

# Campaign Management

*Campaign Management (Campaign Management or Call Centre modules) allows the User to conduct all Campaign related functions.*

*If you wish to create a Campaign you must have created an Account previously.*

## 1. View Account Campaigns

By selecting the Campaign Management button, the User will be presented with a table of the Campaigns and summary information of Campaigns in the currently selected account.

This table will only display Campaigns which the User has permissions to View.

**Note:**

If access is needed for an Campaign that is not in this list, contact the application Administrator to change the Users privileges.

## 2. View All Campaigns

When viewing the Account Campaigns you can choose to display the Campaigns for all Accounts option.

This table will only display Campaigns which the User has permissions to View.

**Note:**

If access is needed for an Campaign that is not in this list, contact the application Administrator to change the Users privileges.

## 3. Search for a Campaign

There are 2 methods to search for a Campaign. The first is on the Banner Section using the Global Search function. (see Global Search section)

The other method offers more fields and options to refine the search and can be accessed by selecting Campaign Management from the Menu Bar then selecting Search Campaigns from the Left Menu Section.

The User can search for a Campaign or a list of Campaigns by filtering on the following criteria:

Displays:

- Account
- Campaign number
- Campaign name
- Status
- Start Date
- End Date

#### 4. Create a Campaign

If the User has Create Campaign privileges, then this option is available in the Left Hand Menu.

**Note:**

If access is needed, contact the application Administrator to change the Users privileges.

All required fields are in **bold**

Field	Description
<b>Campaign</b>	Campaign name
<b>Status</b>	Account status, either Active or Void
Description	Description of the Campaign
<b>Start Date</b>	The Date this Campaign is due to start
End Date	The Date this Campaign is due to end
Budget	The Budget allocated to this Campaign
Cost to Date	The current total of costs incurred for this Campaign

**Table 1:**

#### 5. Add a Campaign Note

Notes can be used to store additional or background information. The User can create a Note by selecting the Add Note link in the Left Menu Section.

## Campaign Management

### 6. View a Campaign

#### 6.1. Activities tab

Activities tab - view all Activities for an Account

Displays:

- Activity No.
- Activity
- Campaign
- Account
- Status
- Step
- Start Date
- End Date

#### 6.2. Notes tab

Notes tab - view all Notes for a Campaign

Displays:

- Date Note was created
- Date Note was updated
- Short description
- View/Edit/Delete operations

### 7. Edit a Campaign

This function is accessible from the Left Menu Section. It allows the User to change and update any Campaign details.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

### 8. Delete a Campaign

**Note:**

USE THIS FUNCTION WITH CAUTION. Campaigns can be deleted but this has the affect of deleting ALL related Activities, Fulfilments etc. It would be an extreme case where an Campaign would be deleted, and if in doubt, use Edit Campaign to change the campaign status to Void. THIS ACTION CANNOT BE UNDONE.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

**9. View Account Activities (Campaign Management or Call Centre modules)**

This function is accessible from the Left Menu and will display all Activities for the currently selected Account.

Refer - [View Account Activities](#) section.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.

**10. Create an Activity (Campaign Management or Call Centre modules)**

Create an Activity for this Account.

Refer - [Create Activity](#) section.

**Note:**

Depending on the Users privileges, this function may not be available. If access is needed, contact the application Administrator to change the Users privileges.