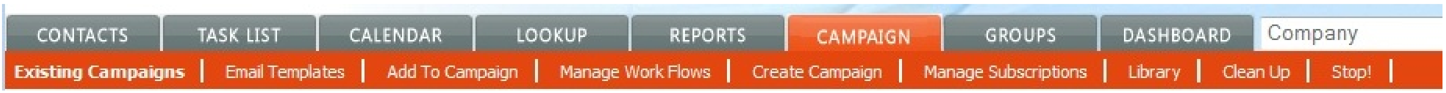
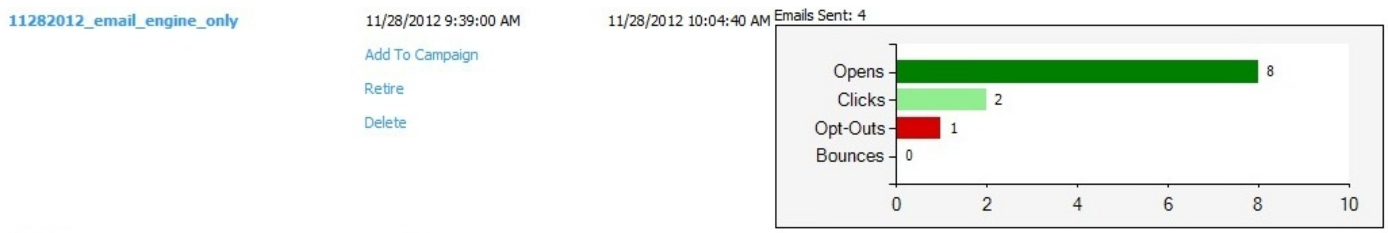
Campaign Tab

This tab has undergone the most change in our new release, and there for has more items to note:



Existing Campaigns

In **Existing Campaign**, you will see the reporting for all the campaigns you have turned on the tracking for. This has been improved to allow you to track the tasks as well as the emails. You will also be able to track the bounced and do not send based on each campaign. (This feature is not available on Small Business or Professional)

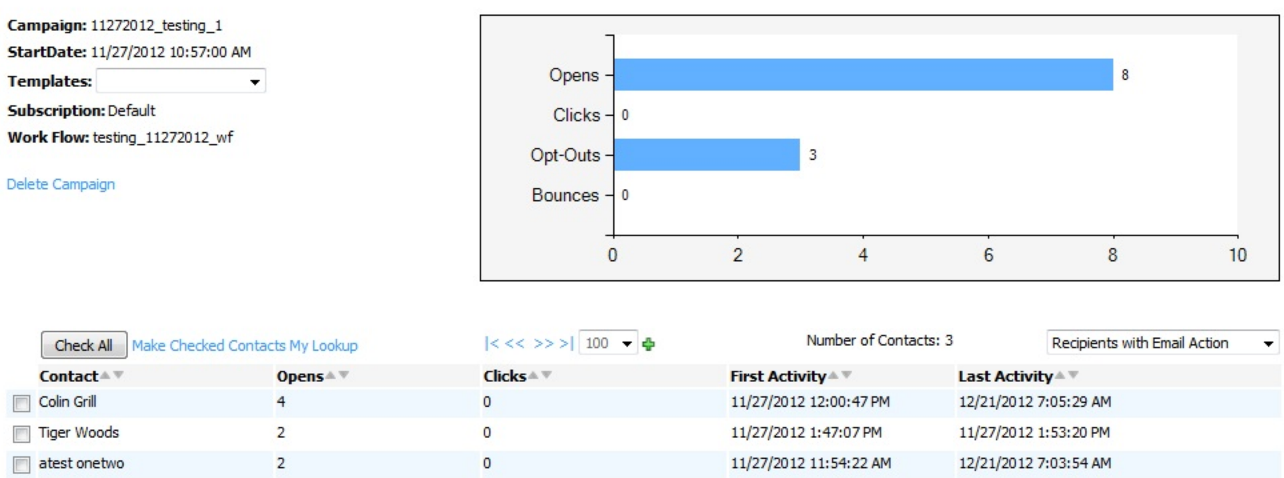


You have the ability to drill down into each of the campaign templates by clicking on the Name of the Campaign. To the far right you will see that you can show your Active Campaigns or show the Retired Campaigns. This allows you to remove campaigns from your day to day view if you are not using them but don't want to completely remove them. You will also notice that you can now send this report to a printer so your report totals can be printed and shared.

Below the Date/Time you will see 3 options:

- **Add** to this Campaign which will allow you to add an existing contact or an existing look up to this same campaign. This is the same window you get when you click on the Add to Campaign with in a contact record, but allows you to add a look up.
- **Retire** a campaign if you are not going to be using it again.
- **Delete** this campaign, a new feature that allows you to control what you keep.

When you click on the Campaign name you will get the following details for that campaign.



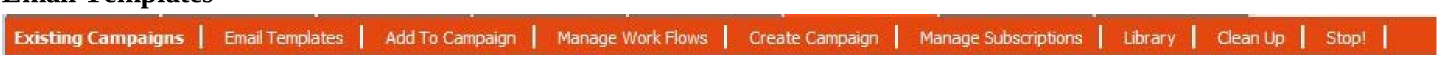
This displays the totals for this campaign combined or you can select to see them by template. You can see how your subject line is working to increase your open rate. By seeing the detail of clicks per template you can see how your Call to Actions are preforming. You also can choose to see the following:

- All contacts in the Campaign
- Recipients without email actions
- Opens
- Clicks
- Opt-out
- Bounced
- Completed calls
- Completed to dos
- Completed meetings

Now choose who you want to market to next. Once you have your list in view. You can check the boxes to the right of the name and select the ones you want to work with. To have all of them selected to be your current look up. Click Check All and then click Make Checked Contacts My Look up. Now you are ready to market to them again.

If you want to see your campaigns in shorter versions by date, you simply make a copy of the campaign, add the new contacts to the New Campaign and retire the previous one.

Email Templates

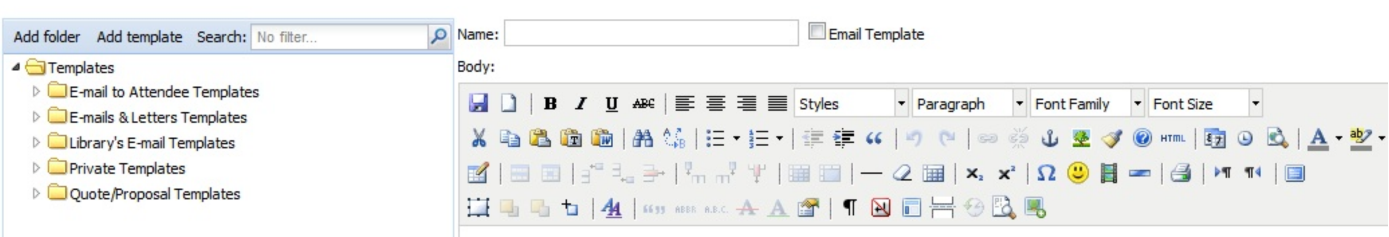


On the **Campaign** Tab, click on the **Email Template** in the Orange Ribbon. In this tab there are several folders. They are used for the following

- Email to Attendee Templates- Used when sending a meeting notice to all attendees while in a task. Pulls from contact and activity fields
- Email & Letters Templates- Used for all email blasts and campaigns
- Library's Email template – Used to store cover letters for items in the library, shortly this will not be needed
- Private Templates – Used to store templates only the user can access
- Quote/Proposal Templates – Used from the Sales tab, can create a proposal template that pulls fields from Contact and from Sales Opportunities.

For Creating email for Campaigns, click on Email & Letters Templates

Click on Add Template in the Blue Ribbon, this will open a blank template.

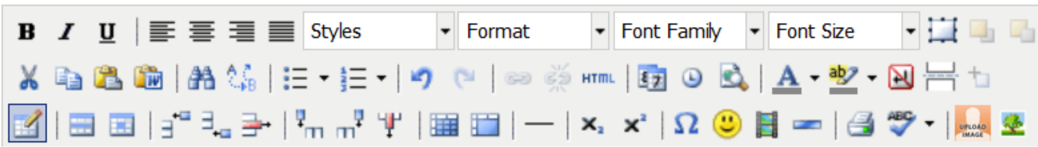


- At the top is Letter Description, this is the name of your template; *make it only alpha numeric, no special characters.*

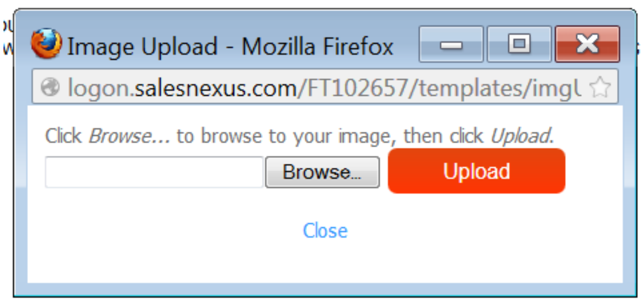
- Check box for Enable email send form- checking this saves the coding for the To: From: and Subject: lines of an email with your template. Without checking it, you can only print as a word document and mail merge.

At this point save your file by clicking on Save in the lower left corner. When your screen refreshes, you are ready to start building your template.

The tool bar above is used to build your template and change the features. This functions a lot like Word and each button is named at the end of this document for your convenience.

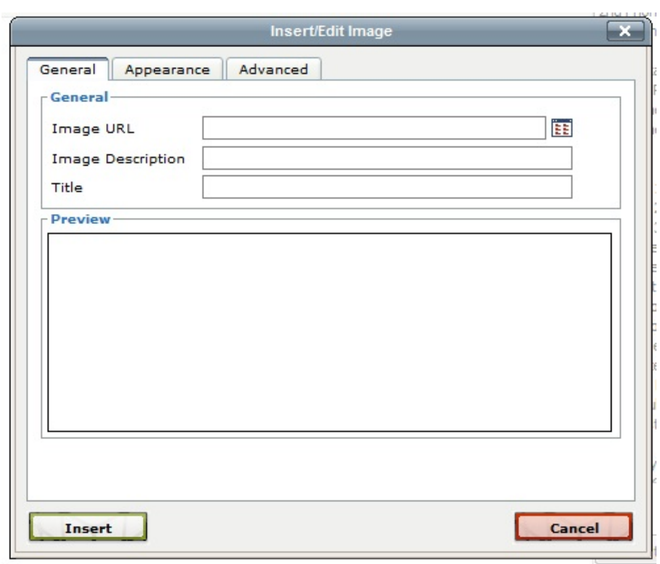


To insert an image into your template, you have to first put it on the server. Click on the small portrait icon. This will open the upload image window



Browse to your hard drive and upload the image to the server. Close the box when you have uploaded all that you want to. It will now be an option for any email template you work on.

To insert the image to your template, have your cursor where you want the image to be, click on the small tree icon next to the portrait icon.



Browse to your image on the server by clicking on the file image to the right of the Image URL line. You will see thumbnails for all images on the system. To select the image for your template, click on it. You will want to give your image a description. . This is what the client will see if they do not allow images in their email. You will find that line under the Image URL line.

Behind the General tab is the Appearance Tab. This allows you to set the image size from this window

On the General tab, when you have your image selected, click on Insert.

Now you are ready to start personalizing your template:

To insert fields from the client into your template, make sure the radio button to the far right is in Contact Field.

Put your cursor where you want the field to appear in the template and then scroll down the list of fields to find the one you want. All fields are listed and are in alphabetic order. Clicking F will take you to the first field beginning with F.

Continue adding text and fields until your info is complete.

To add your own contact information to the letter, change the radio button from Contact Field to My Record Field and now it will pull in the data on the users.

You can **Save** your document along the way but you want to make sure you wait till it refreshes before you make another change or close it, otherwise you can lose your work.

As you are creating the template, you can click **Send Preview Email** and that will send it to the email address associated with your My Record.

Now that your templates are created, you are ready to create the work flow. Click **Send Email with Template** and it will create the workflow for you the first time you send it. Workflows are needed for email templates but not to print to word.

You can **Make a Copy** of the template if you want to make alterations but keep the same look and feel. Once you have a copy, you will just need to rename it as it will read Copy of XXX

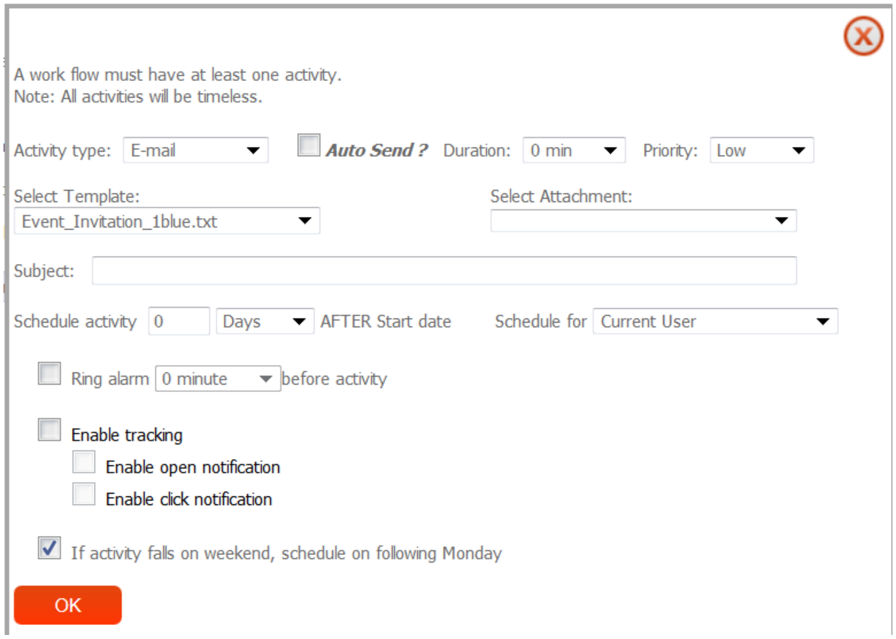
Manage Work Flow

Work flows are used to show the steps that will be involved for a that series of emails or tasks. On the **Campaign Tab,** when you click on **Manage work flow**, you are taken to the area where you can create a new workflow, make a copy of an existing one or change the status of an existing one. When you click on one of the existing work flows, you will see the activities that make up that work flow to the right.

To Create a new workflow, click on **GO**. This will open up the window to start the workflow.

- Choose **Start date**
- Then **Next**
- Now click **ADD** to open the task window.

In the **ACTIVITY** type, you can change it from a To-do to a Call, Meeting, Email or Mail it for me. Depending on the choice you make, it will change the field choices you see.

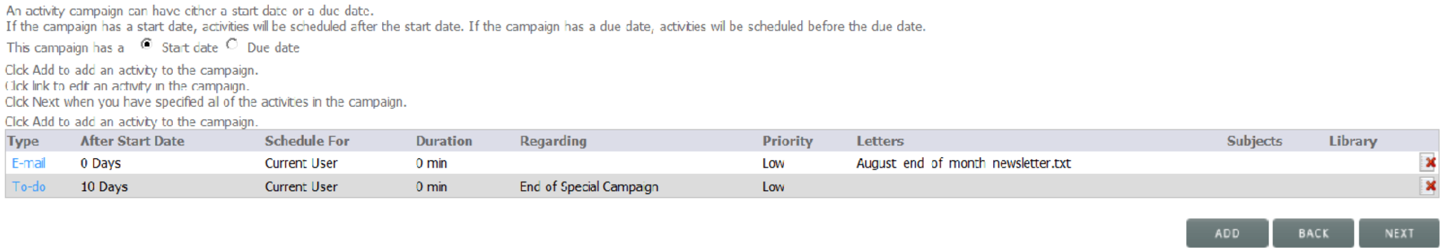


- On the email Activity type, you will see **Auto Send?** This allows you to set the email to go out on the given day without any interaction from you. This means the emails will go out the day they are scheduled even if you do not log into SalesNexus
- You want to select the template you have saved in the Manage Template folder. (Emails & Letters Templates) and Library’s Email Templates)
- You can select an Attachment you have in the Library.
- You can enter your Subject line in the space provided
- Schedule Activity x days AFTER Start date allows you to set this email to go out at a given number of days from the time you start the campaign. 0 Days is always same day the campaign is scheduled to start.
- Schedule for allows you to send it out from a specific user. Current user will be the one scheduling the campaign. Contact’s Record Manger will choose which ever user is that contacts Record Manager.
- Check Enable Tracking, if you are on Complete, allows you to create the report that tells you when they received it.
- Check Enable Open notification to create a task for you on every opening of your email template. This allows you to follow up based on when and how many times the template was opened.
- Check Enable Click notification allows you to have a task that tells you what URL in your email they clicked on. Allows you to know when to follow up based on when they opened it and how many times they opened it.
- Last check box is if the task falls on the weekend schedule for Monday.

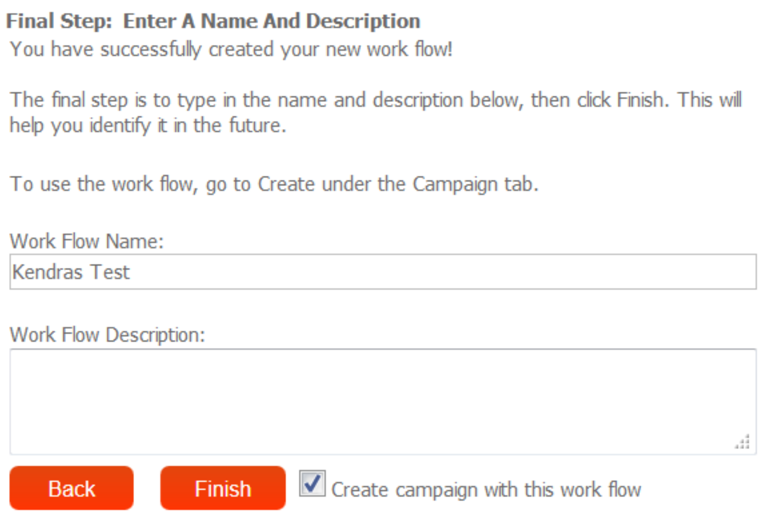
  Click OK

Now you can click ADD to add another item changing the options to fit your need as you build your workflow’.

Once you have your work flow listed in this window, add one more To-Do task, call it the End of XXX campaign, set it as the last task of the work flow. This allows you to have a task telling you this campaign is over for that contact.



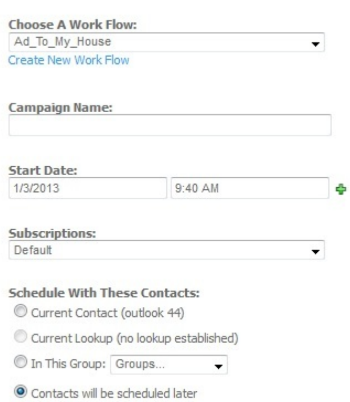
Click **Next** and you will have the widow to name your work flow and put in a subscription. Once you have named it, just click Finish. (if you created an End of XXX task, copy that name as your workflow name.)



Once you have created your templates and the workflow you want to use, you can check the box and it will create a Campaign with the same name as your workflow. Or you can create the new campaign using this workflow.

Create Campaign

When you click on Create Campaign, you will get this window.



Choose the workflow you just created from the top dropdown. You will see the activities that make up the workflow to the right.

Selected Work Flow Activities:

Type	After Start Date	Regarding	Tracking	Open Notification	Click Notification	Email Template
E-mail	0 Days	Ad_To_My_House	No	No	No	Ad_To_My_House.txt

If you did not create the workflow first, you can follow the link back to the screen by clicking on Create New Workflow.

Now you type in a **Campaign Name**, the **Start Date** and **time**, and the **Subscription** you want to send to. (Subscription is the mailing list that you want to send to, this is used to be in compliance with the Spam laws. All contacts are added to Default)

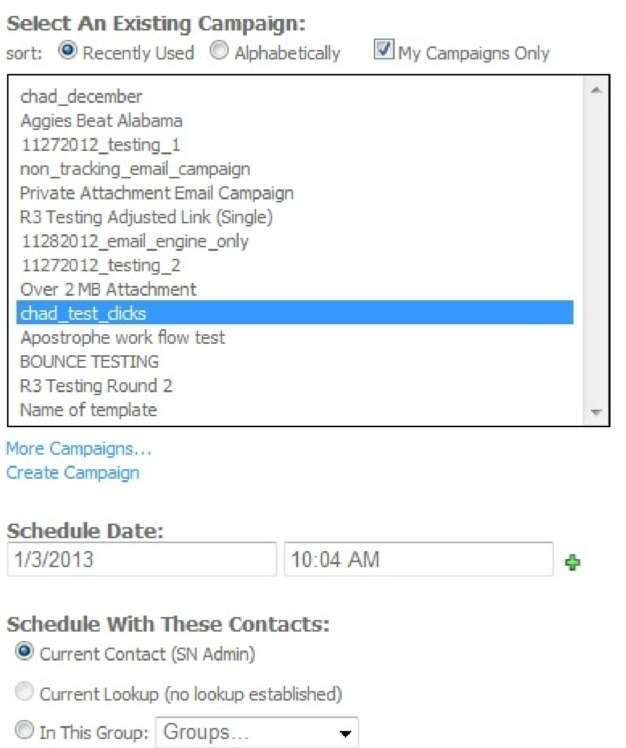
You can also Schedule from here. If you have already created your look up just click on Current Lookup, you now have the option to schedule with one of your existing **Groups** without having to go to the Groups tab. The default is **Contacts will be scheduled later** so you can always add contacts to this campaign later.

How to Schedule a Campaign for a contact or a lookup.

For a Contact

Look up the contact you want, in the orange ribbon at the top you will see Send Email. Use this to send them a regular template,

To set them up in a campaign, you click on **Add to Campaign**. You will see the campaign options you have. You can also add contacts to a campaign from the **Existing Campaign** window.



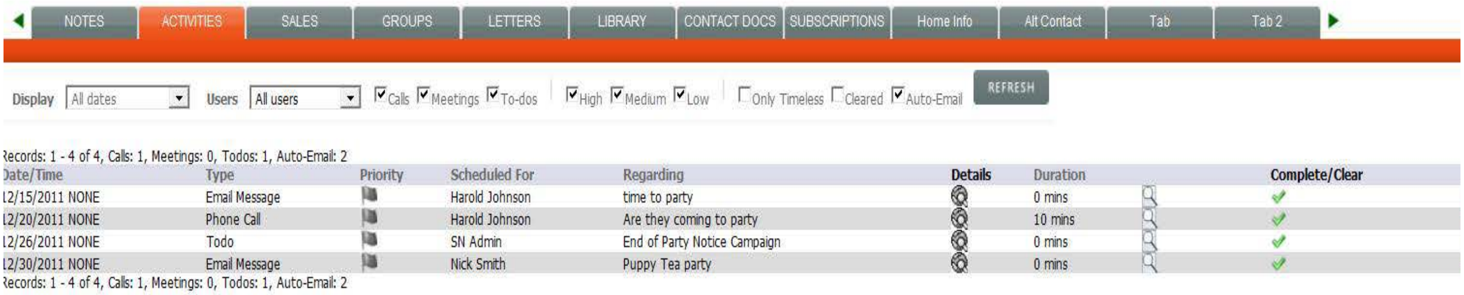
The default shows you the ones you recently used but you can choose to see all Campaign or only the ones you created.

You can set the date you want to start the campaign and schedule the time you want it to go out.

From this window, you can choose which contacts you want to schedule it for, from current contact, current look up and even a one of your existing groups.

Then click Add to Campaign at the bottom

All the tasks for that campaign will now appear in the Activity tab for the contact(s). If you delete any one open task from a campaign, it will give you the option of deleting all open tasks for that campaign.



Date/Time	Type	Priority	Scheduled For	Regarding	Details	Duration		Complete/Clear
12/15/2011 NONE	Email Message		Harold Johnson	time to party		0 mins		
12/20/2011 NONE	Phone Call		Harold Johnson	Are they coming to party		10 mins		
12/26/2011 NONE	Todo		SN Admin	End of Party Notice Campaign		0 mins		
12/30/2011 NONE	Email Message		Nick Smith	Puppy Tea party		0 mins		

Records: 1 - 4 of 4, Calls: 1, Meetings: 0, Todos: 1, Auto-Email: 2

Manage Subscriptions

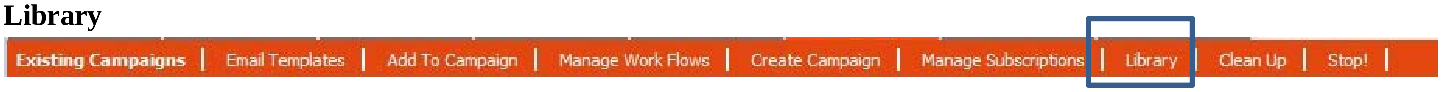
Allows you to add to add new Mailing lists to your database. All contacts are added to the mailing list Default in your database so you can start out using just the one. *You must complete the company information on this screen to be in compliance with spam laws.*

To do that, click on **Campaign**, then **Manage Subscriptions**., In this window you will see several fields that say they are required.

To the right of that you will see all the mailing lists you have set up for your database.

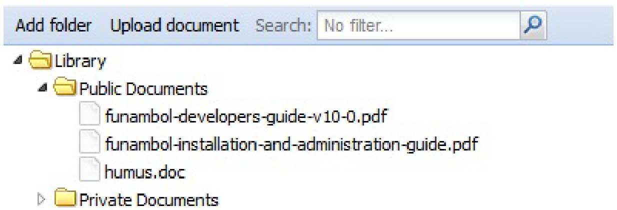
To add contacts to an existing mailing list, click, on Edit for that list and you will see the option at the bottom to add contacts.

Library

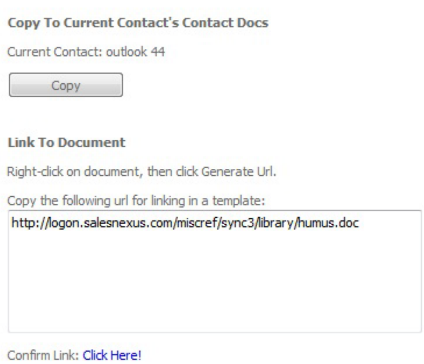


When you click on the Library link, you can upload any document from your PC to the library. Once it is on the server create a link to it that allows you to track the people who clicked on the link. Now instead of just sending an attachment, you can use it to help with your marketing plan.

To upload a document click on the folder you want to save it in and click on Upload Document. You can now browse to your PC to find it.

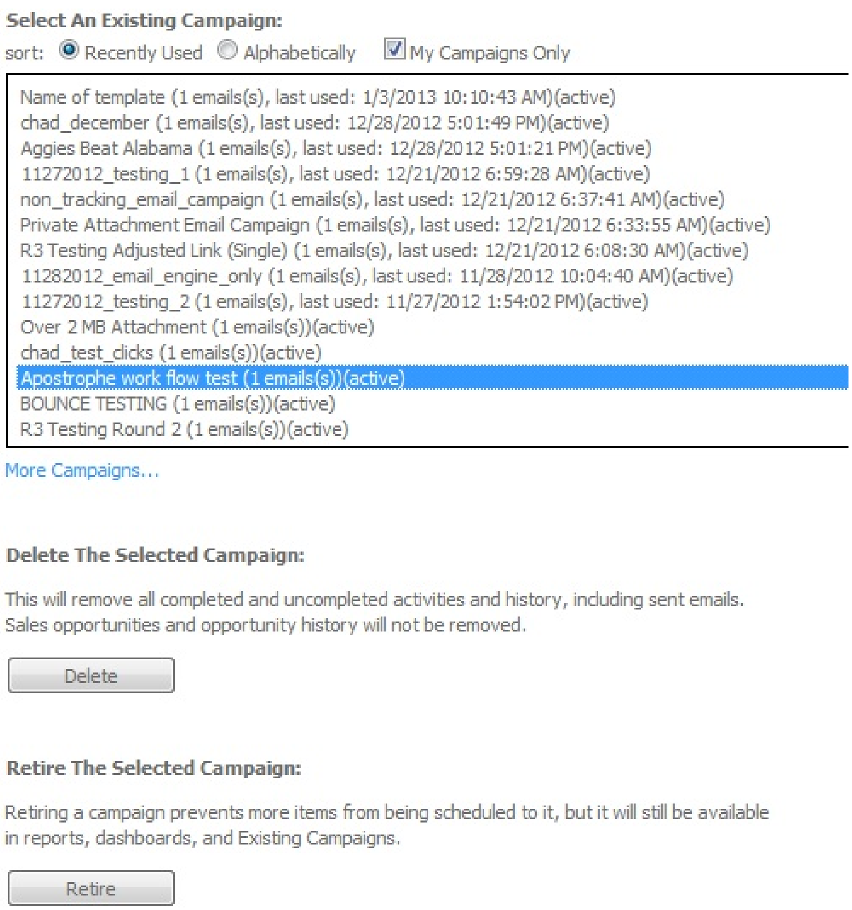


Once it is uploaded you can now create a link to use in templates. Click on the document in the window on the left, Right click and pick Generate URL. The path is in the window on the right. If you want to confirm the link you can do that at the bottom. Copy this link up to your clip board to paste into your template. We recommend copying all to a word doc so you don't lose the URLS.



Clean Up

This feature allows you to delete Campaigns that you want to remove permanently or retire ones that you do not wish to use but would like to keep the details of. This does not remove the templates or the work flow, just that instance of the campaign itself.



Once you have selected the campaign you want, you can either Delete it or Retire it.

NOTE: Delete will remove all open and all closed items for this campaign. It will remove all history of any kind associated with this campaign. *There is no Undo so be sure that is what you want to do before hitting Delete*. If you want to remove only open items please contact Chat.

Retire- will block anyone else from being scheduled for this campaign but does not remove the history.

Stop!

You can now stop any emails from being sent that are in the que. Simply click the Campaign name and click Delete.

NOTE: This will remove all Pending emails for this campaign for all clients so if you do not want to remove all pending emails, please contact Chat to have the specific one removed.

Groups Tab

To look up a group, Go to the group tab in the top row., Click Display All to see all your Groups