Silverbear 365

UCI – Sales, Marketing and Fundraising Course – Marketing Module



Empowered Association[™]

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Video

Video guide available	Video URL	Last updated

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1. Guide Purpose and Usage

GUIDE PURPOSE

- To accompany the Silverbear Sales, Marketing & Fundraising course marketing module
- To give a strong grounding in marketing functions on Silverbear

INCLUDED

- Explanation of marketing lists functions and how to create and manage lists
- Use of Quick Campaigns
- Campaign creation, distribution and monitoring

PREREQUESITE MODULES	RECOMMENDED PREVIOUS MODULES	RECOMMENDED FOLLOW UP MODULES
Silverbear Fundamentals– Introductory	Memberships Subscriptions and products – Introductory	Sales, Marketing and Fundraising – Leads &
Silverbear Fundamentals – Intermediate – Advanced finds are covered in this module and are an essential skill for the Marketing module	Events – Introductory and Intermediate	Opportunities and Fundraising modules
Contacts and Organisations – Introductory		

TRAINING TASKS

You should have been advised which environment (e.g. UAT) you should use for your practice tasks. If you are unsure, please ask your internal CRM administration team who will contact Silverbear if necessary.

FEEDBACK

If you have any feedback on any of the instructions or screen shots please email <u>susannah.patrick@silverbear.com</u>

1. Guide Purpose and Usage

Please note that due to the customised nature of Silverbear Membership some screens in this guide may appear different to the ones shown in your Silverbear environment.

1. Introduction to Silverbear marketing

Silverbear allows you to create targeted customer lists based on your particular campaign requirements. A Marketing List can be based on any combination of information you hold on your clients. For example, you can search by demographics, by membership or purchases, by event bookings, or by pre-defined segmentation.

Certain Marketing Lists can also be compiled or amended manually, by adding or removing individual contacts.

Marketing Lists can be used for bulk email campaigns, and also migrated into third party bulk emailing software and text-based marketing solutions or postal or telephone campaigns.

If you use the Dotdigital email marketing platform this solution can be embedded into the CRM to work seamlessly with your data. Please note that training on this solution is provided by your Dotdigital supplier and is not covered in this guide.

2. Types of marketing lists – dynamic and static

Marketing lists on Silverbear can be one of two types: Dynamic or Static.

Static lists are compiled through a combination of advanced finds and manual addition of records. Any changes or updates to the list need to be carried out manually.

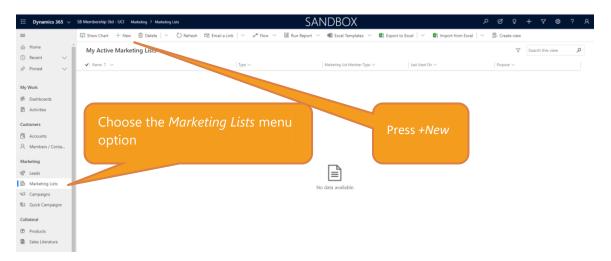
Dynamic lists update automatically. Once the criteria is created, records will be added or removed by the CRM if they meet or no longer meet that criteria. For example, if you had a dynamic marketing list made up of contacts who hold an active membership with you, any contact who cancelled their membership would be automatically removed from that list. Dynamic lists are very useful if you run the same campaigns or member communications regularly. Dynamic lists can be converted into static lists, however static lists cannot be converted into dynamic lists.

Both types of list however can be "locked" so that changes to them cannot be made.

3. Creating a static Marketing List

In the example below we create a list of contacts who live in a particular region, in order to invite them to an event. As it is a static list, we are also going to manually add some additional members.

• Choose the *Marketing* Work Area, and then the *Marketing Lists* menu option and press +*New*



• Enter the basic details for the list as below and make sure your list type is set to *Static*

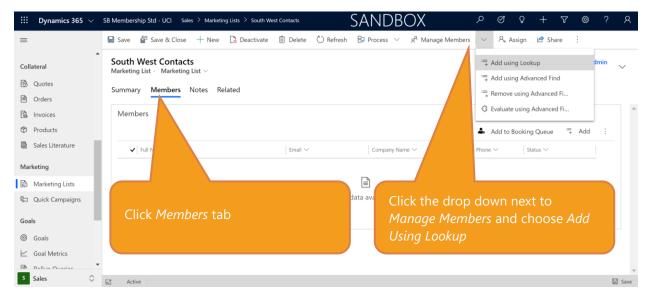
	🖬 Save 🛱 Sa <u>ve & Close — New 🗅 Deactivate 🗊 Delete 🖒 Refresh</u> 🗄		Word Templates \vee 🛛 🗟 Run Report \vee 🔍 Create Quick Campaign
Home Recent \checkmark	South West Contacts Marketing List · Marketing List ·	Press Save once complete	No Locked Last Used on (Date) Owner
Pinned \checkmark	Summary Members Notes Related		
Work	Information	Choose Static <i>List Type</i>	
Dashboards	Name South West Contacts	Choose Static List Type	+ New Campaign 🖄 Add Existing Campaign 🗄
Activities	A List Type Static		Status Reason V
Accounts	Purpose Build awareness of South West events		
Members / Contacts	A Targeted At Contact		
rketing	Source	Targeted at - refers to the type of	
Leads	Currency 🚯 British Pound	record you would like to include	
Marketing Lists	A Modified On 19/05/2020 🛅 12:20	on your list – either Contact,	+ New Quick Campaign 🖒 Refresh 💠
Campaigns Quick Campaigns	Cost	Account (organisation) or Lead	No. of Failures \core is Status Reason \core is Create \$\lambda \core is Create \$\la
llateral	Last Used On 🔟		
Products	Locked No		
Sales Literature	Owner * © 🔗 crm admin		
Reports	Description List of South West Contacts	Purpose, Cost and Source for your	
siness Processes		organisation's recording and	
Lead To Opportunity		tracking – they are optional fields	
Marketing C r	2 Active		2

4. Adding contacts to a static list.

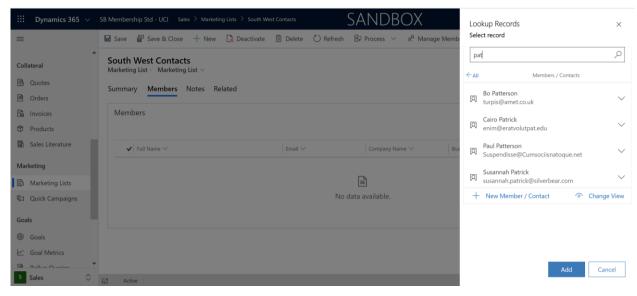
Contacts can be added manually or through use of the Advanced Find. After creating a Marketing List, the next step is to search for contacts to include.

4.1. Adding contacts manually on Marketing List screens

- On your Marketing List screen click on the Members tab
- Click the drop down arrow next to *Manage Members* and choose *Add Using Lookup*

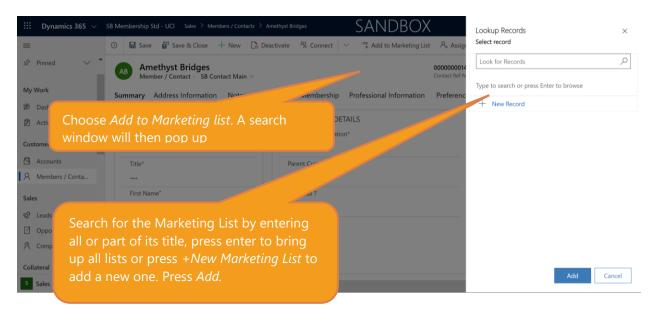


• After choosing *Add Using Lookup*, a lookup records window appears where you can search for and select contacts or add new ones.



4.2. Adding contacts manually on contact record card

• Find your contact, open their record card and click *Add to Marketing List* on the *Command Bar*



5. Add to a Marketing List using Advanced Find.

Advanced finds are covered in further detail in the Silverbear Fundamentals Intermediate course. Advanced Find allows you to search your CRM database for records which meet a specific criteria; you can then use the results in a number of different ways, including adding them to Marketing Lists.

• To work with an Advanced Find, click the drop down next to *Manage Members* and choose *Add Using Advanced Find*

iii Dynamics 365 🗸	S8 Membership Std - UCI	Marketing > Marketing lists > South West Contact	5	SANDE	3OX		، م	3 B	+	∀ ④	3	© ?	р <u>қ</u>
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My Work	Marketing list - Marke	rting list 🗸				Add using Advanced	d Find		LUCKED	Last used or	(Date)	Anner	
券 Dashboards	Summary Membe	ers Notes Related				* Remove using Adva	nced Fi						
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Customers	Name	* South West Contacts						_		+	New Camp	aign ···	
G Organisation	🔒 List Type					Campaign Code		Stat	us Reason				
A Contacts	Subscription	Press the drop of <i>members</i> and che <i>Find</i>			ced								

• An Advanced Find window will pop up (this is styled slightly differently to the standard Advanced Find, but its functionality is still the same). You can use this window to create your search criteria or, if you have previously created your criteria and saved it, you can use the *Use Saved View* option instead

5.1. Creating a new Advanced Find

• For this list, we have searched by *Region Code* as we are targeting South West members.

Look for:	Contact	Use Saved View:
And \sim		
	Region Code 🗸 🗸 Equi	is 🗸 w
- 🖬 🛙	Do not allow Emails 🗸 Equi	is V Allow X V ····

• Your Advanced Find can of course be far more detailed than this and use a combination of different fields. For example, you could search by membership type, subscription purchase or event attendance. Once you have built your search criteria, press *Find*.

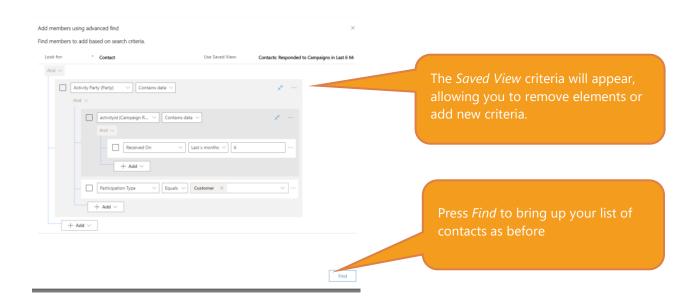
Add members using advanced find Find members to add based on search criteria.	×	Results not what you expected? Click <i>Back to Query</i> to check and
Full Name Alexander James	↑ ▽ Business Phone ▽ 56789	amend if necessary
Dimitri Barrera		
lk171010 lk171010		
Jm0808_04 Jm0808_04		
Jorge Das Neves		
Laura Klein		
Neil Morrison		
Samuel Brinks		Add all these contacts to your list
1 - 8 of 8 (2) selected)	Eack to query Add all Add only selected	Click to the left of individual names to tick them and choose <i>Add Only Selected</i> to include only certain records.

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5.2. Using a previously saved Advanced Find (a Saved View)

 If you have previously used Advanced Find for this mailing list and saved that search as a *Saved View* you will be able to use that instead of creating a new search. Alternatively, you might want to use one of the default *Saved Views*. Please note that the only Saved Views which will be displayed are ones that relate to the type of record you are searching for. In our example below we can only see Contact Saved Views. If your Mailing List consists of Accounts (organisations) you will only see *Saved Views* for Accounts.

	ing advanced find add based on search criteria.	x
Look for:	* Contact	Use Saved View: Contacts: Responded to Campaigns in Last (
Loading		Select
		Active Contacts
		Active Contacts Subgrid View
		All Contacts
		Apprentice Contacts Subgrid View
		Contacts Being Followed
		Contacts I Follow
		Contacts: No Campaign Activities in Last 3 Mont
		Contacts: Responded to Campaigns in Last 6 Mo
		Enrolled Students Subgrid View
		Examiners
		Excluded Contacts Campaigns
		Inactive Contacts
		Member Contacts Subgrid View
		Mentors
		My Active Contacts
		My Connections
		Segment members
		Student Contacts Subgrid View
		Supervisor/Mentors



6. Removing members using the Advanced Find

In this circumstance you have created a Marketing List but wish to remove a certain set of contacts from it. For example, in our South West list we would like to remove any members who have already part of a committee.

• First, make sure that you are viewing the correct Marketing List then choose the *Members* tab and select *Remove Using Advanced Find*.

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🖈 Pinned 🗸 🗸	South West Contacts			The Add using Lookup		n admin 🗸
/ly Work	Marketing list \cdot Marketing list \vee			- Add using Advanced Find	Locked Last Used on (Date) Ow	ner
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Activities	Members			Q Evaluate using Advanced Fi		
ustomers				Add to Booking Queue	Add 🖄 Add Existing Conta	ct
Organisation	✔ Full Name	Email	Company Name	Business Phone	Status	
R Contacts	Laura Klein	laurak@scoass.org.uk	Society of Associations		Active	
farketing	Alexander James	alexj@sb.com	Guildford Circle	56789	Active	
C Leads	Neil Morrison	nm@sb.com			Active	
A Marketing lists	Jorge Das Neves	jorge123@home.com	Association For Project Management		Active	
Campaigns	Samuel Brinks	jm060220@silverbear.com			Active	
Quick Campaigns	Susie Cabrera				Active	
ollateral						
Products						
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usiness Processes						
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Marketing 🗘	E2 Active					🗟 Sav

Remove members using advanced find × Find members to remove based on search criteria.	
Look for: Contact Use Saved View:	
Ard ~ Ard ~ Ard ~ + Add ~	Build your query and press <i>find</i> . In this case we used the <i>Related Entity</i> Option. Please see Silverbear Fundamentals – Intermediate Module for more information on building Advanced Finds

Remove members using advanced find Find members to remove based on search criteria.		×
✓ Full Name	↑ ♀ Business Phone ♀	
Alexander James	56789	Once you have your list, you can select
Jorge Das Neves	***	individuals to remove from your Mailing
Laura Klein		List or <i>Remove All</i> of these individuals
Neil Morrison		
Samuel Brinks		from the list
Susie Cabrera		
1 - 6 of 6 () selected)		
	Back to query Remove all Remove only se	lected

7. Removing selected contacts from Marketing Lists

Individual contacts can be removed from Marketing Lists either in the Marketing Lists record, or via the individual contact record.

7.1. Removing Contacts through the Marketing List record

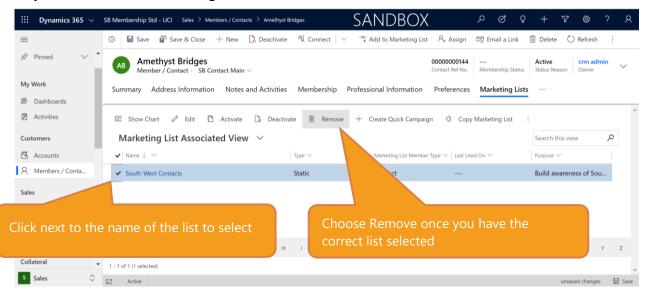
First search for the correct marketing list. (usually through the Marketing Work Area and then Marketing Lists menu option), then click on the required list.

Press the Members tab. Press to the left of the contact(s) you wish to remove to tick them and then press the *more* or *ellipses* option above the grid of members. Choose *Remove* to take them off your marketing list.

Home	South West Contacts				N		fmin
Recent 🗸	Marketing list \cdot Marketing list \vee				Lo	cked Last Used on (Date) Owner	
Pinned 🗸	Summary Members Notes Related						
Work	Members						
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Organisation	✓ Jm0808_04 Jm0808_04	jm0808_04@sb.com	Association For Project Management		Actin	Remove	
Contacts	lk171010 lk171010	ik171010@sb.com	Adventure Works (sample)		Actin	ଷ୍ଟ Quick Campaign	>
15	Neil Morrison				Activ	Assign Contacts	
Leads	Jorge Das Neves	Select your individual of	ontact by placing a		Activ	🖻 Share	
Opportunities	Camuel Brinks			_	Activ	🕫 Email a Link	
Competitors		tick next to them and t				☆ Follow	
lateral		(ellipses) button to a	iccess further options	5		Run Report	>
Quotes		including Remove. Not	e that this will not			Word Templates	Ś
Orders		appear for a dynamic li				See associated records	
Invoices		appear for a dynamic i	ist of a locked list				
Products							

7.2. Viewing and editing an individual's Marketing List memberships from the contact card

- To view the *Marketing List*(s) on which a contact appears, search for their record card in the normal way and once you have accessed it, choose <u>*Related (...)*</u> and then *Marketing Lists*
- To remove the contact from a marketing list they appear on, click to the left of the name of the list (to put a tick against it) and choose Remove. You can also add your contact to marketing lists from this screen.



8. Dynamic Marketing Lists

When you create a dynamic Marketing list you will not be given the option to add contacts individually (although if you convert your dynamic list to a static one you will have that opportunity). A dynamic list updates with your data. For example, in this scenario we have created a marketing list for contacts with email addresses who live in the region code South and who have not opted out of email contact. The membership of this group will change as your contacts change address and/or their contact preferences and also as new contacts are added to your system.

• To create a dynamic list, follow the same process as for static lists, but change the list type to Dynamic

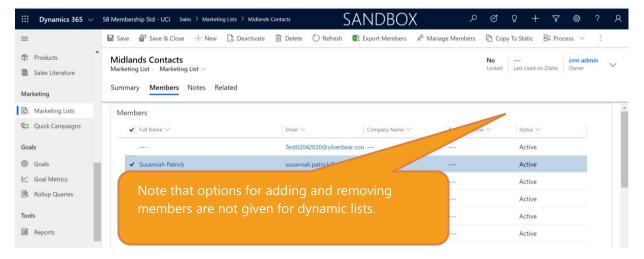
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B Marketing Lists	Information	Campaigns								A
Sa Quick Campaigns	Name*									
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Goals	🛆 List Type*									
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I Reports	Contact									
Business Processes	Source	Quick Campaigns								
_						+ New	Quick Can	npaign	:	-
Sales	E Active								E s	Save

• Click Manage Members

- You will be shown a Manage Dynamic List Members which has the same functionality as Advanced Find. You can build a query yourself or used a Saved View. In this scenario we have created a new search. This functionality is the same as with a Static List as described earlier in this module
- Once you have built your query, press Find.
- Unlike with a Static Marketing list, you are not able to pick and choose which contacts to add to your list; instead you are confirming if you want to use the query to look for members to add to your list, or if you want to adjust your criteria.

anage Dynamic List Men		√ Business Phone	∇
A Delegate			0
Aarti Sales			
Aarti1 SalesPortal1			
Adam Ingg		098765432	
Alex2 McLachlan			
Alistair Morrison			
Amelia Marsh		01483040914	
Amelia Marsh Amy Enderstein Andrew Standards	Choose Back to Query to m Ouery to add these contact	nake changes	
Amy Enderstein	Choose Back to Query to m Query to add these contact list	nake changes	
Amy Enderstein Andrew Standards	Query to add these contact	nake changes	
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• You will not be able to add or remove members manually; members are added to the list if they fulfil the criteria you have set. You can however adjust and update your criteria by clicking on *Manage Members* again. You can also make a static copy of the list if you choose.



i th Region eting list - Marketing list ↓ marv Members Notes Related				No Locked	Last Used on (Date) Owner
embers					
V Full Name	Imail	Company Name	Business Phone	Status	
Susan Barlow	faropk.naj/9@silverbez	Ernst & Young	020 7638 8368	Active	
Shirley Hobson	s.hobson@silverty	Ernst & Young	***	Active	
David Service	davidservice	Ernst & Young		Active	
David Lumm	tarookay	Ernst & Young	072 0220375 3	Active	
Jm1510_01 Jm1510_01		C. C		Active	
Jm161001 Jm161001				Active	
Jennifer McKenzie	Conveto Ctatio			Active	
Penelope Pepperpot		will create a c	copy and allow	inactive	
Mstest1911 MSTest1911				Active	
Alex2 McLachian	you to add and	d remove ind	ividual	Active	
Ryan Greene				Active	
Poly Hapkins	contacts to the	at copy, which	h will work the	Active	
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- 14 of 116 (D selected)	same as any se	are not you	may need to		iii- ii- Page 1
	change the Lo	ckod status to	No first)		
			no mst).		

9. Working with Marketing Lists – next steps

Marketing Lists can be used in a number of different ways, the most common next steps are exporting to Excel, using in a marketing solution such as Dotdigital or working with Quick Campaigns and Campaigns in CRM.

10. Exporting to Excel

- On your Marketing List, click on the Members tab
- Press the Ellipses (or...) on the top right of the list of members
- Choose Export Members/Contacts

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lustomers		Test02042020@silverbear.con		😂 Quick Campaign	>
Accounts	Susannah Patrick	susannah.patrick@silverbear.c		💷 Run Report	>
R Members / Conta	Molly Casey	molly.casey@silverbear.com		Excel Templates	>
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ustomers		Test02042020@silverbear.com	1		- ← Ba	i ck Export Members / Co	ontacts	
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K Members / Conta	Molly Casey	molly.casey@silverbear.com.			d 1	Static Worksheet (Pa	ge only)	
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Sales								

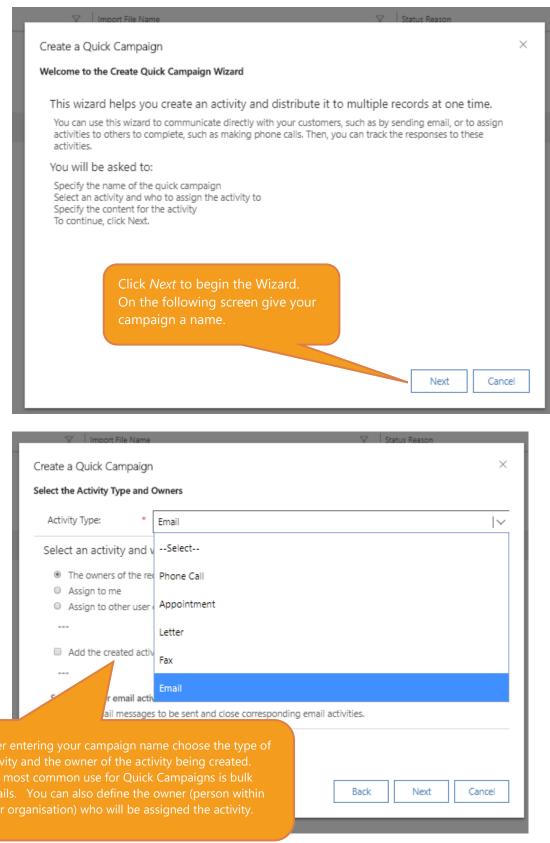
11. Quick campaigns and Campaigns – an overview and comparison

Quick campaigns allow you to efficiently organise a bulk communication to a marketing list. They however do not have the same degree of functionality of standard campaigns which includes tracking, the use of multiple marketing lists and budget monitoring. How to create a Quick Campaign from your marketing list.

• Open your marketing list, and Click on + *New Quick Campaign* on the Summary tab in the Quick Campaigns section

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	A Modified On 19/05/2020		No. of Failu	+ New Quick Campaign O Refresh : res ✓ Status Reason ✓ Create ↓ ✓ Owner ✓
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• A Quick Campaign Wizard will appear



Create a Quick Campa		×
Specify the Content of th	-	
Specify the details of t done, click Next.	he quick campaign by filling out the available fields in the activity. When you are	*
Use Template		
*		5
Priority	Choose Use Template to use a pre-created template	
Due	with placeholders (merge fields) and other features.	
From	Creating templates is covered within further Silverbear Modules	
占 Subject	Alternatively leave unticked and use the email editor below.	
	below.	-
	Back Next Car	icel

Create a Quick Campaign	\times
Completing the Create Quick Campaign Wizard	
You have successfully completed the wizard. Review the information for your campaign. If you want to make changes, click Back.	
Name: test Activity: Email Scope: For Selected Records (1) Owner: The owners of the records that are included in the quick campaign	
After you create this quick campaign, it will be located in the Sales and Marketing pane, under Quick Campaigns.	
To create the quick campaign and its activities, click Create.	
Click <i>create</i> to send your email campaign.	
Back Create Cano	el

12. Quick Campaigns – other communication methods.

Other uses for the Quick Campaigns could be:

- Phone Call if you have used a telemarketing process to contact your Marketing List you can record the details of this phone call through Quick Campaigns.
 Alternatively, you could select *Add the created activities to a queue* option in the Quick Campaign Wizard to assign the calls to a team or team member to make.
- Letter record that you have sent out / are due to send out a campaign letter to this list
- Appointment create an appointment note however that all the members of the list would have the same appointment time and other details.

13. Monitoring Quick Campaigns

• To view your Quick Campaign, you can access it via the *Marketing* work area and the *Quick Campaigns* menu option. Alternatively, you can click through into the details via your marketing list Quick Campaigns section,

\cdots Dynamics 365 $ imes $	SB Membership Std - UCI Marketing > Qui	ck Campaigns	SANI	DBOX	ନ ବ୍ଷ ଚ	+ 7 🕸	? 8
=	🖾 Show Chart 🛛 Task 🖙 E-mail	🛗 Appointment	🗞 Phone Call 🔳 Letter	🖶 Fax 🛛 🏷 Service Acti	vity 🤝 Campaign Response	් Other Activities $$	· :
Activities	My Quick Campaigns $ imes $					Search this view	Q
Customers	$\checkmark $ Subject \lor	Activity Type \searrow	Total Members \checkmark	No. of Successes \checkmark No. of	of Failures \checkmark Status Reason \checkmark	Create \downarrow \checkmark	Owner 🗸
Accounts	Midlands Campaign 2	Email	140	65	75 In Progress	20/05/202	O crm adm
A Members / Conta	Midland Event	Email	208	103	105 Completed	19/05/202	⊙ crm adm
Marketing							
& Leads							
😫 Marketing Lists							
🖘 Campaigns							
😋 Quick <mark>Campaigns</mark>		Em	ail deliveries ar	nd failures are	summarised on		
Collateral			view screen				
Products	4						
🐻 Sales Literature 🗸	All # A B C D	E F G	н і ј к і	M N O P	Q R S T U	v w x	Y Z

• Click through the campaign to the details including (if it is an email campaign), the emails issued and the see the lists of email successes and failures. The lists are given as a view and there is functionality which can be applied to those lists.

III Dynamics 365 🗸	SB Membership Std - UCI Marketing > Quick Campaigns > Midlands Campaign 2	SANDBOX		م	8 9 + 7 ®	? 8
=	③ 🗊 Delete 🖒 Refresh 🖾 Email a Link 🖷 Word Templates ∨ 🗐 Re	in Report 🗠				
ώ Home	Read-only This record's status: Closed					
③ Recent ∨ x ² Pinned ∨	Midlands Campaign 2 Quick Campaign ~ Quick Campaign ~				mbers Type Activity Type Status Reaso	
My Work	Summary Responses Related	Timeline	+ 7 :	SELECTED MEMBERS		
Dashboards Activities	Subject Midlands Campaign 2				🖉 Edit	1
Customers	Owner * © R crm admin	Enter a note	8	$oldsymbol{arphi} $ Full Name \uparrow \lor	C Activate	11
Accounts	No. of Successes 102	What you've missed New activities (102)	×	Abigail Orr Amethyst Bridges	C Deactivate G Add to Marketing List	
Marketing	No. of Failures 106 Error Details	test CRM:0001204 test		Amos Herrera Beatrice Moses	옥기 Quick Campaign > 우, Assign Members / Contacts	
 Leads Marketing Lists 		Cosed S E-mail from crm admin teck-0001205	1154	✓ Beck Cotton	요 Share 명 Email a Link	
Campaigns		test Cosed S7 E-mail from crm admin	1154	Bo Patterson 1 - 6 of 102 (6 selected)	Run Report Reassociated records	
Collateral Products Sales Literature 		et CRAADOO1203 tet Come	1154	EXCLUDED MEMBERS		
Tools III Reports	You can select clients fro	om either the <i>Selected</i>	11:54	✔] Full Name ↑ ∨	Business Phone V	
Business Processes	(successes) section or th	e <i>Excluded</i> (failure)	11:54	Abigail Clemons	***	
Lead To Opportunity Marketing	section to carry out furth example you could add t	he successes to a	11:54	Albie Casey Alexander Reyes Angela Norton	***	
	second marketing list for	r a follow up email.				

• You can also view further information on why the failed emails did not reach the recipients by clicking on the *Members* tab and selecting the relevant view (in this case the view is *Contact Bulk Operations Failures*.

III Dynamics 365 $ \lor $	SB Membership Std - UCI Marketing $>$ Quick Campaigns $>$ Midlands Campaign 2	SANDBOX 🖉 🦉	Ŷ	+ 5	7 🐵		ጸ
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☑ Activities	Read-only This record's status: Closed						
Customers	Midlands Campaign 2	20/05/2020 11:52 Contact		Email	Comple	ted	
🖾 Accounts	Quick Campaign \sim Quick Campaign \sim	Created On Members	Туре	e Activity Type Status Reason			\sim
A Members / Conta	Summary Responses Members Related						
Marketing	図 Show Chart 心 Refresh 通 Run Report ~ 幅 Excel Templates ~ 【	🛚 Export Bulk Operation 🗸 🗸					4
& Leads						0	
Arketing Lists	Contact Bulk Operations Failures $~~$			Search this	view	Q	
Campaigns	✓ Full Name (Customers) ✓ Business Phone (Customers) ✓	Error description \checkmark		Error numbe	u V		Ê
🖏 Quick Campaigns	Zeus Richard	Email not sent due to the recipient's communicat	ion	0x80040b	00		
Collateral	Zephr Frazier	Email not sent due to the recipient's communicat	ion	0x80040b	00		
Products	Zephania Madden	Email not sent due to the recipient's communicat	ion	0x80040b	00		
	w 10.6			0 000 101	~~		*
Sales Literature	All # A B C D E F G H I J K L	M N O P Q R S T	U	v v	v x	Y	z
Tools	1 - 106 of 106 (0 selected)						
Marketing 🗘	Et Closed						

14. Creating a Standard Campaign

- Standard Campaigns can also be created from Marketing Lists. Or alternatively, as below, choose the *Marketing* work area, and then *Campaigns*, and press +*New*.
- Complete the mandatory details (e.g. name and code) and any chosen optional information and press *Save*.

Campaign: SB Campaign: C	Confer: × +										-	Ø ×
← → C 🔒 sbcons	-sandbox.crm4.dynamics.com/main.aspx?appid=cb63	8546-b5e9-4d4a-b26f-2f2a02876	a648tforceUCI=18t	pagetype=entityrecord	Stetn=campaign&i	d=61f884b2-8c9a-ea1	1-a812-000d3a23	c2ba&cmdbar=true			Q	☆ 0 :
III Dynamics 365 🗸	SB Membership Std - UCI Marketing > Campaigns > Con	erence 2020 Campaign			SAN	DBOX			م	ଷ ହ	+ 7 @	? R
=	🖬 Save 🛱 Save & Close 🕂 New 🗋 Deactiva	se 🗊 Delete 🖒 Refresh 🗋	Copy as Campaign	🗋 Copy as Template	₿ Process ∨	🔍 Assign 🛛 🖻 Share	ස්සු Email a Link	P Flow 🗸 🖷	Word Templates $\ \lor$	🗐 Run Report	~	
⇔ Home	Conference 2020 Campaign								No £0	.000	Proposed crm	admin
\odot Recent \checkmark	Campaign - SB Campaign ~								Template Est	imated Revenue	Status Details Own	er 🗸
🔊 Pinned 🗸 🗸	Summary Details Related											
My Work	ap prosn Pound											-
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Activities	Direct Marketing Expected Response(%)			Capture and	d manage all records	in your timeline.		LEADS			+ New Lead	4 E
Customers								✓ Name ↑ ∨	Owner	~	Status 🗸	
Accounts	Is Available for Selection ?								-	7		
8 Members / Contacts	Yes									available.		
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Marketing	No											
© Leads	Quick Add Membership Enabled" Yes											
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Tools	Proposed Start											
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🔬 Lead To Opportunity		track the	succe	ss of a c	ampai	gn – to	enable	e this				
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	Actual End			- and bic	101 300		o eriari	gee				
Marketing	E? Active	to Yes.									unsaved cha	▼ Inges 同 Save

15. Standard Campaign Targeting Options

- A standard Campaign is a little more sophisticated than a Quick Campaign. One new element is the ability to target it at more than one marketing list, and the ability to include leads who are not on marketing lists.
- To add marketing lists to your Campaign, click on the ellipses (...) symbol on the top of the Marketing List section on the *Summary* page of your Campaign.

\cdots Dynamics 365 $ \lor $	SB Membership Std - UCI Marketing > Campaigns > Conference	e 2020 Campaign	SANDBOX		0 0	Q	$+ \nabla$	© (? 8
=	🗟 Save 🛱 Save & Close 🕂 New 🗋 Deactivate	🗓 Delete 💍 Refresh	🗅 Copy as Campaign 🛛 🗋	Copy as Templ	ate 📴	Process	〜 名, Assig	in :	
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Accounts	Summary Details Related								
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Marketing	Name*	ρ Search timeline							211
© Leads	Conference 2020 Campaign	Enter a note	()			Existing Marketi	ng List	
Marketing Lists	🛆 Campaign Code				0) Refre	sh		
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Collateral	🛞 British Pound		\bigcirc	LEAD	S		rt Marketing Lis		
Products	Campaign Type	G	et started			5 See a	ssociated recor	ds	
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Sales Literature	Expected Response(%)					No dat	a available.		
Tools	·								

UCI – Sales, Marketing and Fundraising Course – Marketing Module

• You can then choose how you would like to use this Marketing List. If you select *To the campaign and all undistributed campaign activities* then emails, calls etc that you create will automatically use this list. If you choose *To the campaign only* you will need to define which lists are used for which activity later in the process. This is the recommended option if you are creating a highly segmented campaign with different communications to different groups.

	Dynamics 365	~ s	5B Membership	o Std - UCI Marketing > Can	ipaigns 👌 Conferen	Sandbo	Х	Q	S	Q	+	∇	٢	? 8		
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6 L	.eads		Cor	marketing list:	Select	in and an and	istributed carry	aigh activities.				ds Cont	acts			
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r c	Products		Campa	aign Type				Get started								
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MN	Aarketing	•	E Active													Save

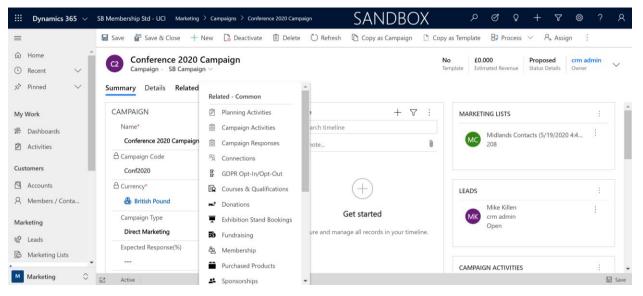
• Existing and new leads can be added through clicking the ellipses on the top right of the Leads section. Leads records normally consist of details of initial enquiries from potential purchasers or connections. Information on the use of leads is covered in the Sales module of this course.

\cdots Dynamics 365 $ \lor $	SB Membership Std - UCI Marketing > Campaigns > Conference	ce 2020 Campaign	SANDBOX	م	ଷ୍ଟ ବୃ	+ 7	© 7	? ጸ
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Accounts	Summary Details Related							
A Members / Conta	🛆 Campaign Code							•
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& Leads	≙ Currency*		(+)	LEADS			:	
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S Campaigns	Campaign Type		Get started	МК	;≣ Sele	ect		
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Collateral	Expected Response(%)			CAMPAIGN	4	v Lead I Existing Lead		
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Sales Literature	Yes				୍ଦ୍ୱ Qui	ck Campaign	>	
Tools	Is Available for Selection on Web ?				I Rur	Report	>	
Marketing 🗘	E3 Active							🗟 Save

16. Adding activities to your Campaign

This section will cover the creation of activities which will make up the communications element of your campaign. At this stage you can set up the activities, but you do not have to issue those communications immediately.

• To add a new activity, click Related and then choose Campaign Responses



• On the following screen choose +*New Campaign activity* to see the form below

iii Dynamics 365 🗸 🕯	S8 Membership Std - UCI Ma	eketing > Activities > Initial Confe	erence smail and early kird offer		SANDBOX	A 6 0 4 4 0 5 4
-	🖬 Save 🏰 Save & Close	🗊 Delete 🖒 Refresh	\fbox Distribute Campaign $\qquad \times$ Close Campaign Activity	B) Process V IA Add to Queue (Q) Queue Item	Details 🔒 Assign 🖽 Email a Link 🖉 f	Row V dd Word Templates V 🗇 Run Report V
 G Home ⊙ Recent ∨ 	Initial Conference en Campaign Activity - Campa	mail and early bird off aign Activity ~	fer			Normal Proposed constantia Constantia Constantia
🖉 Pinned 🗸 🗸	Campaign Activity Auc	diences Related				
My Work	SUMMARY Subject	Initial Conference email and	I early bird offer	Marketing list		Timeline + V :
Activities	🛆 Used in Campaign	 Conference 2020 Campa 	aign	✓ Nome ↑	Marketing List Member Type ${\scriptstyle \smile}$	Pritra acta
Customers	Type	Direct Initial Contact		Midlands Contacts (5/19/2020 4x41x46 PM)	Contact	
Accounts	Channel	Email		South West Contacts	Contact	Marketing Lists which were added to the
R Members / Contacts	Outsource Vendors					Campaign and for which you chose to be
Marketing	Description					
@ Leads B Marketing Lists			Ensure you us	e the correct		added to all activities will automatically
Campaigns	Scheduled Start	20/05/2020				appear here. You can remove them if you
D Quick Campaigns	Scheduled End	20/05/2020	communicatio	n method – ema	1	need to and can also include additional
Collateral	Actual Start		being the mos	st frequent		
Products	🗄 Actual End					lists
Sales Literature						
iools iii Reports	FINANCIALS					
	A Currency	💩 British Pound				
lusiness Processes	Allocated Budget	60.000	Actual Cost £0.000	The Anti-changed	ield stops vou	ur marketing list menshere from receiving
e				The Anti-spann	ield stops you	ur marketing list members from receiving
	Anti-Spam Settings			too many email	S.	
	Frequency cap (days)					
Marketing O	Eð Open					v G. fave

Add any additional marketing lists that you would like to include in this campaign activity. Note these lists must already be included on your campaign, so if necessary, go back a step and add them to your campaign.

In the Anti-Spam Settings section, enter the frequency limit in days for marketing activities directed at any contact in this campaign. The system will look at the last contacted date on the relevant record card and will not send a member of a marketing list your email if they have been too recently contacted. This activity has been set at 5 days, therefore if any marketing list members had been contacted less than 5 days before this email is issued, they will not be sent it. Entering "0" results in no restrictions.

• Include any costs associated with this activity for overall budget tracking for this campaign. Costs are accumulated and shown on the Details tab on the Campaign record

17. Distributing campaign activities

- The previous step established the details of the activity. You can add further activities (for example, a follow up call) before issuing any communications, or you can distribute them as you create them.
- To carry out an activity e.g. send an email or record details of a telemarketing call, press the *Distribute Campaign Activity* on the Command Bar.

III Dynamics 365 $ \lor $	S8 Membership Std - UCI Ma	tarketing \geq Activities \geq Initial Conference email and early bird offer			SAN	
-	🔛 Save 🖉 Save & Close	e 🗊 Delete 🖒 Refresh 🗋 Distribute Campaign 🗙 Cio	se Campaign Activity	E Process U In Antica Contra		Choose Distribute Campaign Activity when you are
 i → Home i → Recent 	Initial Conference e Campaign Activity - Camp	email and early bird offer paign Activity				ready to send your email or process other activities
와 Pinned 🗸 🗸	Campaign Activity Au	idiences Related				
My Work	SUMMARY			Marketing list		such as record details of phone calls made
# Deshboards	Subject	* Initial Conference email and early bird offer				
2 Activities	🛆 Used in Campaign	* Conference 2020 Campaign		✓ Name ↑ ✓	Marketing	
Customers (3) Accounts	Туре	Direct Initial Contact	New Emails			×
R Members / Contacts	Channel	Email	FII out this for email in each m	n to create new emails for the members yo ember's record, click Distribute.	u selected in the marketing list. To add	b add this email as a new
Marketing	Outsource Vendors		Use Template	0		Get started
e Leads	Description		Α			Capture and manage all records in your timeline.
Marketing Lists Campaigns	Scheduled Start	20/05/2020	Priority	Normal		
Es Quick Campaigns	Scheduled End	20/05/2020	Due	30/05/2020	16:14	0
Collateral	Actual Start		From	© 🔍 Silverbear Events		
Products	🛆 Actual End		Subject	Our 2020 Conference and excl	usive members only offer	
Sales Literature			Designer	TML Preview 🦻 🦿	2	
Tools Sill Reports	FINANCIALS				di di B Z U	U 6 v, x' Z
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Business Processes	Allocated Budget	£0.000 Actual Cost £0.000			Help	Distribute Cancel
templat	te or use	an either select from the email editor to c <i>Distribute</i> to send the	reate yo			0 ar

- Create your email by using the editor or choosing from a template. This process is the same as with a Quick Campaign
- After issuing an email you can see successes and failures (just as with a Quick Campaign). These appear on the *Audiences* tab for the Campaign Activity.

18. Using the Queue (for calls and other interactions)

For certain clients you may prefer a more individual approach such as a letter or phone call. Your Silverbear CRM allows you to create other activities such as calls, and these can be added to a Queue which is then handled by a member of your organisation to process. A Queue is a list of activities to be carried out. For example, they could have a set of calls to make, or a list of clients to send a more personal and individual message to.

- Save your activity and then press Add to Queue
- You may need to create a new Queue; an example is given below:

Recent ~	Patrons pho Queue - Queue Summary Related						
Annis	SUMMARY			QUEUE ITEMS		C) Battern (R) Bun B	eport 🗢 🕷 Escal Tampiatas 🔾
Damooards.	Name	* Patrons phone calls					Search this view
Activities	Type	1 Public		✓ ton ~) largered Gaussi 1 \sim	worked by ~	
amers	Insuring Email						
Accounts	Onner	* 0.8 cm admin					
Members / Contacts	Description		wing talking points to let them know about		No dete available.		
eting		the 2020 Conference dates and speakers an and if they have any special requirements.	white check how many tickets they would like				
vents Marketing Lists							
Campaigne	EMAIL SETTINGS						
lurck Campaigna	Convert Incoming Email To Activities	All email messages					
teral Products	(1) Maribox	E Patrona phone calle					
Sales Literature							
	RECORD CREATION AN	ID UPDATE RULES	+ New Record Creation				
Reports	🖌 🖬 Bulanama T 🗠	I then it if] Multitured γ^{i}]. Created on γ^{i}				
uese Processes Lead To Opportunity		Pip data available.					
	ABC 0-0+1010 (0)	acted					

- After creating and saving and closing the Queue you will then need to choose Add to Queue again. Select the queue you have created
- The activity will then appear in the selected team member's *My Activities* section, which appears on the left-hand menu.
- Once the activity has taken place, choosing *Distribute Campaign Activity* will add details of the phone call to the record cards for the marketing list members.

Ma	rketing list			Timeline
				P Search timeline
	🖌 Name T 🖂	Marketing List Member Type \sim	1	Enter a note
New Phone Calls			×	
Fill out this form to creat new phone call in each r	e new phone calls for the members you selected nember's record, click Distribute.	in the marketing list. To add this phone call as	•	
Priority	Normal			
Due	30/05/2020	16:40	0	
Subject	Discussion about conference dates, speakers a	nd tickets with patrons		
Description				
Duration	30 minutes			
Cost £0.000		Help Distribute Ce	incel	

19. Monitoring and progressing a campaign

- You can change the Campaign *Status* to track the progress of your Campaigns
- A timeline of activities is created as activities are distributed

Campaign: SB Camp	asign: Confer: × +			- 0 ×
← → C 🔒 sl	bcons-sandbox.crm4.dynamics.com/main.aspx?appid=cb638546-b5e9-4d4a-b26f-2f2a02876a64	&forceUCI=1&pagetype=entityrecord&etn=campaign&id=61f884b2-8c	9a-ea11-a812-000d3a23c2ba	a 🖈 🖰 :
III Dynamics 365 🗸	S8 Membership Std - UCI Markating > Campaigns > Confinence 2020 Campaign	SANDBOX		ନ ଟ ହ + ସ © ? ନ
=	📓 Save 🔮 Save & Close 🕂 New 🚺 Deactivate 🍵 Delete 🖒 Refresh 🗈 Copy as Campaign 🗈 Co		🗸 📾 Word Templates 🗸 📓 Run Report 🗸	
© Home ⊙ Recent ∨ ∮ Pinned ∨	Conference 2020 Campaign Companyon - SB Campaign Summary Details Related			No £0.000 Launched cm admin Template Status Details Owner A A Template No A A
My Work	CAMPAIGN	Timeline	+ V : MARKETING LISTS	Estimated Revenue 60.000
券 Dashboards	Name*	, Search timeline	V Name † V	Status 2 Launched V
Activities	Conference 2020 Campaign	Enter a note	Midlands Contacts (5/19/2020-4/41/461	Proposed
Customers	A Campaign Code	🐼 🗵 Campaign Activity from crm admin	Patrons	Ready To Launch
Accounts	Cont2020	Patrons phone calls	1643 South West Contacts	Launched
R Members / Contacts	Currency* A British Pound	Campaign Activity from crm admin	South West Compets	Completed
	Campaign Type	Initial Conference email and early bird offer Overdue		Canceled Suspended
Marketing	Direct Marketing		I have been a second	+ New Lead
𝔮 Leads	Expected Response(%)		Update your	Sense Y
Arketing Lists				
Campaigns	Is Available for Selection ?		campaign status	Open
Ra Quick Campaigns	Yes			
Collateral	Is Available for Selection on Web ?			
Products	No			
A time	eline of campaign activity is built	up	CAMPAIGN ACTIVITIES Initial Conference email and early bird	i Otarnal ∽ Effer Email
			Patrons phone calls	Phone
	SCHEDULES			
	Proposed Start			
	Proposed End			
	🖽			
	Actual Start			
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Marketing O	Actual End			-
Marketing O	E Adia			E Seve

- The *Details* tab for Campaigns holds information about the budget and costs. If you have attached an actual cost for an activity, then this will be included in the *Activity Cost* and the *Total Cost* fields on this screen
- Responses can be added manually on the *Details* screen. For example, if you had a member of the Mailing List call or email in to request more information or show interest in membership or an event you could add those details as a response record.

III Dynamics 365 🗸	SIMentenente SEL VIG Manates) Assess > Contenencestes >					
G Home ⊙ Recent ∨ ≫ Pinned ∨	Conference Lickets Cambrance 2020 Company, Marcellan Campany, Reponse Campany, Reponse Related					
My Work	SUMMARY Suger: * Conference tidets DESCRIPTION Interested in blocking a table					
Customers G. Accounts A Members / Contacts Marketing @ Less accounts Contaction Con	RCIVID FROM Cutorer Italia talian Corpury tume Cutorer Stain Corpury tume Cutorer Stain Corpury tume					
Campaign responses can be converted into Leads or opportunities or added to a queue to ensure they are followed up						
Marketing O	El Que I					

(For automatic response handling and click through/opens data an imbedded email solution is required - please speak to your consultant or account manager if you would like more details on options)

20. Campaign tracking through the Cart

Campaign codes can be attached to sales in the CART, allowing you to record where your campaign has resulted in a purchase and track the success of your promotion.

- On your Campaign setup the *Is Available for Selection* field must be set to Yes.
- In the Cart select the code for the relevant campaign and then process the sale as normal

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• You can then run an Advanced Find on any memberships with this campaign code attached, and perhaps save it as a View for ongoing tracking.

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