Campaign and Schedule Codes

ACCESS AND CREATION IN CRM

Purpose

This document's purpose is to provide instruction on the access and creation of Campaign Schedule Codes (CSC) and Campaign Schedule Source Codes (CSSC) in CRM.
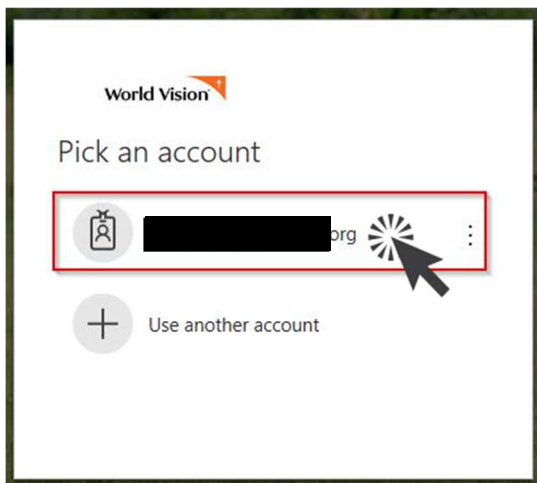
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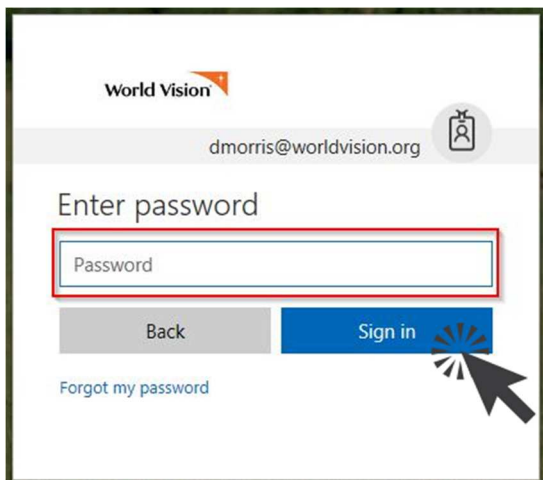
Log-In

Url: https://********.dynamics.com

Click on the URL to access the CRM environment (or CTRL+Click within this document)

Step 1: *Select* your account or *enter* your World Vision email address.

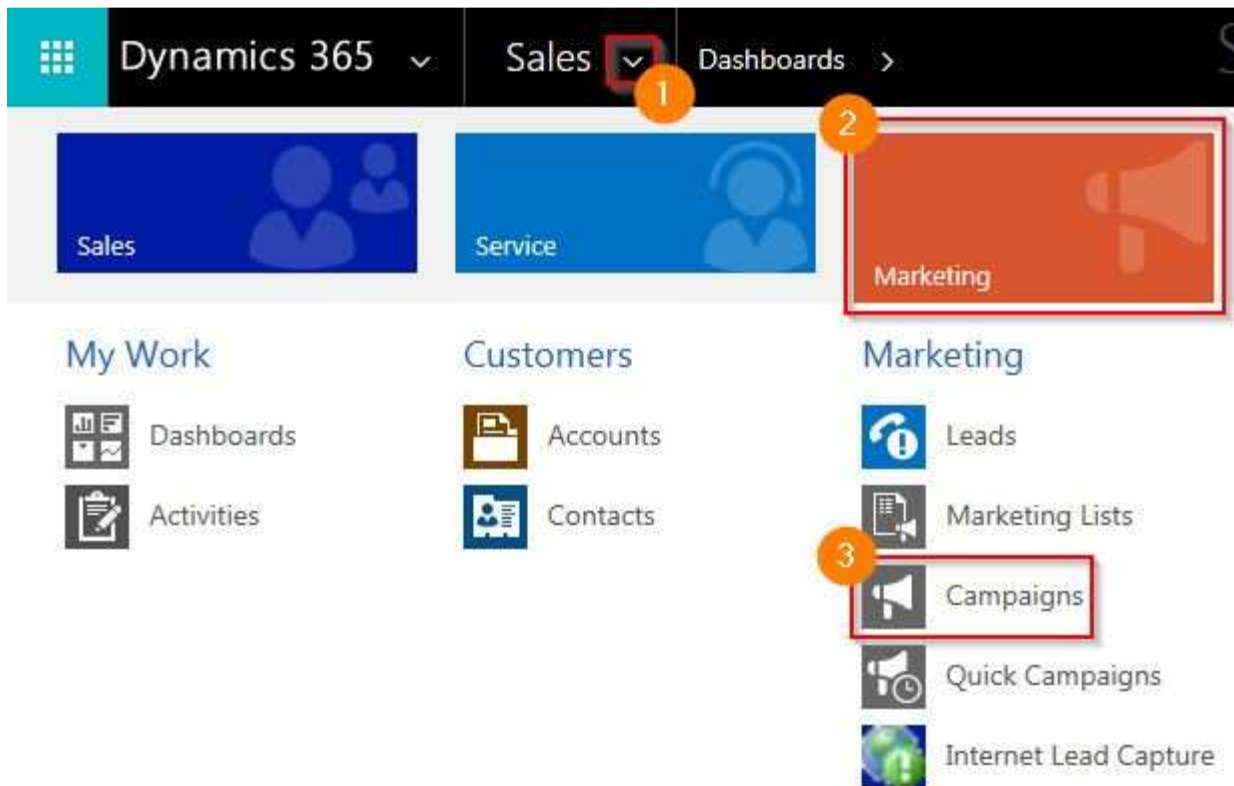**Step 2:** *Enter* your network password.

Step 3: *Click* the "Sign in" button.

Access the Campaign View

Locate the top menu bar.

1. *Click* on the down arrow of the second item, currently labeled "Sales."
2. *Select* "Marketing."
3. *Select* "Campaigns."

The "My Campaigns" view will either be blank or have limited Campaigns. Change your view to include a more practical display of Campaigns.

1. *Click* the down arrow next to the label "My Campaigns."
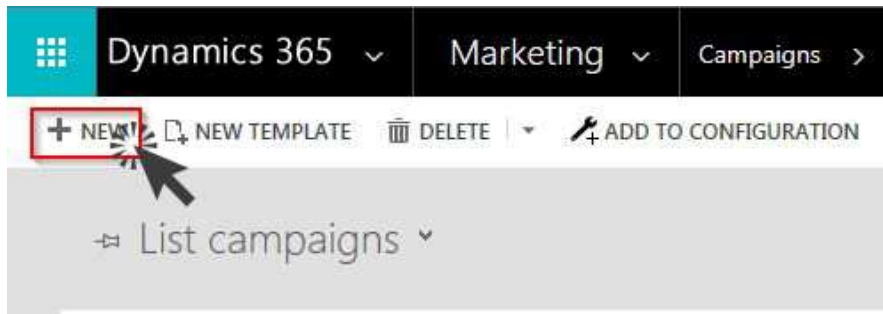2. *Select* a new view from the list. For example: "List campaigns."
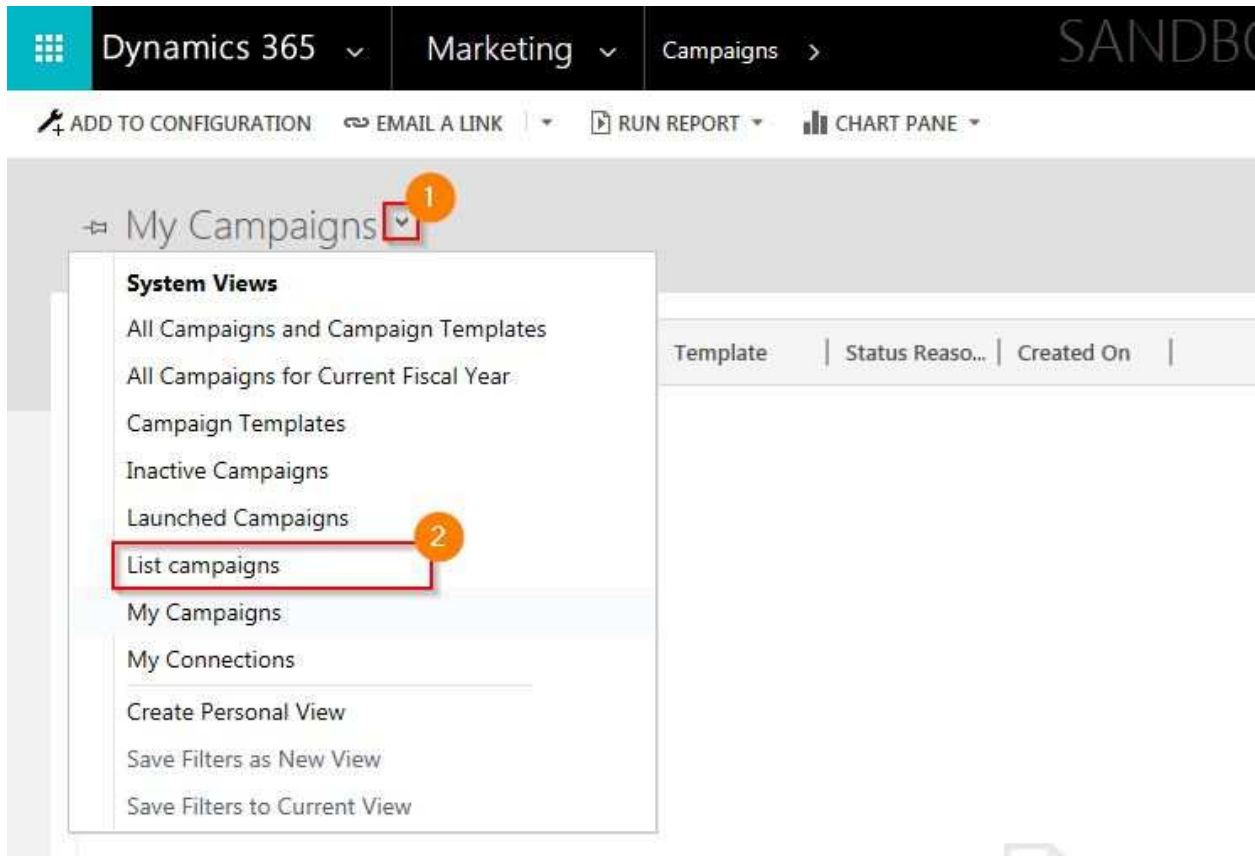
Your view will now populate with Campaigns, sorted in alphabetical order.

ⓘ **Click** the Campaign "Name" to view, or use the "Search" box to locate a Campaign.

Add a New Campaign

Select "New" from the white menu at the top.

A blank Campaign record will be created. Enter the pertinent information in the appropriate fields.

> ℹ A new Campaign requires the following information to be entered before the Campaign can be saved.
>
> Required fields are notated by a red asterisk:
>
> - Campaign Name
> - Program
> - Currency (Defaults to US Dollar)
>
> Missing information will be indicated by red "X" next to the field.
>
> The Campaign Source Code (CSC) will be generated once the new Campaign has been saved.

Naming the New Campaign

There is no naming convention a Campaign must follow, however, please consider these factors when choosing a name to avoid duplicates and allow the Campaign to be found easily in a search:

- Consider including the Program Short Name (SPRNO, DPSGC)
- Consider including a timeframe (FY18, 18MAY)
- Consider a clear donor theme (Hope Sunday, Earthquake HEA Response)

Find the Appropriate Program

Enter a "Search" to find the Program:

1. *Enter* a letter, name, or partial name in the Search box.
   - *Click* the Magnifying Glass icon.
2. *Choose* the program name from the list or
3. *Select* "Look Up More Records"
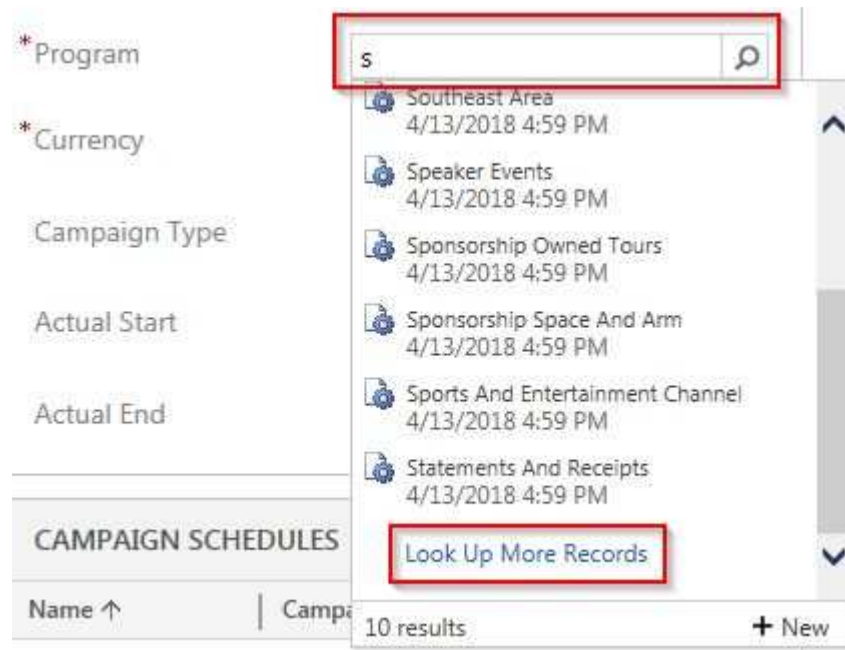
Look Up the Program Name

1. *Enter* a letter, name, or partial name in the Search box.
   - *Click* the Magnifying Glass icon.
2. *Choose* the program name from the list by checking the box next to the name.
3. *Click* the "Add" button.

Choose the Actual Start & Actual End dates.

- **Click** the field next to the "Actual Start" or "Actual End" date.
- **Click** the "calendar" icon to open the date picker.
- **Select** the date the Campaign will begin or end on.

Save the New Campaign

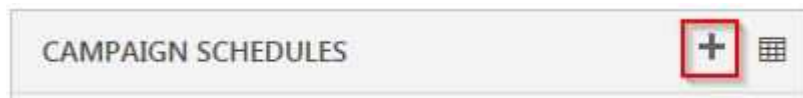*Click* "SAVE & CLOSE" from the top white menu to save the Campaign.

Or to continue working on the same Campaign:

Click "SAVE" from the top white menu.

Create a New Campaign Schedule

With the appropriate Campaign selected:

- ***Click*** the ➕ on the "Campaign Schedules" title bar.

CAMPAIGN SCHEDULES ➕ ▦

A blank Campaign Schedule record will be created. Enter the pertinent information in the appropriate fields.

> ℹ️ A new Campaign Schedule requires the following information to be entered before the Campaign Schedule can be saved.
>
> Required fields are notated by a red asterisk:
>
> - Schedule Name
> - Campaign (Selected Campaign will be the default)
> - Target List System
> - Owner (Current user will be the default)
>
> Missing information will be indicated by red "X" next to the field.
>
> The Campaign Schedule Source Code (CSSC) will be generated once the new Campaign Schedule has been saved.

Name the Schedule Code

There is no naming convention a Schedule must follow, however, please consider these factors when choosing a name to avoid a duplicate name and allow the Schedule to be found easily in a search:

> ℹ️ Duplicate Schedule names will be accepted. Ensure the Schedule name is unique!

- Consider including the activity the Schedule will be tracking (Phone, Email, Event)
- Consider including the Program Short Name (SPRNO, DPSGC)
- Consider including a timeframe (FY18, 18MAY)
- Consider a clear donor theme (Hope Sunday, Earthquake HEA Response)

Choose the Start Date & End Date

When choosing a Start & End Date, please adhere to the following guidelines:

- *Internet, Direct Mail, and Event* Schedules should be set for a 6-month duration.
- *Phone and Email* Schedules should be set for a 4-month duration.

> ℹ️   If a longer duration is needed, the actual date will be accepted.

- *Click* the blank field next to the "Start Date" or "End Date."
- *Click* the "calendar" icon to open the date picker.
- *Select* the date the Schedule will begin or end on.

Choose the Target List System

The "Target List System" is an administrative notation that will indicate where the target list of Donors has been generated from.

- *Click* in the "Target List System" field and select the appropriate item.
- *Use Non-Delivery* if there is no target list of Donors.

Choose the Activity Type

- ***Click*** in the "Activity Type" field and choose the type from the list that best suits the Schedule.

Choose the Owner

If the Schedule needs a different Owner from the default selection (the current logged-in user), use a "Search" to find the Owner's name:

1. ***Click*** the Magnifying Glass icon.
2. ***Select*** "Look Up More Records"

Find an Owner's Name

1. ***Enter*** a letter, name, or partial name in the "Search" box.
   - ***Click*** the Magnifying Glass icon.
2. ***Choose*** the name from the list by checking the box next to the name.
3. ***Click*** the "Add" button.
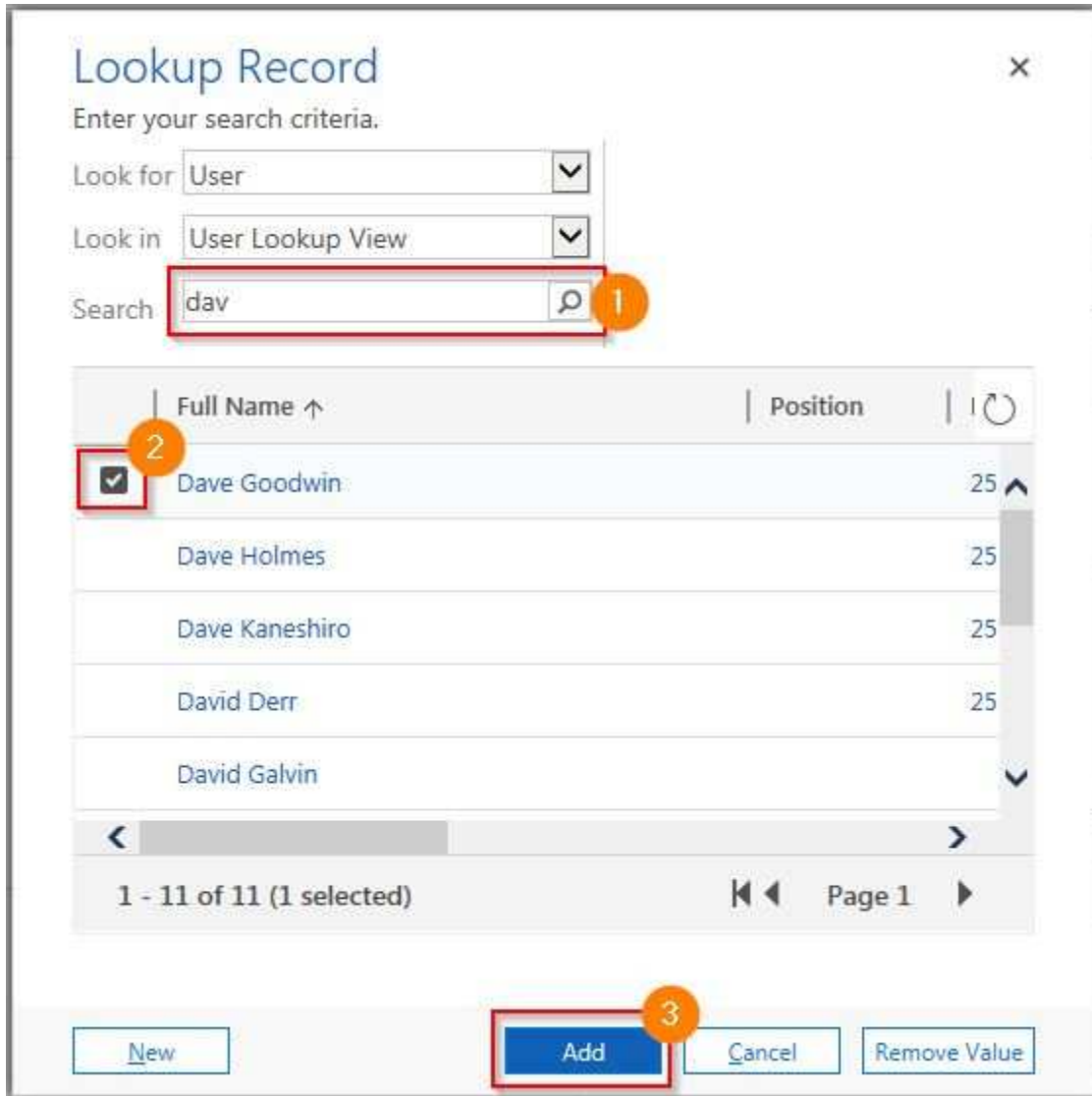
Save the new Schedule

Click "SAVE & CLOSE" from the top white menu to save the Schedule.

Or to continue working on the same Schedule:

Click "SAVE" from the top white menu.

Find a Campaign

Enter your search criteria in the "Search Field" located in the gray bar, directly above the view results.
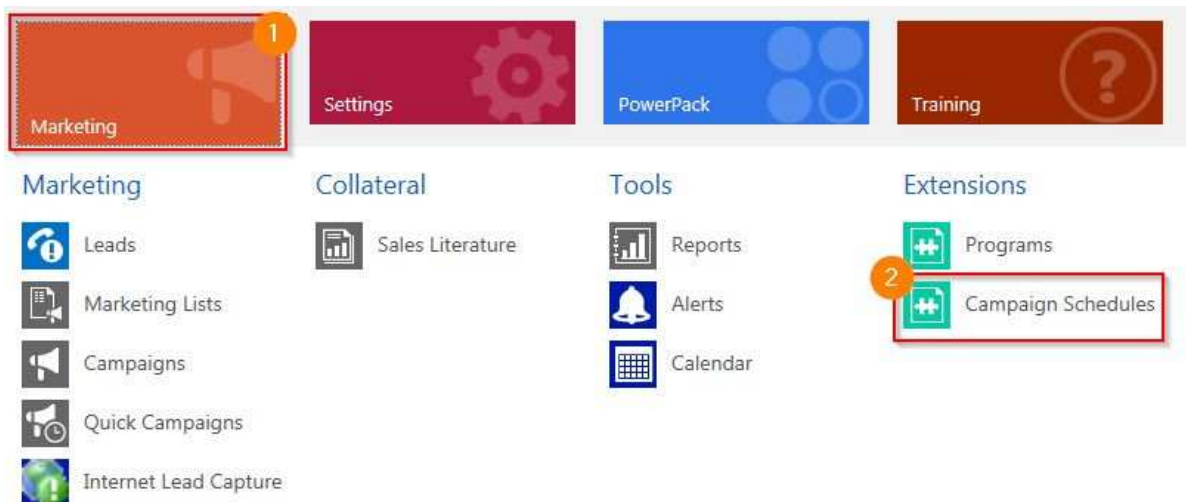

Search Tips and Examples

SEARCH …	ENTER …
By a word	Water *[will return all matching schedules with "water" in the name]*
By Wild Card Name	*email*water* *[will return all schedules with "email" and "water" in the name, in that order]*
By Date Indicator w/ Wild Card	*FY18* / *18May* / *May 18* *[will return all matching schedules with date in the name]*

Click on the Campaign name to view.

Find a Campaign Schedule

1. *Click* the down arrow next to "Marketing" in the top Menu.
2. *Select* "Campaign Schedules"

Enter your search criteria in the "Search Field" located in the gray bar, directly above the view results.

⊸ Active Campaign Schedules ⌄   Search for records   🔍

Search Tips and Examples

SEARCH …	ENTER …
By a word	Water *[will return all matching schedules with "water" in the name]*
By Wild Card Name	*email*water* *[will return all schedules with "email" and "water" in the name, in that order]*
By Date Indicator w/ Wild Card	*FY18* / *18May* / *May 18* *[will return all matching schedules with date in the name]*

Click on the Schedule name to view.

Appendix

View a Campaign Schedule's Interaction History

Select the Campaign to view.

- A Campaign Schedule's interaction history (if any) will be available for display in the right-hand module entitled: "Campaign Schedule Delivery"

Click a specific entry to view.

Campaign & Schedule Codes Document

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