Campaigns Table

Every sales process involves a marketing aspect. A key marketing capability is tracking and measuring multichannel campaigns, including email, partner website, print advertising, purchased lists, newsletters, trade shows, search engine, radio, and TV.

Use Case

The effectiveness of a campaign created by members of the Marketing group can be seen through its association with a Lead or an Opportunity. After creating a campaign, members of the Sales, Sales Manager or Marketing groups can choose that campaign in a Lead or Opportunity record by selecting a Campaign Name from a choice list created from Planned, Launched or Ongoing campaigns.

Creating Campaign Records

Campaigns can be created directly using the web form. New campaigns may only start out as Planned or Launched in the workflow.

Processing Records

Admin users and members of the Marketing group can create and edit Campaigns. Members of the Sales and Sales Manager groups have view access. No other groups have access to the table by default.

Email Marketing Campaigns

Email marketing tracking has been set up by default on the Leads and People tables. This works in conjunction with the Campaign table, which contains many statistical fields to track the results of a sent email related to that campaign.

A marketing staff person sets up a Campaign to track results for a particular email. An email template may be created on the Leads and/or the People tables. Once the recipients are selected, mouse over More, Email, and click Send Email.
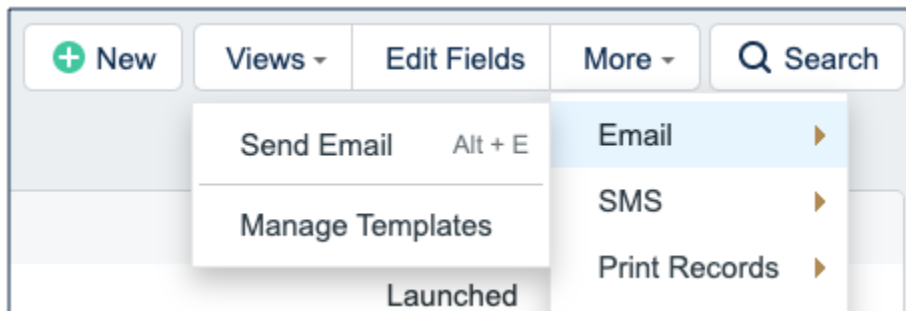
With the email window open, select **Insert > Populate from template > Search...**, then locate the desired marketing email template and import it. On the Options tab of the email dialog, the sender chooses the Campaign Name to use for email tracking.

When the email is sent out, all responses are captured by a service running in the background and the results are compiled in the related campaign as responses are received in the Email Results tab.

If there were links in the email and any recipients clicked them, then new records are automatically created in the Email Clicks table for each link clicked, and these are also shown in the campaign record in the All Emails Clicked section.

Further documentation about how the email campaign statistics are created and how to set up this functionality or modify it, please see Email Marketing. This functionality can easily be turned on for additional custom tables other than Leads and People.

Ownership

Campaign records owned by the user who creates them.

Workflow

The Campaigns table has the following default workflow:
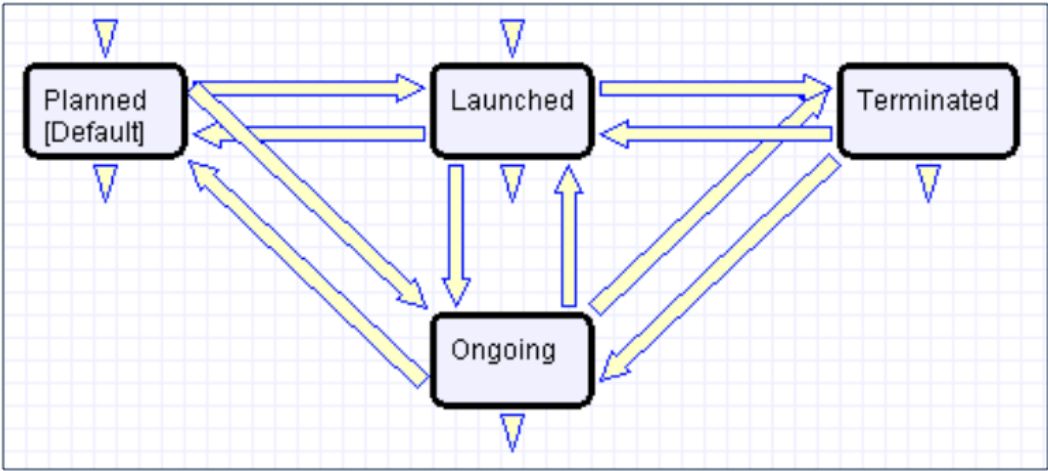
Reports

The Campaigns table contains two default Charts/Reports.

	Edit	View	Title ↑	Filter	Published	Date Updated	Output Format	Type of Report
☐	✎	🔍	Results for All Active Campaigns	F: Not Terminated	Yes	Nov 26 2018 16:53	Graphical chart, HTML	Standard
☐	✎	🔍	Value of Orders by Type of Campaign		Yes	Nov 26 2018 16:53	Graphical chart, HTML, Excel	Standard