	1/23/2017, 10:58 AM	
Private Reports	upload Current Applications for the EMBA program to current students	David's general reports	David Stroer	8/23/2019, 12:19 PM	
Public Reports	#2669 Contacts with Applications Report	David's general reports	David Stroer	8/23/2019, 12:19 PM	
Trended Reports	#2678 Forms w/ Registration Form report	David's general reports	David Stroer	8/23/2019, 12:33 PM	
FOLDERS	EMBA apps (Executive MBA - MOT, Executive MBA - GB) and append a				

Name	Created By	Created On	Last Modified By
SAL Admin Reporting	Andrew Jarrett	3/4/2021, 11:53 AM	Andrew Jarrett
SAL Advisor Beth Spencer	Erin Schroder	3/25/2022, 5:07 PM	Erin Schroder
SAL Advisor Reports	Peter Fife	7/31/2020, 7:53 PM	Peter Fife
SAL Assessment Reports	Russell Wallis	6/16/2022, 9:33 PM	Russell Wallis
SAL Monitoring	Tiago Ruivo	9/14/2020, 10:20 AM	Tiago Ruivo
Sales & Marketing Dashboards Reports	Monique Ward	8/22/2016, 11:09 AM	Monique Ward
Sales and Marketing Reports	Monique Ward	8/22/2016, 11:09 AM	Monique Ward
Saudi Aramco MS Cybersecurity	Byron Harrison	1/23/2020, 10:07 AM	Byron Harrison
Service Dashboards Reports	Monique Ward	8/22/2016, 11:09 AM	Monique Ward
Subscriber Reports	Claude Douglas	12/12/2016, 12:26 PM	Claude Douglas
System Reports	Tiago Ruivo	9/10/2020, 5:22 PM	Tiago Ruivo
Tracking Reports	Claude Douglas	12/12/2016, 12:26 PM	Claude Douglas
Trailhead	Tran Vu Tran	2/22/2022, 12:58 PM	Tran Vu Tran
Undergraduate Campaigns Reports	Shilpa Kuppli	4/10/2023, 3:40 PM	Shilpa Kuppli

Add Students to Appointment Campaign from REPORTS ... Cont'd

1. Select the report you want to use for Advising Campaign
2. Once Selected, make any changes you need using **EDIT** on the top right of the page

Advisor Link | Reports | My Advisees

Report: Cases
My Advisees
Report that shows your advisees

Total Records: 640

Case Number	Contact Name	Last Name (Legal)	GTID	Admit Type	Admit Term	Primary Academic Program	Overall Academic Standing	Class Standing	Gender
1	C...	Wilson			Summer 2023	BS in Mechanical Engineering	Good		
2	B...	Air			Summer 2023	BS in ...	Good		
3	Z...	W...			Summer 2023	BS in ...	Good		
4	R...	D...		Regular Freshman	Fall 2018	BS in Mechanical Engineering	Good	Senior	

Advisor Link | Reports | My Advisees

Reports
Recent
12 items

REPORTS	Report Name	Folder	Description
Recent	My Advisees	GT Campaign Reports Library	Report that shows your advisees
Created by Me	Midterm Advising reports of U grades	GT Campaign Reports Library	
Private Reports	My Advisees with Alerts	GT Campaign Reports Library	
Public Reports	1/11 Executive MBA Webinar Registrants	CoB Marketing Reports	
Trended Reports			
All Reports	1st Generation Report for Undergraduates	GT Campaign Reports Library	This report contains all the first generation students in GT Undergraduate (BS) and non de-

3. Add or edit any **filter criteria** needed for the report
4. Refresh the report or Run the report to ensure your results are looks good.
5. **Save As** by clicking drop down on Save with a new Name in your department folder

Advisor Link | Reports | Undergraduate Cam... | Reports | GT Campaign Report... | Report Builder

REPORT: My Advisees / Cases

Previewing a limited number of records. Run the report to see everything.

Filters

- Show Me: My case team's cases
- Opened Date: All Time
- Units: Hours
- Case Record Type: equis Advisee Record
- Primary Academic Program: equis BS in Mechanical Engineering
- Overall Academic Standing: equis Probation, Warning

Case Number	Contact Name	Last Name (Legal)	GTID	Admit Type	Admit Term	Primary Academic Program	Overall Academic Standing	Class Standing	Gender
1				Regular Freshman	Fall 2020		Probation	Senior	F
2				Regular Transfer	Fall 2019		Warning	Senior	A
3		Busari		International Freshman	Fall 2020		Warning	Junior	A
4		Tihelm		Regular Freshman	Summer 2019		Probation	Senior	A
5				Regular Freshman	Summer 2020		Warning	Senior	A
6				Readmission - Undergraduate	Summer 2022		Probation	Senior	A
7				Regular Freshman	Fall 2019		Probation	Senior	A
8				Regents' Engineering Transfer Program (RETP)	Fall 2021		Warning	Senior	F
9				Regular Freshman	Fall 2021		Probation	Sophomore	A
10				Regular Transfer	Summer 2021		Warning	Senior	A
11				Regular Transfer	Fall 2021		Warning	Junior	A
12				Regular Freshman	Summer 2020		Warning	Junior	A
13				Readmission - Undergraduate	Spring 2022		Warning	Senior	A
14				Regular Freshman	Fall 2021		Probation	Senior	A

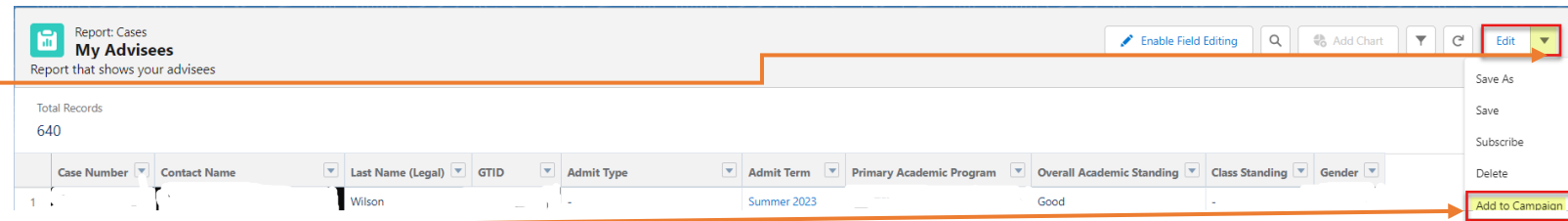
Save & Run | Save | Close | Run

Save As | Properties

Add Students to Appointment Campaign from REPORTS ... Cont'd

1. Click **drop down option** on the **EDIT** at the top right corner of the report page

2. Select **Add to Campaign**



The screenshot shows the top right corner of a report page titled 'Report: Cases My Advisees'. The page includes a toolbar with options like 'Enable Field Editing', 'Add Chart', and 'Edit'. The 'Edit' button has a dropdown menu open, showing options: 'Save As', 'Save', 'Subscribe', 'Delete', and 'Add to Campaign'. An orange arrow points from the 'Add to Campaign' option in the dropdown to the text in step 2. Below the toolbar is a table with columns: Case Number, Contact Name, Last Name (Legal), GTID, Admit Type, Admit Term, Primary Academic Program, Overall Academic Standing, Class Standing, and Gender. A row is visible with the name 'Wilson' and 'Summer 2023'.

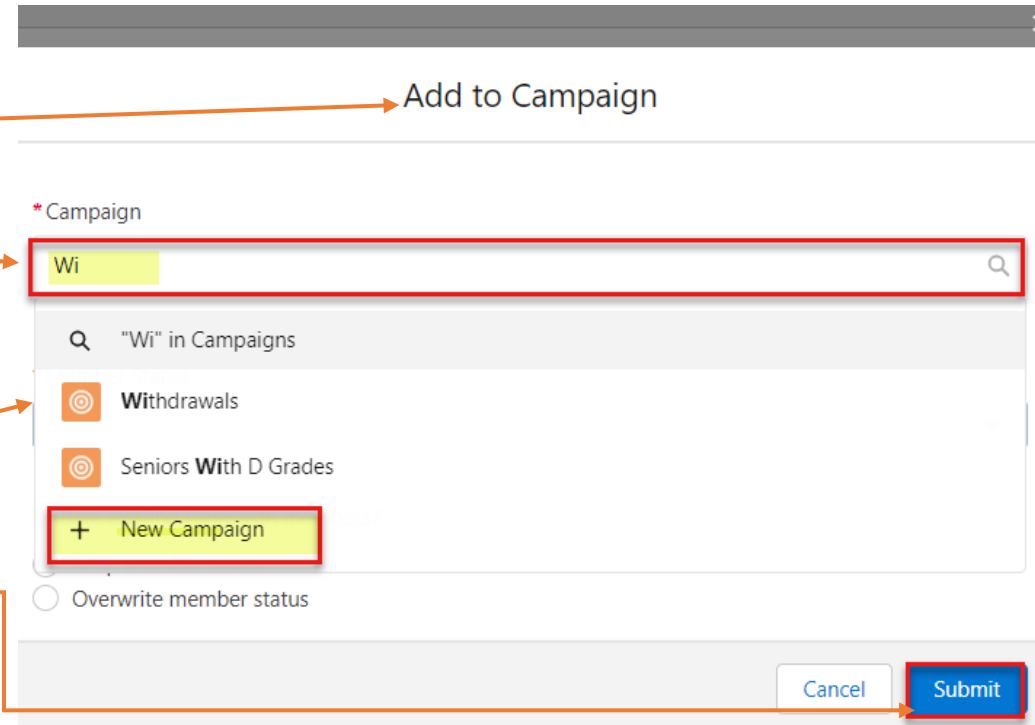
3. A new pop-up window shows up

4. Type in the name of the Campaign

Or

5. Select from available options, if any

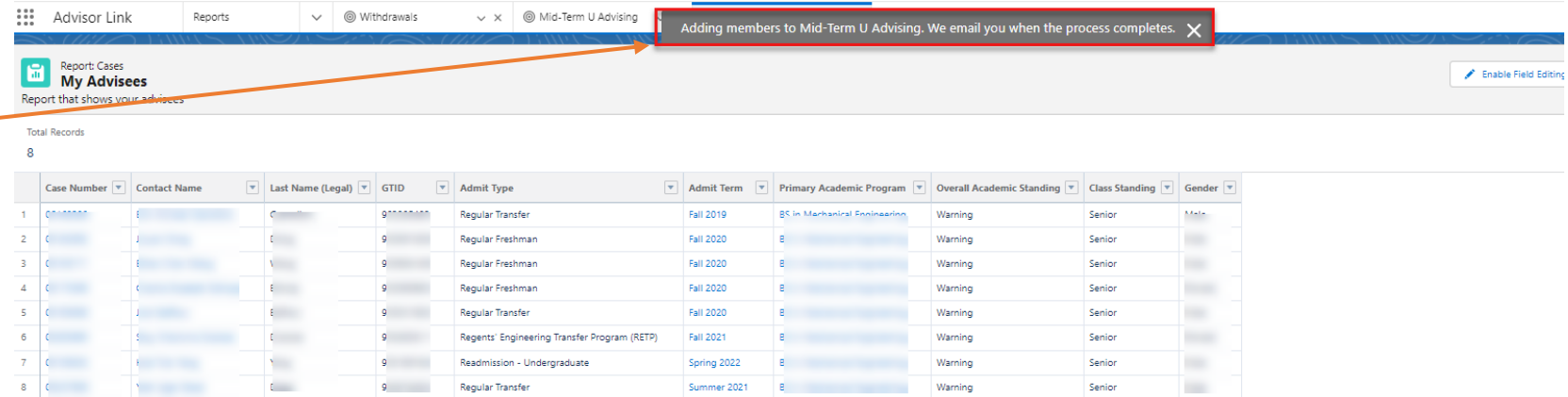
6. Click **SUBMIT**



The screenshot shows a pop-up window titled 'Add to Campaign'. It has a search bar with the text 'Wi' entered. Below the search bar is a list of search results: '"Wi" in Campaigns', 'Withdrawals', and 'Seniors With D Grades'. At the bottom of the list is a button labeled '+ New Campaign'. Below the list is a radio button labeled 'Overwrite member status'. At the bottom right of the window are two buttons: 'Cancel' and 'Submit'. Orange arrows point from the text in steps 3, 4, 5, and 6 to the corresponding elements in the pop-up window.

Add Students to Appointment Campaign from REPORTS ... Cont'd

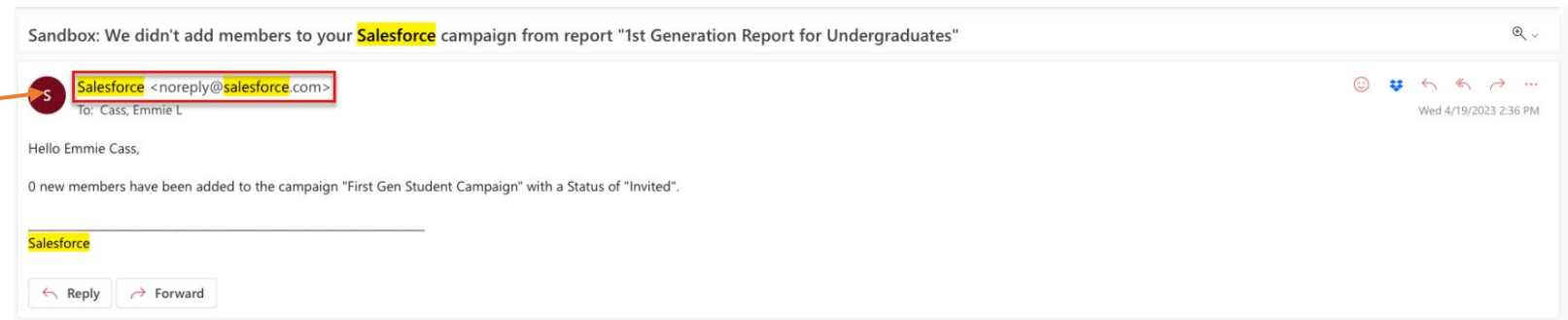
1. A message flashes on the screen “Adding members to **“Campaign Name”**”. We email you once the process completes.



The screenshot shows a Salesforce interface with a notification banner at the top that reads "Adding members to Mid-Term U Advising. We email you when the process completes." Below the banner is a report titled "My Advisees" with 8 total records. The table below lists the records:

Case Number	Contact Name	Last Name (Legal)	GTID	Admit Type	Admit Term	Primary Academic Program	Overall Academic Standing	Class Standing	Gender
1	C	E	9	Regular Transfer	Fall 2019	BS in Mechanical Engineering	Warning	Senior	Male
2	C	J	9	Regular Freshman	Fall 2020	B	Warning	Senior	
3	C	E	9	Regular Freshman	Fall 2020	B	Warning	Senior	
4	C	C	9	Regular Freshman	Fall 2020	B	Warning	Senior	
5	C	J	9	Regular Transfer	Fall 2020	B	Warning	Senior	
6	C	E	9	Regents' Engineering Transfer Program (RETP)	Fall 2021	B	Warning	Senior	
7	C	V	9	Readmission - Undergraduate	Spring 2022	B	Warning	Senior	
8	C	V	9	Regular Transfer	Summer 2021	B	Warning	Senior	

2. Advisor will receive an email from Salesforce



The screenshot shows an email from Salesforce with the following content:

Sandbox: We didn't add members to your Salesforce campaign from report "1st Generation Report for Undergraduates"

Salesforce <noreply@salesforce.com>
To: Cass, Emmie L

Hello Emmie Cass,

0 new members have been added to the campaign "First Gen Student Campaign" with a Status of "Invited".

Salesforce

Reply Forward

HOTS: Hands On Training Session (Demo)

Select a Report

Change a Filter
Criteria on a Report

Save the Report
With New Name

Add Students to
a Campaign
from a Report



HOT: Exercises (5 minutes)

1. Select a Report, **My Advisee from** GT Campaign Reports Library sub-folder in Undergraduate Campaigns Reports folder
2. Edit the filter criteria, Overall Standing equals **“Warning”**
3. Save the new report with **new name e.g. My Advisee with Warning standing”** in the Department folder on Undergraduate Campaigns Reports Folder
4. Add to a campaign : **Advising - Summer Registration**

Student Community View

Student View: Notification About A Campaign

1. Once student is added to a Campaign via Report, they receive an email informing them about a task assigned by their advisor to schedule an appointment.

From: [redacted]@gatech.edu>
Sent: Thursday, April 20, 2023 4:50 PM
To: Wallis, Russell < russell.wallis@gatech.edu >
Subject: Sandbox: Make an Appointment

New Task

To: George Burdell

[redacted] has assigned you the following new task:

Subject: Make an Appointment
Contact: George Burdell
Case: 00261767
Due Date: 4/27/2023
Priority: Normal
Comments: Please make an appointment to meet with Angela Elleby with a topic of Academic Advising and a subtopic of Academic Standing by 4/27/2023.

Book an appointment now by visiting <https://gatech--dev3.sandbox.my.site.com/sal/s/profile/0051K000008xopNQAO>

Students must make an appointment with me regarding D grades.

For more details, click the following link:

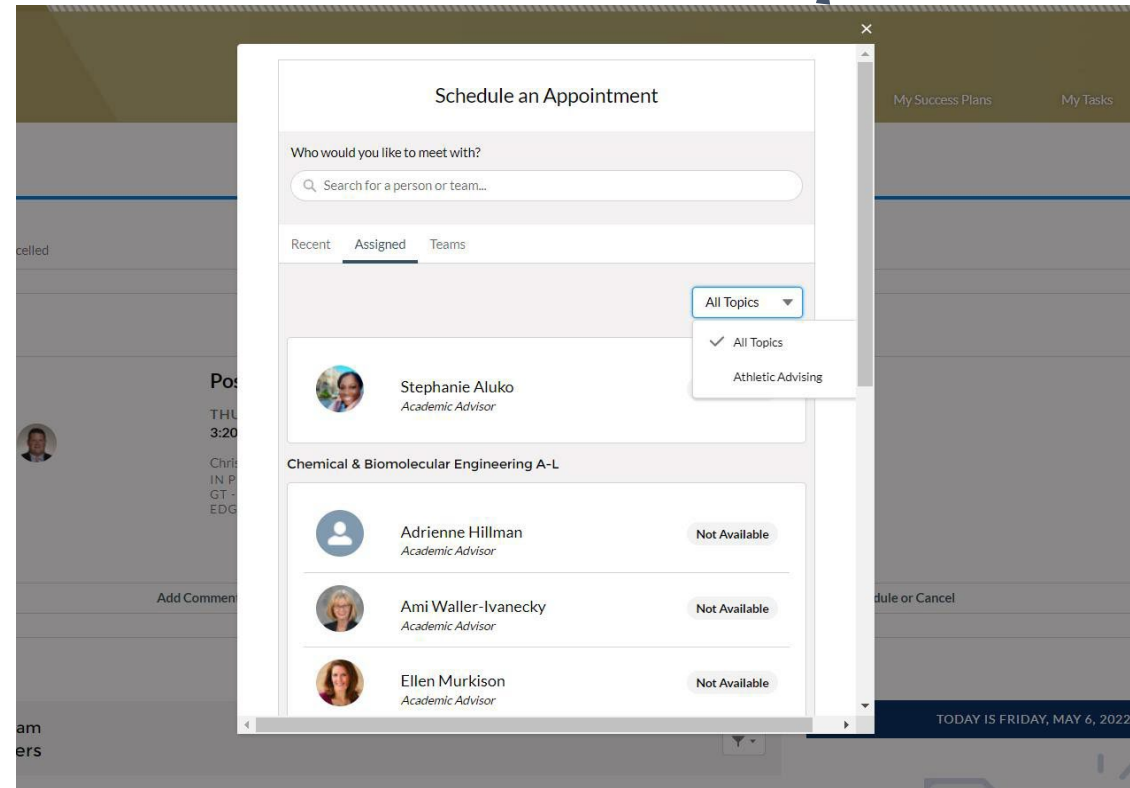
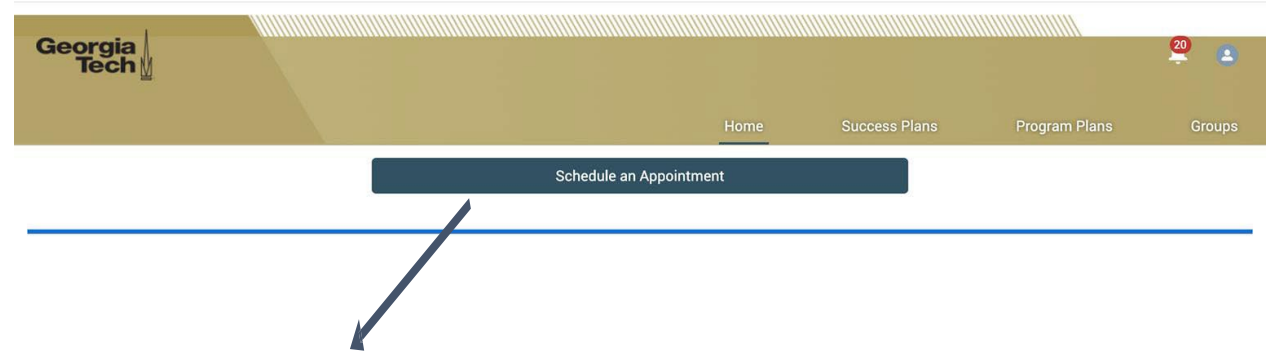
<https://qa.advisor.gatech.edu/00TP0000006nIT>

2. A notification bell icon shows up on their student portal to indicate about new task being created.

The screenshot shows the Georgia Tech student portal interface. The top navigation bar includes the Georgia Tech logo and a notification bell icon with a red '1' badge. Below the navigation bar, there are links for Home, My Success Plans, My Tasks, and Documents. The footer contains contact information for Georgia Institute of Technology, including the address (North Avenue, Atlanta, GA 30332) and phone number (404.894.2000). A notification card is displayed in the bottom right corner, titled 'Notifications' with a 'Mark all as read' option. The notification content reads: 'Lenna Applebee assigned you a task Make an Appointment 2 minutes ago'.

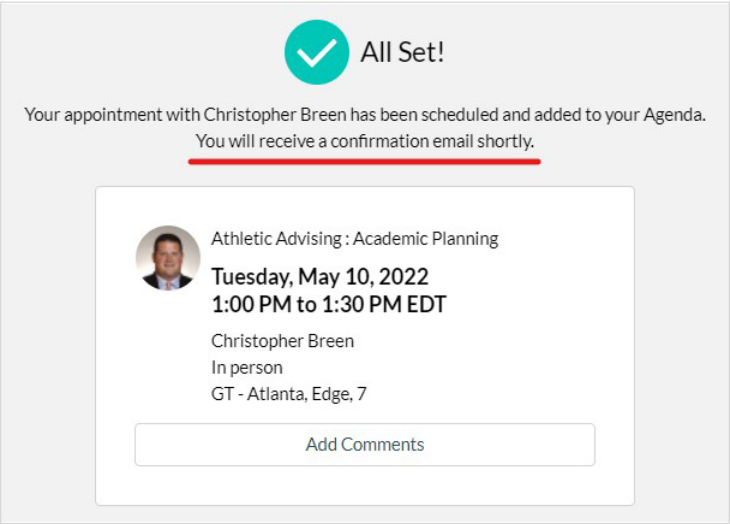
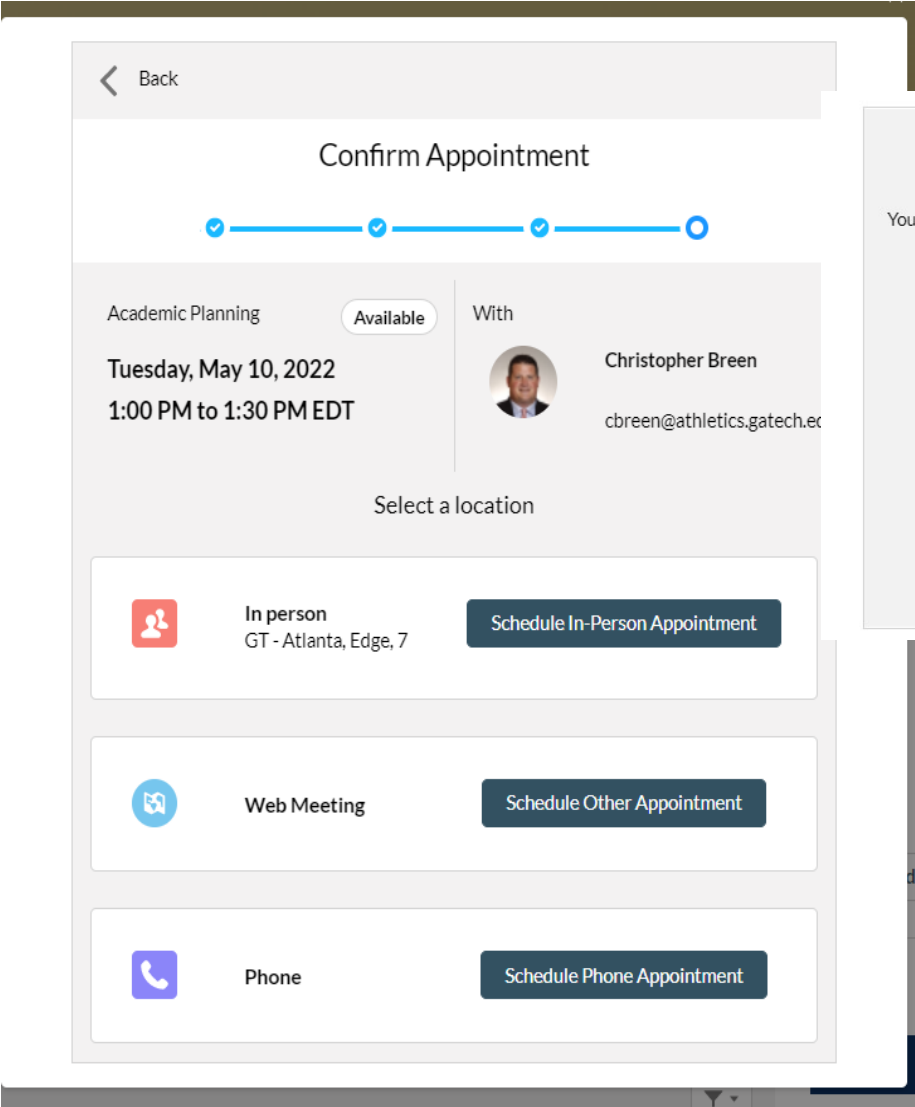
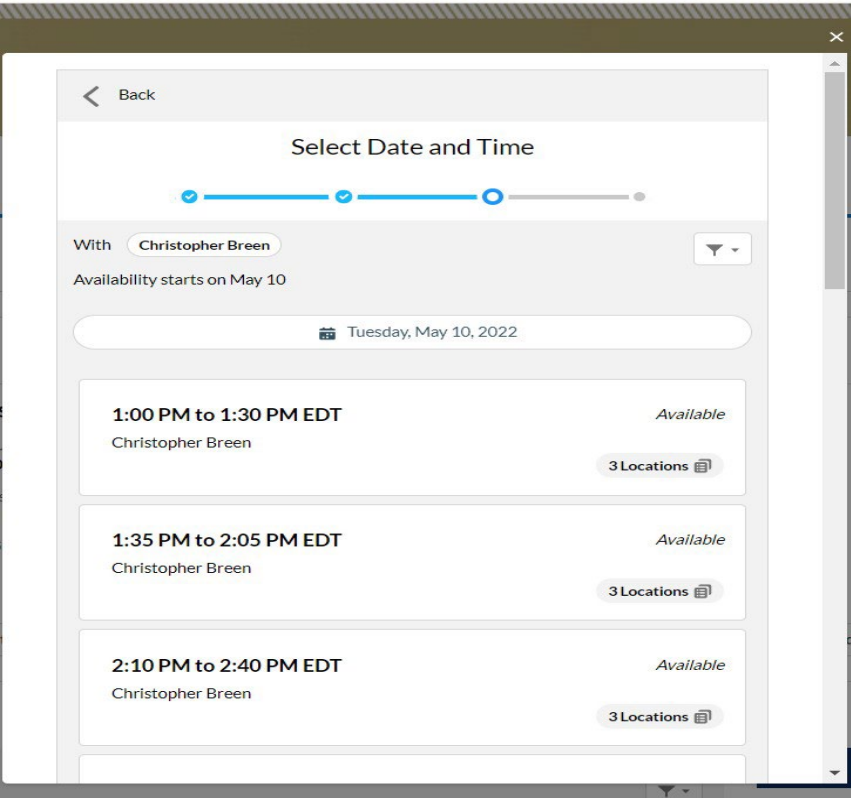
Student View: Schedule an Appointment - As a Student

- Click “Schedule an Appointment” and follow appointment wizard



Student View: Schedule an Appointment - As a Student

- Choose your Date/Time
- Choose your location
- Confirmation Screen will show successfully scheduled appointment!




Student View: Manage Appointments – As a Student

- Students can view upcoming past and cancelled appointments, schedule a new appointment and manage upcoming appointments from the Community

[Schedule an Appointment](#)

Upcoming Past Cancelled

DROP-IN APPOINTMENT




Career Exploration
FRIDAY, MAY 6, 2022
6:00 PM to 6:30 PM
IN PERSON

No Drop-in Advising sessions are available at this time.


Please check back again during office hours.

SCHEDULED APPOINTMENT




Academic Planning
TUESDAY, MAY 10, 2022
1:00 PM to 1:30 PM
Christopher Breen
IN PERSON
GT - ATLANTA
EDGE 7

DROP-IN APPOINTMENT



Career Exploration
MONDAY, MARCH 7, 2022
1:57 PM to 2:27 PM
VIRTUAL

DROP-IN APPOINTMENT



Paperwork Signature
MONDAY, MARCH 7, 2022
10:11 AM to 10:41 AM
VIRTUAL MEETING ON BLUEJEANS

Student Community View

- Students can login to the Student Advisor Link Community to connect with their advisors and view related data.
- Students access it via advisor.gatech.edu

The screenshot displays the user interface of the Student Advisor Link Community. At the top, there is a navigation bar with links for Home, My Success Plans, My Tasks, and Documents. A prominent 'Schedule an Appointment' button is visible. Below this, there are tabs for 'Upcoming', 'Past', and 'Cancelled'. The main content area shows a 'SCHEDULED APPOINTMENT' card for 'Postgrad Planning' on Thursday, May 12, 2022, from 3:20 PM to 3:50 PM. The appointment is with Christopher Breen, an Athletic Advisor for Varsity Men's Golf. The card includes a note to 'Bring your laptop' and two buttons: 'Add Comments' and 'Reschedule or Cancel'. At the bottom of the interface, there is a 'Success Team All Members' section and a date indicator: 'TODAY IS FRIDAY, MAY 6, 2022'.

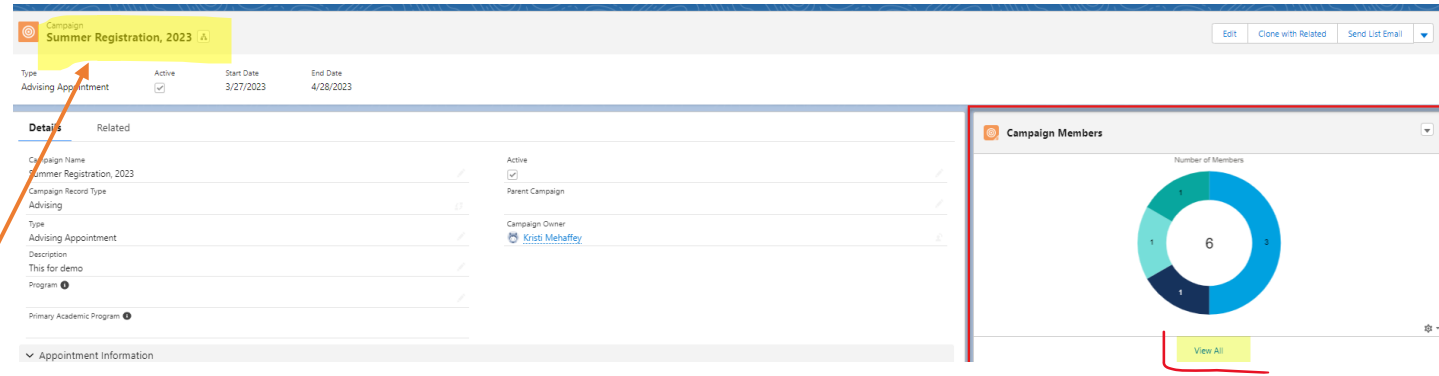
This block shows a list of advisors from the Student Advisor Link Community. The list is titled 'Success Team All Members' and is currently sorted by 'List'. The advisors listed are:

- Amanda Brown**: ASSC DIR-CTR FOR ACAD SUCCESS ACADEMICS, Varsity Men's Golf, Athletic Advisor
- Christopher Breen**: Varsity Men's Golf, Athletic Advisor
- Danielle Lipscomb**: Varsity Men's Golf, Athletic Advisor
- Jewel Perkins**: ACADEMIC ADVISOR I, Business Administration E-K, Academic Advisor
- Justin Corbett**: ACADEMIC SUPPORT COORD II, Varsity Men's Golf, Athletic Advisor
- Phyllis LaBaw**: (No title listed)

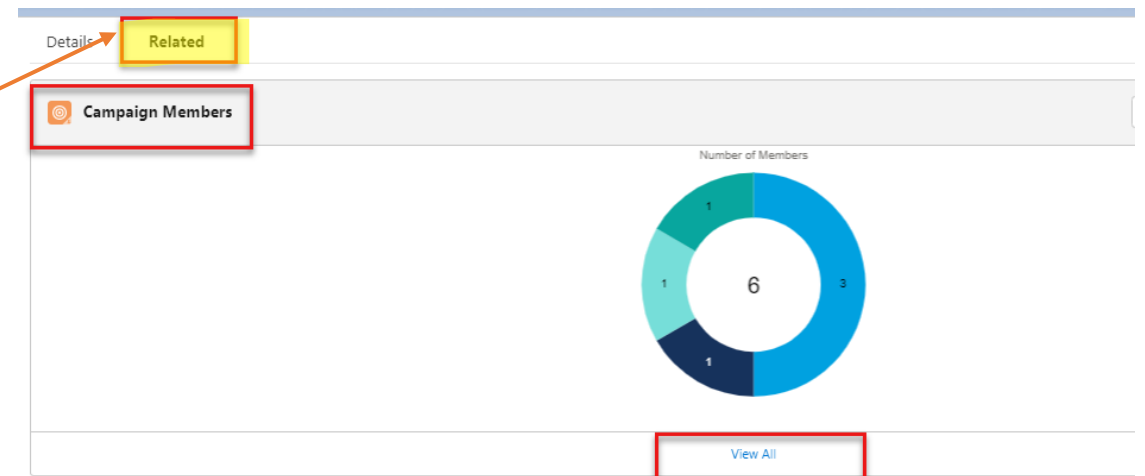
Manage Advising Appointment Campaign Responses

Manage Appointment Campaign Responses

1. Go to Campaign Members by clicking **View All** on

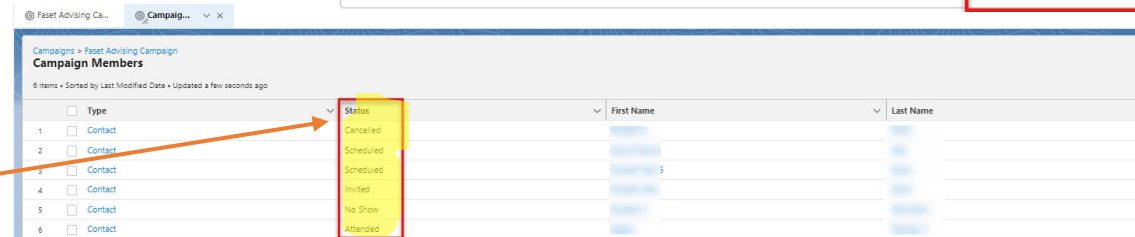


a) Campaign Members option on Campaign Page



b) Related Page

2. View **Status** field



Manually update Appointment Campaign Responses

Campaign Member status change automatically in real time. If needed, the status can be manually changed as well. Follow the steps below to make the changes manually:



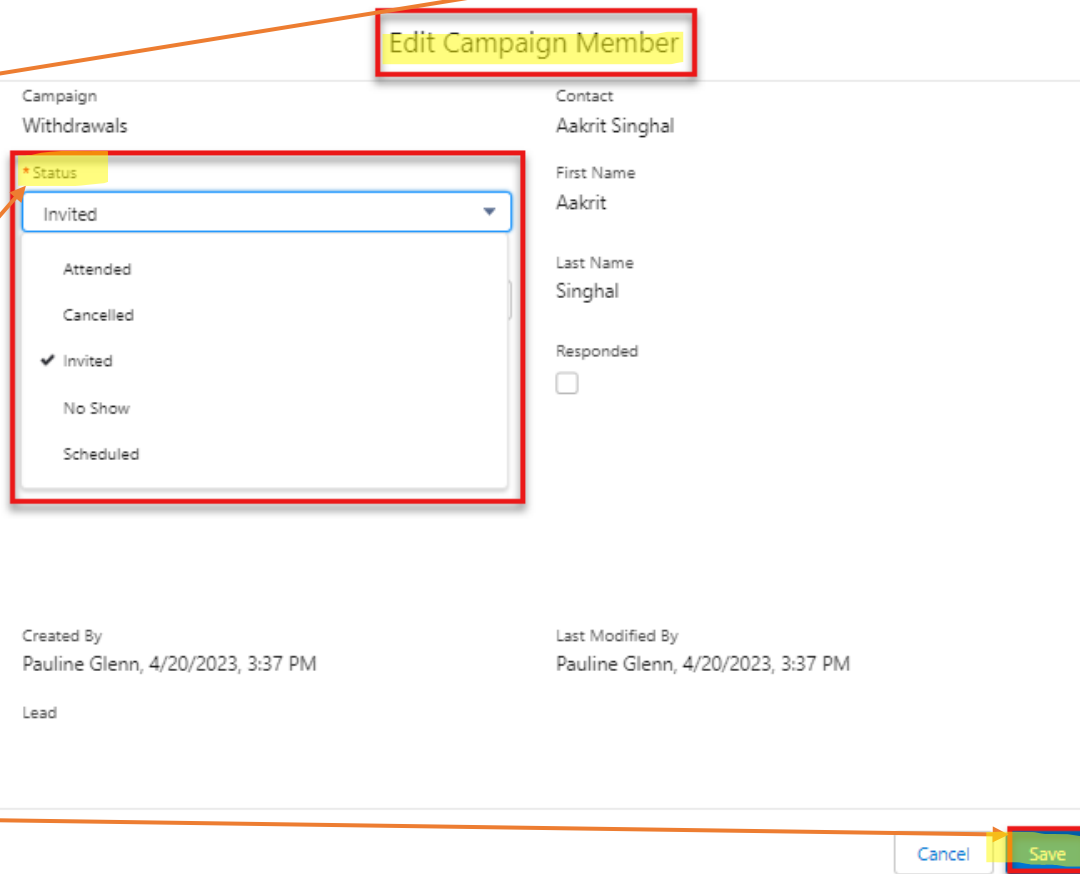
Campaigns > Withdrawals
Campaign Members

50+ Items • Sorted by First Name • Updated a few seconds ago

Type	Status	First Name ↑	Last Name	Last Modified Date
<input type="checkbox"/> Contact	Invited	Aakrit	Singhal	4/20/2023, 3:37 PM
<input type="checkbox"/> Contact	Invited		Narayani	4/20/2023, 3:36 PM
<input type="checkbox"/> Contact	Invited			4/20/2023, 3:37 PM
<input type="checkbox"/> Contact	Invited			4/20/2023, 3:37 PM

Buttons: Add Contacts, Import Leads and Contacts, Edit, Delete

1. Go to Contact and go to drop down option on extreme right and click **EDIT**
2. Edit Campaign Member Page shows up
3. Click the **Status** field and choose any Status
4. Click **Save**



Edit Campaign Member

Campaign Withdrawals

Contact Aakrit Singhal

First Name Aakrit

Last Name Singhal

Responded

Created By Pauline Glenn, 4/20/2023, 3:37 PM

Last Modified By Pauline Glenn, 4/20/2023, 3:37 PM

Lead

Status

- Invited
- Attended
- Cancelled
- Invited
- No Show
- Scheduled

Buttons: Cancel, Save

HOTS: Hands On Training Session (Demo)

Sort the
Campaign
Member Status

Quiz

Change a Status
from Invited
to Scheduled

Change a Status
from Invited
to No Show



HOT: Exercises (5 minutes)

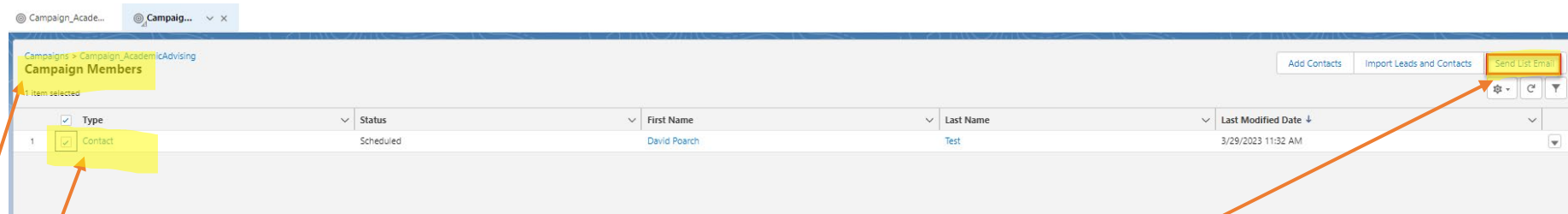
1. Go to **Campaign Members** on Advising - Summer Registration Campaign page, try to sort Status alphabetically .
2. How many Campaign Members do you see on Advising - Summer Registration?
3. Change the Status to “**No Show**” on George Burdell or an Advisee
4. Change the status to “**Scheduled**” on Buzz Aldrin, or an Advisee

Send an Email List



Send List Emails

If a student or a group of students need a nudge or reminder, an advisor can send them list email from the Campaign Members page. Follow the steps below:

1. Go to the Campaign Member Page
2. Select the contacts from the Campaign Member Page
3. Click Send List Email button on top right corner of the page



Send List Emails.....Contd

1. Select Merge Field { } from the bottom left corner
2. Select a Template from the bottom left corner or write your own email 
3. Insert an attachment 
4. Send or Save as draft or send later











Send List Email

From: Advising NoReply <sal-noreply@mail.gatech.edu>



Recipients: (1 Recipient) Campaign_AcademicA... X Related Campaign: Campaign_A...


Subject:

Content Review

Font - Size - **B** *I* U A-          

{{{Recipient.FirstName}}}

()  

5000/5000 send limits remaining 

Save as Draft Send Send Later

Extend the End Date on a Campaign

Extend End Dates of Appointment Campaigns

If an Advisor needs to extend timeline on a Campaign, they can do so by extending End Date on a Campaign. Follow the steps below:

1. Select a Campaign where you want to extend the end date

2. Go to the End Date, change the date to desired end date

3. Save

The screenshot shows the 'Campaigns' page in the Advisor Link interface. The 'Campaigns' tab is selected. The 'End Date' field is highlighted in yellow, and a calendar pop-up is open, showing the date 5/15/2023. The 'Save' button is highlighted in yellow.

The screenshot shows the 'Campaigns' page in the Advisor Link interface. The 'End Date' field is highlighted in yellow, and the date is changed to 5/31/2023. The 'Save' button is highlighted in yellow.

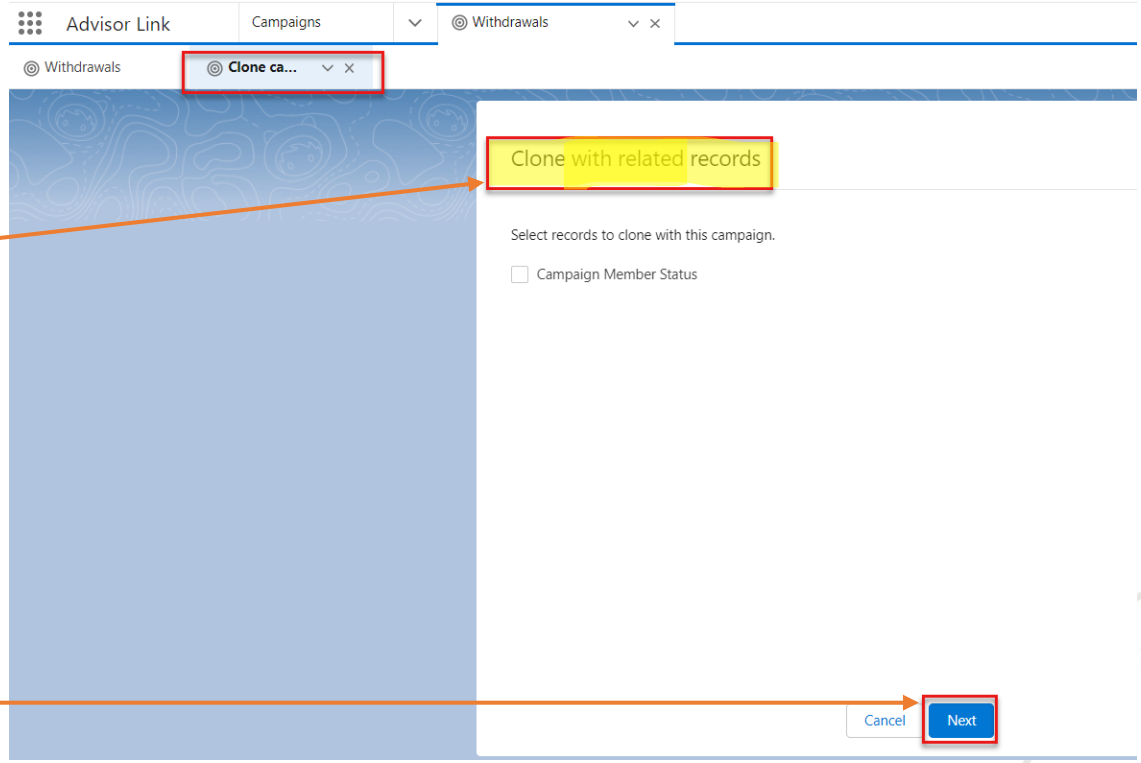
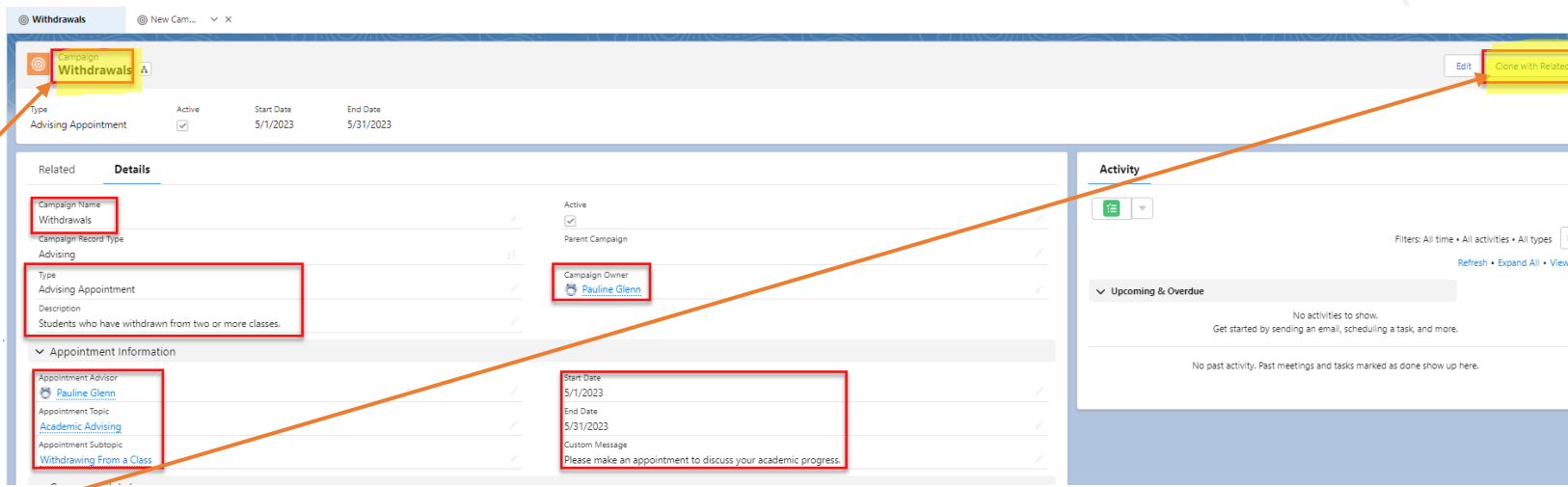
4. End date is now extended for the selected Campaign

The screenshot shows the 'Campaign Details' page in the Advisor Link interface. The 'End Date' field is highlighted in yellow, and the date is 5/31/2023. The 'Save' button is highlighted in yellow.

Clone a Campaign

Clone a Campaign

- 1. Go to Campaigns
- 2. Select a Campaign that you want to Clone
- 3. Click a button "Clone with Related" on the top right of the page
- 4. A new page shows up, Clone with related records
- 5. An option is given to select with campaign member status- keep it unchecked
- 6. Click NEXT



Clone a Campaign.....Contd..

1. Fill or change any fields details on the Campaign Page

2. Click **SAVE**

The screenshot shows a web form titled "New Campaign: Advising". The form is divided into two main sections: "Campaign Information" and "Appointment Information".

Campaign Information:

- Campaign Name:** A text input field containing "Withdrawals".
- Active:** A checkbox that is checked.
- Campaign Record Type:** A dropdown menu set to "Advising".
- Type:** A dropdown menu set to "Advising Appointment".
- Description:** A text area containing "Students who have withdrawn from two or more classes."
- Parent Campaign:** A search input field with the placeholder "Search Campaigns...".
- Campaign Owner:** A text field containing "Lenna Applebee".

Appointment Information:

- Appointment Advisor:** A dropdown menu showing "Pauline Glenn".
- Appointment Topic:** A dropdown menu showing "Academic Advising".
- Appointment Subtopic:** A dropdown menu showing "Withdrawing From a Class".
- Start Date:** A date picker set to "5/1/2023".
- End Date:** A date picker set to "5/31/2023".
- Custom Message:** A text area containing "Please make an appointment to discuss your academic progress."

At the bottom of the form, there are three buttons: "Cancel", "Save & New", and "Save". An orange arrow points from the text "Click **SAVE**" to the "Save" button.

HOTS: Hands On Training Session (Demo)

Extend The End Date
on a Campaign

Clone a Campaign

Add Campaign Members
from a Report



HOT: Exercises (10 minutes)

1. Change the End Date on Summer Registration Campaign by 30 days
2. Clone **Advising- Summer Registration** Campaign and name as **Advising- Fall Registration**
3. Add Campaign Members from a Report – My Advisees to **Advising- Fall Registration**

Advisee Record View on Advisor Link

See Students' Notification on Task/Activity on Advisee Case Record

1. Go to your advisee case record.

2. Click Activity

3. Select the subject that you want to view for more details on an activity

The screenshot displays the 'Activity' tab of an Advisee Case Record. The 'Open Activities (2)' section contains a table with the following data:

Subject	Name	Task	Due Date
Make an Appointment	[Redacted]	<input checked="" type="checkbox"/>	5/8/2023
Make an Appointment	[Redacted]	<input checked="" type="checkbox"/>	5/15/2023

The 'Activity History (0)' section is currently empty. The detailed view of the 'Make an Appointment' task shows the following information:

- Name:** [George Burdell](#)
- Related To:** [00261767](#)

Task Information:

Field	Value
Subject	Make an Appointment
Assigned To	George Burdell
Name	George Burdell
Type	Reminder Set
Reminder Set	No reminder is set
Due Date	5/15/2023
Related To	00261767

Comments:

Please make an appointment to meet with Pauline Glenn with a topic of Academic Advising and a subtopic of Withdrawing From a Class by 5/15/2023.

Book an appointment now by visiting <https://gatech--dev3.sandbox.my.site.com/sal/s/profile/0051K0000090A7AQAU>

Please make an appointment to discuss your academic progress.

Additional Information:

Priority	Normal
Status	Open

System Information:

Created By	Pauline Glenn , 4/20/2023, 3:37 PM
Last Modified By	Pauline Glenn , 4/20/2023, 3:37 PM

See Student Appointment on Advisee Case Record Appointments

Lists advising appointments:

- Upcoming
- In the past

To open an appointment, click on the Topic link

Appointment
Athletic Advising - Postgrad Planning

Related **Details**

Appointment Subject Athletic Advising - Postgrad Planning	Owner Christopher Breen
Start 5/12/2022, 3:20 PM	Web Meeting <input type="checkbox"/>
End 5/12/2022, 3:50 PM	Web Meeting Link
Appointment Advisee AT-234500	Additional Connection Information
Appointment Location In person	Type Scheduled
Description	Topic Athletic Advising
Additional Details Bring your laptop	Subtopic Postgrad Planning
Attendee Limit	Status Updated By
Created By Buzz Aldrin, 5/5/2022, 5:22 PM	Status Comments
	Last Modified By Christopher Breen, 5/11/2022, 5:41 PM

Appts Notes Programs Alerts Team Success Plans More

Upcoming Appointments (1) [New Appointment](#)

TOPIC	SUBTOPIC	OWNER	STATUS	DATE	
Athletic Advising	Postgrad Planning	Christopher Breen	Attending	5/12/2022, 3:20 PM	▼

Past Appointments (11)

TOPIC	SUBTOPIC	OWNER	STATUS	DATE	
Athletic Advising	Academic Planning	Christopher Breen	Attending	5/10/2022, 1:00 PM	▼
Academic Advising	Paperwork Signature	Ellen Murkison	Attending	2/15/2022, 8:56 PM	▼
Academic Advising	Petitions to Faculty	Paul Fincannon	Attending	2/9/2022, 1:18 PM	▼
Career Advising	Resume/Portfolio Review	Paul Fincannon	Attending	1/31/2022, 2:46 PM	▼
Career Advising	Career Exploration	Paul Fincannon	Attending	1/21/2022, 4:43 PM	▼

Reports and Dashboards

View Appointment Campaign Dashboards

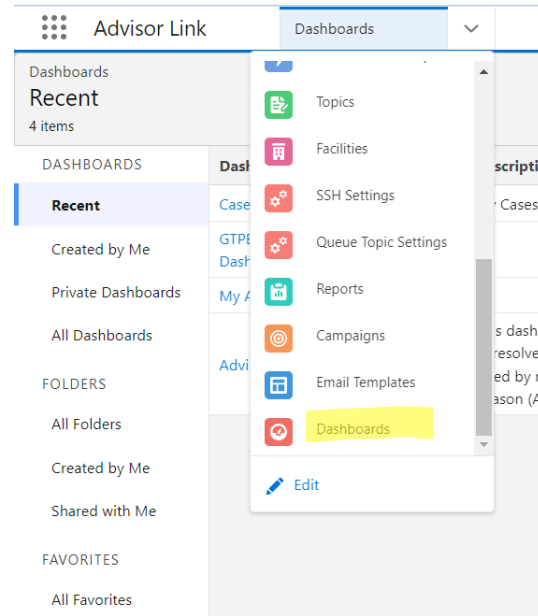
1. Go to Dashboard using App Launcher or Navigation Menu

2. Choose My Advising Campaign Dashboard from the

✓ All Dashboards

✓ Recent items

✓ Dashboard search bar on top right corner



Search all dashboards...

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Adoption Dashboard		Sales and Marketing Dashboards	Monique Ward	8/22/2016, 11:09 AM	
Created by Me	Advisors Open Alerts- Home Page	This dashboard has all open and unresolved alerts. This can be filtered by relative created dates and Reason (Alert)	Alerts Dashboard	Devki Kumayan	12/16/2022, 1:25 PM	
Private Dashboards	Agent Supervisor Overview		Service Dashboards	Monique Ward	8/22/2016, 11:09 AM	
	Alerts Dashboard		Alerts Dashboard	DevOps Integration	11/8/2022, 2:35 PM	
FOLDERS	Marketing Dashboard		Sales and Marketing Dashboards	Monique Ward	8/22/2016, 11:09 AM	
All Folders	My Advising Campaigns		SAL Dashboards	Veena Kommagoni	4/17/2023, 5:22 PM	
Created by Me	SAL Alerts Dashboard	Keep tabs on the Alerts assigned to you and your advisees.	SAL Sample Dashboards	Peter Fife	9/11/2020, 7:11 PM	
Shared with Me	Sales Manager Dashboard	Best Practices Sales Dashboard	Sales and Marketing Dashboards	Monique Ward	8/22/2016, 11:09 AM	
FAVORITES	Scheller Data Quality Dashboard		Service Dashboards	Alex Vibber	2/6/2020, 4:26 PM	
All Favorites	Service Executive Overview		Service Dashboards	Monique Ward	8/22/2016, 11:09 AM	

View Appointment Campaign Dashboards ... Cont'd

1. Use Refresh on top right corner of page to see latest data on dashboard

2. Click the link below on a component to dig into report that supports the dashboard component view

The dashboard displays the following components:

- Active Advising Appointment Campaigns:** 18. [View Report \(My Active Advising Appointment Campaigns\)](#)
- Students in Active Appointment Campaigns Who Have Been Invited:** 1.9K. [View Report \(My Students Active Advising Appt Camps\)](#)
- Students in Active Appointment Campaigns Who Have Not Taken Action:** 1.9K. [View Report \(My Invited Students Active Advising Appt\)](#)
- Students in Active Appointment Campaigns Who Have Cancelled Their Appointments:** [View Report \(My Advising Campaigns w/Campaign Members\)](#)
- Students in Active Appointment Campaigns Who Did Not Show For Their Appointment:** [View Report \(My No Action Students in Active Advi Cam\)](#)

Campaign Name	Sum of Contacts in Campaign	Sum of Responses in Campaign
1/23/19 OMSA Unsubmitted Applications	1,575	1,575
1/30/19 OMSA Unsubmitted Applications	1,702	1,702
11-10-15 Interview Day: Marketing Mgmt Class Visit - Attendees - 11,	3	3
11-10-15 Interview Day: Operations Strategy Class Visit - Attendees -	7	7
2/1/19 OMSA Unsubmitted Applications	1,956	1,956
2/18/19 OMSA Unsubmitted Applications	2,103	2,103
2/25/19 OMSA Unsubmitted Applications	2,205	2,205
2/25/19 OMS Cybersecurity Unsubmitted Applications	747	747
2015 Diversity Breakfast - Attendees - 01/16/2015	65	65
2016 Women at Scheller Luncheon - Attendees - 03/18/2016	68	68
2017 Women at Scheller Luncheon - Attendees - 03/03/2017	68	68
2018/1/10 PMML Online Q&A Jan 10 2018	6	2
2018/1/16 PMOSH Online Q&A Jan 16 2018	12	6
2018/1/17 OMSA Info Session Jan 17 2018	163	3
2018/1/17 PMASE Online Q&A Jan 17 2018	21	7
2018/1/25 PMASE Online Q&A Jan 25 2018	8	5
2018/10/11 PMASE Info Session - 10/11/2018	3	3

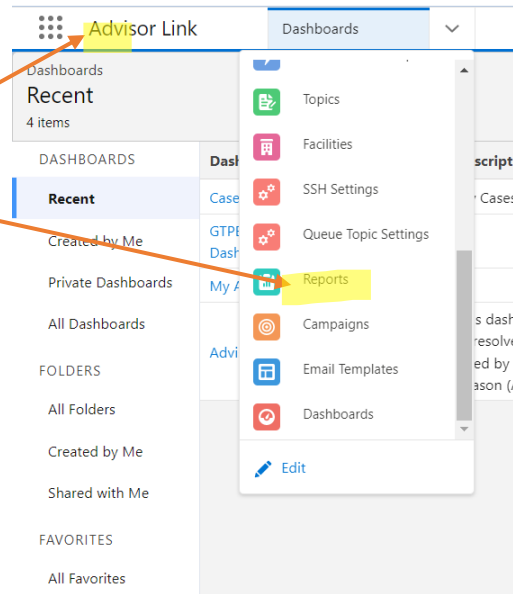
View Appointment Campaign Reports

1. Click Reports from Navigation Menu or App Launcher

2. Search for reports using

a) Tabs on Left – ALL reports & search bar on top right of the page

b) Go to All Folders (Undergraduate Campaign Folder) & look for a specific subfolders if available (GT Campaign Reports Library) and find the report manually or use the search bar at the top right of the page



Search recent reports...

REPORTS	Report Name	Folder	Description	Created By	Created On	Subscri...	Last Modified Date
Recent	Midterm Advising reports of U grades	GT Campaign Reports Library		Veena Kommagoni	4/13/2023, 11:58 AM		4/19/2023, 2:33 PM
Created by Me	My Advisees with Alerts	GT Campaign Reports Library		Veena Kommagoni	4/17/2023, 5:22 PM		4/20/2023, 2:25 PM
Private Reports	1/11 Executive MBA Webinar Registrants	CoB Marketing Reports		Maria Misbach	1/11/2022, 10:24 AM		1/11/2022, 10:26 AM
Public Reports	1st Generation Report for Undergraduates	GT Campaign Reports Library	This report contains all the first generation students in GT Undergraduate (BS) and non degree programs.	Devki Kumayan	4/18/2023, 12:23 PM		4/19/2023, 2:33 PM
Trended Reports	My Invited Students Active Advising Appt	GT Campaign Reports Library		Veena Kommagoni	4/17/2023, 5:22 PM		4/18/2023, 12:07 PM
All Reports	My Active Advising Appointment Campaigns	GT Campaign Reports Library		Veena Kommagoni	4/17/2023, 5:22 PM		4/18/2023, 11:58 AM
FOLDERS	All New Alerts Report	Private Reports	All New Alerts created in last 30 days	Devki Kumayan	9/16/2022, 3:15 PM		10/4/2022, 6:20 PM
Created by Me							
Shared with Me			This report is to identify what to do why Registration holds/General holds in this online team. As per me,				
FAVORITES							
All Favorites							

Reports

... > Undergraduate Campaigns Reports > GT Campaign Reports Library

REPORTS	Name	Description	Folder
Recent	My No Show Students Active Advising		GT Campaign Reports Library
Created by Me	My Students Active Advising Appt Camps		GT Campaign Reports Library
Private Reports	My Active Advising Appointment Campaigns		GT Campaign Reports Library
Public Reports	My No Action Students in Active Advi Cam		GT Campaign Reports Library
All Reports	My Advisees with Alerts		GT Campaign Reports Library
FOLDERS	All Students with Alerts by Program	Indicates which Students has Alerts that may need Advisor Attention	GT Campaign Reports Library
Created by Me	My Cancelled Students Active Advising		GT Campaign Reports Library
Shared with Me	My Invited Students Active Advising Appt		GT Campaign Reports Library
FAVORITES	My Advising Campaigns w/Campaign Members		GT Campaign Reports Library
All Favorites	Advising Campaign Report: Grade Concern		GT Campaign Reports Library
	1st Generation Report for Undergraduates	This report contains all the first generation students in GT Undergraduate (BS) and non degree programs	GT Campaign Reports Library
	Midterm Advising reports of U grades		GT Campaign Reports Library
	My Advisees with Alerts		GT Campaign Reports Library
	My Advisees	Report that shows your advisees	GT Campaign Reports Library

HOTS: Hands On Training Session (Demo)

Create, Clone
& Edit a Report

Add Filter
Criteria (s)

Add Campaign
Members from
a Report



HOT: Exercises - Working with My Students Active Advising Appointment Campaigns Reports (5 minutes)

1. Go to the reports via Folder/All reports
2. Search for the report- [My Students Active Advising Appt Camps](#).
3. Edit, change the filters to match your report criteria
4. Add a filter “Appointment Advisor” equals “Your Name”
5. Save the new report in your department folder with new name
6. Add the newly created report to a desired campaign

HOT: Exercises - Working with My Students with Alerts by Program Report (5 minutes)

1. Go to the reports via Folder/All reports
2. Search for the report- **All Students with Alerts by Program**
3. Click Edit and add filter criteria
 - ✓ Primary Academic Program = "BS in Your Program Name"
 - ✓ Reason = Open Incomplete
4. Save the new report in your department folder with new name
5. Add the newly created report to a desired campaign

HOT: Exercises – Generating New Reports to Add Students to Appointment Campaign (10 minutes or Homework)

1. Go to Reports
2. Choose the report type, report format
3. Select the fields you want to view on report
4. Select the filters
5. Add a description
6. Save As

[Salesforce User Group Presentation - Reports Basics.pptx](#)

Support Resources

Get Help After Go-Live: May 1, 2023

On 05/01/2023, Campaigns will be in production, and support will be provided using the Georgia Tech Enterprise Service Desk powered by ServiceNow:

- Access services.gatech.edu
 - Choose the “Teaching and Learning” tile
 - Select “Advising Platform (Advising Resources and Support for Advisors & Students)”
 - Then, complete the support form.: [Advisor Link Support Request](#)

The screenshot shows the ServiceNow portal interface. On the left, there is a 'Categories' sidebar with 'Advising Platform' selected. Below it is a 'Top Viewed Articles' section. The main content area is titled 'Advising Platform' and includes a 'Service Overview' section with text about Georgia Tech's advising programs and the new Salesforce Advisor Link platform. A link to <https://neweraadvising.gatech.edu/> is provided. Below the overview is a 'Service Items' section with two cards: 'Request Salesforce Enhancement' and 'Request Help – Academic Technology (remote classes, Teaching and Learning, ...)', which is highlighted with a red border. Both cards have a 'View Details' button.

Get Help After Go-Live: May 1st, 2023

- Support will be directed to:

Functional Support (OUE)

Examples:

I need help locating my active campaigns.

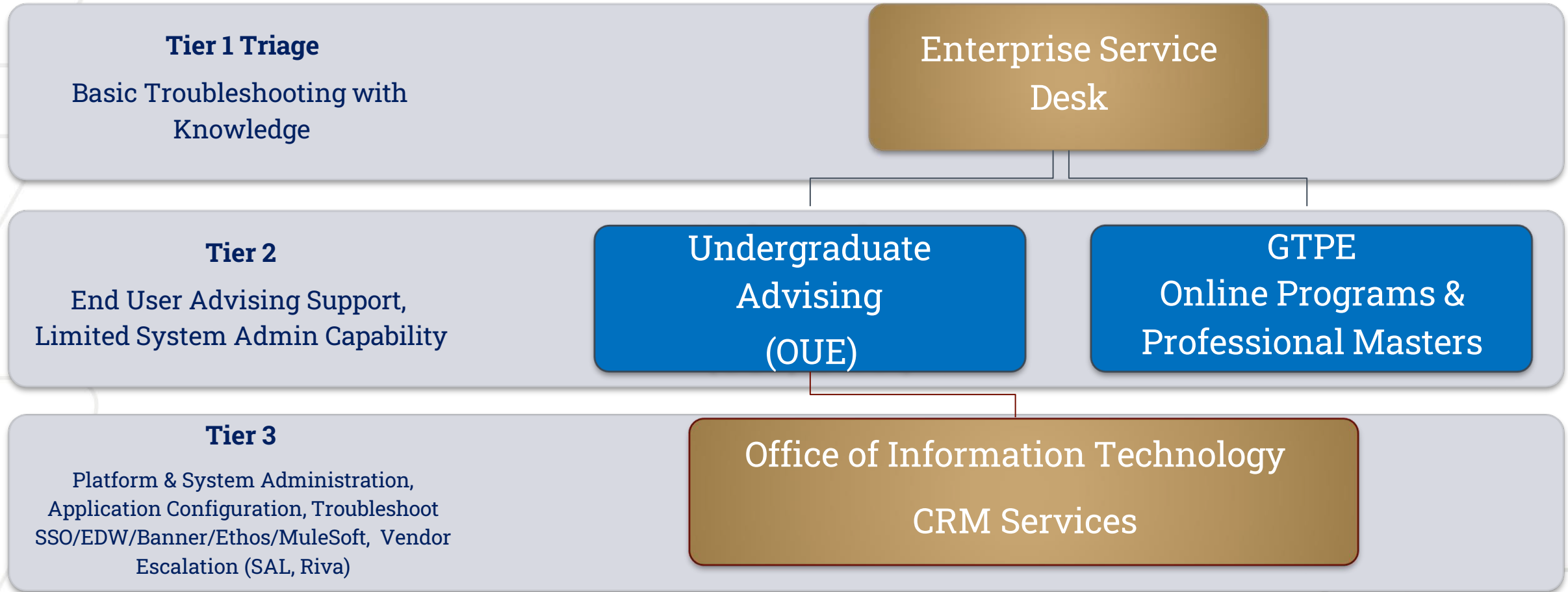
Technical Support (OUE and OIT)

Examples:

I can't log into the Advisor Link Interface.
I'm getting the following error message.

Salesforce Advisor Link Support Model

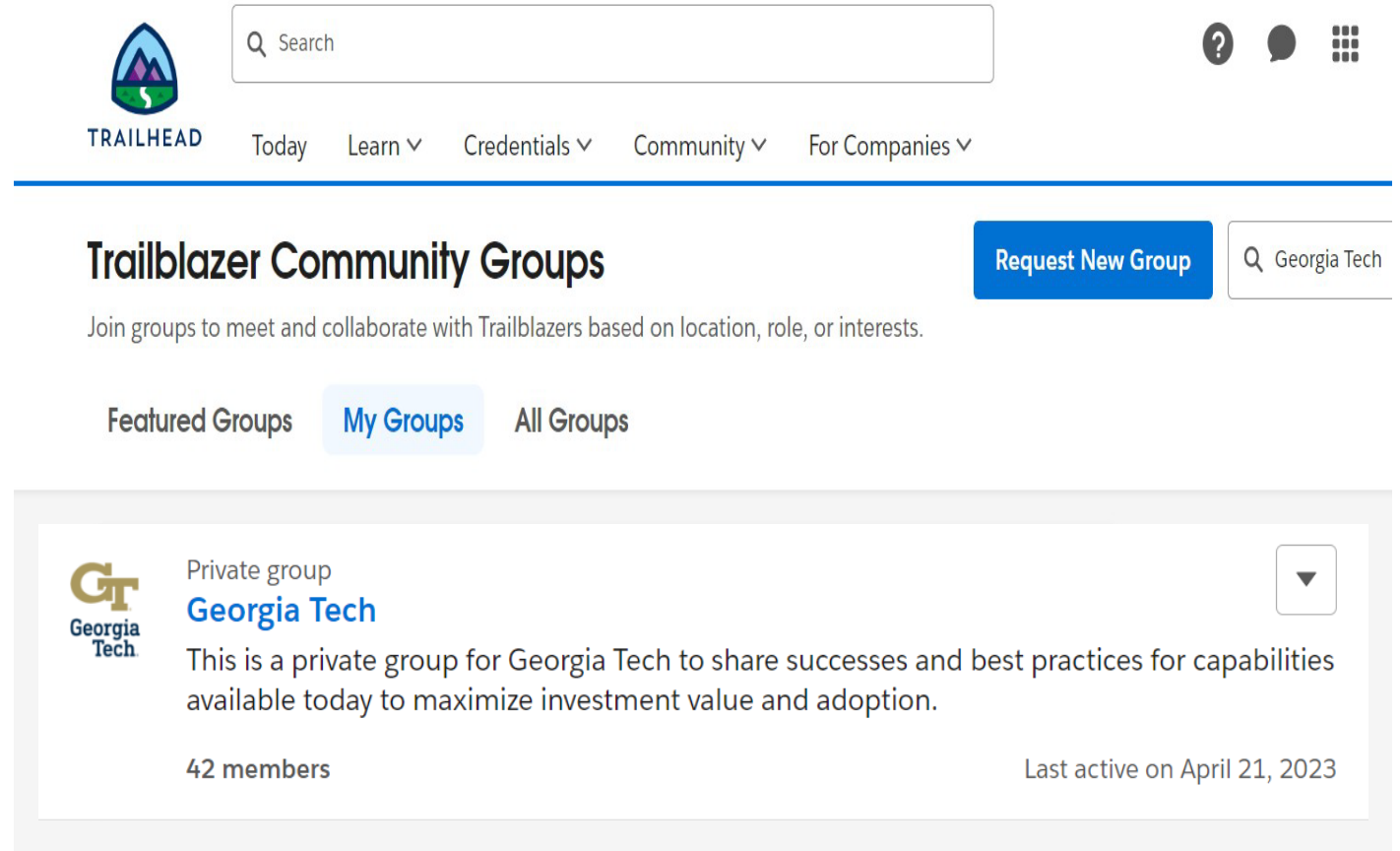
Advisor Link Support Request



Salesforce Advisor Link Resources

Join Georgia Tech Community on Trailblazer

- Create a Trailhead account at [Salesforce Trailhead](#)
- Go to Community
- Search for Georgia Tech Group
- Request to become a member




TRAILHEAD Today Learn ▾ Credentials ▾ Community ▾ For Companies ▾

Trailblazer Community Groups

Join groups to meet and collaborate with Trailblazers based on location, role, or interests.

Request New Group

Featured Groups **My Groups** All Groups

 Private group **Georgia Tech** ▼

This is a private group for Georgia Tech to share successes and best practices for capabilities available today to maximize investment value and adoption.

42 members Last active on April 21, 2023

Salesforce Advisor Link Resources

- [Salesforce User Community](#): Connect with other users in the Salesforce Trailblazer community.
 - Learn relevant skills and more
- [Salesforce Basics- Reports](#) : 2-hours
- [Salesforce Campaign Reports](#) : 5-minute overview
- [Salesforce Trailheads - Student Success Hub/Advisor Link](#) : Salesforce web-based training modules about the product
- [Advisor How-To Guides](#): Advisor job aids created by Georgia Tech
- [Getting Started using SAL](#): Basic end user WBT module developed by Georgia Tech

Log into Advisor Link PROD

Advisors: gatech.my.salesforce.com

- Use your standard GT Account for Single-Sign On

Access to the QA Sandbox

This is a Hands-on training workshop designed to engage attendees with the **basic features** of Advising Campaigns.

- Please log into the QA/TEST instance: <https://gatech--qa.sandbox.lightning.force.com>
- This QA/TEST instance is available from April 26 to May 19th, 2023
- You are encouraged to practice the HOTS (hands on trainings) exercises during and after today's workshop so:
 - To become familiar with the functionality in Test
 - To better identify the type of support you need
 - To better serve and engage with your students

Advising Campaign Support Office Hours	
May 1	3:00 – 4:00 PM
May 2 – May 5	11:00 AM – Noon
May 8	3:00 – 4:00 PM
May 9 – May 12	11:00 AM - Noon

Questions and Next Steps



Thank you!

Thank You!

We encourage you to use the QA Test Environment to become comfortable with the platform.

Please log into your QA Sandbox using : <https://gatech--qa.sandbox.lightning.force.com/lightning/page/home>