

# 6.1.1 Step 1: Campaign

**Creating Campaign**

**Campaign Information**

Campaign Name:

Campaign No:

Campaign Status:

Product:

Expected Close Date:

Target Size:

Assigned To:

Campaign Type:

Target Audience:

Sponsor:

Num Sent:

**Expectations & Actuals**

Budget Cost: (€)

Actual Cost: (€)

In order to create a regular newsletters (e.g. with weekly frequency) addressed to a specific target in your database, you must first create a new campaign that will act as the newsletters “container”.

Note that “Campaigns” is a horizontal module that can be used also for other kinds of campaigns, such as telemarketing or events.

Create a new record from Campaigns with the CREATE button

Most of the fields shown are optional. If you are creating a newsletter-type campaign, fields like Revenue, Budget and Costs are less relevant (so you can omit them) compared, for example, to a trade show type campaign.

<b>Campaign Name</b>	Choose a name based on the objective
<b>Campaign Type</b>	Choose the campaign type from the picklist (admin-editable values)
<b>Product</b>	Select a product from the CRM and link it to the campaign, if relevant
<b>Campaign Status</b>	Select the status (list can be changed by the administrator)
<b>Expected Close Date</b>	Date on which campaign will be ended

<b>Expected Revenue</b>	Amount of profit expected to be generated by the campaign
<b>Budget Cost</b>	Costs incurred for the campaign (indicated e.g. for trade show type campaigns)
<b>Assigned to</b>	User or group responsible for campaign management
<b>Target</b>	Describe target to which the campaign is addressed (Information text field)

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