



CRM Campaigns

2016 - Fall Edition

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Overview

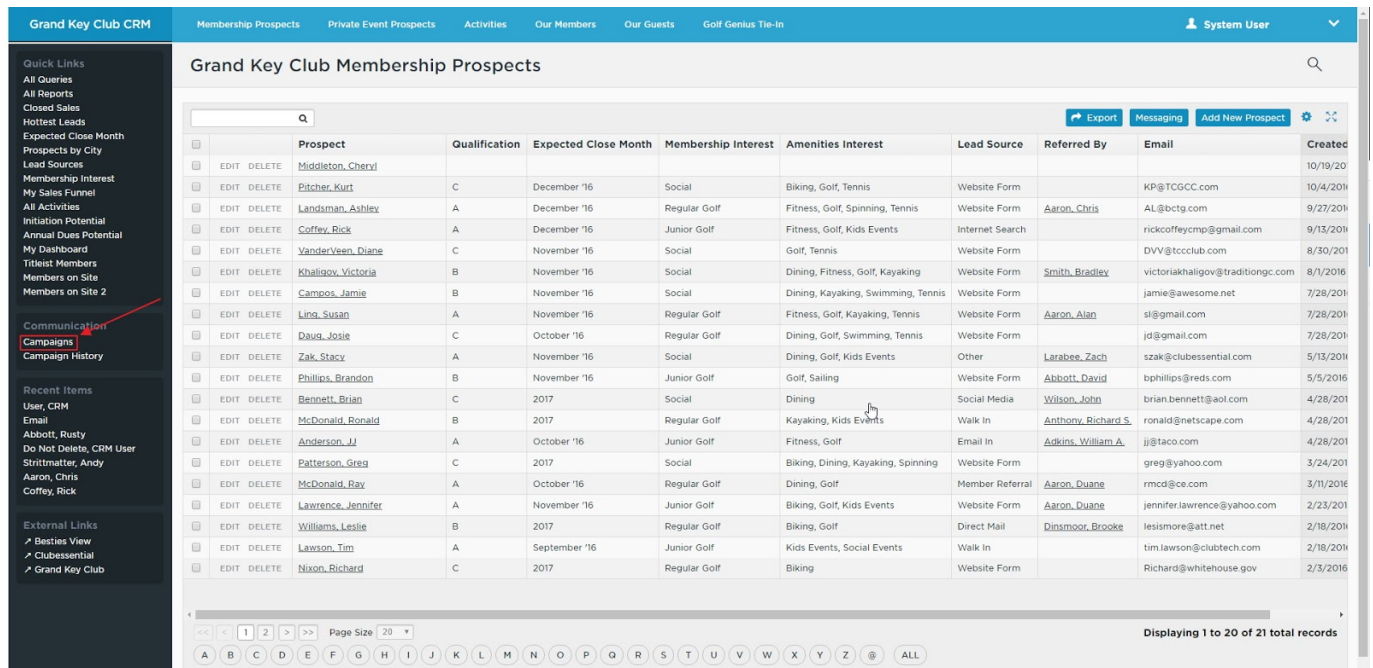
Campaigns are utilized to send blast-emails within the **CRM**, and are an excellent way to provide a meaningful communication touch-point to Prospects and/or Members. The campaigns or blast emails may be targeted to contacts within the CRM, by utilizing filters with specific queries, or by selecting individual Contacts.

Use Case(s)

Oftentimes, Clubs will utilize Campaigns to reach out to Prospects based on their funnel stage, lead source, or interests. Additionally, Clubs may utilize Campaigns to reach out to Members who have not been to the Club in awhile, as determined by a Member's online reservation history.

Accessing the Tool

From within your **CRM**, click on the **Campaigns** link in the sidebar, under the **Communication** section.



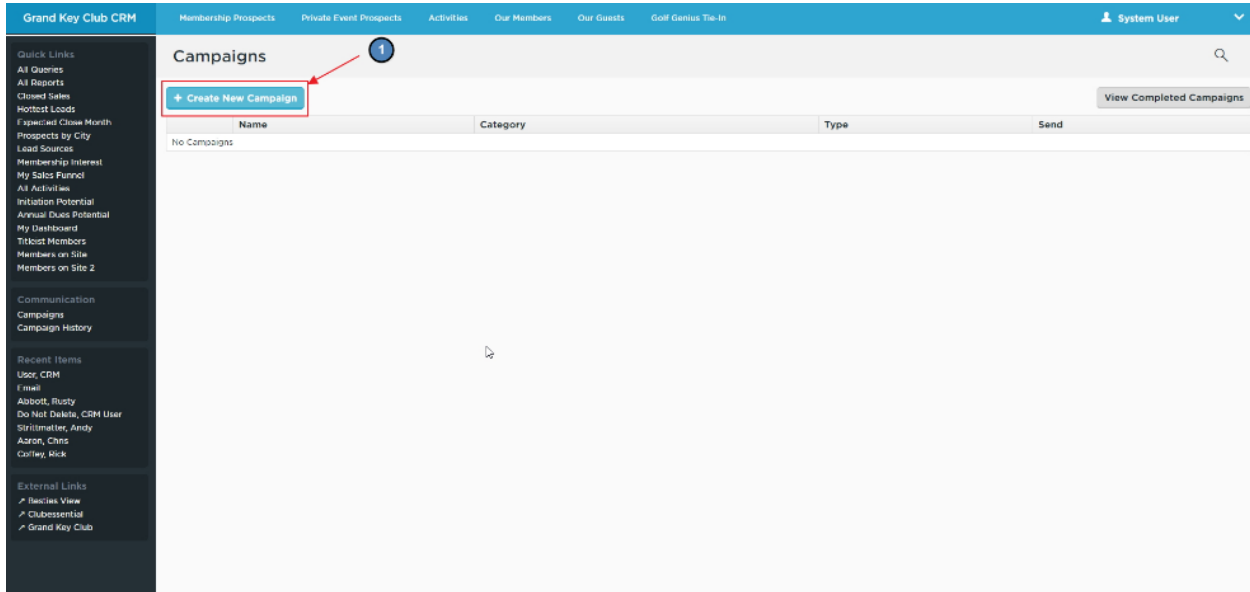
The screenshot displays the CRM interface for 'Grand Key Club CRM'. The main content area shows a table titled 'Grand Key Club Membership Prospects'. The table has the following columns: Prospect, Qualification, Expected Close Month, Membership Interest, Amenities Interest, Lead Source, Referred By, Email, and Created. The table contains 21 records, with the first few visible as follows:

Prospect	Qualification	Expected Close Month	Membership Interest	Amenities Interest	Lead Source	Referred By	Email	Created
Middleton, Cheryl	C	December '16	Social	Biking, Golf, Tennis	Website Form		KP@TCGCC.com	10/19/2016
Pitcher, Kurt	C	December '16	Regular Golf	Fitness, Golf, Spinning, Tennis	Website Form	Aaron, Chris	AL@bctg.com	9/27/2016
Landsman, Ashlev	A	December '16	Regular Golf	Fitness, Golf, Kids Events	Internet Search		rickcoffeycmp@gmail.com	9/13/2016
Coffey, Rick	A	December '16	Junior Golf	Fitness, Golf, Kids Events	Internet Search		rickcoffeycmp@gmail.com	9/13/2016
VanderVeen, Diane	C	November '16	Social	Golf, Tennis	Website Form		DVV@tcclub.com	8/30/2016
Khaligov, Victoria	B	November '16	Social	Dining, Fitness, Golf, Kayaking	Website Form	Smith, Bradley	victoriakhaligov@traditiong.com	8/1/2016
Campos, Jamie	B	November '16	Social	Dining, Kayaking, Swimming, Tennis	Website Form		jamie@awesome.net	7/28/2016
Lina, Susan	A	November '16	Regular Golf	Fitness, Golf, Kayaking, Tennis	Website Form	Aaron, Alan	sl@gmail.com	7/28/2016
Daug, Josie	C	October '16	Regular Golf	Dining, Golf, Swimming, Tennis	Website Form		jd@gmail.com	7/28/2016
Zak, Stacy	A	November '16	Social	Dining, Golf, Kids Events	Other	Larabee, Zach	szak@clubessential.com	5/13/2016
Phillips, Brandon	B	November '16	Junior Golf	Golf, Sailing	Website Form	Abbott, David	bphillips@reds.com	5/5/2016
Bennett, Brian	C	2017	Social	Dining	Social Media	Wilson, John	brian.bennett@aol.com	4/28/2016
McDonald, Ronald	B	2017	Regular Golf	Kayaking, Kids Events	Walk In	Anthony, Richard S.	ronald@netscape.com	4/28/2016
Anderson, JJ	A	October '16	Junior Golf	Fitness, Golf	Email In	Adkins, William A.	jj@taco.com	4/28/2016
Patterson, Greg	C	2017	Social	Biking, Dining, Kayaking, Spinning	Website Form		greg@yahoo.com	3/24/2016
McDonald, Ray	A	October '16	Regular Golf	Dining, Golf	Member Referral	Aaron, Duane	rmcd@ce.com	3/11/2016
Lawrence, Jennifer	A	November '16	Junior Golf	Biking, Golf, Kids Events	Website Form	Aaron, Duane	jennifer.lawrence@yahoo.com	2/23/2016
Williams, Leslie	B	2017	Regular Golf	Biking, Golf	Direct Mail	Dinsmoor, Brooke	lesismore@att.net	2/18/2016
Lawson, Tim	A	September '16	Junior Golf	Kids Events, Social Events	Walk In		tim.lawson@clubtech.com	2/18/2016
Nixon, Richard	C	2017	Regular Golf	Biking	Website Form		Richard@whitehouse.gov	2/3/2016

The interface also includes a sidebar with navigation options like 'Campaigns' and 'Communication', and a footer showing 'Displaying 1 to 20 of 21 total records'.

Starting a New Campaign

From the **Campaigns** screen, **click** on the **blue button** labeled **Create New Campaign**.

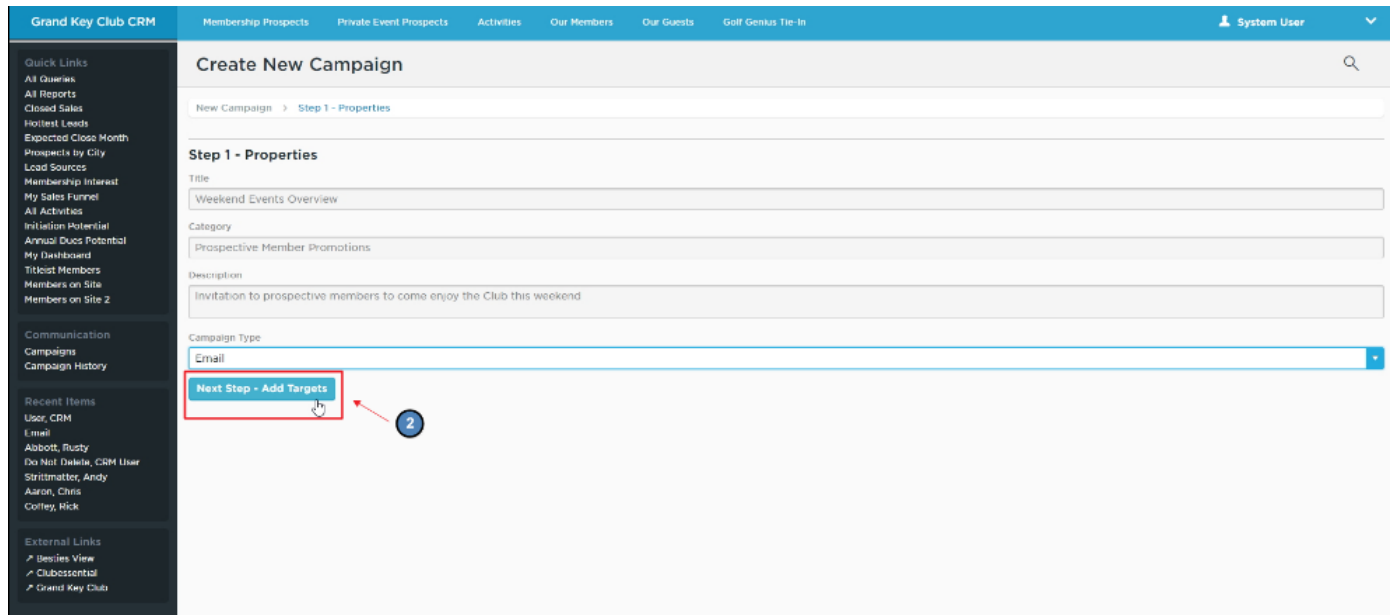


Step 1 - Properties

All the information on this screen is for internal use only - your selected recipients will not see anything that you enter on this page.

- **Title:** Enter a title for your **Campaign**, that you will use to find the **Campaign** in your **Drafts**, or in your **Campaign History**. This is often the same as your email subject, but it can be anything that describes the current **Campaign**.
- **Category:** **Categories** are optional, and can be useful if you are sending many **Campaigns** through your **CRM**, to help organize your **Campaign History** and/or **Drafts**. For example, if you are sending multiple **Campaigns** about the same event or promotion because you need to target multiple queries, using a shared **Category** would help you keep track of these linked **Campaigns**.
- **Description:** Descriptions are also optional fields, and can be useful to differentiate your **Campaigns** if you are sending many/similar messages via the **CRM**.
- **Campaign Type:** Choose either **Email**, or **Mail Merge**. Most **Campaigns** will be **Emails**, so this document will focus on this option.

When finished populating information, click **Next Step - Add Targets**.



Step 2 - Targets

In this step you will select who will receive the **email** from this **Campaign**. To begin, **click the blue button labeled *Add Targets***.

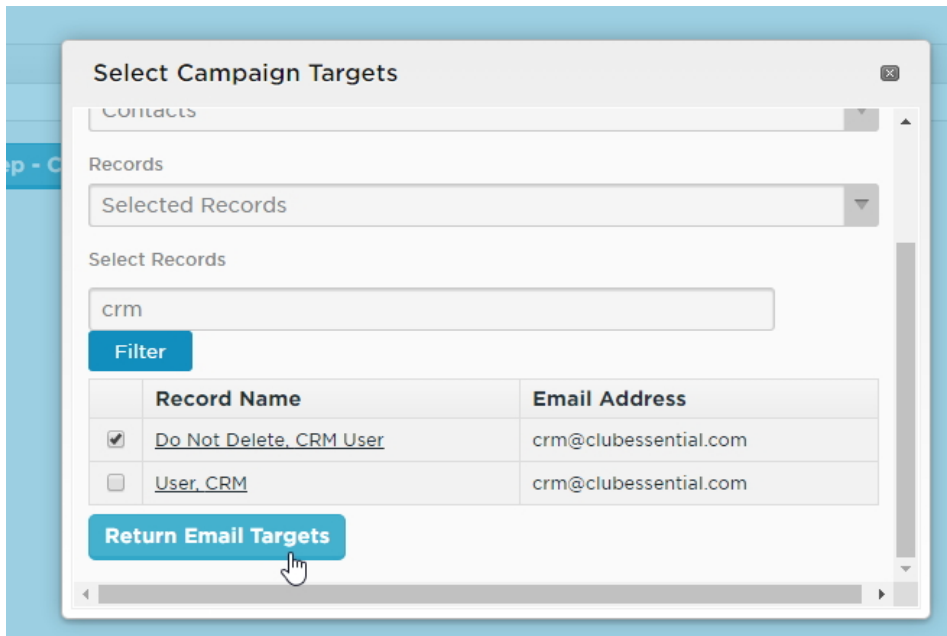
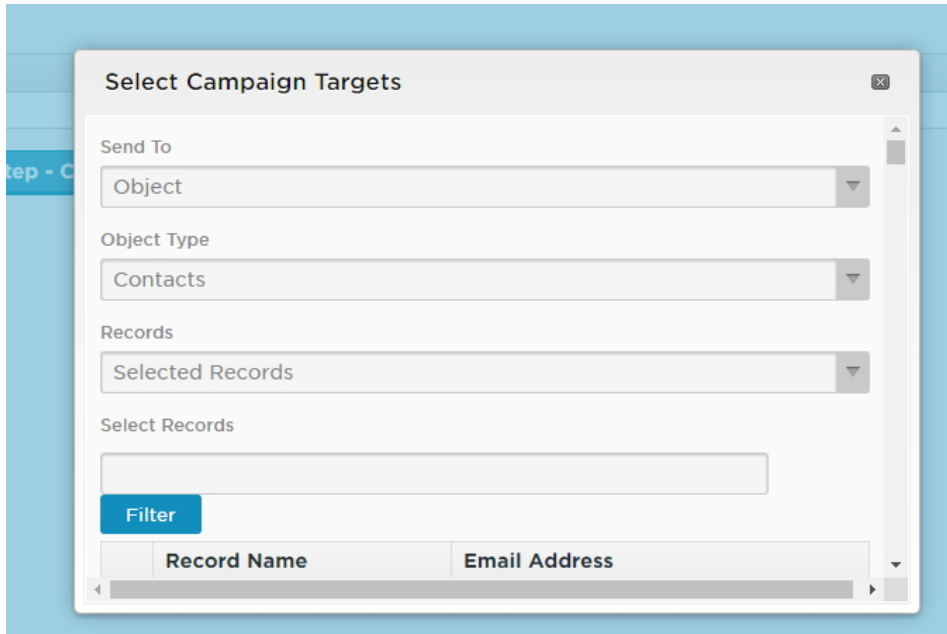
In the **Send To** dropdown box, you will need to choose what type of target you will be sending to:

- **Object:** This will allow you to send to all **Contact records** within your **CRM** at once (which you probably never want to do), or allow you to choose records to target one by one. This can be useful if the group you are targeting can not easily be selected in a **query**.
- **Query:** This allows you to send an **email** to the results of a **query** saved in your system. This is useful for sending **emails** to **groups** of contacts in your system that are grouped together by shared criteria, such as **Membership Level, Qualification or Age**, to name a few.

Sending to an Object:

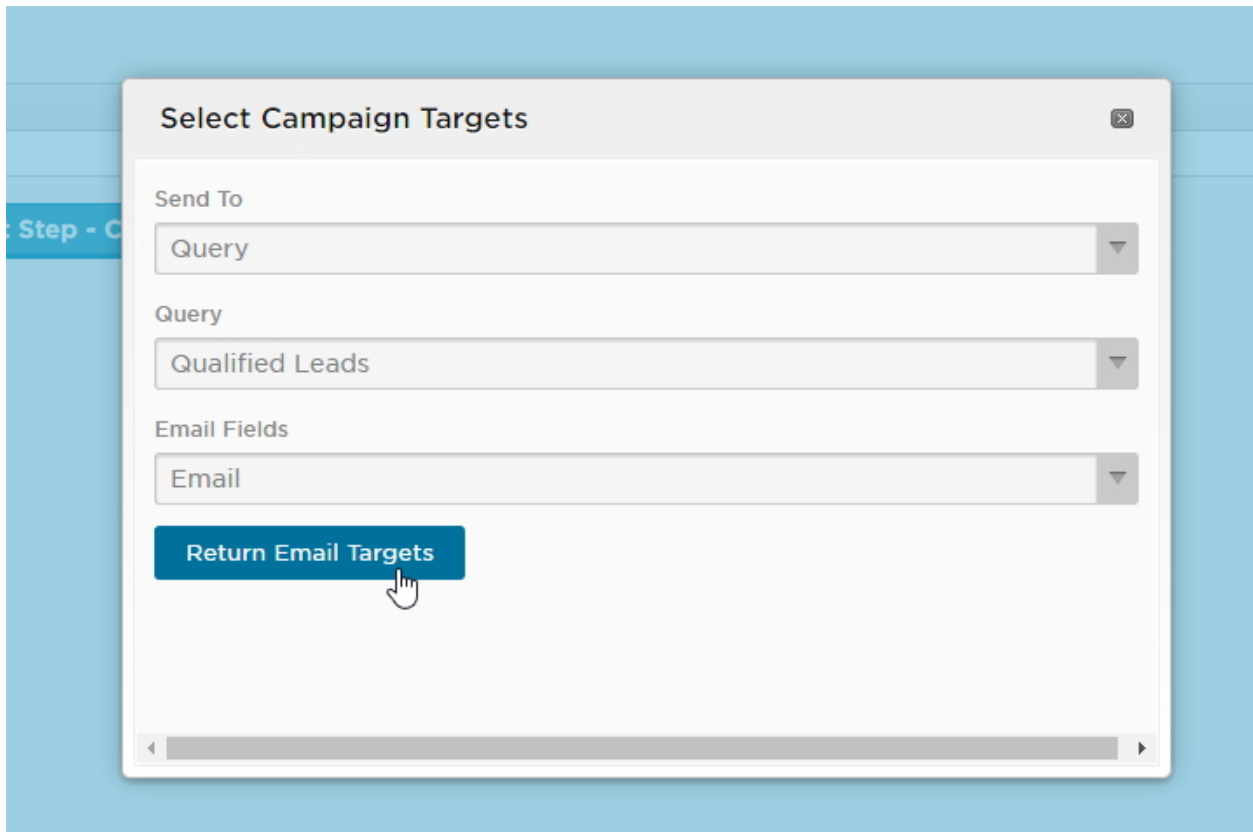
- **Send To:** Choose **Object**
- **Object Type:** Choose the **Object** to send to (most likely **Contacts**)
- **Records:** Choose **All Records** to send this **Campaign** to ALL records within your **CRM**. Choose **Selected Records** to bring up an additional section for you to select individual contacts.

- **Select Records:** This section appears when you select **Selected Records** in the option above. **Search** for contacts by name in the **search bar**, and **click Filter** to narrow down the list. **Check the box** next to each contact that you would like to send this **Campaign** to.
- **Email Fields:** Select the **CRM email field(s)** that you would like to target for each selected record you've chosen.
- **Return Email Targets:** **Click this button** once you have filled out each of the options above, and your targets will be selected for this **Campaign**.



Sending to a Query:

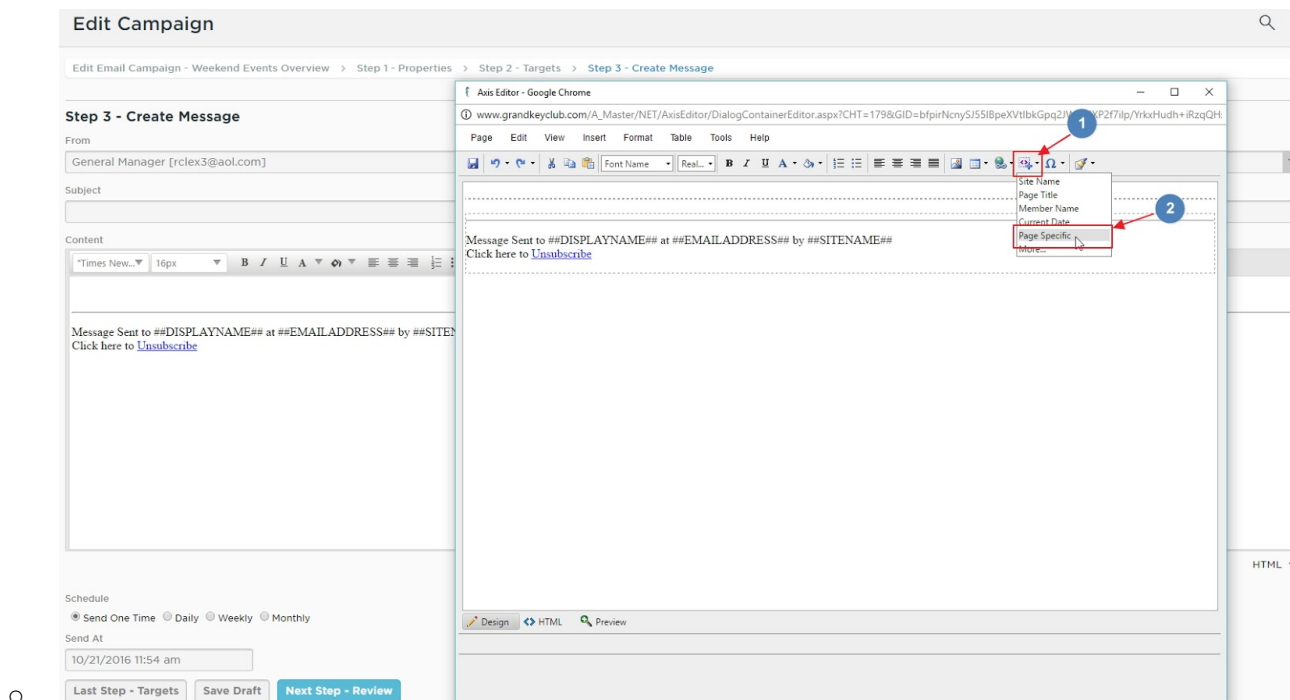
- **Send To:** Choose **Query**
- **Query:** Choose a **query** from the list that you would like to target with this **Campaign**.
 - You may only **select one query per Campaign**.
 - If you do not see the **query** that you need listed, it may need to first be created. Please contact your CRM support team for assistance (educational materials for **CRM Query** creation are coming soon).
- **Email Fields:** Select the **CRM email field(s)** that you would like to target for each selected record you've chosen. Please note that, in order to function, at least one email field must be returned in the selected **query** chosen as a **Campaign** target.
- **Return Email Targets:** Click this **button** once you have filled out each of the options above, and your targets will be selected for this **Campaign**.



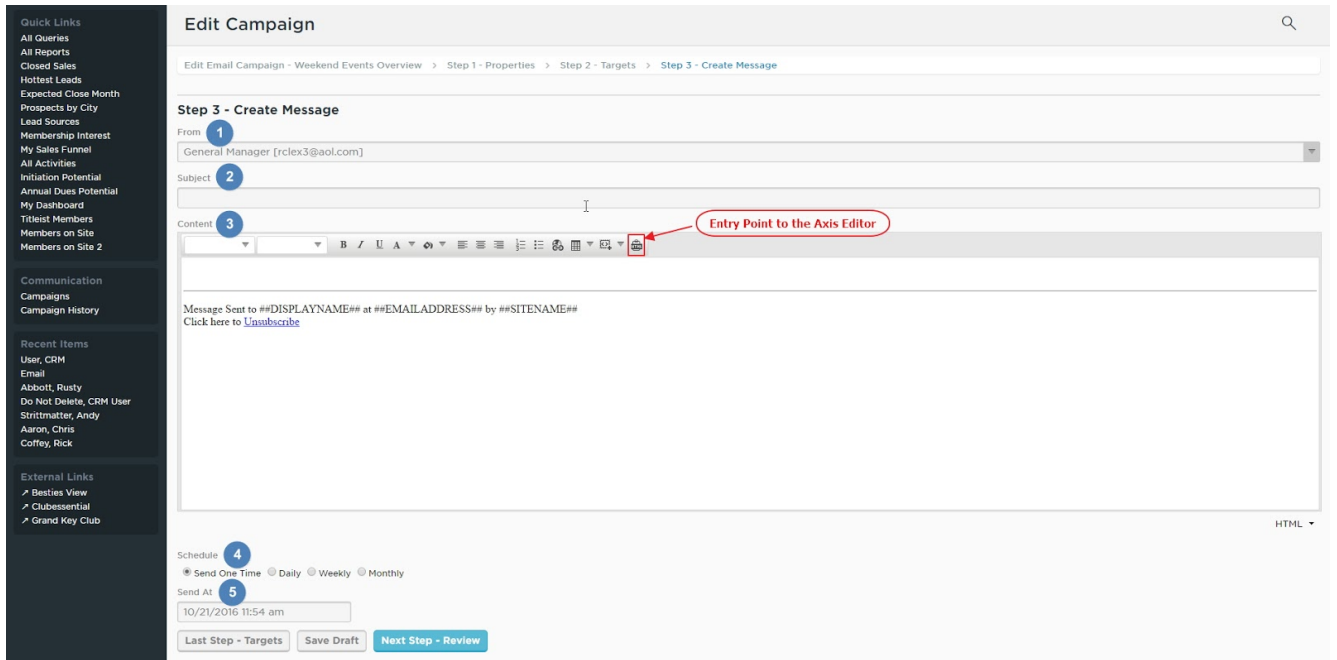
Step 3 - Create Message

In **Step 3**, you will craft the actual **email** which will be sent to the selected targets of this **Campaign**.

- **From:** Choose an **email address** from the list that you would like the emails in this **Campaign** to be sent from (if you do not see your email address on this list, please contact your CRM Support Team).
- **Subject:** Enter the **subject of the email**. This will be seen by the recipients.
- **Content:** Create the **body content of the email** that will be sent.
 - You can enter the content directly into this box, and format using the tools on the **toolbar** above.
 - Alternatively, the **last icon on the right** will bring up the full **Axis Editor** for you to edit your email with.
 - **IMPORTANT NOTE:** The list of available **snippets** in the **CRM** is different than those available to you through the **Axis Website**. When adding **snippets** to your **email** in the **Axis Editor**, be sure to **only** select **snippets** from the **“Page Specific”** section of the snippet dropdown, as these are the only ones that will reference your **CRM database**.



- **Schedule:** Select if you would like the **emails** in this **Campaign** to be sent only **one time**, or on a **recurring basis**.
- **Send At:** **Select the time** that you wish to send the emails out (or, if you have set up a recurring email, the time for the first batch of emails to be sent).



Edit Campaign

Edit Email Campaign - Weekend Events Overview > Step 1 - Properties > Step 2 - Targets > **Step 3 - Create Message**

Step 3 - Create Message

From **1**
General Manager [rclex3@aol.com]

Subject **2**

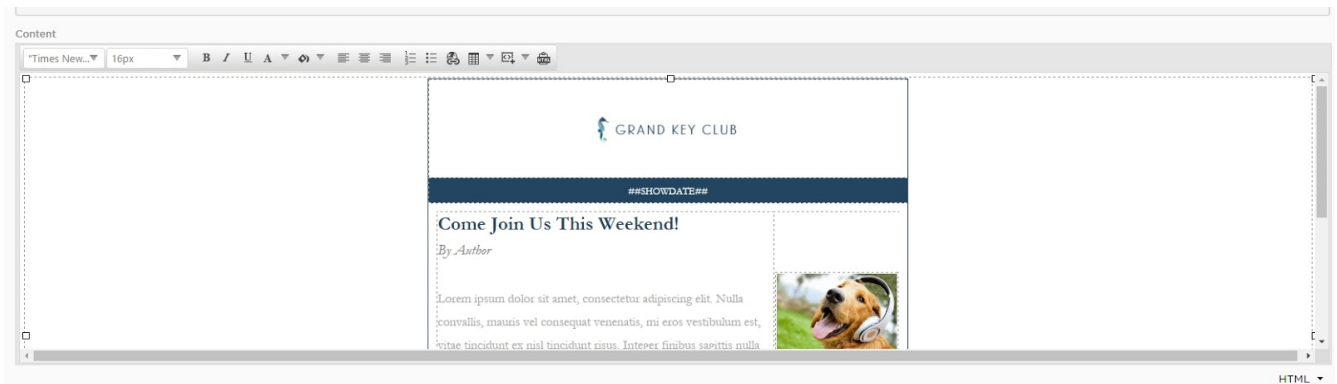
Content **3**

Message Sent to ##DISPLAYNAME## at ##EMAILADDRESS## by ##SITENAME##
Click here to [Unsubscribe](#)

Schedule **4**
 Send One Time Daily Weekly Monthly

Send At **5**
10/21/2016 11:54 am

Last Step - Targets Save Draft **Next Step - Review**



Content

"Times New..." 16px

GRAND KEY CLUB

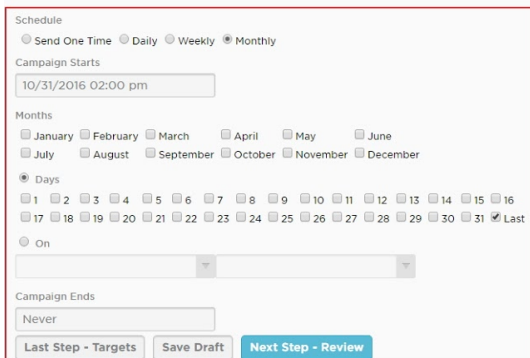
##SHOWDATE##

Come Join Us This Weekend!

By Author

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla convalis, mauris vel consequat venenatis, mi eros vestibulum est, vitae tincidunt ex nisi tincidunt risus. Integer finibus sapit nulla

HTML



Schedule

Send One Time Daily Weekly Monthly

Campaign Starts
10/31/2016 02:00 pm

Months
 January February March April May June
 July August September October November December

Days
 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16
 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 Last

On
 [Dropdown]

Campaign Ends
Never

Last Step - Targets Save Draft **Next Step - Review**

Step 4 - Review

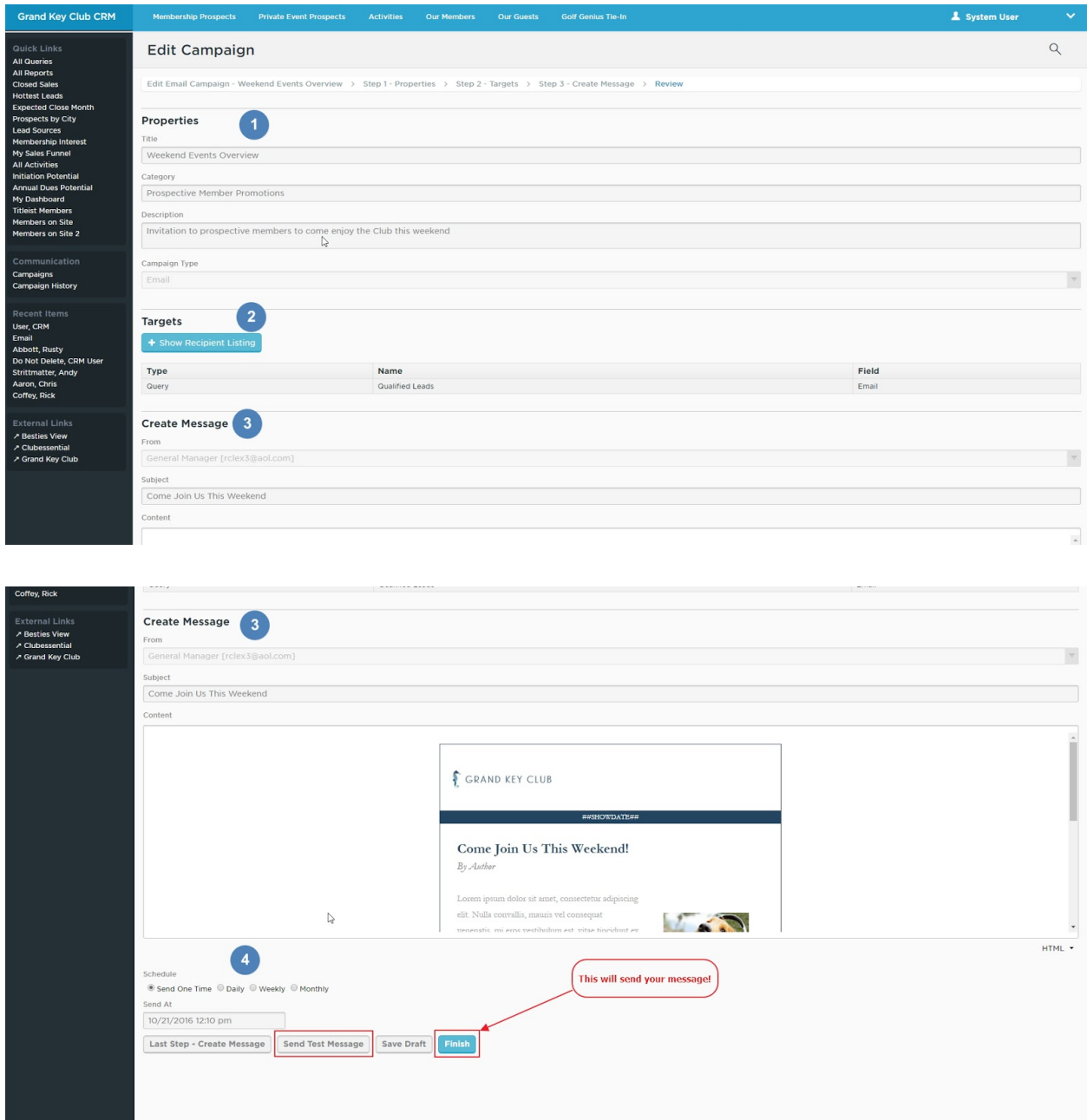
In this step you have the opportunity to review your input for all previous steps. If you notice any edits that need to be made, you can easily return back to any step in the process either by

clicking on the button at the bottom of the screen labeled **Last Step - Create Message** or by clicking on the name of the step from the cookie trail at the top of the screen.

- **Properties:** Displays the information entered as **Properties** for this **Campaign**. Remember that everything in this section is internal only, and will not be seen by **Campaign** recipients.
- **Targets:** Displays the set of contacts that you are targeting with this **Campaign**. You can see the **Object** or **Query** that you targeted in the grid, or to view a list of all returned targets, you can **click** the **blue button** labelled **Show Recipient Listing**.
- **Create Message:** Displays the **From Address, Subject, and body content** of the **email** that will be sent out via this **Campaign**. Also displays the selected **Schedule** and **Send At** time for the **Campaign**, at the bottom of the section.

Finally, at the bottom of the **Review** screen, there are four options:

- **Last Step - Create Message:** This will bring you back to the previous step and enable you to make any changes to the **email**.
- **Send Test Message:** Displays a small popup window that enables you to send this **Campaign** to a single recipient - as a test only - so that you can review the format of your email in a live email client.
 - **IMPORTANT NOTE:** It is highly recommended that you utilize this feature at least once before officially sending the **Campaign**.
- **Save Draft:** **Saves** your current **Campaign** as a **Draft** and returns you to the list of active **Campaigns**.
- **Finish:** This is your **Send** button. Once you **click Finish**, the system will **queue** your **email messages** to be sent according to the schedule you set earlier. If you chose **Now** as your desired time, then **clicking** the **Finish** button will **queue** your **emails** to be sent immediately.



Grand Key Club CRM | Membership Prospects | Private Event Prospects | Activities | Our Members | Our Guests | Golf Genius Tie-In | System User

Edit Campaign

Edit Email Campaign - Weekend Events Overview > Step 1 - Properties > Step 2 - Targets > Step 3 - Create Message > Review

Properties 1

Title: Weekend Events Overview
 Category: Prospective Member Promotions
 Description: Invitation to prospective members to come enjoy the Club this weekend
 Campaign Type: Email

Targets 2

+ Show Recipient Listing

Type	Name	Field
Query	Qualified Leads	Email

Create Message 3

From: General Manager [rclex3@aol.com]
 Subject: Come Join Us This Weekend
 Content: [Rich Text Editor]

Create Message 3

From: General Manager [rclex3@aol.com]
 Subject: Come Join Us This Weekend
 Content: [HTML Preview]

Schedule 4

Send One Time | Daily | Weekly | Monthly
 Send At: 10/21/2016 12:10 pm

Last Step - Create Message | Send Test Message | Save Draft | **Finish**

This will send your message!

Viewing Your Campaign History

To access a list of all the **Campaigns** that have been sent via your **CRM**, and to view the **statistics** for each **Campaign**, click on the **Campaign History** link in the sidebar, under the **Communication** section.

	Prospect	Qualification	Expected Close Month	Membership Interest	Amenities Interest	Lead Source	Referred By	Email	Created
EDIT DELETE	Parsons, Kim								10/21/2017
EDIT DELETE	Doe, John								10/21/2017
EDIT DELETE	Middleton, Cheryl								10/19/2017
EDIT DELETE	Fitcher, Kurt	C	December '16	Social	Biking, Golf, Tennis	Website Form		KP@TCGCC.com	10/4/2018
EDIT DELETE	Landsman, Ashley	A	December '16	Regular Golf	Fitness, Golf, Spinning, Tennis	Website Form	Aaron, Chris	AL@bctg.com	9/27/2018
EDIT DELETE	Coffey, Rick	A	December '16	Junior Golf	Fitness, Golf, Kids Events	Internet Search		rickcoffeycmp@gmail.com	9/13/2018
EDIT DELETE	VanderVeen, Diane	C	November '16	Social	Golf, Tennis	Website Form		DVV@tccclub.com	8/30/2017
EDIT DELETE	Khaligov, Victoria	B	November '16	Social	Dining, Fitness, Golf, Kayaking	Website Form	Smith, Bradley	victoriakhaligov@traditiongc.com	8/1/2016
EDIT DELETE	Campes, Jamie	B	November '16	Social	Dining, Kayaking, Swimming, Tennis	Website Form		jami@awesome.net	7/28/2017
EDIT DELETE	Lina, Susan	A	November '16	Regular Golf	Fitness, Golf, Kayaking, Tennis	Website Form	Aaron, Alan	sl@gmail.com	7/28/2017
EDIT DELETE	Davis, Josie	C	October '16	Regular Golf	Dining, Golf, Swimming, Tennis	Website Form		jd@gmail.com	7/28/2017
EDIT DELETE	Zak, Stacy	A	November '16	Social	Dining, Golf, Kids Events	Other	Larabee, Zach	szak@clubessential.com	5/13/2017
EDIT DELETE	Phillips, Brandon	B	November '16	Junior Golf	Golf, Sailing	Website Form	Akabbott, David	bphillips@reds.com	5/5/2016
EDIT DELETE	Bennett, Brian	C	2017	Social	Dining	Social Media	Wilson, John	brianbennett@aol.com	4/28/2017
EDIT DELETE	McDonald, Ronald	B	2017	Regular Golf	Kayaking, Kids Events	Walk In	Anthony, Richard S.	ronald@netscape.com	4/28/2017
EDIT DELETE	Anderson, JJ	A	October '16	Junior Golf	Fitness, Golf	Email In	Atkins, William A.	jj@taco.com	4/28/2017
EDIT DELETE	Patterson, Greg	C	2017	Social	Biking, Dining, Kayaking, Spinning	Website Form		greg@yahoo.com	3/24/2017
EDIT DELETE	McDonald, Ray	A	October '16	Regular Golf	Dining, Golf	Member Referral	Aaron, Duane	rncd@ce.com	3/11/2016
EDIT DELETE	Lawrence, Jennifer	A	November '16	Junior Golf	Biking, Golf, Kids Events	Website Form	Aaron, Duane	jennifer.lawrence@yahoo.com	2/23/2017
EDIT DELETE	Williams, Leslie	B	2017	Regular Golf	Biking, Golf	Direct Mail	Dinsmoor, Brooke	lesimore@gatt.net	2/18/2017

Campaign History Overview

The first screen you will see once you click on **Campaign History** in the sidebar is the **Campaign History Overview**. Here, you are able to view an overview of all **Campaigns** sent via your **CRM**, with some aggregated statistics for each.

The **filters** at the top of this page allow you to adjust which **Campaigns** display in the bottom part of the page. You can filter your results upon the following criteria:

- **Campaign Name:** This is the name entered in the **Properties** section for each **Campaign**.
- **Subject:** This is the subject of the email that was sent.
- **Sent By:** Enables you to choose from the list of all available outgoing addresses in your **CRM**.
- **Type:** Choose between **Email** and **Mail Merge**.
- **Sent On or After & Sent On or Before:** Enables you to **view all Campaigns** sent between the dates that you choose in these respective fields. Be sure to accurately set the necessary date range to return the specific Campaign(s) you wish to view statistics for.

Beneath these **filters** is a list of all the messages that have been sent via **Campaigns** in your **CRM** that meet the criteria as specified by the **filters**. See below for a brief description of each column in this report:

- **Campaign Name:** This is the name you entered in the **Properties** section of your **Campaign**. Click on **this name** to **view statistics** for this **individual Campaign**, including a list of all messages that were sent as part of this **Campaign** (in the event that the **Campaign** was sent on a recurring basis).
- **Message Subject:** This is the **subject** of the **emails** that were sent out in this **Campaign**. You can **click on this name** to view a more detailed overview of the **statistics** for this specific message.
- **Sent By:** Displays the **email address** that this message was sent from.
- **Selected Recipients:** Displays the **number of email addresses that were targeted** with the **Campaign**.
- **Recipients Sent To:** Displays the **number of email addresses that actually had the message sent** to them. Typically, if this number is lower than the total of **Selected Recipients**, it is due to unsubscribes or duplicate email addresses.
- **Opened:** Displays the **number of messages that were opened** by the recipients.
- **Open Rate:** Displays the **percentage of recipients that opened** the email to those that received the message, but never opened it.
- **Link Clicks:** Calculates the **total number of clicks on hyperlinks** included within the email message. You can view a breakdown of **link clicks** per **hyperlink** by **clicking** on the **Message Subject**.
- **Timestamp:** Displays the **time that the message was sent** from the system.
- **Re-Send:** Enables you to **send this exact message again**, to the **same group of targets**, or a **subset of the original group of targets**. Your sending options are:
 - **Use Campaign Targets:** Will **send the new message to the exact same group of targets** as the original Campaign was sent to.
 - **Use Campaign Targets, Ignore Recipients Who Opened Original:** Will **send the new message to ONLY those contacts who received the original message, but did not open it**.
 - **Original Recipients Only:** Will **send the new message to those contacts that the original message was sent to**. This is different from **Use Campaign Targets** because it excludes any contacts that were targeted, but did not have the message sent to them, either due to a missing email address from their CRM record, their email address already being present in the target list in a different CRM record (duplicate email addresses), or because they had previously unsubscribed from your CRM Campaigns.

- **Original Recipients Only, Ignore Recipients Who Open Original:** Same as the previous option, excluding those who opened the original email.

The **statistics** on this initial screen serve as an overview of your sent **Campaigns**. If you need to “drill down” deeper into any given **Campaign**, or even a specific **Message** from within a **Campaign**, you can do so by **clicking** either the **Campaign Name** or **Message Subject**.

Campaign Name	Message Subject	Sent By	Selected Recipients	Recipients Sent To	Opened	Open Rate	Link Clicks	Timestamp
Weekend Events Overview	Come Join Us This Weekend	rclex3@aol.com	23	23	0	0%	0	10/21/2016 12:42:55 PM

Campaign Details

To access the **details** of a **Campaign** as a whole (especially for those with recurring messages), **click** on the **Campaign Name** from the **Campaign History** screen. Here, you will be able to review the **properties** of this **Campaign**, as well as view an overview of all the individual messages that have been sent as part of this **Campaign**.

The details in this section are very similar to those on the previous screen, but this view allows you to easily gauge the long-term effectiveness of recurring email **Campaigns**. You are also able to drill down into the message details of any message in the list by **clicking** on the **Message Subject** of that message.

The screenshot shows the 'Campaign Details' page for a campaign titled 'Come Join Us This Weekend'. The page is divided into several sections:

- Properties:**
 - TITLE:** Weekend Events Overview
 - DESCRIPTION:** Invitation to prospective members to come enjoy the Club this weekend
 - CAMPAIGN TYPE:** Email
- Messages:** A table showing the performance of the message.

Message Subject	Sent By	Selected Recipients	Recipients Sent To	Opened	Open Rate	Link Clicks	Unsubscribed	Bounced	Timestamp	Re-Send
Come Join Us This Weekend	rctex3@aol.com	23	23	0	0%	0	0	0	10/21/2016 12:42:55 PM	Re-Send
1 messages		23	23	0	0%	0	0	0		

Message Details

To access the **details** of a **message sent** through a **Campaign**, click on its **Message Subject** from either the **main Campaign History** screen, or from the **Campaign Details** screen. Here, you will be able to **view** the **properties** of the **Campaign** that this **message** was a part of, as well as review the body of the **email** itself.

Further down, you will see a list of all the **links** contained within this **email**, and how many clicks each link received. You are able to see a list of all the contacts that clicked on the link by clicking on the number in the **Clicks** column.

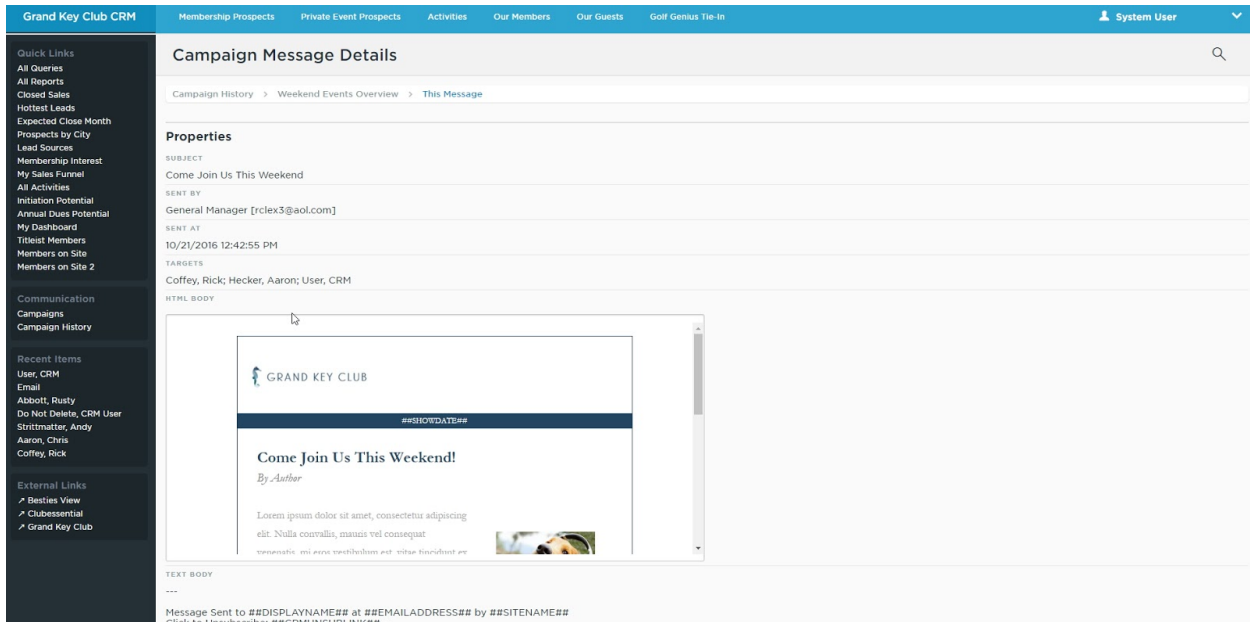
The last section on this screen displays a list of all the **recipients** of this **message**. You are able to **filter** the results to track down a specific **email address**, by **typing** that address into the box labelled **Sent To** and **clicking** the **Filter** button. You are also able to **filter** the results on the following three categories:

- **Opened:** When this box is checked, only recipients that opened the message will appear in the listing below.
- **Unsubscribed:** When this box is checked, only recipients that clicked on the unsubscribe link within your message will appear in the listing below.

- **Bounced:** When this box is checked, only recipients that had the message bounce back from their email address (meaning they were unable to actually receive the message) will appear in the listing below.

The **statistics** that are shown for each recipient are broken out as follows:

- **Sent To:** Displays the **CRM record** that this message was sent to. **Click on this name** to display the **message history** for this record.
- **Address:** Displays the **email address that corresponds with the CRM record** that this message was sent to. **Click on this address** to generate a **new email** to this email address.
- **Sent At:** Displays the **timestamp at which this message was sent** from Clubessential's email servers to the recipient.
- **Opened:** Displays the **time that the recipient opened the message**. If the recipient did not open the message, this field will remain blank.
- **Unsubscribed:** Displays the **time that the recipient unsubscribed from the message**. If the recipient did not unsubscribe from this message, this field will remain blank.
- **Bounced:** Displays the **time that this message was marked as having bounced**. If the message was delivered successfully, this field will remain blank.
- **Link Clicks:** Displays the **number of times that this recipient clicked on any link** within the message.



The screenshot shows the 'Campaign Message Details' page in the CRM system. The page header includes navigation tabs for 'Membership Prospects', 'Private Event Prospects', 'Activities', 'Our Members', 'Our Guests', and 'Golf Genius Tie-In'. The user is logged in as 'System User'. The left sidebar contains various navigation options like 'Quick Links', 'All Queries', 'All Reports', 'Closed Sales', 'Hottest Leads', 'Expected Close Month', 'Prospects by City', 'Lead Sources', 'Membership Interest', 'My Sales Funnel', 'All Activities', 'Initiation Potential', 'Annual Dues Potential', 'My Dashboard', 'Titled Members', 'Members on Site', 'Members on Site 2', 'Communication', 'Campaigns', 'Campaign History', 'Recent Items', 'User, CRM', 'Email', 'Abbott, Rusty', 'Do Not Delete, CRM User', 'Strittmatter, Andy', 'Aaron, Chris', 'Coffey, Rick', 'External Links', 'Besties View', 'Clubessential', and 'Grand Key Club'.

The main content area displays the following details for the message:

- Properties**
- SUBJECT:** Come Join Us This Weekend
- SENT BY:** General Manager [rclex3@aol.com]
- SENT AT:** 10/21/2016 12:42:55 PM
- TARGETS:** Coffey, Rick; Hecker, Aaron; User, CRM
- HTML BODY:** A preview of the email content is shown, featuring the 'GRAND KEY CLUB' logo, a subject line 'Come Join Us This Weekend!', a byline 'By Author', and placeholder text: 'Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla conwall, mauris vel consequat. venenatis, mi eros vestibulum est. sitae fincubunt et'.
- TEXT BODY:** Message Sent to ##DISPLAYNAME## at ##EMAILADDRESS## by ##SITENAME##
Click to Unsubscribe: ##CRMUNSUBLINK##

Message Sent to ##DISPLAYNAME## at ##EMAILADDRESS## by ##SITENAME##
 Click to Unsubscribe: ##CRMUNSUBLINK##

Re-Send

Recipients

Sent To Opened Unsubscribed Bounced

Filter Export Results

Sent To	Address	Sent At	Opened	Unsubscribed	Bounced
AL@bcta.com	AL@bcta.com				
alan.jackson@blackberry.net	alan.jackson@blackberry.net				
bobhillips@reds.com	bobhillips@reds.com				
chester@gmail.com	chester@gmail.com				
ed@yahoo.com	ed@yahoo.com				
jamie@awesome.net	jamie@awesome.net				
jennifer.lawrence@yahoo.com	jennifer.lawrence@yahoo.com				
jilazebrook@gmail.com	jilazebrook@gmail.com				
ji@taco.com	ji@taco.com				
ku@bvc.com	ku@bvc.com				
lesismore@att.net	lesismore@att.net				
rickoffeycme@gmail.com	rickoffeycme@gmail.com				
ringo@yahoo.com	ringo@yahoo.com				
rmcd@ce.com	rmcd@ce.com				
ron@yahoo.com	ron@yahoo.com				
ronald@netscape.com	ronald@netscape.com				
sl@gmail.com	sl@gmail.com				
stacy@yahoo.com	stacy@yahoo.com				
szak@clubessential.com	szak@clubessential.com				
tim.lawson@clubtech.com	tim.lawson@clubtech.com				
tl@aol.com	tl@aol.com				
tom@movies.net	tom@movies.net				
victoria.khalilov@traditiongc.com	victoria.khalilov@traditiongc.com				
23 recipients				0	0

FAQs

Q: How can I manually select which contacts to target with my Campaign?

A: Sending to an Object:

- Send To: Choose *Object*
- Object Type: Choose the Object to send to (most likely Contacts)
- Records: Choose All Records to send this Campaign to ALL records within your CRM. Choose Selected Records to bring up an additional section for you to select individual contacts.
- Select Records: This section appears when you select Selected Records in the option above. Search for contacts by name in the search bar, and click Filter to narrow down the list. Check the box next to each contact that you would like to send this Campaign to.
- Email Fields: Select the CRM email field(s) that you would like to target for each selected record you've chosen.
- Return Email Targets: Click this button once you have filled out each of the options above, and your targets will be selected for this Campaign!

Q: Can I use multiple queries as targets for my Campaign?

A: You are only able to select one Query at a time as the target for a Campaign. If you want to send the same message to multiple queries, you have two options:

- Contact your CRM support team to create a new query that targets everyone you need, and use this query as the target for your Campaign.
- Copy your Campaign, and change the Target for the new one.

Best Practices

1. Always be sure to send a Test of your message before finishing your Campaign. This allows you to be sure that the formatting of your email is correct when viewed from within an actual email client. Microsoft Outlook is particularly notorious for displaying certain elements of email messages differently than the rest of the internet, so if you have this installed on your computer, it can be beneficial to send yourself a test there to troubleshoot.
2. If you are sending your Campaign to the results of a Query, run that query before sending, and go through the results to ensure that the contacts returned are exactly who you expect them to be. If you notice any discrepancies, don't hesitate to contact your CRM Support Team!