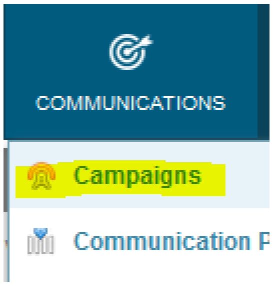
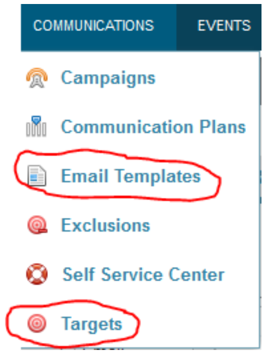
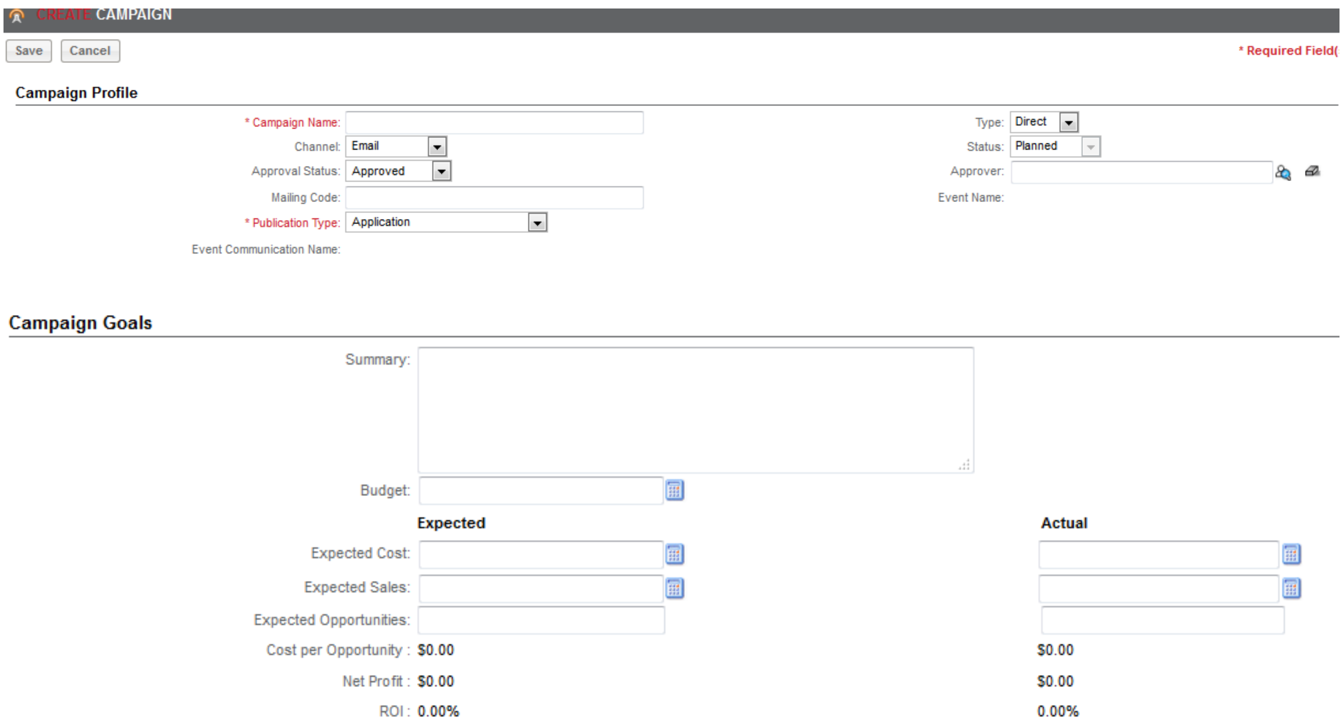
CAMPAIGNS





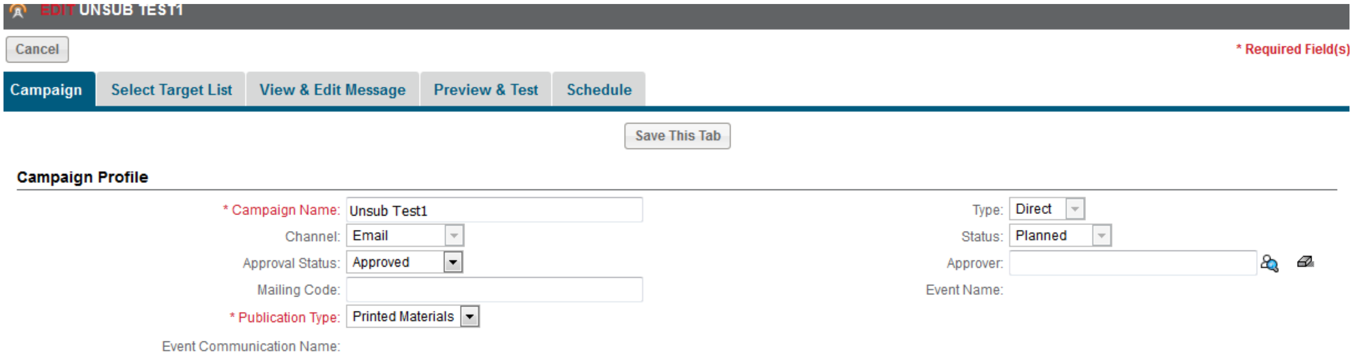
Prior to setting up your Campaign, you will need to create your Target and the email template that you will be using.

After these two pieces are completed, return to the drop down menu under Communications and select Campaigns.



Once you complete the Campaign details, select Save (upper left of screen).

The next steps will be to: Select Target List (created earlier); View & Edit Message (email template); Preview & Test your email message (send the message to yourself); Schedule (when the campaign will be sent).



TARGET (External)

Target is a group of contacts that meet certain user-specified conditions. Targets can be used to send email campaigns or event invitations to a group of contact records at one time. There are two types of targets within Radius: Static and Dynamic.

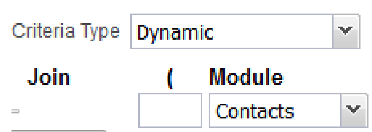
- **Static Target:** Allows you to pre-define the contacts to include in your target list. You must add any new contacts manually to this list for them to be included in the campaign.
- **Dynamic Target:** Allows you to define a target list based upon criteria settings. This list update automatically by adding new contacts that meet the list criteria.

Targets <u>must be built PRIOR</u> to being added to a campaign or event communication. The process and steps for creating, or building, a Target View is the same as for building a List View.

LIST VIEWS: Guidelines for creating new views

CREATE CUSTOM VIEW

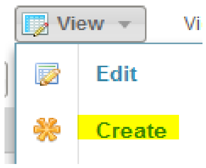
- "Naming Convention": Begin with your first and last name initials (capped) followed by a dash (-) when creating the View Name.  (Ex: JB – New Prospects)

- "Criteria Type":
  - The majority of your views will be "Dynamic". This will allow for additional of new records that meet the specific criteria for that view. 

  - A "Static" view can be used if wanting to follow a specific inquiries or applicants. This will be determined by the criteria selected when creating the view. No new names will be automatically added to this view; however, you can add additional names individually if you desire. 

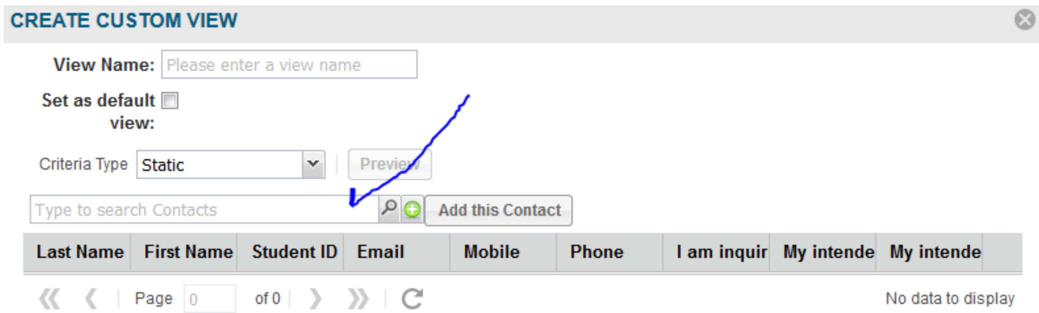
- **Building Static Views**

  Locate the box shown below with "View" and a down arrow. Click on the arrow and select



This will open the screen below.

In the box at the top called "View Name", name the custom view you are creating using the established naming conventions.

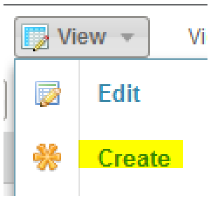


The Statics View will track a specific list of contact records determined by the user and are added at the "Add this Contact" box. Contact Records must already exist in the Contacts Module to be added. If the Contact Record is not found, create first in the Contact Module. DO NOT use the "Quick Create" feature. After created the user can edit the Static View and add the new Contact. Note, new contact records added to the CRM in the future will not be automatically added to the Static View but can edit be added manually using the edit view feature.

When complete, click save at the bottom of the screen.

- **Building Dynamic View Criteria**

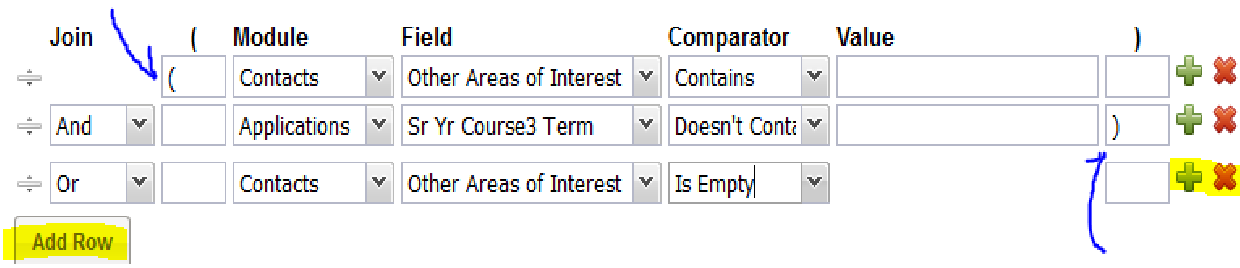
Locate the box shown below with "View" and a down arrow. Click on the arrow and select "Create".



This will open the screen below.

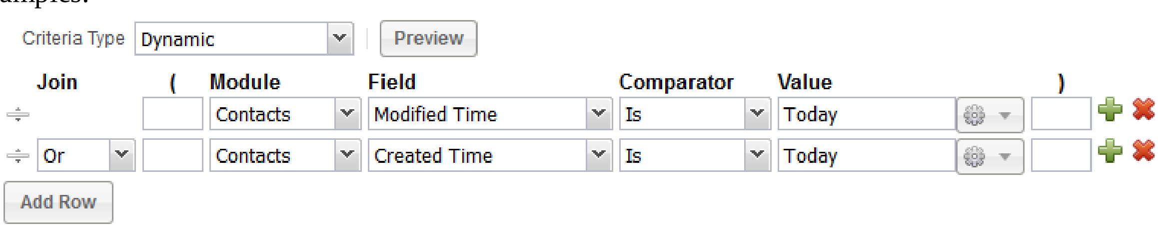
In the box at the top called "View Name", name the custom view you are creating using the established naming conventions.

You are not ready to add the criteria that will define the data you wish to display in your view. Depending on the Module you are in, you will have access to all associated Modules to assist in building your criteria. By clicking "**Add Row**" or the symbol you are able to add rows for additional criteria. Using the symbol will delete a row. **Parenthesis** can be used to group data to be looked at together by the system. This criterion is **Joined** by using "**And, Or,** or **Minus**".



- Building blocks for dynamic view logic:
  - **Parenthesis (or Brackets)**: Used for grouping lines of criteria in the logic. There can be more than one set of grouped criteria within a view. (Find this set of data first, then find this data, etc).
  - **Join**: Operator used to connect the lines of logic and direct how the criteria is evaluated. (Operators are: And, Or, Minus)
  - **Module**: Select the module that contains the data you wish to pull. (Where the data lives.)
  - **Field**: Select the data field(s) from the drop down list to begin to narrow the broader CRM data to provide the desired view (query). (What data you want to see.)
  - **Comparator**: This field "tells" the view how to treat, or search for, the field data and is also known as the "criteria operator". The field type will determine which operators are available. (How you want the CRM to search for the data.)
  - **Value**: This is the field value that you want included, or excluded, in the view.

Examples:



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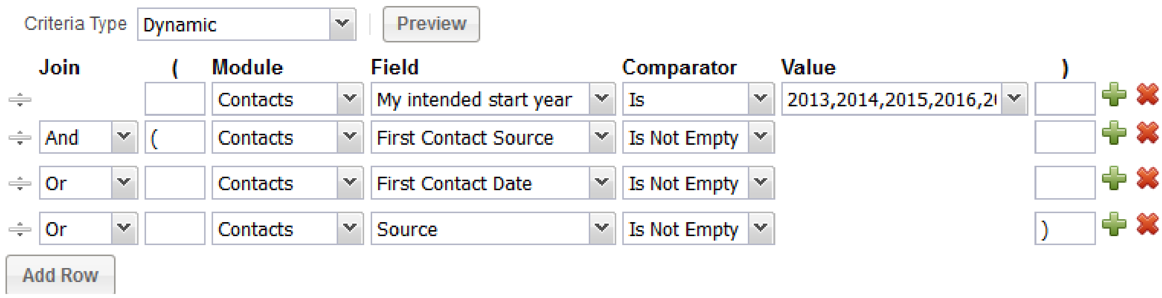
(2) 

When complete, "Save" your new custom view by clicking the save button at the bottom.