

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.

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

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

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