



## Creating an Advising Appointment Campaign

### Step 1:

Click on the megaphone icon on the left-hand side.



### Step 2:

In the Campaigns menu, click on "Appointment Campaigns".

#### Student Campaigns

Student Campaigns are campaigns that can be sent directly to the students to complete a specific action or to be notified at different times.

[Appointment Campaigns](#)

Allows staff to reach out to specific student populations and encourage them to schedule appointments. Appointment Campaigns are best deployed by staff members seeking to encourage students to meet with them for advising or other services.

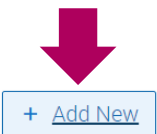
### Step 3:

On the Appointment Campaigns page, click on "Add New".

## Appointment Campaigns

[View All Campaign Types](#)

Filter by care unit:



[+ Add New](#)

View only my campaigns

### Step 4:

Complete your Campaign Configurations by completing the mandatory fields:

- **Campaign Name**
- **Care Unit**
- **Location**
- **Service**

Campaign Name \*  Instructions or Notes for Landing Page:

Care Unit: \*  Location: \*

Service: \*

### Step 5:

Complete your Appointment Configurations by completing the mandatory fields:

- **Appointment Limit**
- **Appointment Length**
- **Slots Per Time**

Appointment Limit: \*  x v

Appointment Length: \*  x v

Slots Per Time: \*  x v

Allow Scheduling Over Courses

Staff Reminders:  Email  Text      Recipient Reminders:  Email  Text

### Step 6:

Choose the dates you want your campaign to start and end in the Scheduling Window.

Start Date \*  v

End Date \*  v

### Step 7:

Click "Continue".

Save and Exit  

### Step 8:

Add students to your campaign. Use the search filters to find the students you want to make an advising appointment.

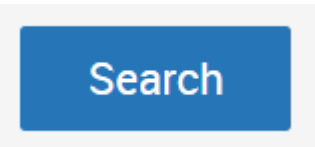
- **NOTE:** If you want currently enrolled students in your major, use the following:
  - In Category, choose "CSUB Main Campus (MAIN)" under Student Information.
  - In Enrollment Terms, choose the current term under Enrollment History.
  - In Major, choose the degree program under Area of Study.

#### New Search

| Saved Searches -  |                      |
|---|----------------------|
| Keywords (First Name, Last Name, E-mail, Student ID)?                                     | <input type="text"/> |
| <b>Student Information</b> First Name, Last Name, Student ID, Category, Tag, Student List | v                    |
| <b>Enrollment History</b> Enrollment Terms  | v                    |
| <b>Area of Study</b> College/School, Degree, Concentration, Major                         | v                    |
| <b>Term Data</b> Classification, Section Tag, Term GPA                                    | v                    |
| <b>Performance Data</b> GPA, Hours, Credits   | v                    |
| <b>Course Data</b> Course, Section, Status  | v                    |
| <b>Assigned To</b>  | v                    |
| <b>Success Indicators</b> Recommended Support Level, Success Markers                      | v                    |

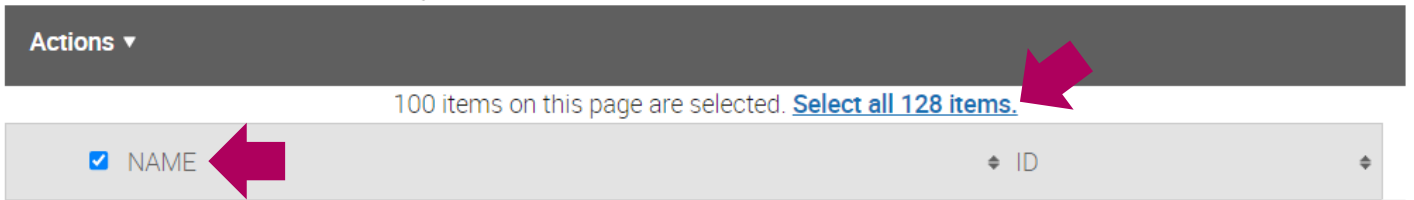
**Step 9:**

Click "Search".



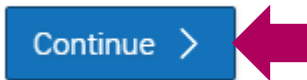
**Step 10:**

The list of students will show. To add them to your advising appointment campaign, click on the box next to NAME. If the list is more than 100, you will have to click on the link that will select all students.



**Step 11:**

Click "Continue".



**Step 12:**

Review the students that have been added to your advising appointment campaign. If everything looks good. Click "Continue".

- **NOTE:** You can add more students by clicking "Add More Recipients" - you won't lose your current list.



**Step 13:**

Select the Staff that will be available for students to choose from in the campaign.

- **NOTE:** If no one shows under Available Staff, it is due to their availability. They either don't have the service listed in their availability and/or have campaigns turned off in their availability.

**Available Staff**

Include Appointment Availabilities?

| ID                       | NAME | AVAILABLE TIMES  |
|--------------------------|------|--|
| <input type="checkbox"/> |      | <b>For: Appointments/Campaigns</b> Mon-Thu 9:00am - 5:00pm PT<br><b>For: Appointments/Campaigns</b> Fri 9:00am - 3:30pm PT<br><b>For: Appointments/Campaigns</b> Mon-Thu 9:00am - 4:00pm PT<br><b>For: Appointments/Campaigns</b> Fri 9:00am - 3:30pm PT |
| <input type="checkbox"/> |      | <b>For: Appointments/Campaigns</b> Mon-Fri 8:00am - 4:00pm PT<br><b>For: Appointments/Campaigns</b> Mon-Fri 8:00am - 4:00pm PT   |

**Step 14:**

Click "Continue".




**Step 15:**

Compose your Nudge (e-mail through Runner Connect). Click "Add Welcome Message".

**Nudges**

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.

+ Add Welcome Message



There are currently no nudges

**Step 16:**

Add your Welcome Message. Edit/change the template message. Attach any documents you want students to have and double check the send date.

Compose Message

Subject \*

{Sstudent\_first\_name}. Schedule an Advising appointment

Message \*

**B I** | | | | Heading 2 | Merge Tags | |

**Please Schedule Your Advising Appointment.**

**Hello {Sstudent\_first\_name}:**

Please schedule an appointment for Add/Drop Courses to my Schedule at Arts and Humanities Student Center. To do so, please click the following link, select a time that works with your schedule, and click Save. You will receive an email confirming the appointment time and details.

{Sschedule\_link}

Thank you!

Available Merge Tags

|                       |   |
|-----------------------|---|
| {Sstudent_name}       | Inserts the first name and last name of the student |
| {Sstudent_first_name} | Inserts the student's first name                    |
| {Sstudent_last_name}  | Inserts the student's last name                     |
| {Sschedule_link}      | Inserts a link to schedule the appointment          |

Add Attachment:

Choose File No file chosen

Send Date \*

September 7, 2023

Previous Nudge Dates:

N/A

Current Nudge Dates:

N/A

**Step 17:**

Click "Save Welcome Message".





**Step 18:**

You'll be taken back to the Compose Nudges page. You'll see your welcome message in Nudges.

**Nudges**

What would you like to say to your recipients? Set up your outreach and follow-up messages. Follow-up messages will only be sent to students who have not scheduled all appointments in the campaign.



**Send Date:** 09/07/2023  

**Email Subject:** {Sstudent\_first\_name}, Schedule an Advising appointment

**Email Message:** Please schedule your Advising appo...

**Step 19:**

Click "Continue".



**Step 20:**

Verify your Campaign Summary. Double check that everything is correct.

**Campaign Summary**

|                        |  |   |
|------------------------|--|---|
| <b>Define Campaign</b> | Name:<br>Care Unit:<br>Location:<br>Service:<br>Appointment Limit:<br>Appointment Length:<br>Slots Per Time:<br>Scheduling Window:<br>Allow Scheduling Over Courses:<br>Staff Reminders:<br>Recipient Reminders: | Advising<br>Arts and Humanities Student Center<br>Add/Drop Courses to my Schedule<br>1<br>30 mins<br>1<br>09/07/2023 - 09/21/2023<br>No<br>Email - Yes   Text - Yes<br>Email - Yes   Text - Yes |
| <b>Recipients</b>      | <a href="#">View 128 recipients</a>  |   |
| <b>Staff</b>           | <a href="#">View 1 staff</a>   |   |
| <b>Welcome Message</b> | Send Date:<br>Subject:<br>Email Preview:   | Thu 09/07/2023<br>{Sstudent_first_name}, Schedule an Advising appointment<br><a href="#">View Email</a>   |

**Quick Tips:**

- Once your campaign starts, you'll be able to click on the campaigns button (on the left side) to view the logistics of your campaign.
- You can edit and add more students individually to your campaign after it has started.
- You can resend nudges (messages) within the campaign.
- You can view who has scheduled, and who has not scheduled within the campaign.