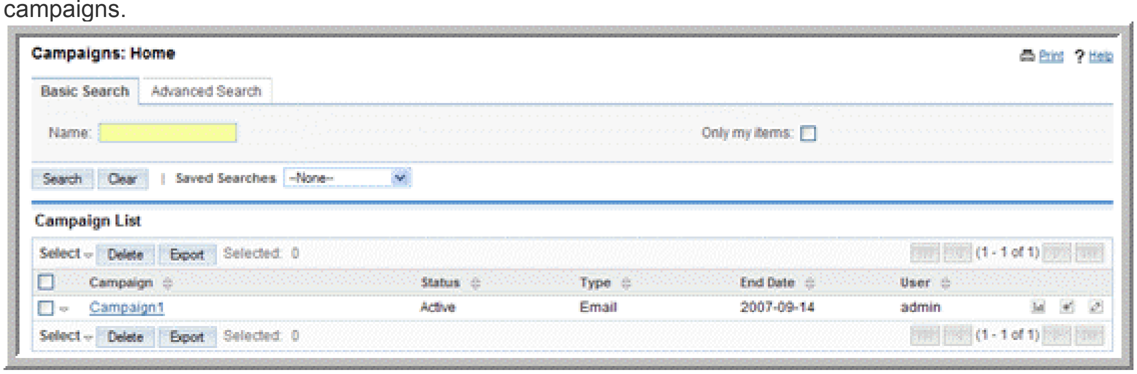
How to use the CAMPAIGN MODULE

Campaigns Module

Use the Campaigns Module to track and manage mass marketing campaigns.



You can create many types of campaigns.
From Contacts, Leads, and Opportunities modules, you can associate a record with an existing campaign.
Typically, a mass marketing campaign targets a large group of individuals or organizations. Therefore, the campaign process begins with identifying the targets. You can group multiple targets into a target list according to a set of predetermined criteria such as age group or spending habits.
Creating and Importing Campaign Targets
A target is an individual that you have some information on but does not qualify as a lead or contact. Targets are stand-alone records that are not attached to contacts, leads, or opportunities. However, you can add contacts, leads, and users to a campaign's target list.
You can add targets to a target list by importing them from a file (either CSV or TSV) or by selecting them from existing contacts and leads
Usually, you create or import a target list first, associate it with targets, and then associate it with a campaign. However, you can also create a campaign first and then associate it with a target list.
The general process is as follows:

Targets → Target List → Campaign

A target list can specify either individuals who need to be included in a campaign or excluded from a campaign. You can create one of the following types of target lists:

Default. A list of people who are the campaign targets and receive the campaign email.
Seed. A list of people who need to receive the campaign email but must not be tracked as potential leads. Typically, these are individuals who need to approve the campaign before it is launched.
Test. A list of people who receive the campaign email to test how different email clients display the campaign message before you send it out to the default list.
Suppression List. A list of people you want excluded from the campaign email recipient list. Typically, these are people who chose to opt out of receiving your campaign message. Suppression lists can be by ID, email address, or domain.

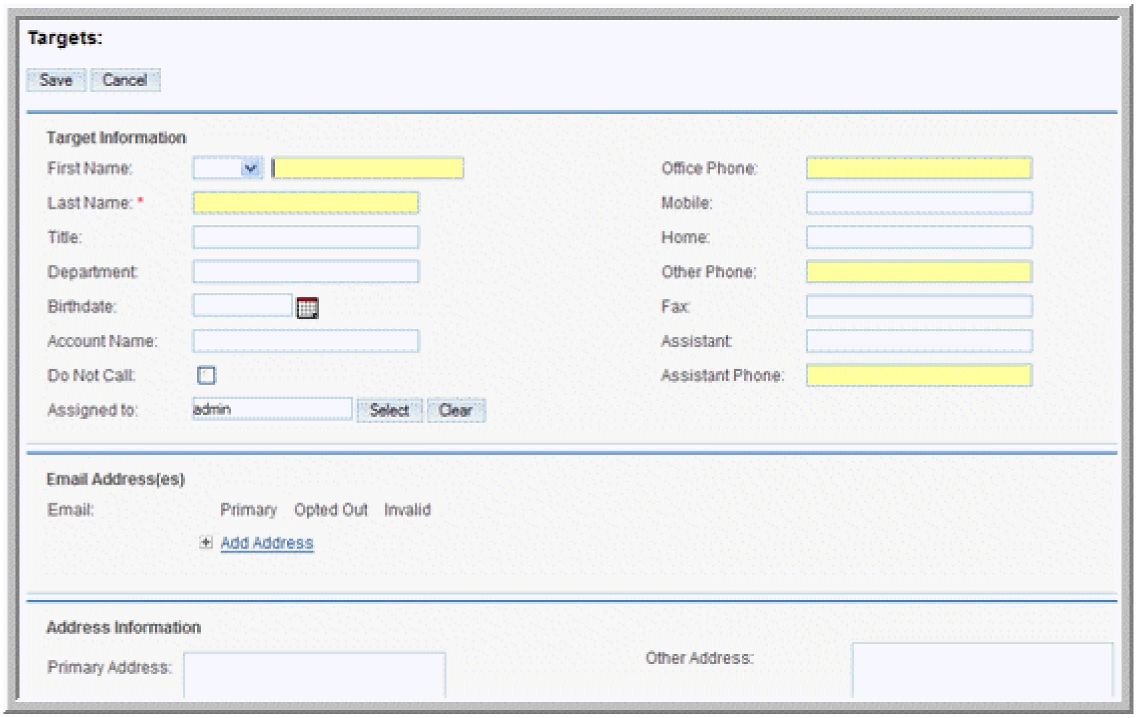
Note:Test and seed lists are ignored in email tracking statistics.

To create a target list

1.From the Shortcuts menu on the Campaigns Home page, click **Create Target List**.
2.On the Target Lists page, enter the following information:
Name. Enter a name for the target list.
Type. From the drop-down list, select the target list type.
Assigned to. Enter the name of the user assigned to this list; click **Select** to select from the User list. By default, it is assigned to you.
Description. Enter a brief description of the target list.
3.Click **Save** to save the target list; click **Cancel** to exit the page without creating the list.

To create a target

1.In the Shortcuts menu, click **Create Target**.



Targets are stand-alone records that are not attached to Contacts or Leads. If you plan to send emails
Note:to existing Contacts or Leads, you can skip the step below.

2. On the Targets page, enter information for the following fields:

Target Information

First Name. Enter the target's first name.
Last Name. Enter the target's last name.
Office Phone. Enter the target's work number.
Mobile. Enter the target's mobile phone number.
Home. Enter the target's home phone number.
Other Phone. Enter the alternative phone number, if any.
Fax. Enter the target's fax number.
Assistant. Enter the target's assistant's name.
Assistant Phone. Enter the assistant's phone number.
Department. Enter the name of the department to which the target belongs.
Birthdate. Enter the target's birth date.
Account Name. Enter the name of the account related to the target.
Do Not Call. Select this box to add the target's name to the Do Not Call list.
Assigned to. Select the user who has ownership of the account related to the target.

Email Address(es). Enter one or more emails addresses for the contact and select Primary. If an email address is incorrect, select Invalid to indicate it. If you sent out campaign emails this contact and the individual chose to opt-out of receiving them, select Opted Out.

To add an additional email address, click Add Address. You can add multiple email addresses.

Address Information. Enter the primary address and other address information. To copy information from one section to the other, you can enter the address information on either one of the sections and click the arrow buttons.

Description. Enter a brief description of the target.

3.Click Save to create the target; click Cancel to exit the page without creating the target.

When you save the target, the target's detail page displays the Campaign Log sub-panel, which lists all the campaigns that you sent to the target.

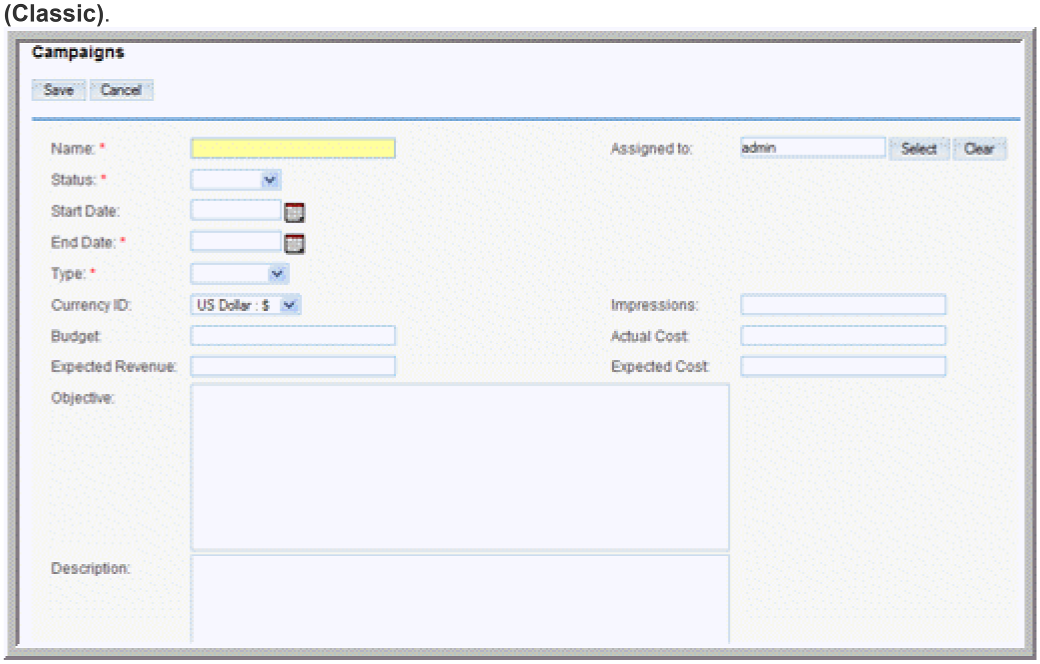
Creating a Campaign

You can create a campaign using the Campaign Classic option or the Campaign Wizard option. When you use the Campaign Classic option, you are creating a campaign record but you are not completing related tasks such as specifying the email settings.
When you use the Campaign Wizard, it guides you through the process of creating the campaign as well as completing related tasks. .
The Campaigns module provides an embedded Return on Investment (ROI) form that you can use to gauge the success of an executed campaignTypes of Campaigns
You can create the many types of marketing campaigns such as Email, Newsletter, Mail, Web, Radio, Television, Print, and Telesales.
When you create a campaign such as Mail and Radio, you are creating a record in Sugar for your reference. However, you cannot execute the campaign through Sugar.
When you create an Email campaign or a Newsletter campaign, you can execute it through Sugar. In an Email campaign, you send out a one-time email with the information that is of interest to your targets. In a newsletter campaign, you email a newsletter to your targets on a regular basis. For example, a newsletter can contain information on product updates. You can send out a newsletter on a weekly, monthly, quarterly, or yearly basis. To measure the campaign’s success, you can view statistics such as the number of targets that responded, the number of opportunities that were created, and the generated revenue.
After you launch an Email or Newsletter campaign, you can view its status to determine its success. For example, you can view how many targets viewed the campaign email, how many clicked any links that were included in the email, and how many leads and contacts were created from the campaign. To capture leads from an email or a newsletter campaign, you can create a Web-to-Lead form. For Email campaigns, you can embed images in your email templates instead of sending them as attachments. This prevents your emails from being reported as spam. A campaign diagnostic tool is provided to help you ensure that all pending administrative tasks, such as setting up a bounce-handling inbox, have been completed.

Note:You must be an administrator to use the Email Setup option that displays in the Shortcuts menu.

To create a campaign

1. From the Shortcuts menu, select **Create Campaign (Classic)**.



2. Enter information for the following fields:

Name. Enter the campaign name.
Assigned to. Enter the name of the user assigned to the campaign; to choose a user from the Users list, click **Select**, and click the user name.
Status. From the drop-down list, select the current status of the campaign.
Start Date. Click the Calendar icon and select the date on which the campaign begins.

End Date. Click the Calendar icon and select the date on which the campaign ends.

Note: The Start Date, End Date, and Status values are for your records only. These values do not impact the execution of an email marketing campaign.

Type. From the drop-down list, select the campaign type such as email or trade show.

Currency. From the drop-down list, select the currency used to calculate the budget, cost, and revenue.

Impressions. Enter the number of page impressions generated from the campaign. You will need to fill in this field after the campaign has commenced.

Budget. Enter the budget for the campaign.

Actual Cost. Enter the actual cost incurred to conduct the campaign.

Expected Revenue. Enter the estimated revenue from the campaign.

Expected Cost. Enter the estimated cost of the campaign.

Objective. Explain the goal of the campaign.

Description. Enter a brief description of the campaign.

3. Click **Save** to save the campaign; click **Cancel** to return to the Campaigns home page without creating the campaign.

The system displays the campaign's detail page. The detail page of an email campaign or a newsletter campaign displays sub-panels for targets, tracker URLs, and email marketing. You can create and view any of this information from the respective sub-panels.

Executing an Email Campaign

The process of executing an email campaign consists of the following steps:

1. The Campaign wizard will guide you through the steps listed below.
2. You can import targets, or create a new target list, or merge with existing target list. You can also select individuals from a lead report or a contact report.
3. Create an email template containing the message you want to convey to your targets.
4. Specify an inbox for bounce-handling. This is required to handle campaign emails that bounce back to you. Only administrators can set up mailboxes for inbound emails. When you create a bounce-handling inbox, all bounced campaign emails are routed to that inbox. Bounced emails contain specific identifiers that enable you to tell them apart from emails that are responses from your targets.

For more information on creating a mailbox, see the Sugar Community Edition Installation and Administration Guide.

5. Create an email marketing record that specifies information such as the target list, the email template, the campaign start date, and the bounce-handling inbox.
6. Optionally, specify one or more Tracker Redirect URLs to track campaign activities
7. Optionally, run the diagnostic tool to ensure that the email campaign will be successfully executed.
8. Send a test email to your test list to ensure the operation is successful.
9. Clear statistics from the test email.
10. Request the administrator to schedule a job to send out the campaign emails.
11. Queue the email for the campaign launch.
12. Optionally, convert the campaign targets into leads or contacts.

You can associate a Web-to-Lead form with the campaign. After you launch an email campaign, you can view the campaign status for information on the campaign results.

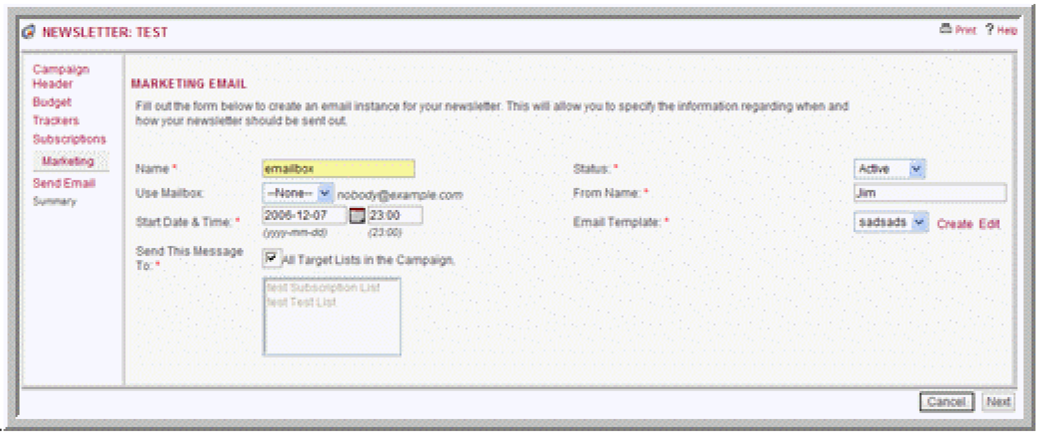
Note: The start date, start time, and status specified on the email marketing page determine when the email is sent.

Creating Email Marketing Records

When you create an email campaign, you must also create an email marketing record that contains information such as the campaign target list, the campaign email template, and the inbox to handle emails that bounce back to you. You must specify the email marketing start date and time that is in the past to queue it for delivery. Any emails that bounce back are sent to the From address defined in this record.

To create an email marketing record

1. On the campaign's detail page, scroll down to the Email Marketing sub-panel and click



Create.

2.On the Email Marketing page, enter information for the following fields:

Name. Enter a name for the record.

Status. From the drop-down list, select Active if the record is in use; select Inactive if the record is not in use. Only active records will be queued for campaign launch.

Use Mailbox. From the drop-down list, select a mailbox that is set up for BounceHandling.

From Name. Enter the name of the organization or person that is sending out the email.

Start Date & Time. Click the Calendar icon and select a date to send out the email. Enter the time in the adjoining field.

To queue the email for campaign launch, select a date and time that has already passed. Do this after Note:you ensure that the test email was successful.

Email Template. From the drop-down list, select an existing email template; to create a new template or edit an existing one, click the adjoining **Create** or **Edit** link respectively.

You will need to edit the template to add the Tracker URLs described below into Text and HTML formats.

Send This Message to. Select one or more target lists from the box below; to send it to all the target lists in the box, select the All Target Lists in the Campaign box.

3.To save the record, click **Save**; click **Cancel** to exit the page without saving your changes.

Creating Tracker Redirect URLs

A campaign email can contain not only the campaign message but also images and links. Links can direct targets to other URLs such as an external Web site or a.php file on your system.

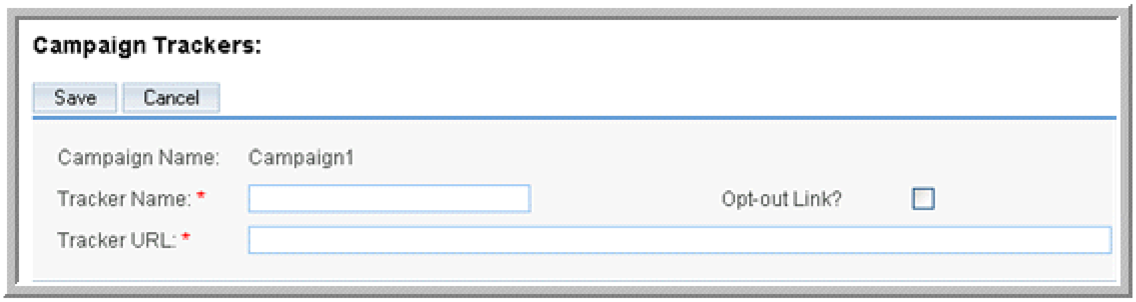
You can use one or more tracker URLs in your campaign emails to track the response to your campaign. The system generates a unique key for each URL and for each recipient and associates it with the email template. When recipients open the email and click on a URL link, the system, using the unique key identifier, track each action by each recipient.

You can also provide a link to allow targets to unsubscribe themselves from your campaign mailing list. You can embed an “Unsubscribe” link in a tracker URL. When targets click on this URL to unsubscribe from your campaign emails, the system logs the action for your records.

Before you create a campaign email, check with your system administrator to ensure that the outbound email process is configured to send email from your system as described in Configure System section Note:and Mass Emailing section.

To create a tracker redirect URL

On the Campaign's detail page, scroll down to the Tracker URLs sub-panel, and click **Create**.



1.

2. On the Campaign Trackers page, enter information for the following fields:

Tracker Name. Enter a tracker name for your reference; use alpha-numeric characters.

Tracker URL. Enter the tracker URL; for example, http://www.sugarcrm.com.

Opt-out Link? Select this box to embed your "Unsubscribe" instructions in a tracker URL. By default, the system uses the removeme.php file which contains these instructions, and displays this file name in the Tracker URL field.

3.To create the campaign tracker, click **Save**; click **Cancel** to exit the page without saving your changes. You can now insert this tracker URL into an email template of your choice.

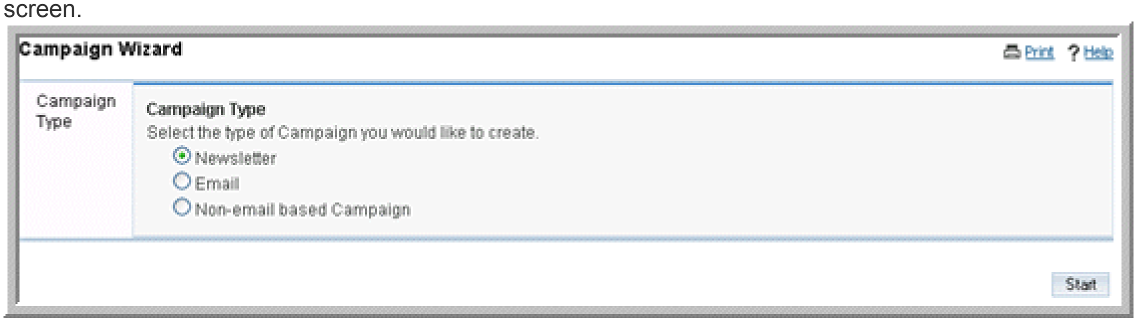
Using the Campaign Wizard

You can use the campaign wizard to guide you through the process of creating a campaign.

To create a campaign using the Campaign Wizard

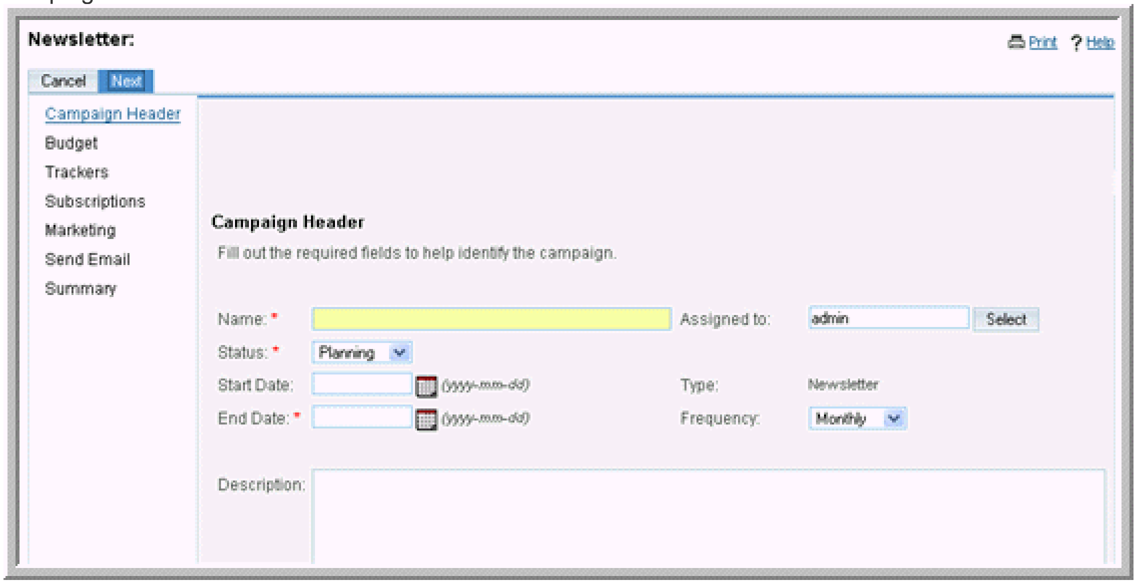
1.In the Shortcuts menu of the Campaigns module, click Campaign Wizard.

The Campaign wizard displays on the screen.



2.Select the type of campaign you want to create and click Start.

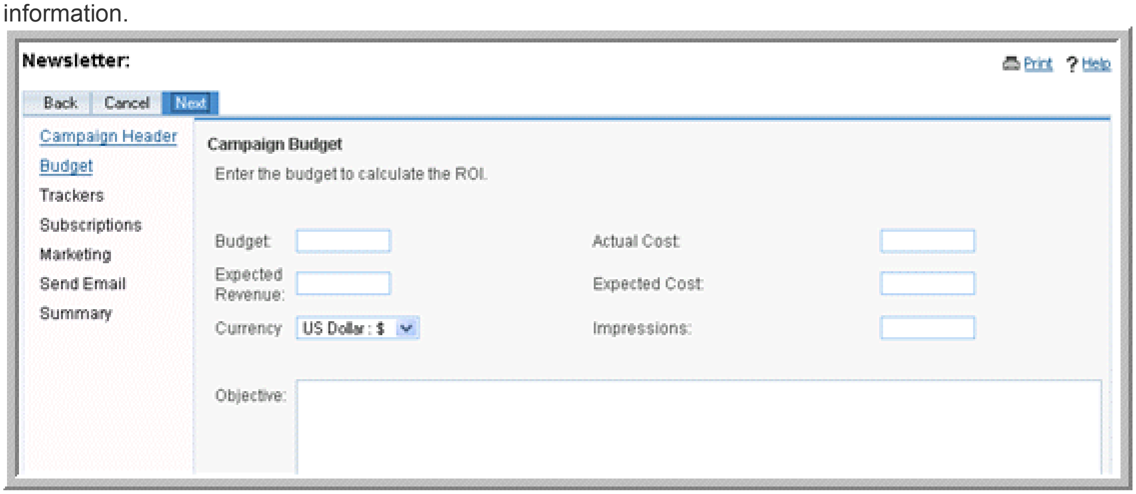
The screen below illustrates a Newsletter
campaign.



3.Enter information for the following fields:

- Name. Enter the campaign name.
- Status. From the drop-down list, select the current state of the campaign.
- Assigned to. Enter the name of the user who is assigned to the campaign. To select from the Users list, click Select. By default, it is assigned to you.
- Type. If you are creating a non-email campaign, select the campaign type from the drop-down list.
- Frequency. This field displays only for newsletter campaigns. From the drop-down list, select the intervals at which the newsletter will be emailed to targets.
- Start Date. Enter the campaign start date; click the Calendar icon to select the date.
- End Date. Enter the campaign end date; click the Calendar icon to select the date.
- Description. Optionally, enter a brief description of the campaign.
Click Next to enter the campaign budget
information.

4.

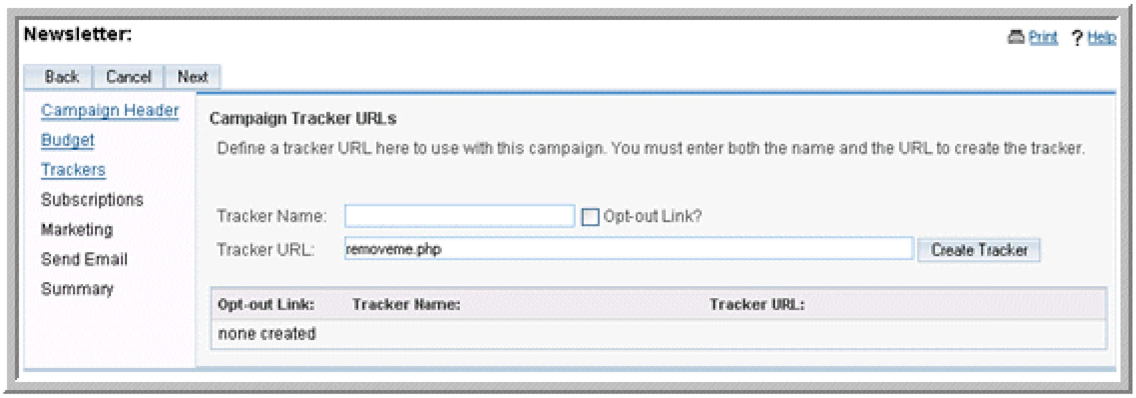


5.Enter information for the following fields:

- Budget. Enter a numerical value for the campaign budget.

- Actual Cost. Enter the actual cost of the campaign.
- Expected Cost. Enter the expected cost of the campaign.
- Expected Revenue. Enter the estimated revenue from the campaign.
- Currency. From the drop-down list, select the currency used for the campaign.

Click Next to enter the tracker URL information.



6.

7. Enter information for the following fields:

Tracker Name. Enter a tracker name.

Opt-out link? Select this box to create an opt-out tracker that allows targets to unsubscribe from your email campaigns.

If a target chooses to opt out of an email campaign, the system suppresses the target's information to ensure that they never receive any of your email campaigns. The system also automatically selects the Email Opt Out option on the target's detail page.

However, if a target chooses to unsubscribe from a newsletter campaign, the system suppresses their information only for that specific campaign. You can still include them in target lists for other newsletter campaigns.

Tracker URL. Enter the tracker URL.

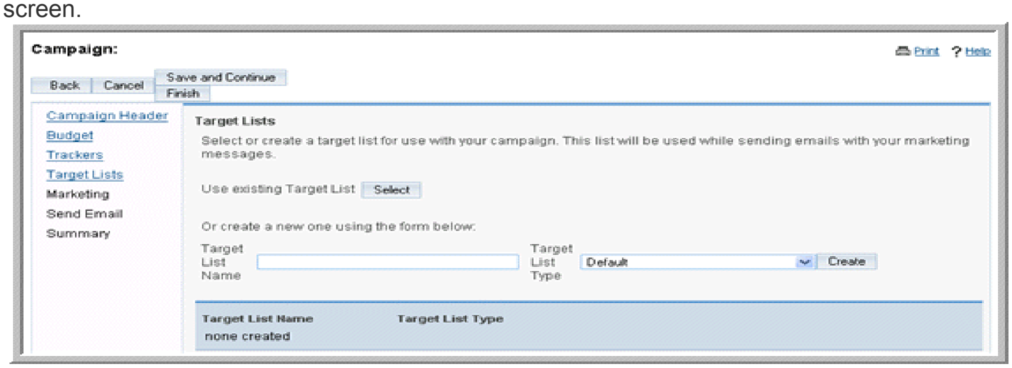
8. Click Create Tracker.

The new tracker displays below.

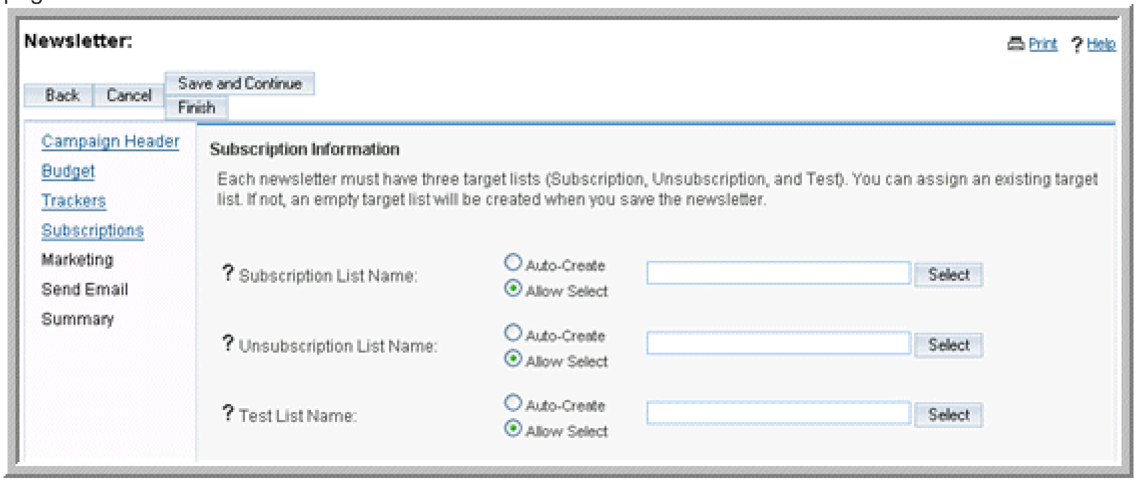
To create additional tracker URLs, click Create Tracker again and enter the new tracker information.

9. Click Next.

If you are creating an email campaign or a non-email campaign, the Target Lists screen displays on the screen.



If you are creating a newsletter campaign, the Subscription Information page displays on the page.



a.To use an existing target list, click Select and use the Search panel to find the list.

b.To create a new target list, enter its name in the Target List Name field and select the type from the adjoining Target List Type field.

The target list name displays below.

10.For newsletters, you must create the following three subscription lists:

- Subscription list: These targets receive the newsletter regularly.
- Unsubscription list: These targets are those who have chosen to opt-out of your mailing list.
- Test list: These targets are the recipients of the test email that you send out to ensure it is successful.

a.To create a custom list, select Allow Select and click Select to search for targets and create the list.

b.For a system-generated list, select Auto-Create and the system displays the name of the list in the field above the Select button.

11.To save the campaign information and begin the process of specifying other details such as the email settings, click Save and Continue. If you want specify the email settings later, click Finish.

When you click Save and Continue, the Marketing Email page displays on the screen. When you click Finish, the campaign's detail page displays on the screen.

You can edit the information and create an email marketing record from this page.

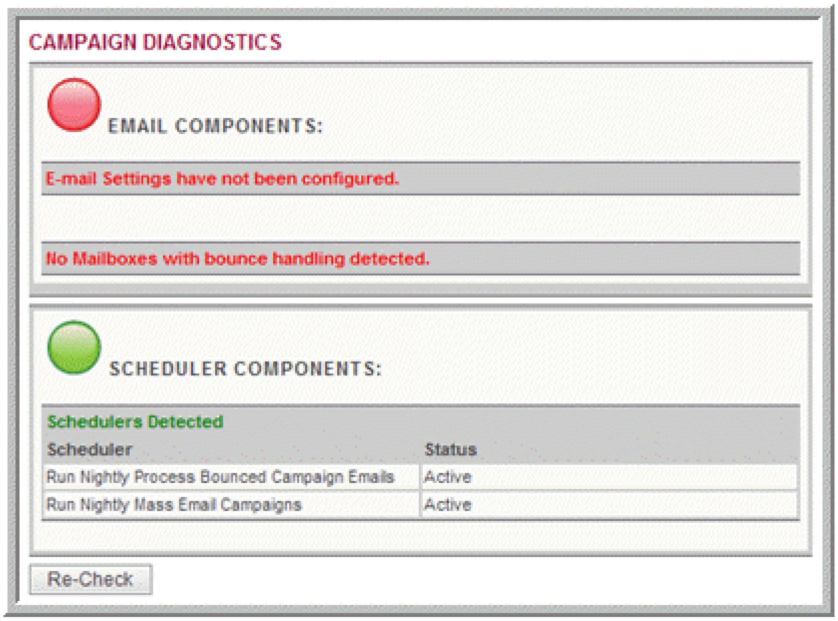
Running Campaign Diagnostics

Executing an email campaign or a newsletter campaign involves several steps, some of which can be performed only by your administrator. The campaign diagnostic tool enables you to check if all pending administrative tasks have been completed before you attempt to launch the campaign.

To run diagnostics

1.In the Shortcuts menu of the Campaigns module, click Diagnostics.

the Campaign Diagnostics page displays on the screen.



If the email settings and a bounce-handling inbox have not been configured, warning messages display on this page. Contact your administrator to complete these tasks.
2.To perform the diagnostics again, click Re-Check.

Testing Campaigns

Before you launch an email or newsletter campaign, it is recommended that you test it check how different email clients display the campaign message.
To test a campaign click **Send Test** and on the Campaign's detail page, select the message, and click **Send**. Ensure that you are sending out the campaign to the Test target list.
Note that in test mode, the system disables your suppression lists. Therefore, the campaign message is sent to targets on your suppression lists. The system also disables checks for duplicate email addresses, thereby allowing users to send a message multiple times.

Managing Campaigns

Managing campaigns includes tasks such as sorting, editing, and duplicating campaign information.

- To sort the list view, on the Campaigns Home page, click any column title which has the icon beside it; to reverse the sort order, click the column title again.
- To update information for some or all campaigns, on the Campaigns home page, use the Mass Update panel
- To view the campaign's details, click the campaign name on the list. From the detail page, you can create Tracker URLs and Email Marketing Records for email campaigns.
- To edit the campaign information, on the detail page, click **Edit**.
- To duplicate the campaign information, on the detail page, click **Duplicate**.

Duplication is a convenient way of creating a similar campaign. You can change the information in the duplicate record to create a new campaign.

- To perform a mail merge, on the detail page, click Mail Merge.
- After you launch non-email campaign such as a Telesales or a Mail campaign, you will need to manually mark the campaign as "sent". To do this, click Mark as Sent on the campaign's detail page. When you click this button, the Campaigns sub-panel on a targets' detail page indicates the Activity Type as "Message Sent" to indicate that the campaign material was sent to that individual.
- To delete a campaign, on the detail page, click the **Delete**.
- To send a email campaign to the test group before the formal launch, click Send Test.
- To queue email campaigns for the launch, click **Send Emails**.
- To send out the campaign message to the target audience, click **Send**, and on the Campaign Send page, select the message and click **Send**.
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- To track changes to a campaign over time, in the detail view, click the **View Change Log** link.

- To export information on one or more campaigns, select them in the Campaign List sub-panel on the Campaigns Home page, click the Export icon, and export them.
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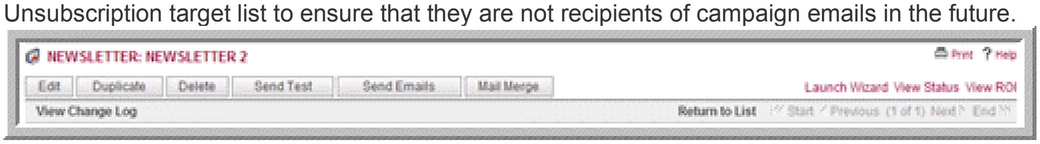
Viewing Campaign Status

After you launch a campaign, you can view the campaign status to determine its success. From a campaign's detail page, you can view the status and the result of the campaign such as the number of generated leads and the return on investment (ROI). This enables you to evaluate the effectiveness of the campaign and to take further action. For example, you can add targets that opted out of the campaign to the Unsubscription target list to ensure that they are not recipients of campaign emails in the future.

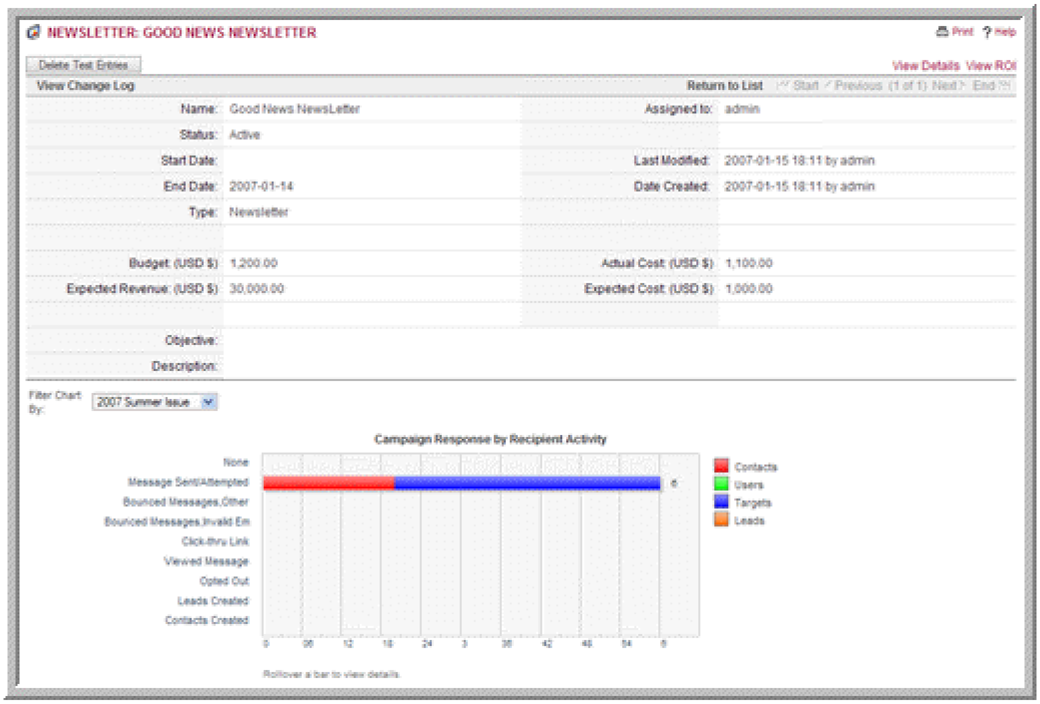


The sub-panels on the View display the following information:

- A chart depicting the responses from campaign targets. This includes how many targets viewed the message, how many open any links that were included in the campaign email, and how many opted out of the campaign
- A list of any campaign emails are still in the queue to be sent out.
- A list of processed campaign emails.
- A list of targets who viewed the campaign email.
- A list of targets who viewed any links that were included in the campaign email.
- A list of leads that were created as a result of the campaign. These leads are created when targets identify the campaign and, as a result, are converted into leads.
- A list of contacts that were created as a result of the campaign. These contacts are created when leads identify the campaign and, as a result, are converted into contacts.
- A list of campaign emails that bounced back because of invalid email addresses. Note that this information is tracked only if your administrator has scheduled a job to track bounced emails.
- A list of campaign emails that bounced back for other reasons.
- A list of targets that opted out of the campaign.
- A list of opportunities that were generated from the campaign.

<u>To view campaign status</u>

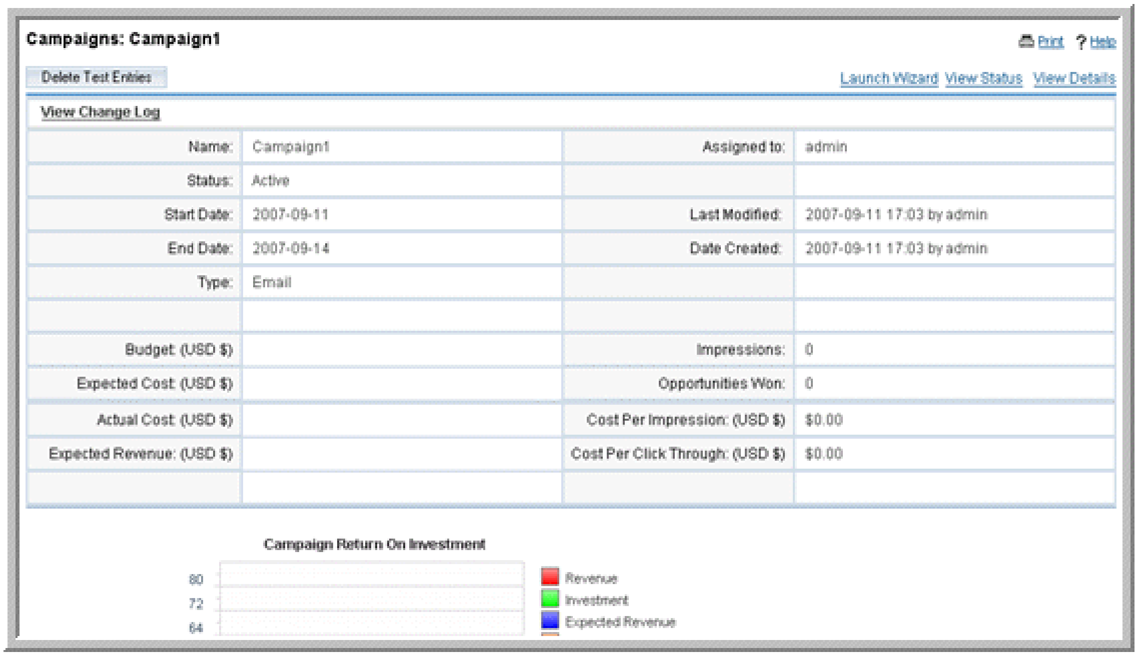
To view a campaign’s statistics, click the **View Status** link located below the Print icon on the Campaign
1.detail page.
The system displays the campaign’s status.



2.To return to the Campaigns home page, click **Return to List**.
3.To view the status of the first campaign on the Campaigns list, click **Start**.
4.To view the status of the campaign prior to the one you are viewing currently, click **Previous**.
Viewing a Campaign’s Return on Investment
For any campaign that you execute, Sugar provides an embedded ROI report based on the “Closed/Won” opportunities generated from the campaign. You can view this report from the campaign’s detail page.

To view a campaign ROI report

1.On the campaign’s detail page, click the View ROI option that is located next to the View Status option. The ROI chart displays on the
screen.



This chart displays the actual revenue versus the expected revenue generated from the campaign, as well as the actual cost of running the campaign versus the budget allocated for the campaign.