

6.1.2 Step 2: Target

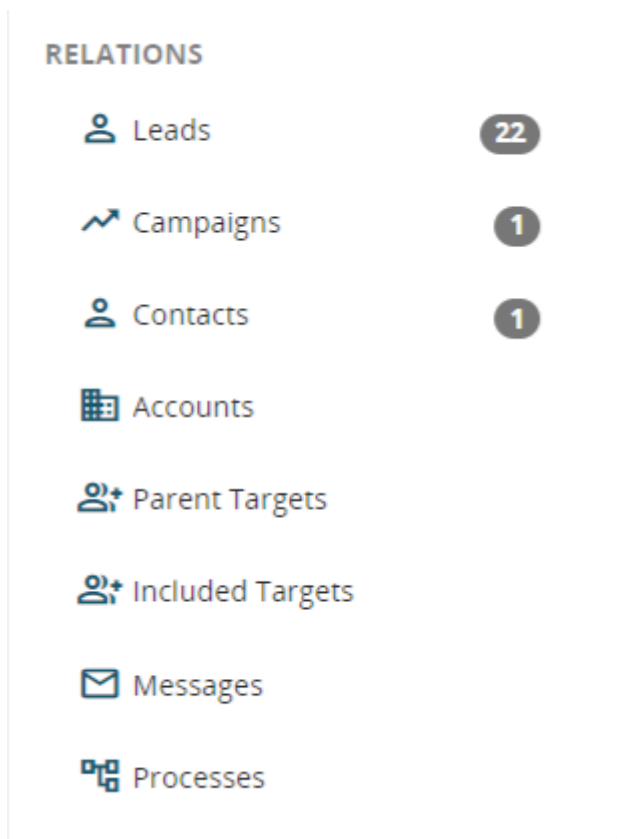
At this point the campaign recipients target must be defined, associating Targets and Campaigns. In the campaign tab, select the Target module and then Add Target in the Relations menu. If the target has already been created, use Select Target to select it.

N.B.: you can add more than one.

The screenshot shows a CRM interface with a sidebar on the left and a main content area. The main content area has a 'Notes - Slider' section with a '+ CREATE' button. On the right, there is a 'SHORTCUTS' and 'RELATIONS' sidebar. The 'RELATIONS' sidebar lists 'Newsletter', 'Targets', 'Potentials', 'Activities', 'Messages', and 'Processes'. The 'Targets' link is highlighted, and a red arrow points from it to a table at the bottom of the page. The table is titled 'Targets (1) - List' and contains one row of data. The table has columns for 'Action', 'Target Name', 'Target Type', 'Target State', 'End Time', and 'Assigned To'. The first row shows 'Potential Customers' as the target name, with other fields set to default or empty values.

Action	Target Name	Target Type	Target State	End Time	Assigned To
	Potential Customers	-- Nessuno --	-- Nessuno --	09-02-2019	formazione.vtenext@gmail.com (Francesco Villani)

The target is composed of lists of names, a set of accounts, contacts and/or leads (also of other targets). The names are loaded either individually (with single name search) or by means of filters.



Choose the module concerned in the relations menu, select the filter from the drop-down menu and click Load List.

The filter must be already available (e.g.: Filter Customers in Foreign Companies) and then used as a target.

The 'Contacts (10) - List' view displays a table of contacts. The table has the following columns: Action, Last Name, First Name, Title, Account Name, Email, Office Phone, and Assigned To. The table contains 10 rows of contact data. The right sidebar shows the 'RELATIONS' menu with 'Contacts' selected.

Action	Last Name	First Name	Title	Account Name	Email	Office Phone	Assigned To
	Benedetti	Manuel		VTENEXT s.r.l.	manuel.benedetti@vtenext.com		
	Brown	Elizabeth	Director Operations	vteuser	test123123@gmail.com	(741) 842-5067	
	Brown	Elizabeth	VP Sales	X-CEED INC 99	test12311@virgilio.com	(806) 029-0390	
	CAMPONALIS	MARINE		samplevte	test123@test123.com	(8796)7296999	
	CLAMINER	RAFFAEL		vteCRM Inc	test123@test123.com	(8799)83582373	
	CORIONAL	BRUNE		De BRUNE CORIONAL s.n.c.	test123@test123.com	3395088235	

N.B.: With this new function it is no longer necessary to reload a target in order to manage a newsletter. The target will be updated automatically in two ways (user selectable):

- **Incremental:** names are added to the target based on the initial filter. Does not take into account filter variations that result in record exclusions;

- **Synchronised:** varies upward and downward based on the filter.

This update will occur automatically every 6 hours thanks to a cron that allows you to reload the records to the target automatically. In addition, automatic synchronisation is performed when the Newsletter is sent, or when the user decides to click on the Send Email button.

If the Target is set to **Target Type = Dynamic** and **Synchronisation Type = Synchronised**, in the Accounts, Contacts and Leads relationships, the **Add** and **Select** buttons of the relative entities will not be available.

In the example in the above figure, the target includes 498 accounts, 2 contacts and 0 leads. The campaign, which involves sending a newsletter in our case, will be addressed to this set of recipients.

Note. The Newsletter module can manage duplicated email addresses avoiding repeat sends to the same email address. Therefore, if the target includes an account and a contact associated with the same email address, the newsletter will be sent only once, and no manual clean-up operations will be necessary.

The targets can be nested and included, exclusively in order to group specific customers together. For example, you can create an Italy target (parent target) containing a target for each Italian region (included targets). When you send the newsletter, it is sent to all recipients indiscriminately. The function is display only.

The screenshot shows the CRM interface for the 'Campaign DM Campaign to Top Customers'. The main content area displays a large document icon. On the right, the 'RELATIONS' sidebar is visible, with 'Newsletter' highlighted. Below the sidebar, a table titled 'Newsletter (1) - List' is shown, containing one row of data.

Action	Newsletter Name	Date scheduled	Time scheduled (hh:mm)	Assigned To	Scheduled
	Potential Customers	09-02-2019	17:25		yes

Revision #1

Created 2 September 2024 07:59:01 by Admin

Updated 2 September 2024 07:59:01 by Admin