Create an Advising Campaign

The **appointment campaign functionality** is the backbone of targeted outreach in Run4Success. It allows users to identify a population of students and proactively encourage them to schedule appointments using custom appointment campaign scheduling links and a dashboard for tracking communication. **Appointment campaign functionality in Run4Success automatically tracks and reports on which students in your targeted population have received communication, scheduled appointments, and completed those appointments, allowing for effective outreach and efficient follow-up.**

Questions? Contact Kim Raynor or Anne Van Der Karr at [student.success@newark.rutgers.edu](mailto:student.success@newark.rutgers.edu).

1. **Use the left-hand side bar to navigate to the Campaigns page, and then select ‘Appointment Campaign’ from the Actions table on the right side of the screen**

   ![Appointment Campaign Selection](image)

2. **You will be prompted to define the campaign**
   Fill in each field to name and set the parameters and goals of your campaign

![Define Campaign](image)

---

Create an advising appointment campaign 1-21  
3. **Continue to Add Students to Campaign** page and use the **Advanced Search** to identify the students you want to receive the campaign outreach.

![Advanced Search](image)

**Step 1:** Select your filtering criteria

- **You can choose to limit the search to only students that are assigned to you.**

**Step 2:** Click ‘Search’

---

**Example:** Craft your targeted student population by filtering for students majoring in Nursing who have completed between 30 and 45 credits.

![Example Filter](image)

**Area of Study**

<table>
<thead>
<tr>
<th>College/School</th>
<th>Degree</th>
<th>Concentration/Major</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>All</td>
<td>All</td>
</tr>
</tbody>
</table>

**Performance Data**

- **Min. Credits Earned:** 30
- **Max. Credits Earned:** 45
- **Min. Hours Attempted:** 0
- **Max. Hours:** 5000

---

You have several options for choosing the right students to include in your campaign once you have selected the enrollment status and term:

- **Student Information** – Filter students by name, gender, race, or a pre-existing watch list.
- **Area of Study** – Filter students by college, concentration, degree, or major.
- **Performance Data** – Filter by min. or max. credits earned.
- **Semester Data** – Filter by semester-specific data, such as term GPA or professor and section assignment.
- **Course Data** – Filter by course.
- **Assigned To** – Filter by advisor, tutor, coach, or team member assignment.
4. Review the invite list and add students to your campaign

5. Add Advisors to your campaign
   You need to choose which Advisors are available for appointments. You must select yourself. You can also select additional staff.

Students can schedule with any Advisor in the campaign. Appointment campaigns override any restriction that students can only meet with their assigned Advisor.
Create an advising appointment campaign 1-21

6. **Compose the message you want students to receive**

You have the ability to customize both the subject line and the messaging of the email you will send to students. The invitation to schedule an appointment through the campaign appears in a preview panel below the message.

![Compose Your Message](image)

**Use Merge Tags like this to include each student’s name in their message**

- **subject_line**: ([Student_first_name], Schedule an Advising Appointment)
- **[schedule_link]**: A link to schedule the appointment is directly embedded in the email the student receives

**Warning:** Do not remove the schedule link from the email body.

---

7. **Confirm and Send**

Review your campaign details, invitees, and advisors on this page. Select how your organizers and attendees get reminders about appointments.

![S21 Planning Check](image)

**Click Send** when you are ready to email the invites to the selected students.

Once you have sent out the campaign, you will be able to track appointments made as a result of the campaign at any time by revisiting the Campaigns page and selecting the 'Appointment Campaigns' tab.