Manage campaigns

In **iconnect360**, a campaign is a scheduled effort to send an email out to the target recipients.

I want to…

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- View campaigns
  - View list of campaigns
    - Campaign status
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  - View details of a campaign
- Edit campaign details
- Copy campaign
- Stop campaign
- Reactivate campaign
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Create a campaign

You can create a campaign at organisation or site level. Campaigns created at the organisation level are visible at the site level and vice versa. However campaigns created at a site are not visible at other sites.

To create a new campaign with similar details from an existing campaign, see topic: Copy campaign.

1. At the Organisation or Site level, select **Marketing** > **Campaigns** from the left menu.
2. Select **Add Campaign**.
3. In the *General Details* section:
    a. Enter the **Name** for the campaign. Limited to 50 characters. E.g. Birthday Offer.
    b. (*Optional*) Enter a **Description** of the campaign.
    c. (*Organisation level only*) Select the **Site** field.
    In the *Site Lookup* pop-up window, select the site(s) from the **Choices** column. There are several ways to do so.
        - Select a site name and confirm selection with the **Select** button.
        - To multiple select, press the Ctrl key and select each required site. Then confirm selection with the Select button.
        - To select all sites, use the **Select All** button.
        The selected site(s) will appear in the **Selected** column.
        To deselect the site(s), use the **Deselect** or **Deselect All** button.
    d. Select **OK** once the selection has been made.
    e. Select a **Send Date** option.
        - **One-off** - Enter the date the campaign will be executed or select the date from the calendar date picker.
        - **Recurring**
            - Enter or select the start date of the campaign in the first field.
            - If the campaign is intended to be ongoing, leave the second field blank. This means the campaign does not end until you manually stop it.
            - If the campaign is intended for a specific period, enter the end date in the second field. The stated end date is included in the campaign period. E.g. End date is 30/11/2015. The campaign will last be executed on 30/11/2015.
    f. Select the **Send Time** from the dropdown list.
    Note: Time selection is only available in hourly intervals.
    g. Select a type of **Recipients List**.

Type	Steps
Select Recipient List	i. Select the empty field to select from a list of pre-defined recipients list. You can select more than one recipient list. ii. In the *Recipient List Lookup* pop-up window, select the recipient list(s) from the **Choices** column. iii. Select **OK** once the selection has been made. Availability of recipient lists for selection depends on its status and the level in which it was created.
Select Rules	i. Select to whom the rule **Applies to** from the dropdown list. ii. Select the condition of the rule from the dropdown list. iii. Depending on the selection, conditions may need to be further defined. *Terms defined:* o *Between = includes* *E.g. Age between 20 and 30 includes 20 and 30 years.* o *More than, less than, below, above, etc. = excludes* *E.g. Age below 50 excludes 50 years, i.e. 49 years and below.* iv. To add another rule, select **Add Rule** link. There is no limit to the number of rules for a list. However, too many rules may return no result. v. To delete a rule, select the corresponding **Remove** button.
Select Recipients (*option available only for single site*)	i. Select **Add Recipient** to add a customer or prospect. ii. In the *Person Lookup* pop-up window, select the customer or prospect's name. To search for a name, use the page navigation or enter the name into the **Search Person** field and press the Enter key. iii. To delete a name, select the corresponding **Remove** button. iv. To delete all names, select the **Reset List** link.

4. In the *Content* section:
   a. Select a **Template** option.
      - For **Select from email templates**, select the template from the dropdown list.
        How do I create an email template?
   b. Enter or change the **Subject** of the email.
   c. In the email body, type your email message.

- Use the available toolbars in the *Home* and *Insert* tabs to format your message.
- Use the in-built auto text fields in the *Merge Fields: Person* tab to insert auto text in your email message.

You can insert images into the email body. However the size of the email, inclusive of text content and images, must be less than 1.5MB.

The bigger the email size (especially with images), the longer it takes for recipients to open and view the email.

5. Select **Next**.
6. Check the accuracy of the area details in the *Summary* page.
   If you need to make any changes, select **Back** to return to the previous page.
7. Select **Finish**.

A confirmation message appears at the top of the *Campaigns* page.

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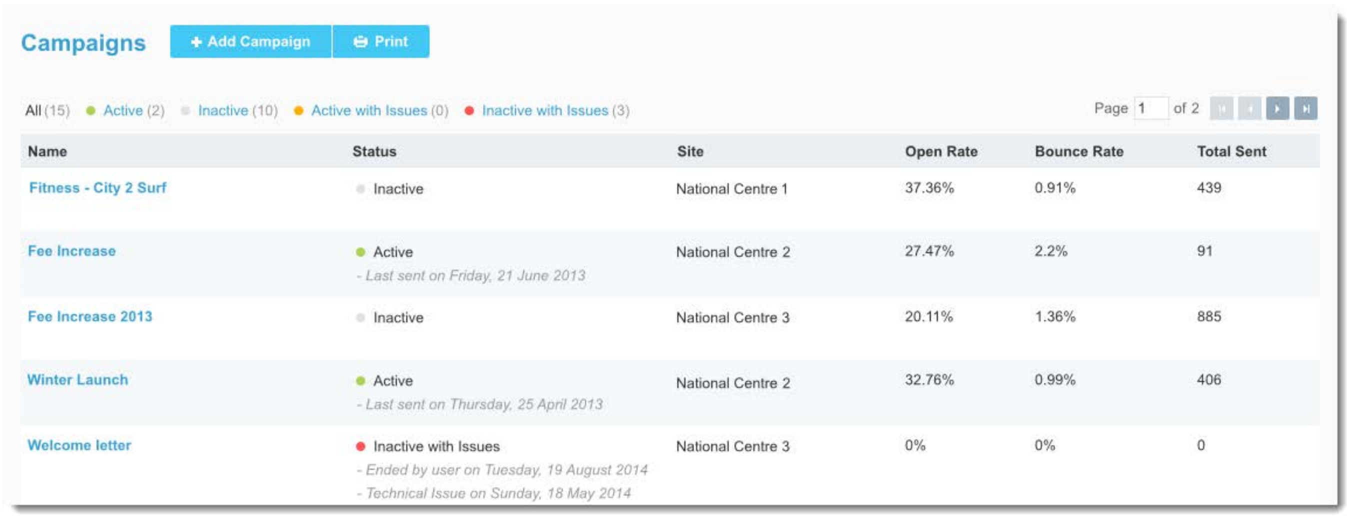
View list of campaigns

1. To view the campaigns lists available at the organisation level or at your site, select **Marketing > Campaigns** from the left menu.

A campaign created at the *organisation* level is visible at the *site(s)* it was created for.
A campaign created at the *site* level is visible at the *organisation* level but not at other *sites*.

2. Use the page navigation to move between the list pages.

Screenshot of Campaigns at organisation level



Column	Description
Name	The name of the campaign.
Status	The current status of the campaign. See status details below.
Site	The site(s) in which the campaign is/was assigned to. **This column is only available at organisation level.*
Open Rate	The percentage rate of opened emails (by the recipients) over Total Sent.
Bounce Rate	The percentage rate of bounced emails (returned emails) over Total Sent.
Total Sent	The number of emails sent throughout the campaign period.

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Campaign status

1. Select a status link to narrow down the list of campaigns.

2. The bracket next to the link indicates the number of campaigns.

Status	Status message	Description
Active	Starting on <date>	The campaign has not started. The scheduled send date is displayed.
	Last sent on <date>	The campaign is ongoing or recurring. The date the campaign was last executed is displayed.
Inactive	Ended by user on <date>	The campaign was intentionally stopped by a user. The date the campaign was stopped is displayed.
	Ended on <date>	The campaign has ended. The date the campaign was last executed is displayed.
Active with Issues	Technical Issue on <date>	The campaign is ongoing or recurring but failed in its last execution due to technical issues. The date the campaign last failed is displayed. See troubleshooting guide.
	The campaign will continue to run as scheduled. If issues are not solved, the next execution will also fail.	
Inactive with Issues	Technical Issue on <date>	The campaign has ended with the last execution failed due to technical issues. The date the campaign last failed is displayed. See troubleshooting guide.

Troubleshooting guide

Issue: Technical issues

Solution:

1. Select the campaign's name.
2. Select the *History* tab.
3. Note the details of the failed execution. You may want to Print Screen to capture the issue.
4. Contact Production Support: support@iconnect360.com with details of the failed issue.

Issue resolved

1. Once the issue is resolved, return to the campaign details.
2. Select **More** and select **Ignore Issue** from the dropdown list.
3. If you wish to reactivate the campaign, see topic: Reactivate campaign

Print list of campaigns

You can print the list of campaigns or save the list into a document.

1. In the *Campaigns* page, select **Print**.
2. The *Campaign List Report* is displayed in a pop-up window.
    a. To print the report, select **Print**.
    b. To save the report, select **Export** and select the desired file format. Then select **Save** to save to your local computer.
3. Select **Close** to close the report.

View details of a campaign

To view details of a specific campaign, select the campaign name.

- In the *Details* tab, general details about the campaign and its email content are displayed.
- In the *History* tab, past details of the campaign execution are displayed.
- In the *Timeline* tab, past changes on the campaign are displayed.

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Edit campaign details

You can only change the name, description and email content of the campaign. Campaigns created at the organisation level cannot be edited at the site level and vice versa.

If you require changes to the site distribution, send date and time, and recipients list, you will need to create a new campaign. See topics: Create a campaign or Copy campaign.

To manually end a campaign, see topic: Stop campaign.

1. At the Organisation or Site level, select **Marketing** > **Campaigns** from the left menu.
2. Select the desired campaign listed in the **Name** column.
3. To change the name and description of the campaign:
    a. In *General Details* section, select **Edit**.
    b. Make the necessary changes.
    c. Select **Save Changes**.
2. To change the contents of the email:
    a. In *Content* section, select **Edit**.
    b. Select a **Template** option.
        - Retain the default **Current** to keep the current email format and text.
        - Select the **Clear Content** link to remove the email subject and all content.
        - Select the **Select from email templates** to select a pre-defined template from the dropdown list.

          How do I create an email template?
    c. If required, change the **Subject** of the email.
    d. In the email body, edit the email message.
        - Use the available toolbars in the *Home* and *Insert* tabs to format your message.
        - Use the in-built auto text fields in the *Merge Fields: Person* tab to insert auto text in your email message.

      You can insert images into the email body. However the size of the email, inclusive of text content and images, must be less than 1.5MB.

      The bigger the email size (especially with images), the longer it takes for recipients to open and view the email.
    e. Select **Save Changes** when you are done.

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Copy campaign

Copying a campaign enables you to quickly create a new campaign with all the details of an existing campaign populated including the recipients list. You can copy both active and inactive campaigns.

1. At the Organisation or Site level, select **Marketing > Campaigns** from the left menu.
2. Select the desired campaign listed in the **Name** column.
3. Select **More** and select **Copy Campaign** from the dropdown list.
4. In the *Confirmation* pop-up window, select **Yes**.
5. In the *General Details* section:
    a. By default, a copy of the same **Name** is populated. If necessary, change the name for the campaign. Limited to 50 characters. E.g. Birthday Offer.
    b. (*Optional*) Retain/change the **Description** of the campaign.
    c. (*Organisation level only*) Retain/change the site(s) the campaign is made available.
        i. To change, select the **Site** field.
        ii. In the *Site Lookup* pop-up window, select the site(s) from the **Choices** column.
        iii. Select **OK** once the selection has been made.
    d. Retain/change the **Send Date**.
        - **One-off** - Enter the date the campaign will be executed or select the date from the calendar date picker.
        - **Recurring**
            - Enter or select the start date of the campaign in the first field.
            - If the campaign is intended to be ongoing, leave the second field blank. This means the campaign does not end until you manually stop it.
            - If the campaign is intended for a specific period, enter the end date in the second field. The stated end date is included in the campaign period. E.g. End date is 30/11/2014. The campaign will last be executed on 30/11/2014.
    e. Retain/select the **Send Time** from the dropdown list.
    Note: Time selection is only available in hourly intervals.
    f. Retain/change the type of **Recipients List**.

Type	Steps
Select Recipient List	i. Select the empty field to select from a list of pre-defined recipients list. You can select more than one recipient list. ii. In the *Recipient List Lookup* pop-up window, select the recipient list(s) from the **Choices** column. iii. Select **OK** once the selection has been made. Availability of recipient lists for selection depends on its status and the level in which it was created.

Type	Steps
Select Rules	i. Select to whom the rule **Applies to** from the dropdown list. ii. Select the condition of the rule from the dropdown list. iii. Depending on the selection, conditions may need to be further defined. *Terms defined:* o *Between = includes* *E.g. Age between 20 and 30 includes 20 and 30 years.* o *More than, less than, below, above, etc. = excludes* *E.g. Age below 50 excludes 50 years, i.e. 49 years and below.* iv. To add another rule, select **Add Rule** link. There is no limit to the number of rules for a list. However, too many rules may return no result. v. To delete a rule, select the corresponding **Remove** button.
Select Recipients (*option available only for single site*)	i. Select Add Recipient to add a customer or prospect. ii. In the *Person Lookup* pop-up window, select the customer or prospect's name. To search for a name, use the page navigation or enter the name into the **Search Person** field and press the Enter key. iii. To delete a name, select the corresponding **Remove** button. iv. To delete all names, select the **Reset List** link.

6. In the *Content* section:
    a. Retain/change the **Template**.
        - For **Select from email templates**, select the template from the dropdown list.
          [How do I create an email template?]
    b. Retain/change the **Subject** of the email.
    c. In the email body, make the necessary changes to the email message.
        - Use the available toolbars in the *Home* and *Insert* tabs to format your message.
        - Use the in-built auto text fields in the *Merge Fields: Person* tab to insert auto text in your email message.
7. Select **Next**.
8. Check the accuracy of the area details in the *Summary* page.
   If you need to make any changes, select **Back** to return to the previous page.
9. Select **Finish**.

A confirmation message appears at the top of the *Campaigns* page.

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Stop campaign

A one-off campaign automatically ends after it has been executed whereas a recurring campaign ends when its last scheduled date has been executed. However you can choose to stop a campaign prematurely before it begins or before the campaign period ends.

Stopping a campaign takes effect immediately.

1. At the Organisation or Site level, select **Marketing > Campaigns** from the left menu.
2. Select the desired campaign listed in the **Name** column.
3. Select **More** and select **Stop Campaign** from the dropdown list.
4. In the *Confirmation* pop-up window, select **Yes**.

The campaign's status changes to *Inactive* and its status message displays "*Ended by user on {date}*". You can check the details of the action in the *Timeline* tab.

Reactivate campaign

When a campaign has ended, its status becomes inactive. You can reactivate an inactive campaign anytime. Reactivating a campaign means running the campaign on a different send date and time but retaining its other details, i.e. same recipient list and email content.

1. At the Organisation or Site level, select **Marketing > Campaigns** from the left menu.
2. Select the desired campaign listed in the **Name** column.
3. Select **More** and select **Reactivate Campaign** from the dropdown list.
4. In the *Reactivate Campaign* pop-up window:
    a. Enter the **Send Date** for the campaign or select the date from the calendar date picker.
       If the campaign was originally a one-off campaign, you cannot change it to a recurring campaign, and vice versa.
       To change the *Send Date* option, see topic: Copy campaign.
    b. Select the **Send Time** from the dropdown list.
       Note: Time selection is only available in hourly intervals.
5. Select **OK**.

The campaign's status changes to *Active*. You can check the details of the action in the *Timeline* tab.

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View the Campaign Run Recipient List report

This report displays the list of customers and/or prospects who were recipients of campaigns that have been executed.

- At the organisation level, you can view reports for campaigns run at all organisation and site levels.
- At the site level, you can view reports for campaigns run at the organisation level and at its own site only.

1. At the Organisation or Site level, select **Reports** from the left menu.
2. In the *Campaign* section of the *Reports* page, select **Campaign Run Recipient List**.
3. Select the **Send Date**.

   By default, the selection is today's date. To change the date, enter the date in the *dd/mm/yy* format or select from the calendar date picker.
4. Select the **Campaign** you wish to view from the dropdown list.
5. Select the **Status** of the emails sent.
   - **All** - Bounced and Not Bounced emails.
   - **Bounced** - Returned emails (i.e. due to invalid email address or email inbox full).
   - **Not Bounced** - Successful emails sent.
6. Select **Generate Report**.

The generated report may consist of more than one page. The total number of recipients for each campaign is indicated in brackets next to the campaign's name.

Campaign Run Recipient List Report

Campaign : Site 1 Halloween Party One-off (Rules List),Org Halloween Party One-off (Rules+Recipient List)
Date : 31/10/2012
Status : All

Site 1 Halloween Party One-off (Rules List) (3)

Recipient Name	Email	Phone Number
Able Beng	Beng@iconnect360.com	0412345678
		0212345678
Bella Cullen	dc.rock85@gmail.com	0456565656

- To move between the pages, use the page navigation buttons.
- To print the report, select the **Print** button.

- To download the report, select **Export** and select the desired file format from the dropdown list. Select **Save** to save the file into your computer.
- To increase or decrease the visual size of the report, use the document size selector (at bottom right of the document).
- If you have generated more than one report, use the **Back** and **Next** buttons to move between the different reports.

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