



ODU / Retain Advisor Guide



Welcome to Retain's user guide! *Last updated Aug 31st, 2020*

This guide is being updated for relevant training regarding the ODU Campus Rollout.

For all other questions please email retain@odu.edu

Logging In

URL: <https://app.retain.io>

You will be prompted to login through an ODU login page with your MIDAS ID. Please click "Campus Login?" at bottom of screen, enter school code of odu and hit Go!



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Google Chrome is the preferred web browser, however Firefox or Internet Explorer are still accepted.

Video on how to log in

Getting Started



➤ [Editing User Profile](#)



➤ [Notification Opti...](#)



➤ [Your Calendar](#)



➤ [Searching Stude...](#)

Managing Your Availability

You have the option to set appointment availability based on a variety of factors including location, appointment type, reason, or days of the week. Pair your availability with Outlook calendar sync for the most accurate conflict and open availability. You also have the option to define availability for In-Person or Remote activity!



➤ [Managing Availability](#)

Integrations

Zoom and Outlook 2-way integrations are enabled. Click on the Calendar icon in lower left-hand corner of your screen to open the integrations sidebar to authorize the apps. Once your Outlook is connected, you will see Busy appointments on your Retain calendar and any scheduled appointments through Retain will automatically appear in Outlook. For virtual appointments, if the Zoom option is selected, the Zoom meeting link will automatically be attached to the appointment details and can be launched directly from inside Retain. You also have the option in your Availability settings to define if you want appointments to be In-Person, Remote, or Both.



[↗ Outlook Calendar](#)



[↗ Zoom Meetings](#)

Appointment Campaigns

This feature allows you to create targeted scheduling requests for a specific appointment type that is sent to the student. Once created, the students will receive an email with your provided message and a unique scheduling link to book an appointment. You can select applicable students by group, tag, or other parameters. Additionally you will have the ability to do a "Bulk Search" by pasting in a list of Student ID numbers to directly target a specific list of students.



[↗ Appointment Campaigns](#)

Sending Email & Text Messages

You have the option to send out mass email or text message notifications through Retain. All outbound text messages that get sent will come from: **(757) 568-7486**

Historical Advising Notes

Existing Advising notes from EAB are available on the student profile pages. Click on the "Documents" tab and if there exists any notes, you will see a PDF file labeled "Notes Recorded Before Fall 2020" that you can open.

