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Campaigns User Manual

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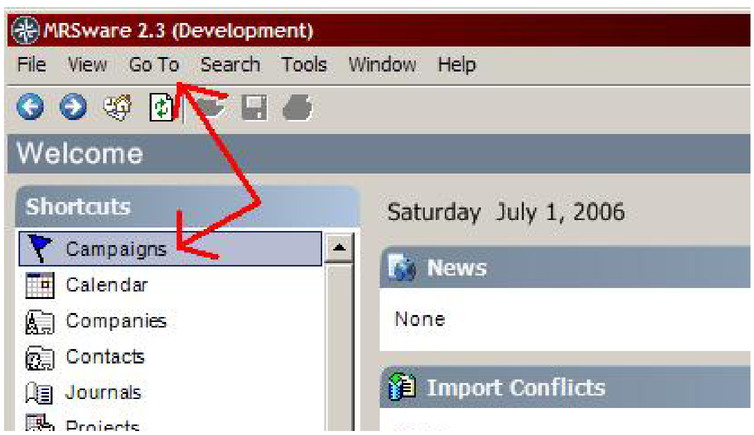
Overview

The Campaigns module in MRSware allows you to track the performance and value of your sales drives and promotions. The integration with the Sales Opportunity and Expense Report modules makes Campaigns an ideal place to find out where your company's resources are best spent.

Accessing the Module

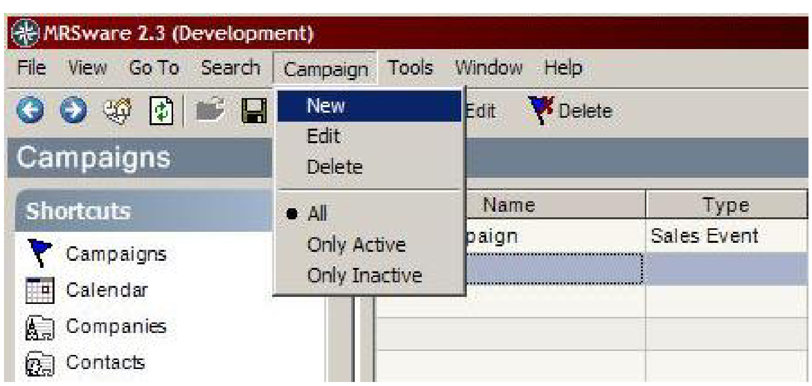
The Campaigns module can be accessed in the same fashion as the other standard modules in MRSware. By default, an icon should appear in your *Shortcuts* bar, or you can navigate to the screen using the MRSware menu *Go To* → *Campaigns* → *Campaigns*.



The Main View

The main campaign view consists of a table of the campaigns in your system and the actions you can perform on them. The New, Edit and Delete buttons are on the top menu bar; these features can also be accessed from the *Campaigns* menu and by right clicking on the data table.

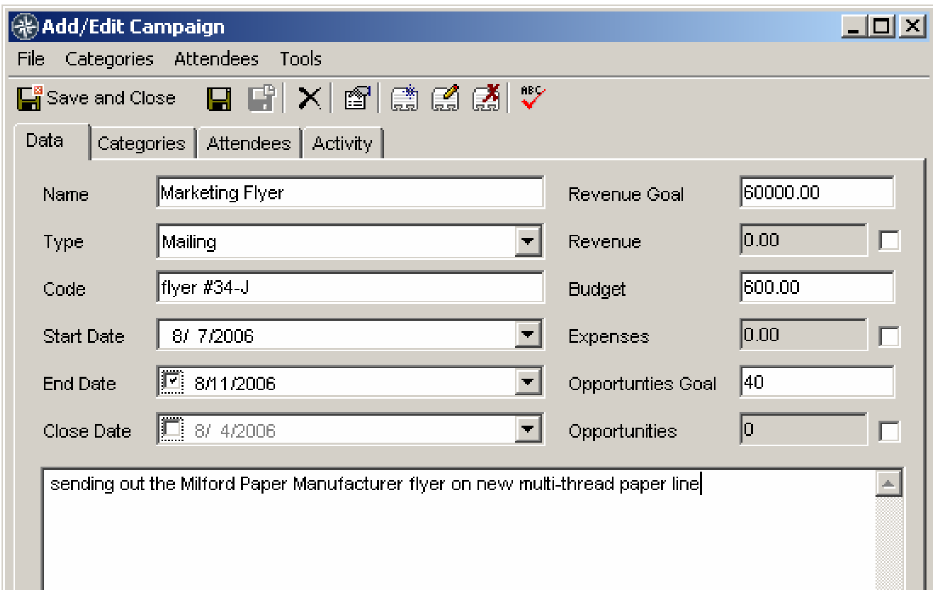
There are three ways to view the campaigns in the table: All, Only Active and Only Inactive. A campaign is considered inactive if its "Close Date" has been set (explained below).



A printout of the Campaigns listing can be generated by using the printer icon on the toolbar, or by going to *File* → *Print* or *Print Preview*. The Campaign Value report can be generated for the selected campaign by right-clicking on the campaign and choosing: *Reports* → *Campaign Value*.

Adding a New Campaign

Users can add a new campaign by using any of the *New* buttons described above or by double clicking on an empty row in the table. This will display the Add/Edit Campaign dialog which is used to add and maintain campaigns.

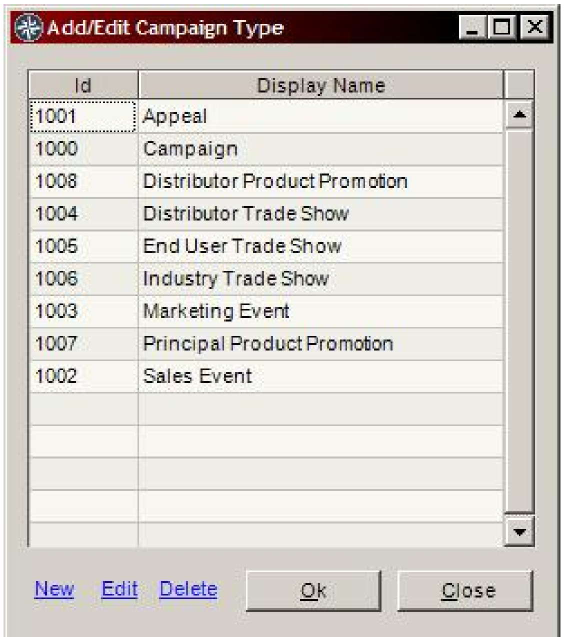


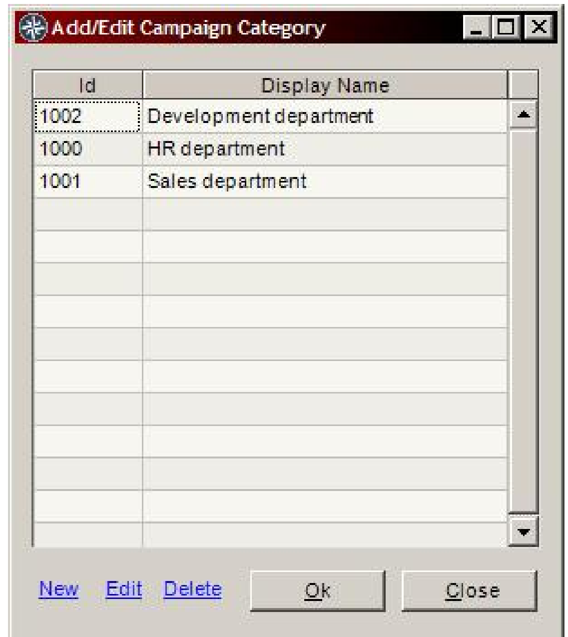
The fields on a campaign are described below:

Field Name	Description
Name	The main title of the campaign.
Type	The user defined type of the campaign (described below).
Code	Any identifier used to represent the campaign.
Start Date	The date the campaign or event begins.
End Date	The date the campaign or event ends.
Close Date	The date to stop displaying the campaign in selection boxes in other modules such as Sales Opportunities and Expense Reports.
Revenue Goal	the amount of money you want the campaign to bring in
Revenue	The amount of money the campaign has brought in. This totals the amounts won in the Sales Opportunity modules as well as the donations made in the Donations module.
Budget	The amount of money allocated to be spent on expenses during the campaign.
Expenses	The actual amount of money spent on the campaign as totaled by the expenses in the Expense Reports module.
Prospects Goal	The number of Sales Opportunity prospects you want the campaign to earn.
Prospects	The actual number of Sales Opportunity prospects the campaign brought in.
(Notes)	A free form field for additional information about the campaign.

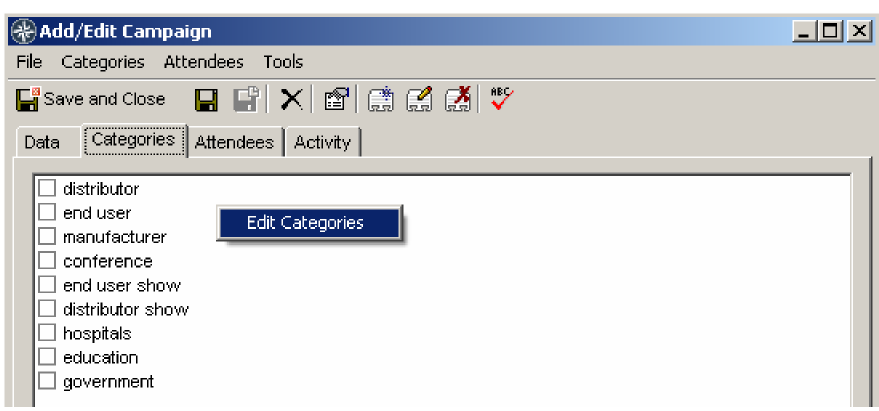
Managing Types and Categories

Each campaign can be assigned a single user defined type and any number of user defined categories. To add, edit or delete these types or categories, navigate to: *Go To* → *Campaigns* → *Manage* → *Campaign Categories*/ *Types*. Each screen has New, Edit and Delete links that can be used to manage the items in the table.



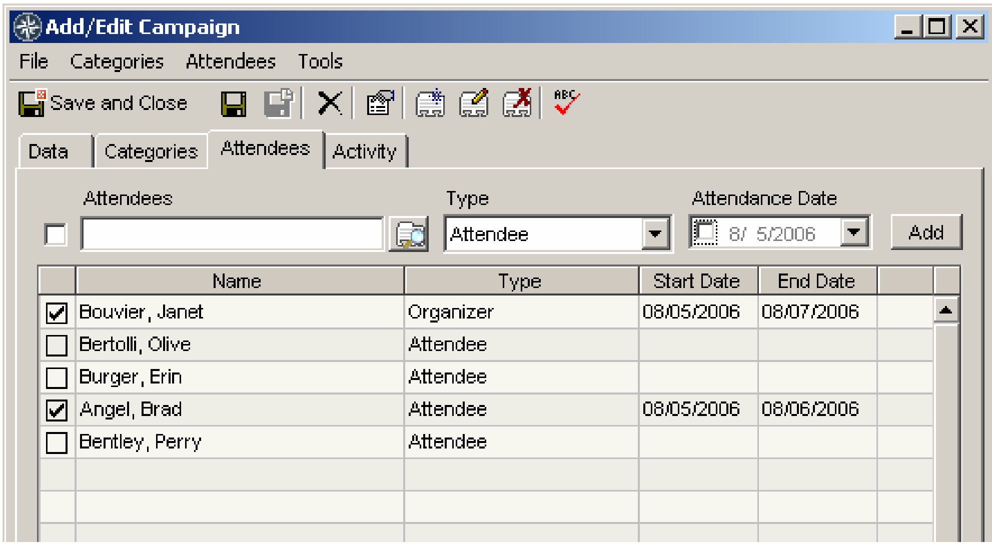


The types are displayed on the *Data* tab in the Add/Edit Campaign dialog pictured above. The categories are displayed and can be selected in the *Categories* tab. The categories can also be managed from the tab by right-clicking anywhere in the categories area and choosing *Edit Categories*, as seen below.



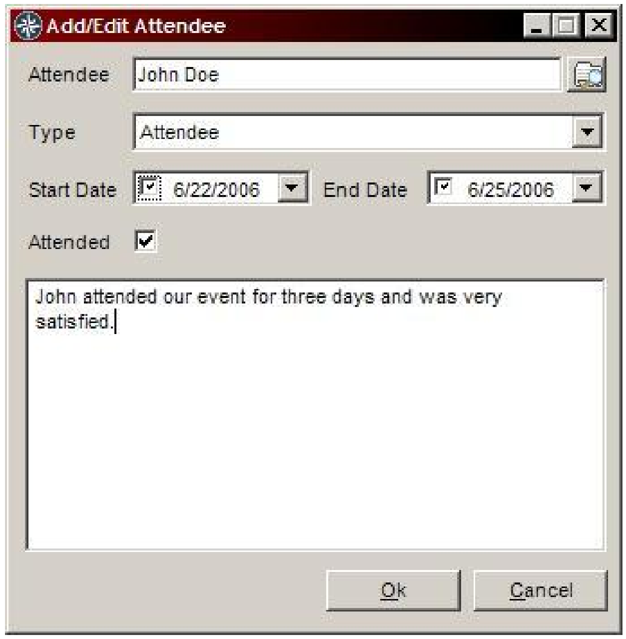
Attendees

The Attendees tab on the Add/Edit Campaign dialog allows the user to manage which contacts have attended the campaign. These can be company sales reps, meeting organizers, prospects or anyone who is a contact in your system. The entry fields at the top of the screen can be used to quickly add attendees. The checkbox indicates whether the contact attended, the Type field (explained below) describes the contact's role at the event and Attendance Date is the date they attended. Attendees can be added, edited or removed by using the buttons on the toolbar or by right-clicking on the table and choosing the corresponding action.

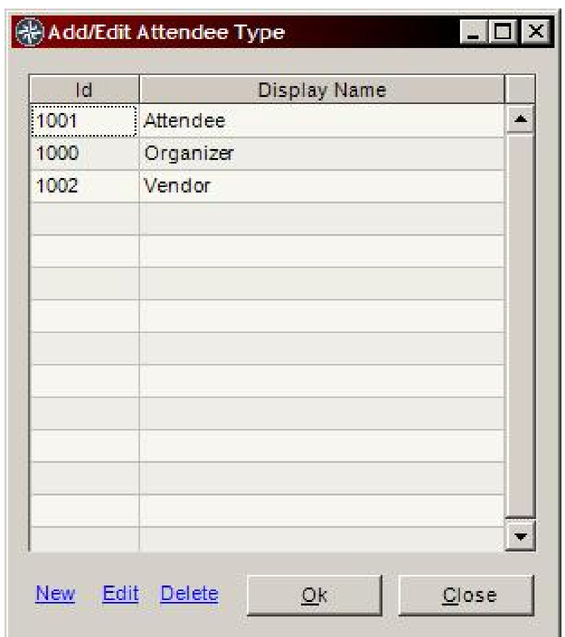


Clicking the New link brings up the Add/Edit Attendee dialog which allows you to input more information then the quick-add area contains. The fields on an attendee are described below:

Field Name	Description
Attendee	The contact attending the campaign or event.
Type	The user defined attendee type associated to the contact (described below).
Start Date	The first date the contact attended the campaign or event.
End Date	The final date the contact attended the campaign or event.
Attended	Whether the contact attended the event or was met by a sales rep at the event.
(Notes)	Additional information about the attendee.



To manage the Attendee Types, use the menu *Go To* → *Campaigns* → *Manage* → *Attendee Types*. They are managed in the same manner as the campaign types described above.



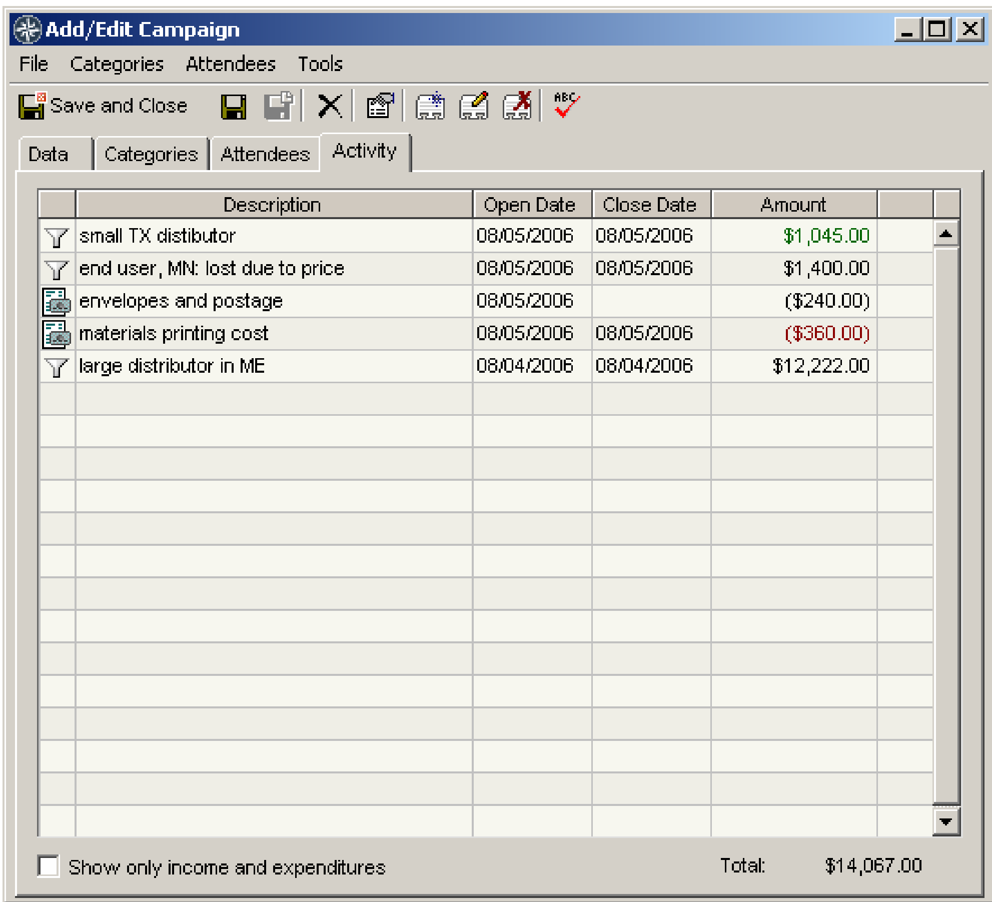
Activity

The Activity tab on the Add/Edit Campaign dialog displays all Sales Opportunities, Expense Reports and Donations associated to the campaign. To associate these items to a campaign, open the item in its Add/Edit dialog and choose the appropriate campaign in the *Campaign* selector. Besides displaying on the Activity tab, this will cause the item's prospects, revenue or expenditures to be included in the calculations on the Data tab (described above).

In the screenshot below, there are five items associated to the selected campaign; three are Sales Opportunities and two are Expense Reports. The Amount column is color coded to indicate how the item is contributing to the campaign's sales numbers. Items in red contribute to the expenses calculation and items in green are added to the revenue. Items whose amount is in black are described below:

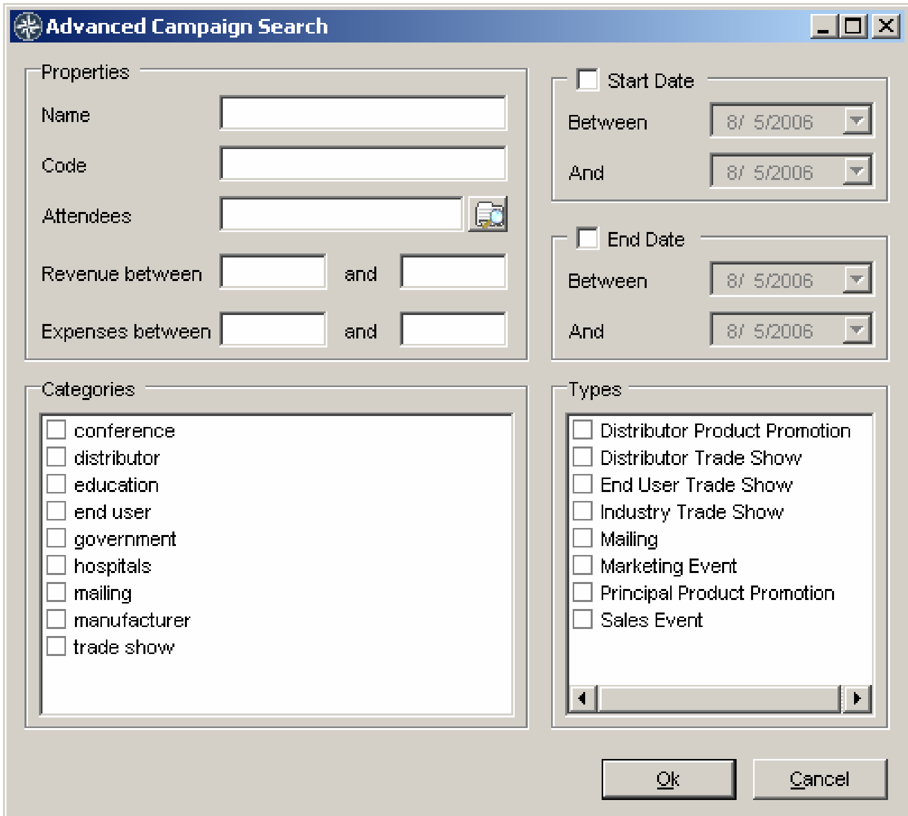
- Sales Opportunities are either not closed (neither Won nor Lost), or are closed but were marked as Lost.
- Expense Reports are in a state in which they have not yet been paid. This can mean they have been rejected or are in the process of being approved.

To only show the items that are actually contributing to financial calculations, check the *Show only income and expenditures* checkbox; this will only show those items whose amounts are in green or red.



Search

Campaigns can be searched by navigating to: *Search* → *Campaigns*. Simply enter the criteria you wish to search on and click Ok.



It is possible to search on many of the fields present on a campaign. The resulting list of Campaigns will contain all those campaigns that match the inputted criteria. Selecting multiple Categories or Types will result in campaigns that match any of those categories or types. Wildcards (*) can be used to search for multiple possible matches; for example, entering *J* Smith* in the Attendees field will return all the attendees whose last name is Smith and first name began with J.

This document, and other documentation, can be accessed by any user from the *Help → Documents* link in the main MRSware menu.

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