

Campaigns

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What is a Campaign?

Campaigns are designed to control mass-communication to your **Contacts** and **Accounts** and can be distributed using Email, fax, letter or telephone media.

The **Campaigns** creation process is designed to be flexible to enable you to select and adjust recipients easily. The following options are available:

1. **Create a New Quick Campaign from a List:** create a new **Campaign** from any Gold-Vision List (see New Quick Campaign Tutorial)
2. **Create a Campaign Source:** Campaign sources provide a flexible, reusable list management system for campaigns. Sources can be created from any Gold-Vision or Lead Management list and can also be manually edited to refine the list of recipients. Recipients can be added or excluded from sources either individually or as a list to ensure communication is only sent to those you wish. Once created, sources can be used as inclusion or exclusion lists for marketing campaigns or the data can simply be exported for other means.

Campaign sources support media type preferences that allow recipients to be litmus-tested for validity before they are even used for a marketing campaign. Invalid addresses and contact preferences are easily identified from an overview that highlights both positive and negative validity.

3. **Create Multi Stage Campaigns:** Enhanced campaign functionality supports multiple stages across a variety of mediums. Powerful follow-up rules allow for multiple tiers to suit your logic. The campaign overview screen allows users to visualise even the most complex structure all in one place.

Campaigns stages, runs and follow-ups can be planned in advance and executed as required. The stage tier system allows follow-ups to be created based upon the outcome of previous stage data. For example a follow-up could be based on a positive response to a phone call, a click on an email or website, a new sales opportunity, or even simple changes to the record data itself.

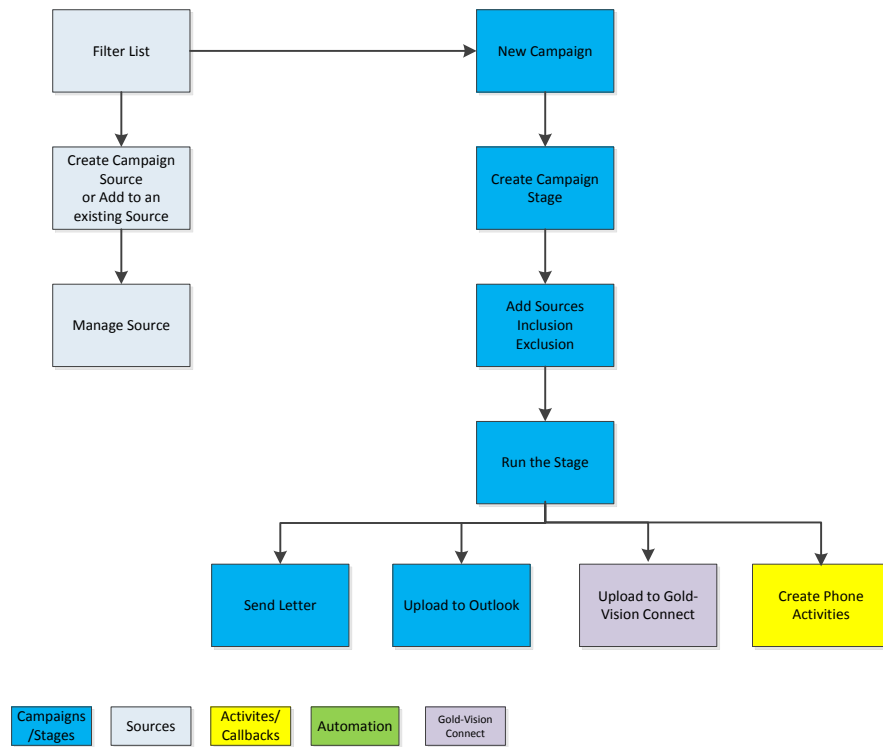
The campaign run system ties in with Gold-Vision Connect to support visual marketing that can be traced and reported on. Follow-up activities can also be created for account management or other duties.

The campaigns functionality combines both standard Gold-Vision data and Lead Management to offer the same powerful functionality from both data sources

Campaigns

Create Source

Create Campaign



> Campaign Source

> Creating a Gold-Vision Campaign Source

Campaign sources provide a flexible, reusable list management system for campaigns. Sources can be created from any Gold-Vision or Lead Management list (see below) and can also be manually edited to refine the list of recipients. Recipients can be added or excluded from sources either individually or as a list to ensure communication is only sent to those you wish.

Once created, sources can be used as inclusion or exclusion lists for marketing campaigns. For example you may wish to send an offer to your Prospects but exclude anyone who has an open opportunity.

Note – sources from Gold-Vision and Lead Management cannot be used in the same Stage.

Invalid addresses and contact preferences are easily identified from an overview that highlights both positive and negative validity. .

From a main Gold-Vision screen

Click on **View** and select required Gold-Vision item, e.g. Accounts

OR: Click on the **Icon** on the top menu to select the required Gold-Vision item

Filter the **List** as required for the Campaign Source that you wish to create.

For example the following **List** has been filtered, and all Hot Prospects have been selected:

Account	Primary Contact	Account Manager	Account Type 1	Phone Number	Edit
Access Limited	Andrada Habean	Mark Vernon	Hot Prospect	0118 966 3333	
Action Drains Ltd	Craig Pears	Jiggy Keith	Hot Prospect	01215004060	
Air Miles Travel Co Ltd	Darren Byron	Jiggy Keith	Hot Prospect	01925866000	
Baines Simmons	Fred McFReddie	-	Hot Prospect	01276 855412	
Boutique Design Ltd	Jodi Gaywood	Jiggy Keith	Hot Prospect	02089621000	
Decathalon Uk Ltd	Tim Beresford	Jiggy Keith	Hot Prospect	02073942000	
Electrical Services Ltd	Calum Mackay	Jiggy Keith	Hot Prospect	01992635515	
Elite Music Repro Pre Press Reprodu...	Andrew Fiendley	Jodi Gaywood	Hot Prospect	02073884114	
Fastback Courier Services	John George	Jiggy Keith	Hot Prospect	01663747475	
Jackson Fire And Security	Russell Jackson	Jiggy Keith	Hot Prospect	01925765222	
London Bread & Cake Co	Sam Berey	Jiggy Keith	Hot Prospect	02088076773	
Runrite Services	Nikki Bugla	Jiggy Keith	Hot Prospect	01993709511	
Zygo Ltd	John-Paul Jenkins	Nikki Bugla	Hot Prospect	01394671444	

Click the Campaigns Tab and select Create a New Campaign Source, enter a name for the Source, click OK

Add to existing Campaign Source or create new?

<p style="text-align: center; background-color: #0070c0; color: white; padding: 2px;">Create a New Quick Campaign</p> <p style="font-size: 8px;">Create a new Campaign using the selected recipients (Will also generate an accompanying Campaign Source and Campaign Stage).</p>	<p style="text-align: center; background-color: #0070c0; color: white; padding: 2px;">Create a New Campaign Source</p> <p style="font-size: 8px;">Create a new Campaign Source using the selected recipients.</p>	<p style="text-align: center; background-color: #0070c0; color: white; padding: 2px;">Add to existing Campaign Source</p> <p style="font-size: 8px;">Add the selected recipients to an existing Campaign Source.</p>
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▼ Details

Summary: Hot Prospects	Email Preference: Preferred Email
Owner: <input style="width: 80%;" type="text"/>	Phone Preference: Preferred Phone
Total Recipients: <input style="width: 80%;" type="text"/>	Fax Preference: Preferred Fax
	Letter Preference: Preferred Address

► More Options

Open the Campaign Source to review the recipients.

Note – by default:

The source will include the **'Direct Contact'** eg Primary Contact if list of accounts, Opportunity Contact if list of Opportunities. (Other options see below)

The source will include a **default contact** i.e. even if there is no Primary Contact for the account a recipient will still be included

Invalid for – e.g. missing email address/phone number, unsubscribes etc.,

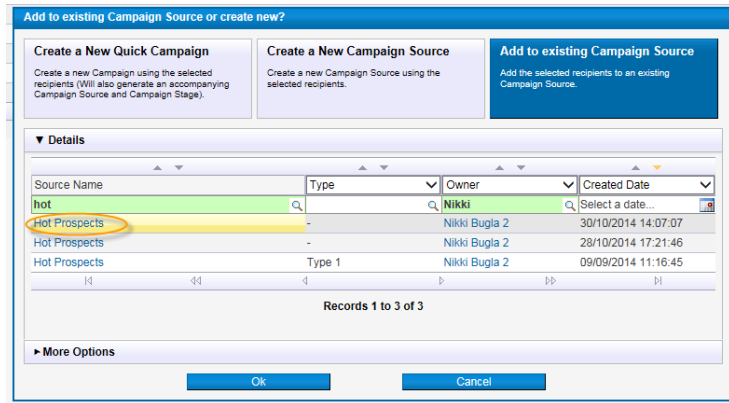
➤ **Reviewing Recipients**

There are several ways to view recipients in a Campaign Source:

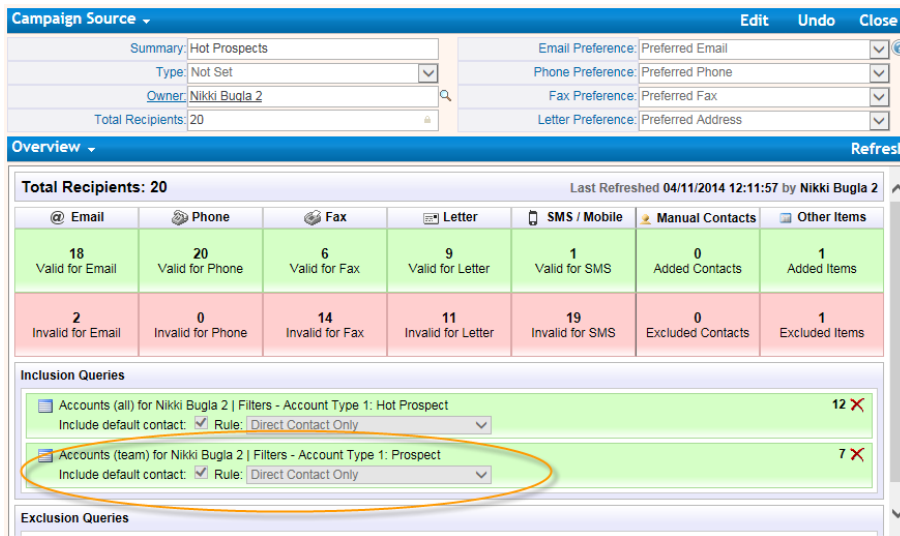
To view ALL recipients click Total Recipients.

To view all recipients valid for Email click as below

Or from the Campaign Source Overview menu
Select required Recipients list



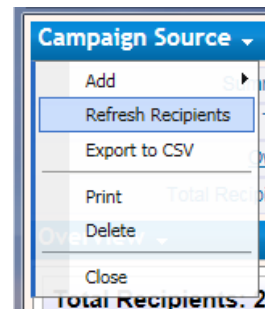
Refresh the recipients. The Campaign Source will now show the Two sources and all the Recipients



➤ Refreshing Campaign Sources

At any point before running a Campaign you can refresh the Campaign Sources

From the Campaign Source menu
Select Refresh Recipients



➤ Deleting Sources

Click the Delete Cross **X** to delete an Inclusion Query/source included

The screenshot shows the Gold-Vision interface with a 'Gold-Vision Message' dialog box. The dialog box contains the text 'Remove this query, are you sure?' and two buttons: 'Ok' and 'Cancel'. In the background, there is a table with columns for various communication methods and a list of inclusion queries. A red 'X' icon is circled next to the second query in the list.

@ Email	Phone	Fax	Letter	SMS / Mobile	Manual Contacts	Other Items
18 Valid for Email	20 Valid for Phone	6 Valid for Fax	9 Valid for Letter	1 Valid for SMS	0 Added Contacts	1 Added Items
2 Invalid for Email	0 Invalid for Phone	0 Invalid for Fax	0 Invalid for Letter	0 Invalid for SMS	0 Added Contacts	1 Excluded Items

Inclusion Queries

- Accounts (all) for Nikki Bugla 2 | Filters - Account Type 1: Hot Prospect
Include default contact: Rule: Direct Contact Only 12 X
- Accounts (team) for Nikki Bugla 2 | Filters - Account Type 1: Prospect
Include default contact: Rule: Direct Contact Only 7 X

➤ Creating a Leads Campaign Source

Sources can be created from a Lead list in the same way as above.

Adding Leads to a Source: Please note – Additional recipients can only be added from the list view of Leads (there is no option in the Campaign Source to add Recipients or in the Lead Record to Add to a Campaign Source).

Invalid Recipients – there is an option in the Admin Console (Lead Management Settings) to Invalidate Leads where the email address already exists in Gold-Vision.

Invalidate Lead emails already in Gold-Vision:

Leads will show as Invalid For Email with the reason Lead Potentially In Gold-Vision

The screenshot shows the 'Recipients' table in Gold-Vision. The table has columns for Name, Account, Valid for Email, Invalid Email Reason, Email, and Query. One row is highlighted in yellow, showing 'Colin Altonen' with 'Smith, Arthur D Esq' as the account and 'Lead potentially in Gold-Vision' as the invalid email reason. The 'Invalid Email Reason' column is circled in orange.

Name	Account	Valid for Email	Invalid Email Reason	Email	Query
Colin Altonen	Smith, Arthur D Esq	No	Lead potentially in Gold-Vision	jlgaywood@esteiro.co.uk	

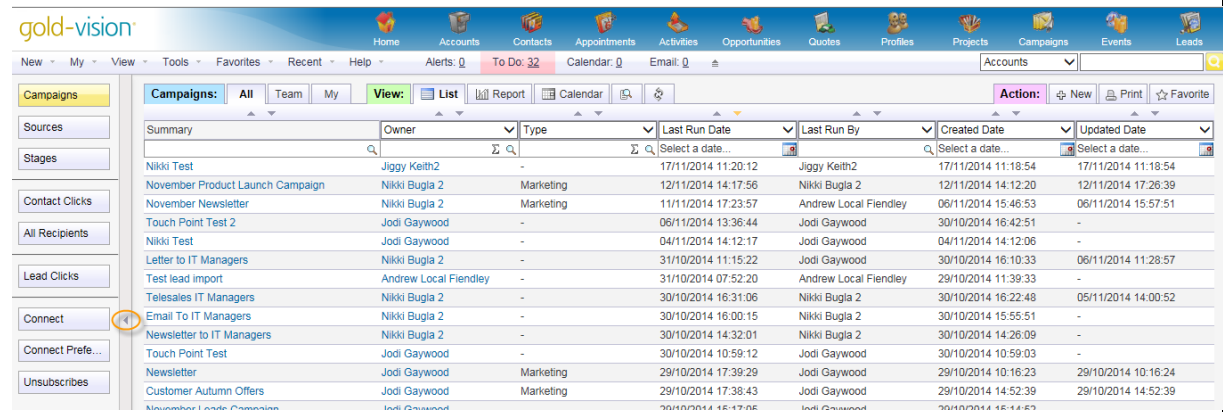
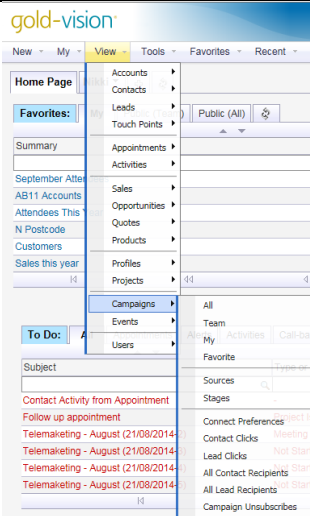
> Accessing Campaigns

> Viewing all Gold-Vision Campaign Records

You can view all Campaigns created from your Gold-Vision main page:



Or from the View Menu



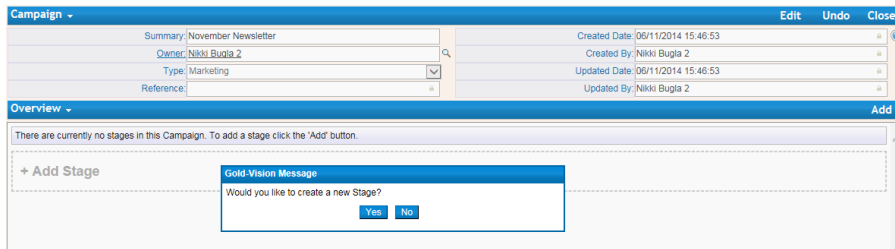
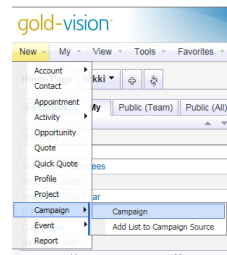
The menu on the left hand side can be hidden by clicking the arrow.

Note – All the above options refer to New Campaigns (Legacy Campaigns are accessed via the View → Campaigns menu).

➤ Creating A Campaign

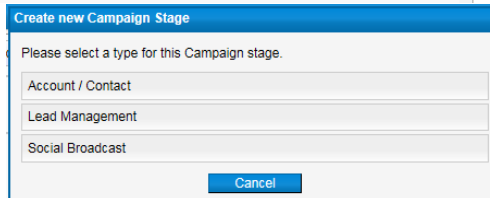
➤ Defining your Campaign

As well as creating a New Quick Campaign, you can create a Campaign, add one or more Campaign Sources and then run the Stage



➤ Adding a Stage

Define your Campaign and click to add a Stage
 Select the type of recipients for this Stage

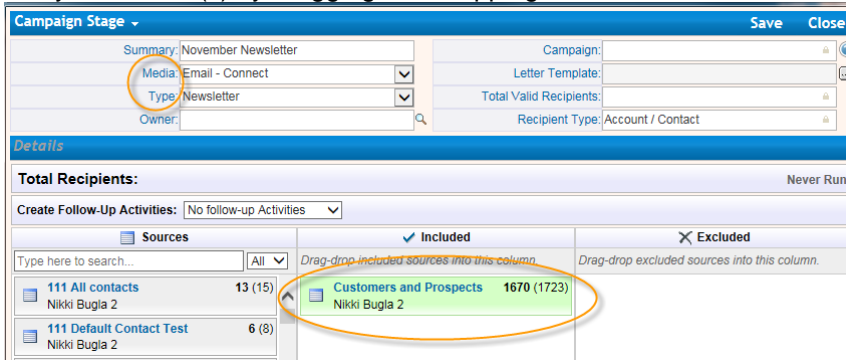


Define your Stage by adding the following:

- Media – Email/Letter etc
- Type – select from the dropdown list

➤ Adding Sources

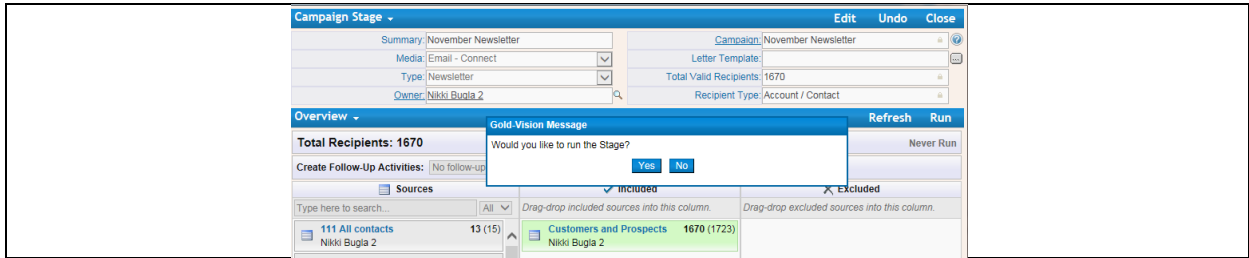
Add your Source(s) by dragging and dropping from the list of Sources



Excluding Sources

You may wish to Exclude certain sources from your Campaign Stage, this can be done by dragging the source to the Excluded column

Click Save – this will validate the Recipients for this particular Stage (eg valid email address) your will then be prompted the run the Stage

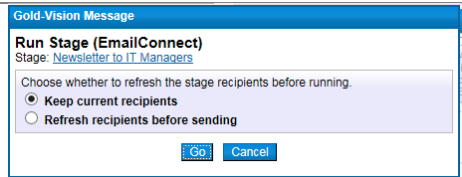


➤ **Running the Campaign Stage**

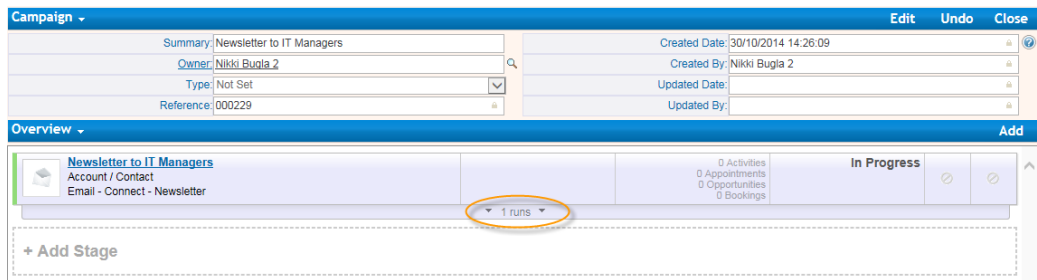
Email – Connect

Click the Yes to upload the recipients to Connect

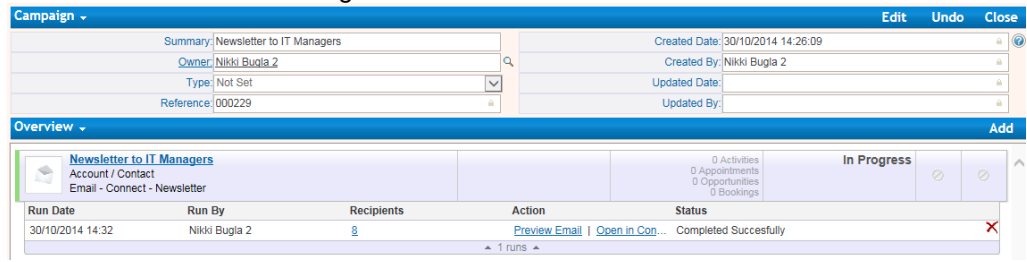
You will be asked if you want to refresh the recipients. In this example they do not need to be refreshed.



The recipients will be uploaded to Connect.



Click Run to see the following information



Recipients – once the Mailshot has been sent, view recipient click through data.

Preview Email – once a Template has been applied, click to Preview the Mailshot.

Open in Connect- to work on your mailshot.(you will be prompted to enter your User Name and Password if you do not already have Connect open.

Once the mailshot has been sent you will be able to see all the run and click thru data

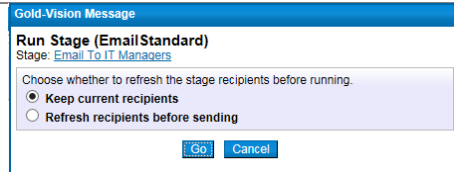
Recipients Click Thrus Download CSV

Name	Account	Run Date	Valid	Opened	Clicked	Delivered
		Select a date...	All	All	All	All
Alex Williamson	Global Transport Forum Ltd	07/10/2014 16:45:...	✓	-	-	-
Andrew Fiendley	Gold-Vision CRM	07/10/2014 16:45:...	✓	-	-	-
Andrew Fiendleyson	1St Call Transport Service	07/10/2014 16:45:...	✓	✓	-	✓
Craig Pears	Craig Test	07/10/2014 16:45:...	✓	-	-	-

Email – Standard

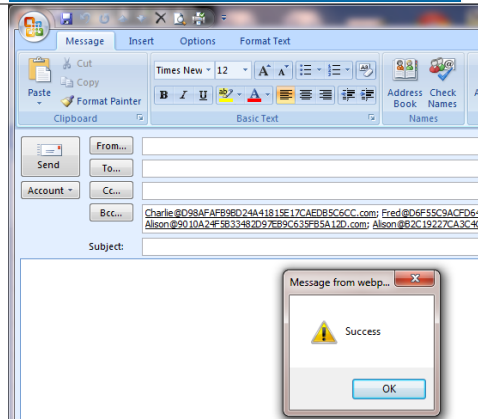
Click Yes to create an Outlook Email

You will be asked if you want to refresh the Recipients, in this example they do not need to be refreshed.

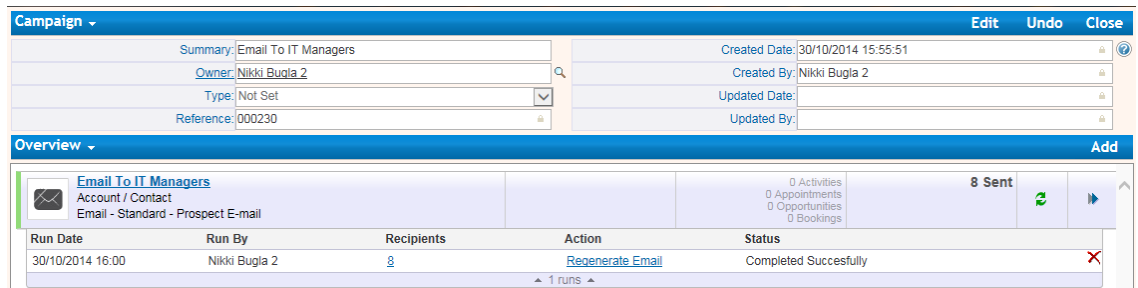
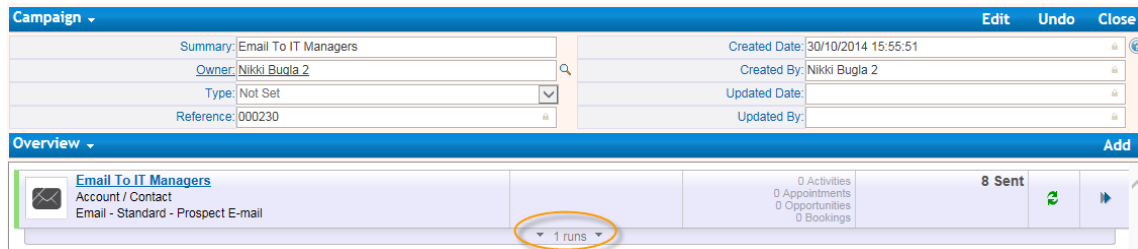


An Outlook email will open with the Recipients in the BCC section.

Add your email subject and body, click send.



Once the email has been sent, click on Runs to see the recipients who were included in the run.

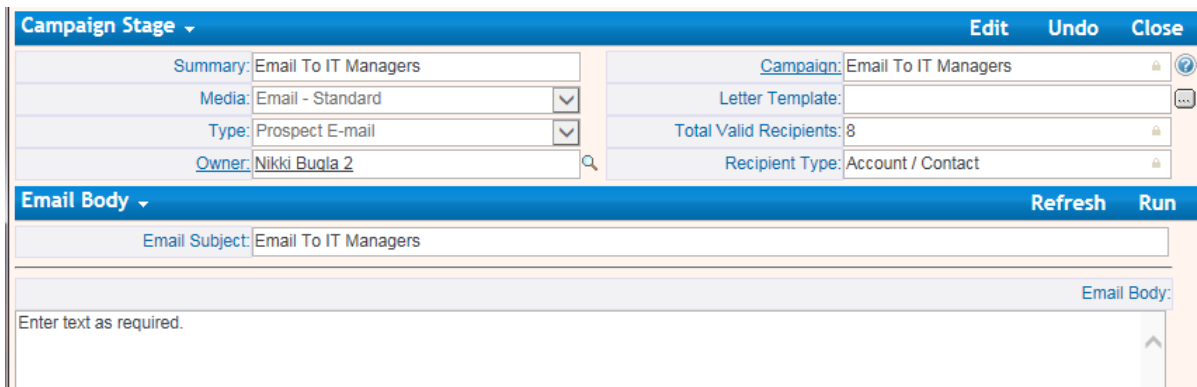
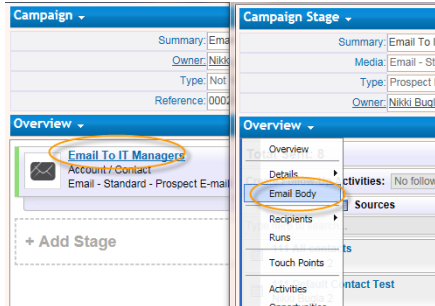


Option 2

Adding the Email Body to the Gold-Vision record

Click the Stage (eg Email to IT Managers) and from the Overview menu select Email Body

Click **Edit** to add Subject and Body of the Email. Save – further editing can be made as required, click **Run**. This will open an Outlook email as above.

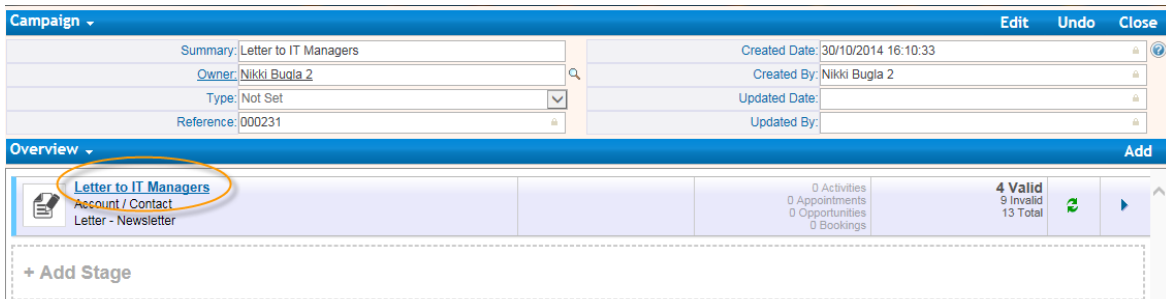


Letter

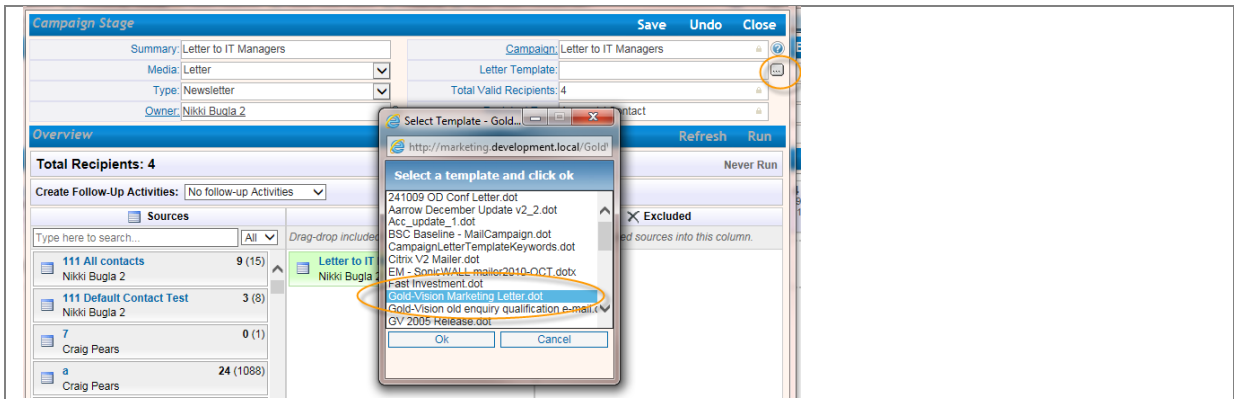
Campaign letter templates need to be prepared for use, this is simply a Word document template saved to the GVTemplates shared folder.

This process is documented in the Administration Console Guide, alternatively contact your Account Manager for further assistance.

You now need to select a Letter Template. Click the **Campaign Stage**

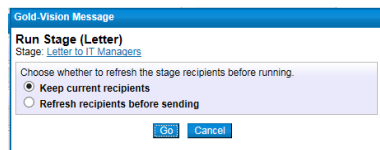
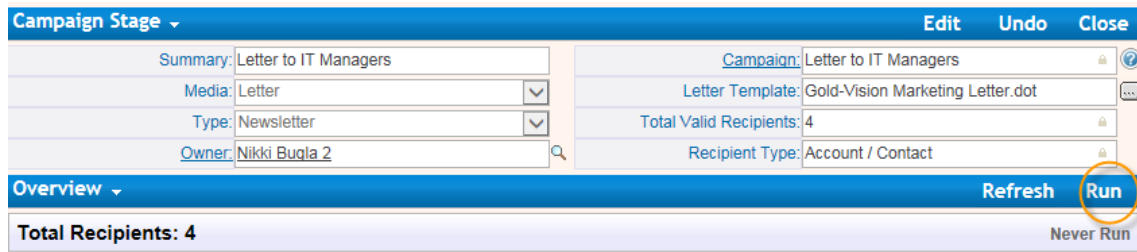


Click **Edit**, click the Template Icon and select a Template



The Default Salutation is Sir / Madam which will act as default if no Letter Salutation is set for a Contact

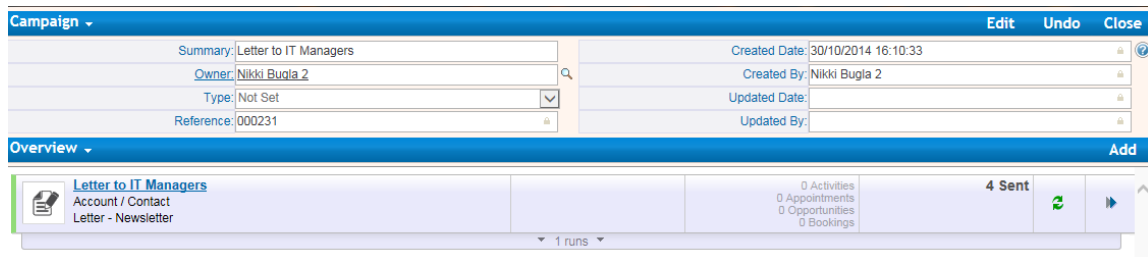
Click **Run** . You will be asked if you want to refresh the Recipients, in this example they do not need to be refreshed.



Word will open and a Letter will be created based on the Template you selected for each of the campaign recipients.

To produce the Campaign Letters, click Print

Once the email has been sent, click on Runs to see the recipients who were included in the run.



The screenshot shows the 'Campaign' overview for 'Letter to IT Managers'. The summary includes: Summary: Letter to IT Managers, Owner: Nikki Bugla 2, Type: Not Set, Reference: 000231. It also shows dates: Created Date: 30/10/2014 16:10:33, Created By: Nikki Bugla 2, Updated Date: (empty), Updated By: (empty). The overview section shows 4 Sent letters. A table below lists the run details:

Run Date	Run By	Recipients	Action	Status
30/10/2014 16:17	Nikki Bugla 2	4	Regenerate Letters	Completed Successfully

From here its possible to regenerate letters if required.

Phone

Campaign Activities can be created when a Campaign is run, for example as a follow up to an email or a letter Campaign or you they could be used to create a Telesales Campaign, creating activities for users to call a recipient.

Campaign Activities allow you to monitor the success of a Campaign by the changes in the Campaign Activity statuses. For example, a company may have five stages for a Campaign Activity (Campaign sent, Response received, Demonstration arranged, Evaluation version despatched and Order Placed). Looking at the Activities list and filtering to show the Campaign activities under each of the five stages will show the progress and success of a Campaign.

The screenshot shows the 'Campaign' overview for 'Telesales IT Managers'. The summary includes: Summary: Telesales IT Managers, Owner: Nikki Bugla 2, Type: Not Set, Reference: 000232. It also shows dates: Created Date: 30/10/2014 16:22:48, Created By: Nikki Bugla 2, Updated Date: (empty), Updated By: (empty). The overview section shows 4 Valid, 9 Invalid, 13 Total. The 'Telesales IT Managers' entry is circled in orange.

Click Edit and select Create Follow Up Activities (either Account or Contact activities)

The screenshot shows the 'Campaign Stage' configuration. Summary: Telesales IT Managers, Campaign: Telesales IT Managers, Media: Phone, Type: Telemarketing, Owner: Nikki Bugla 2. Letter Template: (empty), Total Valid Recipients: 4, Recipient Type: Account / Contact. The overview shows Total Recipients: 4, Never Run. The 'Create Follow-Up Activities' dropdown is circled in orange, showing options: No follow-up Activities, Create Account Activities, Create Contact Activities.

Select the Activity Owner, Activity State, Start and Due Date then run the Campaign Stage

Campaign Stage Edit Undo Close

Summary: Telesales IT Managers Campaign: Telesales IT Managers

Media: Phone Letter Template:

Type: Telemarketing Total Valid Recipients: 4

Owner: Nikki Bugla 2 Recipient Type: Account / Contact

Overview Refresh **Run**

Total Recipients: 4 Never Run

Create Follow-Up Activities: Create Account Activities

Activity Owner: Account Manager Activity Stage: Not Started

Activity Start Date: 03/11/2014 09:00:00 Activity Due Date: 14/11/2014 17:00:00

Click Run

This message asks you to confirm that you want to create the activities. You will be asked if you want to refresh the Recipients, in this example they do not need to be refreshed.

Gold-Vision Message

Run Stage (Phone)
Stage: Telesales IT Managers

You have chosen to create activities when this stage is run. Un-check the box below to prevent activities from being created this run.

Create Follow-Up Activities

Choose whether to refresh the stage recipients before running.

Keep current recipients

Refresh recipients before sending

Go Cancel

The Activities will then be created.

Close the Stage and return to the Campaign record.

Click Activities to view the Activities which have been created:

Campaign Edit Undo Close

Summary: Telesales IT Managers Created Date: 30/10/2014 16:22:48

Owner: Nikki Bugla 2 Created By: Nikki Bugla 2

Type: Not Set Updated Date: 30/10/2014 16:33:14

Reference: 000232 Updated By: Nikki Bugla 2

Overview Add

Telesales IT Managers
Account / Contact
Phone - Telemarketing

4 Activities
6 Appointments
0 Opportunities
0 Bookings

4 Calls
4 Activities
0 Completed

1 runs

Campaign Stage Edit Undo Close

Summary: Telesales IT Managers Campaign: Telesales IT Managers

Media: Phone Letter Template:

Type: Telemarketing Total Valid Recipients: 4

Owner: Nikki Bugla 2 Recipient Type: Account / Contact

Activities Refresh Run

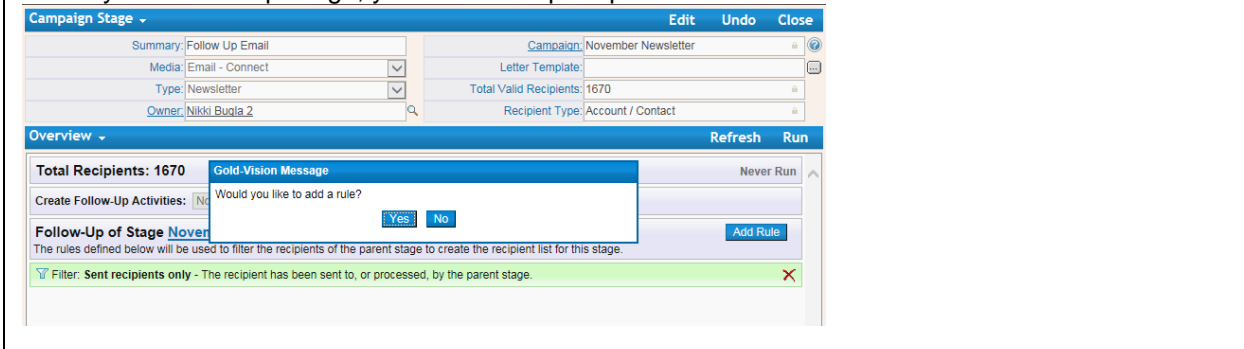
Summary	Contact	Contact Phone	Campaign Activity Stage	Owner	Complete
Telesales IT Manage...	Alison Speely	01926 651800	Not Started	Nikki Bugla	-
Telesales IT Manage...	Andrew Reynolds	020 7280 9000	Not Started	-	-
Telesales IT Manage...	Alison Bryan	0123654987	Not Started	Charlie Shaw	-
Telesales IT Manage...	Charlie Shaw	01744 811119	Not Started	Nikki Bugla	-

> Follow Up Stages

Once the Stage has been run you may wish to create a Follow Up Stage - For Example – to send a Follow Up Email to everyone who has clicked on a specific link in a Gold-Vision Connect Mailshot.

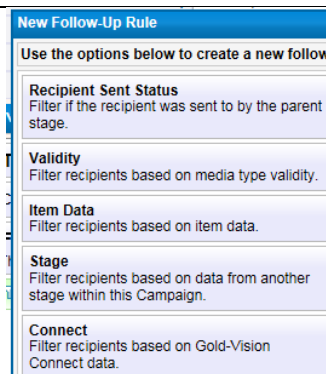


Define your Follow Up Stage, you will be prompted to add a Rule

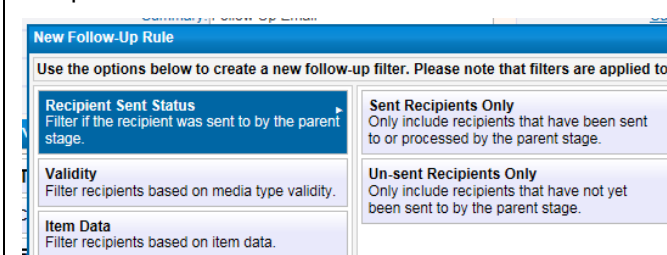


> Follow Up Rules

Select from the list of follow up rules



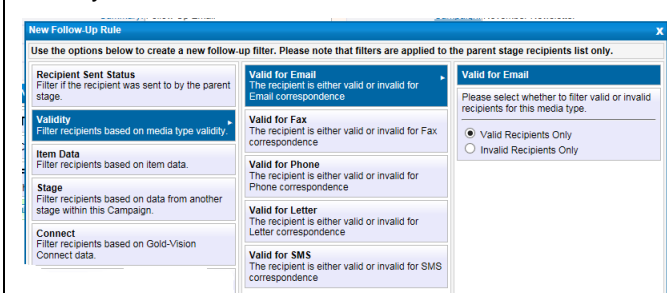
Recipient Sent Status



For example – you have a source 'New Prospects', when the account type changes to Prospect, new accounts will be added. You have used this source to send an email at the beginning of the month. You now wish to send a follow up email but only to those who were included in the original email.

Option – Sent recipients only

Validity



Options to send to either those who were included in the first stage or those who weren't

For example Stage 1 – email to all Customers but you have some who are Invalid due to missing email address

Stage 2 – send a letter to all those who were invalid in the initial stage

Item Data

New Follow-Up Rule

Use the options below to create a new follow-up filter. Please note that filters are applied to the parent stage recipients list only.

- Recipient Sent Status**
Filter if the recipient was sent to by the parent stage.
- Validity**
Filter recipients based on media type validity.
- Item Data**
Filter recipients based on item data.
- Stage**
Filter recipients based on data from another stage within this Campaign.
- Connect**
Filter recipients based on Gold-Vision Connect data.
- Account**
Filter based on recipient's Account data
- Contact**
Filter based on recipient's Contact data
- Follow-Up Account Activity**
Filter based on follow-up Activities associated with the Campaign stage
- Follow-Up Contact Activity**
Filter based on follow-up Activities associated with the Campaign stage
- Linked Opportunity**
Filter based on Opportunities associated with the Campaign stage
- Linked Appointment**
Filter based on Appointments associated with the Campaign stage
- Linked Booking**

Save Cancel

For example I want to send a follow up email with 20% offer, but I don't want to include anyone with an open Opportunity

Stage

New Follow-Up Rule

Use the options below to create a new follow-up filter. Please note that filters are applied to the parent stage recipients list only.

- Recipient Sent Status**
Filter if the recipient was sent to by the parent stage.
- Validity**
Filter recipients based on media type validity.
- Item Data**
Filter recipients based on item data.
- Stage**
Filter recipients based on data from another stage within this Campaign.
- Connect**
Filter recipients based on Gold-Vision Connect data.
- Exclude a Sibling Stage**
Select another sibling stage from this tree to exclude recipients for

For example
1st stage is a Connect mail
Follow up 1 is Phone call to those who have clicked a link
Follow up 2 is to re send the mail to those who haven't received a phone call. Use the Exclude Sibling Stage

Connect

New Follow-Up Rule

Use the options below to create a new follow-up filter. Please note that filters are applied to the parent stage recipients list only.

- Recipient Sent Status**
Filter if the recipient was sent to by the parent stage.
- Validity**
Filter recipients based on media type validity.
- Item Data**
Filter recipients based on item data.
- Stage**
Filter recipients based on data from another stage within this Campaign.
- Connect**
Filter recipients based on Gold-Vision Connect data.
- Delivered**
Email was successfully delivered
- Bounced**
Email bounced and was not delivered
- Bounce Code**
Email bounced with a particular response code
- Opened**
The recipient opened the email
- Didn't Open**
The recipient didn't open the email
- Clicked Any Link**

For example I want to create an activity for a sales person to call if a specific link has been clicked

Example of a Multi Stage Campaign

Campaign Summary: Nikki's Leads Campaign
Owner: Nikki Bugla 2
Type: Event Follow Up
Reference:

Created Date: 06/10/2014 15:29:20
Created By: Nikki Bugla 2
Updated Date: 06/10/2014 15:29:20
Updated By: Nikki Bugla 2

Overview

Activity Name	Lead Management	Activities	Appointments	Opportunities	Bookings	Status
Email Stage with call backs Lead Management Email - Standard - Newsletter	1 runs	0	0	0	0	3 Sent
Follow up 1 Lead Management Email - Standard - Prospect E-mail	1 runs	0	0	0	0	3 Sent
Test Lead Management Email - Standard - Prospect E-mail		0	0	3 Invalid	3 Total	3 Valid
Letter Stage Lead Management Letter - Newsletter	2 runs	0	0	0	0	6 Sent
Follow up 2 Lead Management Email - Standard		0	0	3 Invalid	3 Total	3 Valid

➤ **Managing Campaign Stages**

<p>Campaign Stage Menu</p>	
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Follow-Up Stage:
 - Create a Follow Up Stage (see above for more information)

Copy Stage
 - Copy the stage and recipients to the Campaign

Export to Excel – All/Valid/Sent
 This will send the output to a “Comma Separated Value” format, ideal for Word mail merge, or for sending to an agency.

New Link
 Create a Link to another Gold-Vision item.

Once the Campaign Stage has been Run, the following will take place.

A record of the Campaign will be created for each Account which can be viewed from the Account Overview Screen

A record of the Campaign will also be created for each Contact included in the Campaign which can be viewed from the Contact Record

<p>Campaign Stage – Overview menu</p>	
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Overview

Overview		Refresh	Run
Total Sent: 4		Last Run 31/10/2014 11:15:22 by Jodi Gaywood	
Create Follow-Up Activities: No follow-up Activities			
Sources		Included	
Type here to search...	All	Drag-drop included sources into this column.	
<ul style="list-style-type: none"> 111 All contacts 9 (15) 111 Default Contact Test 3 (8) 	<ul style="list-style-type: none"> Letter to IT Managers 4 (13) 		
		Excluded	
		Drag-drop excluded sources into this column.	

View the Sent, Run and Source information for the Stage

Details

Campaign Stage		Edit Undo Close	
Summary:	Telesales IT Managers	Campaign:	Telesales IT Managers
Media:	Phone	Letter Template:	
Type:	Telemarketing	Total Valid Recipients:	4
Owner:	Nikki Bugla 2	Recipient Type:	Account / Contact
Details		Refresh Run	
Default Salutation:	Sir/Madam	Last Refreshed Date:	30/10/2014 16:22:49
Reference:	000684	Last Refreshed By:	Nikki Bugla 2
Parent Stage:		Last Run Date:	30/10/2014 16:31:06
State:	Completed Successfully	Last Run By:	Nikki Bugla 2
Created Date:	30/10/2014 16:22:48	Updated Date:	17/11/2014 15:35:54
Created By:	Nikki Bugla 2	Updated By:	Nikki Bugla 2
Total Appointments:	0	Cost:	£150.00
Opportunities:	3	Value Open:	£7500.00
Activities:	4	Value Won:	£3000.00
Complete Activities:	4	Value Lost:	£0.00
Bookings:	1	Bookings Won:	£0.00
Confirmed Bookings:	1	Profit:	£2850.00

Summary details of the Campaign Stage

Recipients

Recipients – all recipients included in the Source(s) for the Stage
Sent Recipients – only those recipients who were valid for the stage when it was run. Note there is an option to add these recipients to a Source
Excluded Recipients – all recipients who were Excluded from the Source(s) for this Stage

Runs

Information about when the Stage was Run,

Runs				Refresh	Run
Run Date	Run By	Recipients	Status		
Select a date...			All		
30/10/2014 16:17:04	Nikki Bugla 2	4	Completed Successful		X

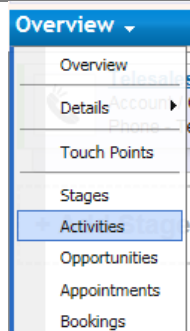
Activities, Opportunities, Appointments, Bookings
 See Managing Campaign Activities.

➤ Campaign Activities & Monitoring Campaign Performance

➤ Monitoring the Campaign

It is easy to see the progress of Campaign Activities either from within the Campaign itself, the Campaign Stage, or from the main Activity list.

Clicking on an item will display detailed notes, and the user may click through to the Account for any e-mail or Opportunity records created.

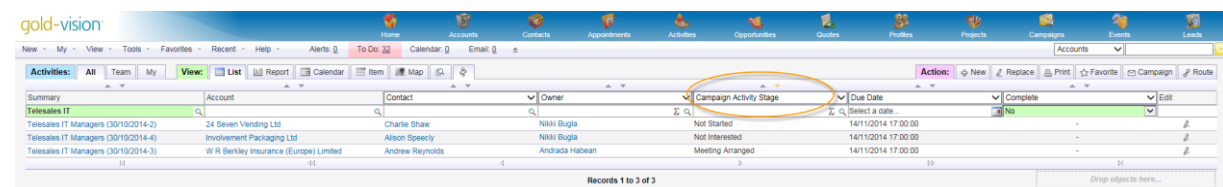


Summary	Contact	Contact Phone	Campaign Activity Stage	Owner	Complete
Telesales IT Manage...	Alison Speeclly	01926 651800	Not Interested	Nikki Bugla	-
Telesales IT Manage...	Andrew Reynolds	020 7280 9000	Meeting Arranged	Andrada Habean	-
Telesales IT Manage...	Alison Bryan	0123654987	Meeting Arranged	Charlie Shaw	✓
Telesales IT Manage...	Charlie Shaw	01744 811119	Not Started	Nikki Bugla	-

Records 1 to 4 of 4

By selecting an Activity the record will open and can be Edited, for example, the Status, Activity Stage, and Priority. The Activity can also be opened from the Owner's To Do List

From the main Gold-Vision page you can view all the Activities for a Campaign. Select **Activities**, enter the Campaign in the Summary and select **Campaign Activity Stage**.



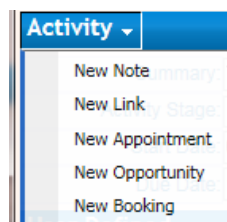
➤ Adding Appointments, Opportunities and Bookings

Appointments, Opportunities and Bookings may be created directly from the Campaign Activity and will be automatically included in the Campaign analysis.

From the Campaign record, select Activities.

Select the Activity you wish to add the Appointment, Opportunity or Booking to.

From the Activity menu select **New Opportunity/Appointment/Booking**

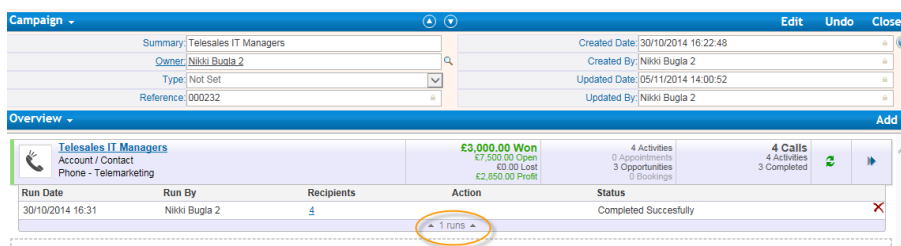


If an opportunity is created independently it can be linked back to the campaign by amending the Campaign Source field. Please see your administrator if this field is not available on your Gold-Vision screen.

From the Opportunity record select **Source Campaign** and select the relevant Campaign (please see you Gold-Vision Administrator if this is not on your Opportunities record)

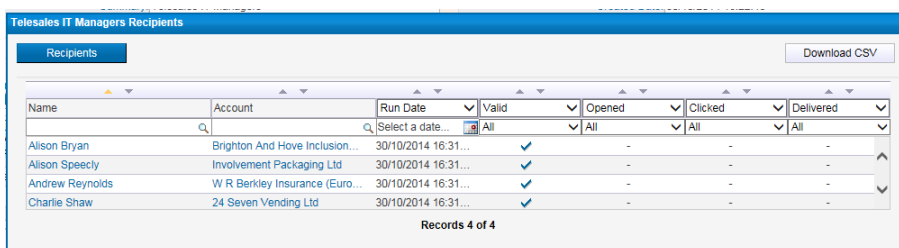
Viewing the Campaign Run History:

From the **Campaign Overview**, select **Runs**



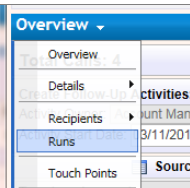
(You can **Delete** a run record by clicking the X. This will remove the run record from the campaign and from each Contact. **Note: If you have created Activities from this run, these will also be deleted.**

Click Run to view **Recipients** included in the Run:



Note- this list can be downloaded to CSV

The information is also available from the Campaign Stage Overview Menu



➤ **Re Running a Campaign Stage**

A Gold-Vision campaign stage may be re-run multiple times.

This allows you to just use one campaign for, say, the distribution of a standard Newsletter, or for different phases of the same campaign.

Each Run creates a separate record against the Contact and Account. Since the Campaign may retain the same title (although it may be edited), each Run is differentiated with a date stamp. Clicking on each Run record (as seen in the screenshot above) will show the Contacts that were selected for each Run).

Furthermore, each Run can use a different medium, and perhaps a slightly different recipient list.

For each run, the user has the choice of:

1. Using the same recipient list - simply re-run without Refreshing the Recipient List. This will ignore any contacts that may subsequently match the original criteria (e.g. have a newsletter profile).
2. Refresh the Recipient List from the Campaign Function menu or from the Source menu. This will re-run the original query and will include any contacts that may subsequently match the original criteria (e.g. have a newsletter profile). See section on Reviewing and Refreshing
3. Make further manual additions or deletions to the list, perhaps removing uninterested contacts.

➤ Viewing Campaign Records for an Account

From an Account Overview

Click on Campaigns from the Account Overview screen

The screenshot shows the 'Account Overview' for 'Masters Technology'. The 'Overview' section contains several links: Details, Account Planning (5), Additional Info, Opportunities (4/9), Quotes (3/10), Campaigns (57), and Events (2). The 'Campaigns' link is highlighted with a blue bar and circled in orange.

A List of Campaigns set up for the Account will be opened:

Campaign Stage	Campaign	Contact	Last Run Date	Media	State
November Newsletter	November Newsletter	Alison Bird	06/11/2014 15:57:21	Email - Connect	Completed Successfully
Letter to IT Managers	Letter to IT Managers	Alison Bird	31/10/2014 11:15:22	Letter	Completed Successfully
Telesales IT Managers	Telesales IT Managers	Alison Bird	30/10/2014 16:31:06	Phone	Completed Successfully
Email To IT Managers	Email To IT Managers	Alison Bird	30/10/2014 16:00:14	Email - Standard	Completed Successfully
Newsletter to IT Managers	Newsletter to IT Mana...	Alison Bird	30/10/2014 14:32:00	Email - Connect	Completed Successfully

Click on the Campaign or the Campaign Stage

➤ More Options

➤ Permanently Excluding Recipients From a Campaign Source

Lists of Contacts can be added to an Excluded from Campaign Sources. For example you might have a Source of all your Customers who you regularly send an Update Email to but you don't want to include a particular group of Contacts

Filter your list to show the Contacts you want to Exclude, click the Campaign Tab. Select Add to existing Campaign Source, select the Source and click **More Options**

Source Name	Type	Owner	Created Date
Newsletter Source	-	Nikki Bugla 2	17/11/2014 15:53:50
Test 2233	-	Jiggy Keith2	17/11/2014 11:48:23
Test21212	Type 2	Jiggy Keith2	17/11/2014 11:47:57
IT Managers (Bash)	-	Bashar Al-Azzawe	10/11/2014 15:45:52
test	-	Nikki Bugla 2	10/11/2014 14:29:38

Select Exclude the Selected Recipients

➤ Recipient Options

From More Option you can also select which recipients you want to include/exclude in the Source

Record Contact Only – the contact from your list e.g. From a list of Opportunities the contact would be the Contact for the Opportunity. From a list of Accounts this would be the Primary Contact
 Primary Contact only – Regardless of the list, this will only include the Primary Contact
 All Account Contacts-
 All Linked Contact – all Contacts linked to the item. For example – if the list is from Opportunities this option will include all Contacts linked to the Opportunities

➤ Default Contacts

By default, a default Contact for Accounts with no Contacts will be included. This gives the option in Letter Campaign Stage to create letter with the salutation Dear Sire/Madam.

This can be unticked if required.