

## Managing Campaigns

Learn how to create and manage a Campaign within the Customer Relationship Management application.

## By creating a campaign you can:

Plan and Create

Record and Measure

Assign Employees to Campaigns

Outline Responsibilities

Email Campaigns (Sales Correspondence)

### Creating a campaign gives you the ability to:

- Plan and create marketing initiatives by defining your objectives.
- Record and measure the effectiveness of your Campaign.
- Assign Employees to specific campaigns.
- Outline the responsibilities for those employees.
- And you are able to create an email campaign with your contacts, but you must use the Sales Correspondence Application to do so.

List Maintenance Import Contacts

**Marketing Campaigns** <<

- All Campaigns
- Completed
- Planning Stage
- Scheduled

.....

- Tasks
- Contacts
- Leads
- Notes
- Reports
- Events
- Marketing Campaigns**
- Proposals

+ Add New

Subject	Type
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2. Then select 'Add New' to create a new Campaign.

1. Select 'Marketing Campaigns'.

To begin, select:

1. 'Marketing Campaigns'
2. Then select 'Add New' to create a new campaign.

**Campaign - Untitled**

Save and Close Cancel

Campaign Detail

Assigned Tasks

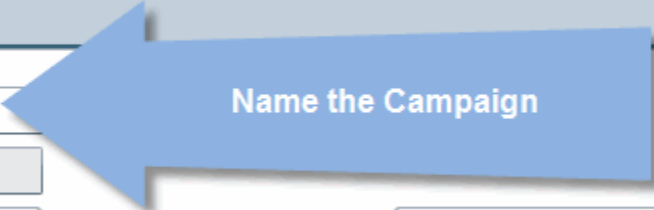
Notes

**Campaign**

Owner Alex Sherman

Status

Type



The 'New Campaign' window will then appear. First begin by adding the name of the Campaign.

**Campaign - Untitled**

Save and Close Cancel

Campaign Detail

**Campaign** New Campaign

**Owner** Alex Sherman

**Status**  **Type**

**Start Date**  **End Date**

**Description**

Total Distribution Number (if applicable)

Expected Response  Actual Response

Budgeted Cost  Actual Cost

Expected Revenue  Actual Revenue

Select a 'Status'.

Then select a 'Type'.

-Then select a status type that represents the current status of the campaign. And select a 'Campaign Type'. A 'Campaign Type' can be the channel that you are using to drive your campaign.

*For example*, you may be using a series of direct mail flyers, or emails that are carrying the intended marketing message to your specified contacts. Both 'Status' and 'Campaign Types' can be added or edited through the 'Admin' tab under the 'Maintenance' option.

**Campaign - Untitled**

Save and Close Cancel

Campaign Detail

**Campaign**

Owner

Status  Type

---

**Start Date**

**End Date**

Description

Total Distribution Number (if applicable)

Expected Response  Actual Response

Budgeted Cost  Actual Cost

Expected Revenue  Actual Revenue

Then select a start date and end date for the Campaign.

After selecting the Status and Campaign types, you may select the Start and End dates for the campaign which will appear on your main calendar.

**Campaign - Untitled**

Save and Close Cancel

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**Campaign Detail**

**Campaign**

**Owner**

**Status**  **Type**

---

**Start Date**

**End Date**

---

**Description**

← Add a description here.

---

Total Distribution Number (if applicable)

Expected Response <input type="text" value="50"/>	Actual Response <input type="text" value="0"/>
Budgeted Cost <input type="text" value="\$100.00"/>	Actual Cost <input type="text" value="\$0.00"/>
Expected Revenue <input type="text" value="250.00"/>	Actual Revenue <input type="text" value="\$0.00"/>

Next, if necessary, you may add a description to help explain the message and purpose of the campaign to other employees.

**Campaign - Untitled**

Save and Close Cancel

Campaign Detail

Assigned Tasks

Notes

**Campaign** New Campaign

Owner Alex Sherman

Status Scheduled Type Print Ad

**Start Date** Monday, April 05, 2010

**End Date** Friday, April 09, 2010

Description This campaign is to focus on Print Ad.

Total Distribution Number (if applicable)

Expected Response	<input type="text" value="50"/>	Actual Response	<input type="text" value="0"/>
Budgeted Cost	<input type="text" value="\$100.00"/>	Actual Cost	<input type="text" value="\$0.00"/>
Expected Revenue	<input type="text" value="250.00"/>	Actual Revenue	<input type="text" value="\$0.00"/>

Add estimated information here.

Next, be sure to add what your expected number of responses from the campaign maybe,

- Here for example the number of expected responses is 50 based on the number of direct mail flyers that I may be sending out to my contacts.
- My budgeted cost of \$100 is what I expected to pay for the campaign, and is the costs associated with the direct mail flyers.
- And my expected revenue is based on the 50 contacts that may purchase my product as a result of this campaign.

The actual costs and responses are to be put in after the campaign has ended.

**Campaign - Untitled**

Save and Close Cancel

**Campaign Detail**

**Campaign** New Campaign

Owner Alex Sherman

Status Scheduled Type Print Ad

---

**Start Date** Monday, April 05, 2010

**End Date** Friday, April 09, 2010

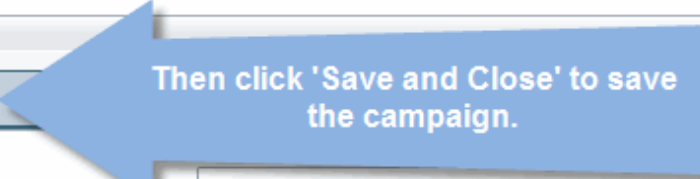
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**Description** This campaign is to focus on Print Ad.

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Total Distribution Number (if applicable)

Expected Response	50	Actual Response	0
Budgeted Cost	\$100.00	Actual Cost	\$0.00
Expected Revenue	250.00	Actual Revenue	\$0.00



After completing the new Campaign be sure to click 'Save and Close' to save the Campaign.

Calendar

Today Day Week **Month**

April - 2010

March, 2010

Su	Mo	Tu	We	Th	Fr	Sa
28	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10




May, 2010

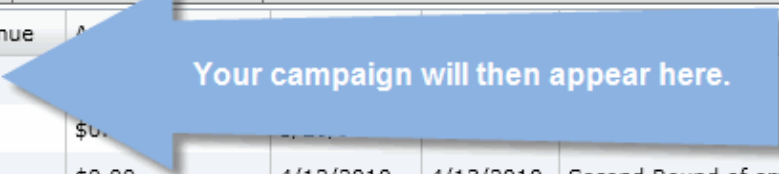
Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
March	28	29	30	31	April 1	2	3
Mar28 - Apr3							
	4	5	6	7	8	9	10
Apr4 - Apr10	Campaign: New Campaign						
	11	12	13	14	15	16	17
Apr11 - Apr17							
	18	19	20	21	22	23	24
Apr18 - Apr24							
	25	26	27	28	29	30	May 1
Apr25 - May1							




Your Campaign will then appear on your Calendar.

Your new Campaign will then appear in your main calendar.

+ Add New		Search		Action		Multi-Edit Form		Grid Columns		Total Records: 3	
Subject	Type	Status	Expected Revenue								
 New Campaign	Print Ad	Scheduled	\$250.00								focus on Print Ad....
 First Round email blast.	eMail Distribution	Scheduled	\$1,200.00	\$0.00							sent to a database ...
 Second Round Email Blast	eMail Distribution	Scheduled	\$350.00	\$0.00	4/12/2010	4/13/2010	Second Round of email blasts will be sen...				



The new Campaign will also appear in your 'Campaign List'.

+ Add New		Search		Action		Multi-Edit Form		Grid Columns		Total Records: 3	
Subject				Actual Revenue	Start Date	End Date	Description				
				\$0.00	4/5/2010	4/9/2010	This campaign is to focus on Print Ad....				
View Details											
	First Round Email blast.	eMail Distribution	Scheduled	\$1,200.00	\$0.00	3/26/2010	3/31/2010	Three emails will be sent to a database ...			
	Second Round Email blast	eMail Distribution	Scheduled	\$350.00	\$0.00	4/12/2010	4/13/2010	Second Round of email blasts will be sen...			

Double Click the selected Campaign, or select the drop down function.

Then you may click 'View Details' to open up the selected campaign.

To add or edit any information to an existing campaign select the 'Campaign' and click the 'View Details' button to continue.

**Campaign Form: New Campaign**

Save and Close

Delete Record

Cancel

Campaign Detail

Su

Assigned Tasks

You may assign tasks to a specific employee.

Sta  Type: Print Ad

Notes

Start Date: Monday, April 05, 2010

You may also add additional notes to the campaign.

us on Print Ad.

Total Distribution Number (if applicable):

Expected  Actual Response: 0

You are also able to record the Actual Responses, Cost, and Revenue that the campaign has generated.

Actual Cost: \$0.00

Expected  Actual Revenue: \$0.00