Setting up a Campaign

What is the purpose of setting up campaigns?

Throughout this onboarding program, you've created several marketing assets, such as emails, social posts, banner ads, and more. By setting up campaigns, you combine these different assets into a single collection, enabling you to provide a variety of resources when marketing specific products and services. Campaigns also include instructions to help you guide your partners toward success.

Once a series of campaigns are created, they are grouped to form a campaign product. (**Note:** Campaign products are covered in the next lesson.)

How do I set them up?

Before setting up a campaign, you must first create the individual assets you want to include in the campaign. Once created, follow these steps:

1. Create a campaign shell select desired attributes and filters
2. Add assets to the campaign
3. Publish and share with partner accounts

Once set up you can also feature select campaigns on your home page, drawing more visibility to the specific products and services you want to target.

What will I do in this lesson?

By the end of this lesson, you will be able to do the following:

- Copy an existing campaign
- Create campaign settings
- Create description (Note: this section applies to accounts using the **traditional campaign build** only. Contact your **customer success manager** to learn which version applies to you).
- Add marketing activities
- Publish campaign (This step is for **reference only.** Publish files for partner use. **Do not publish practice content created during this onboarding program.**)

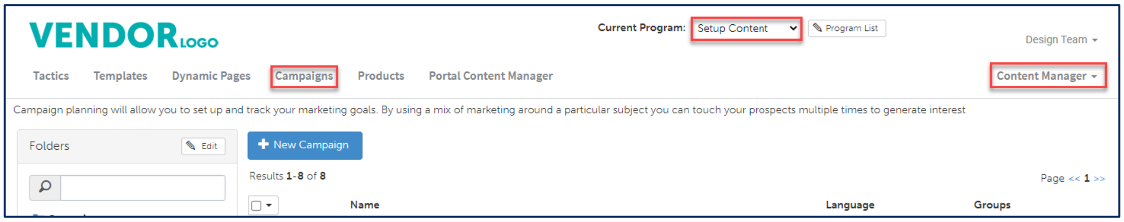
To complete this lesson, you must download the assets located within the **Packaging your Content** Block**.** Once downloaded, save each item to your local drive.

Steps

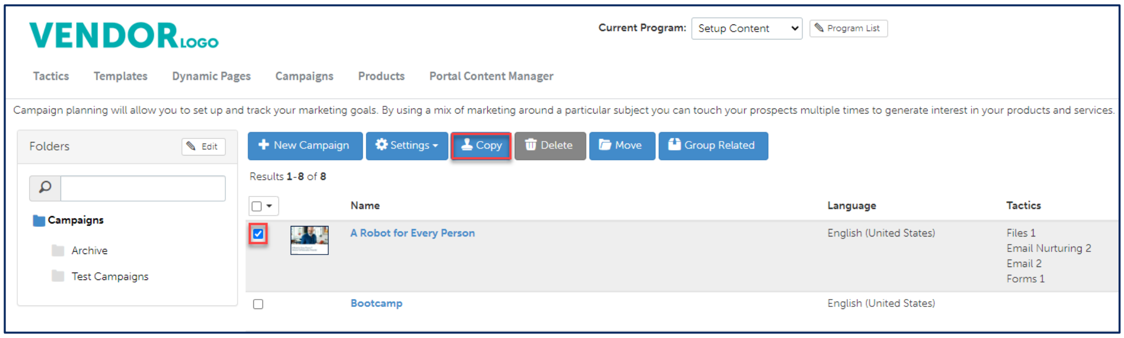
COPY A CAMPAIGN

1 In **Content Manager**, from **Current Program**, select **Setup Content**.

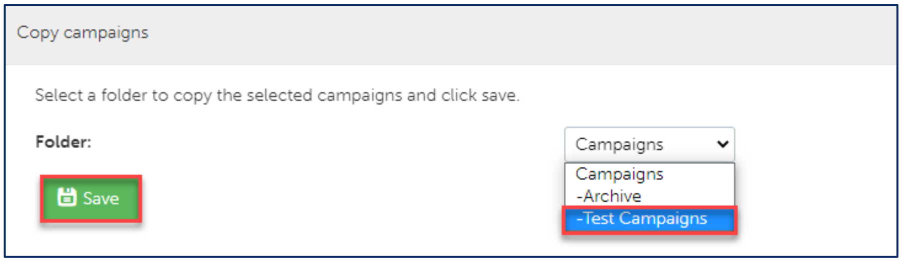
2 From the header, select **Campaigns.**



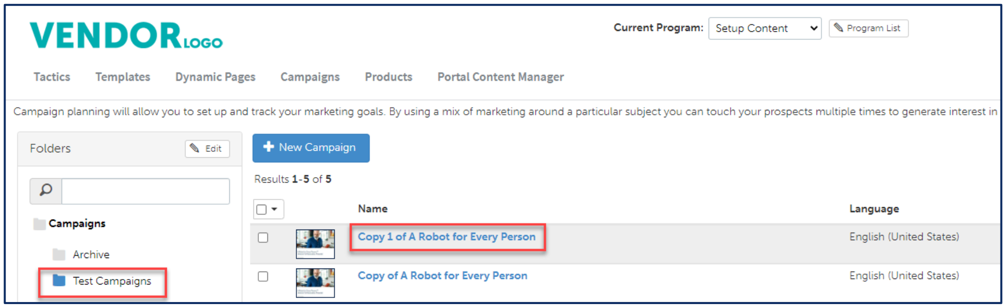
3 Select an **existing campaign**, then select **Copy**. The Copy campaign box opens.



4 Choose the **folder** for which you want to save the campaign. Then click **Save**.



5 Navigate to where the **copied campaign** is stored. Then from the **Name** column, click on the **copied campaign's** name.



CREATE CAMPAIGN SETTINGS

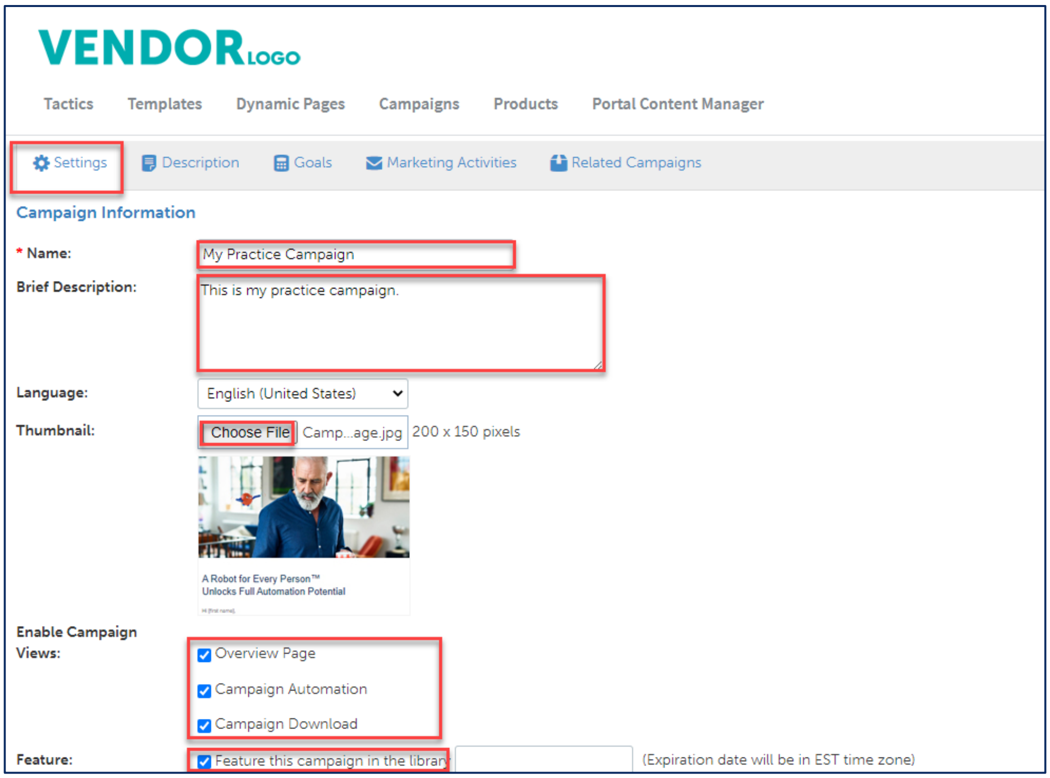
1 From the **Settings** tab, in the **Name** text field, type **My Practice Campaign**.

2 In the **Brief Description** text field, type **This is my practice campaign.**

3 In **Thumbnail,** click **Choose File**. Then, navigate to where the **Campaign_Image.jpg file** is stored. (Note: this image is included in your download package.)

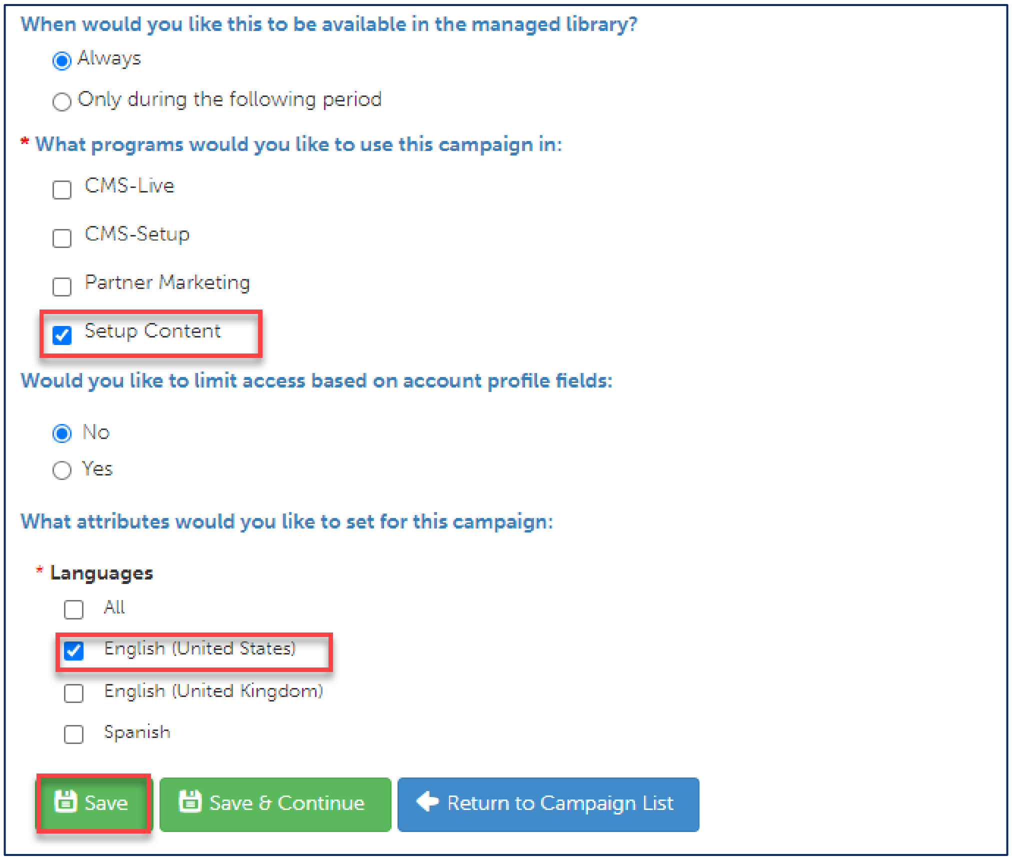
4 From **Enable Campaign Views**, do not change the selected options.

6 From **Feature**, select **Feature this campaign in the library**.



7 From **What programs would you like to use this campaign in,** select **Setup Content**.

8 From **What attributed would like to set for this campaign,** from **Language**, select **English** (United States).



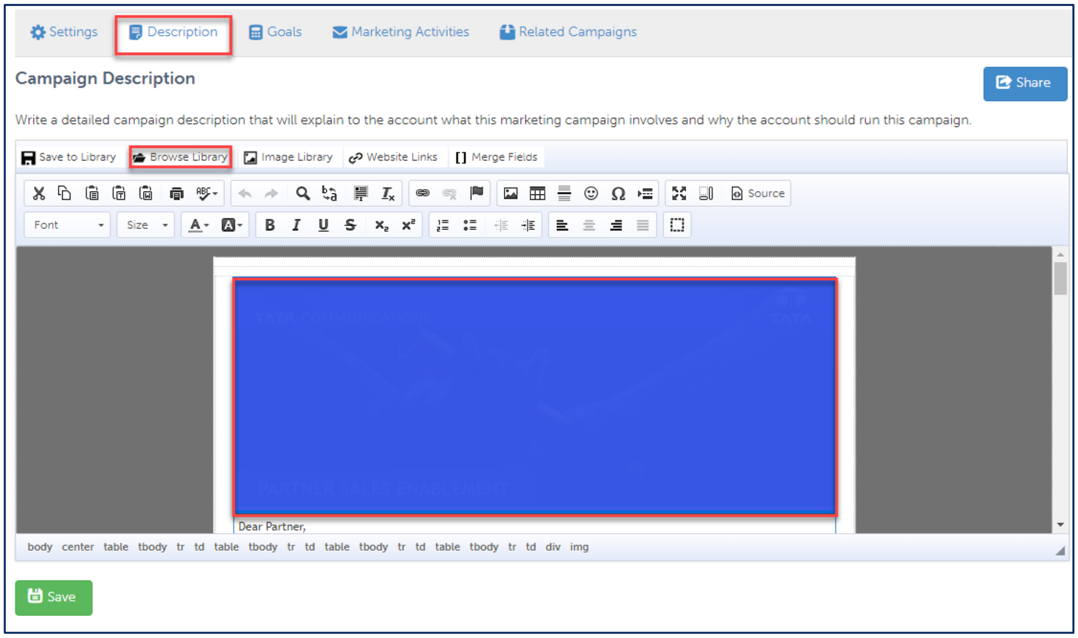
9 Click **Save**.

CREATE DESCRIPTION

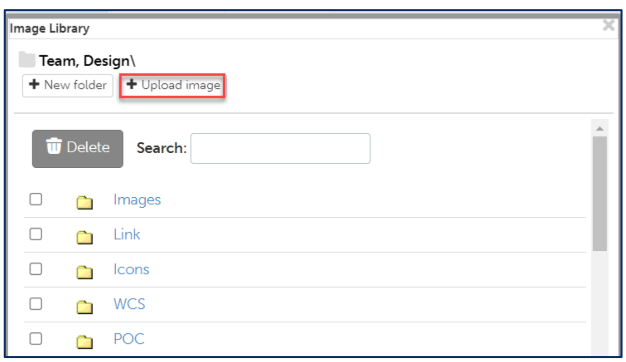
1 **NOTE**: When using campaign automator, skip this step. However, if you are using a traditional campaign build, you must update the campaign description.

Here you practice, updating an **image** and **content** in the **traditional campaign build**.

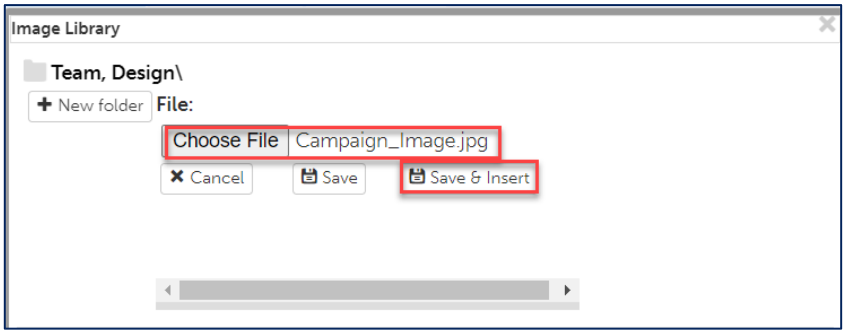
2 From the Description tab, click on any image to update. Click Image Library. The Image Library box opens.



3 Click Upload Image. Then click Choose file.

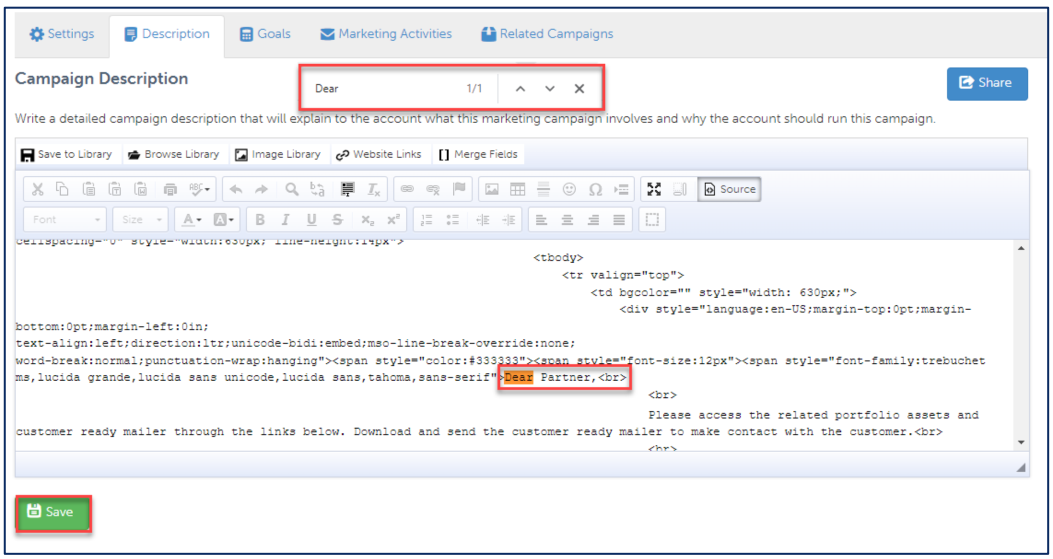


4 Select **Campaign_Image.jpg.** (Note: this image is included in your download package.) Then click **Save & Insert**.



6 Click **Source**. Click **CTRL F**. This action opens the Find box.

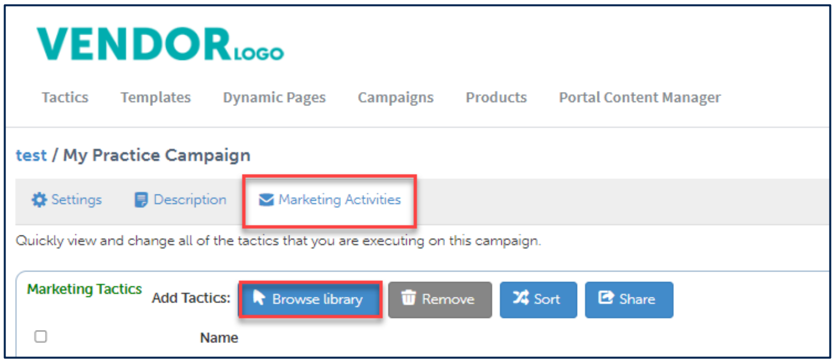
7 In the **Find** box, type the **word** you want to change. Then type: **Practice**.



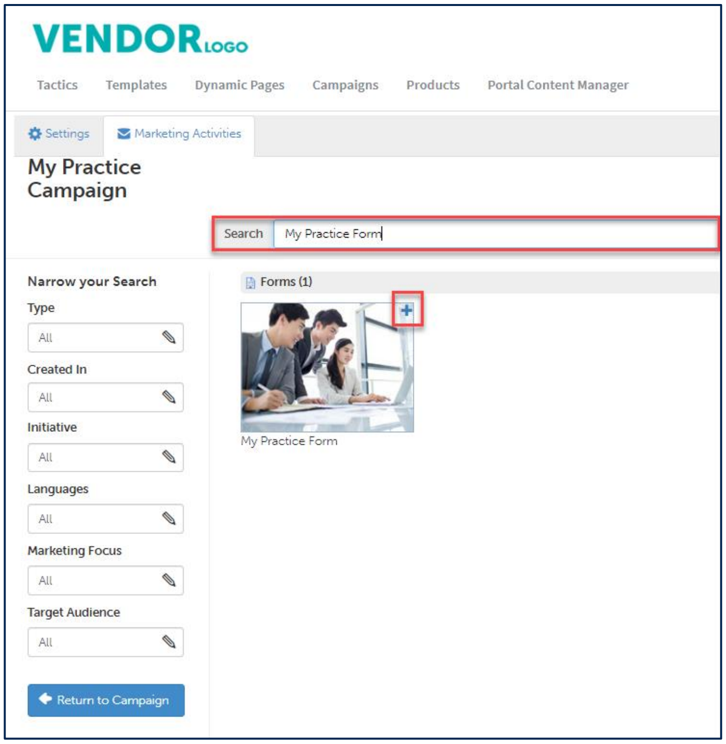
8 Click **Save**.

ADD MARKETING ACTIVITIES

1 From the toolbar, select **Marketing Activities**. Then select **Browse Library**.



2 In the **Search** bar, type **My Practice Form.** Then in the top right corner of the box, click the **+** sign.

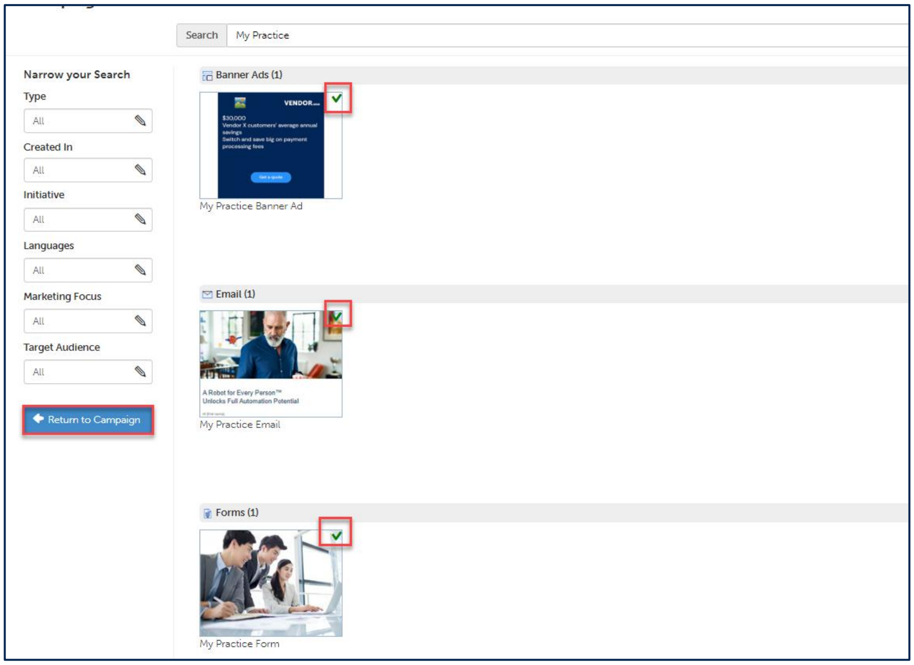


3 To add additional assets, repeat step 2 using the following search terms:

- **My Practice Email**
- **My Practice Social Post**
- **My Practice Banner ad**
- **My Practice Uploaded File**
- **My Practice File Cobranded Pdf**

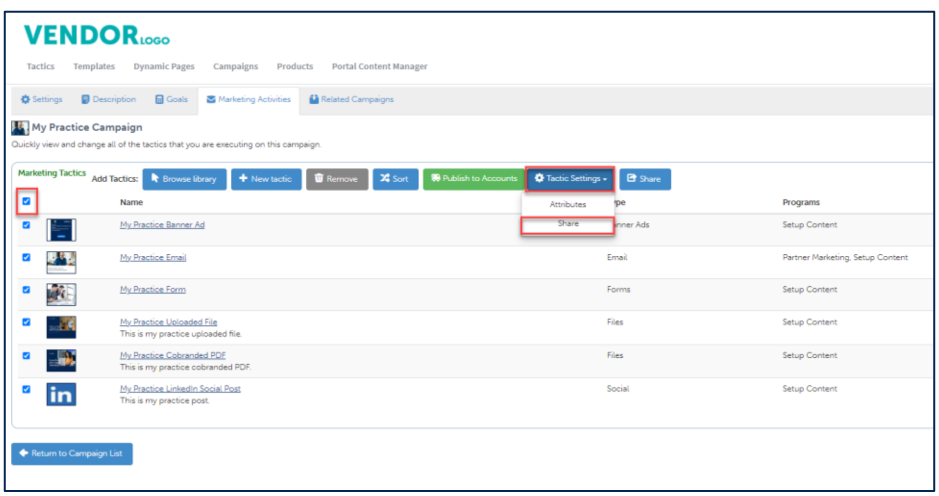
(Note: tactics can be applied to one campaign only).

4 Click **Return to Campaign.**



5 In the **Marketing Tactics** area, click **Select All.**

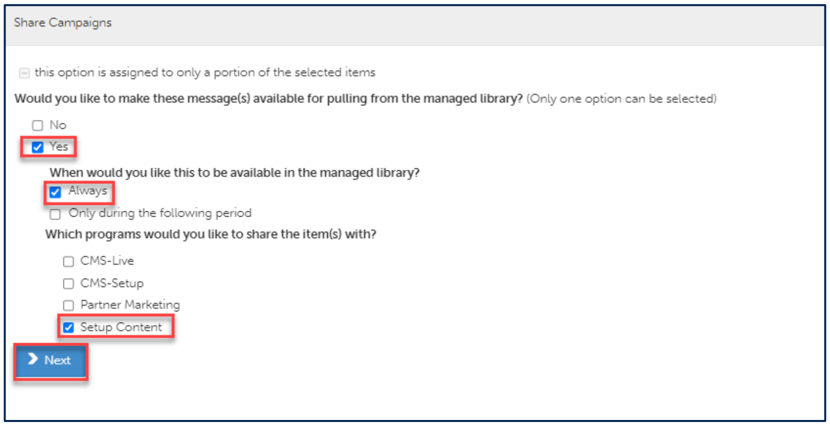
6 From the **Tactics Settings** drop-down menu, select **Share**.



7 From the **Share Campaigns** box, in **Would you like to make these messages available for pulling from the Library?,** click **Yes**.

8 In **When would you like this to be available in the managed library?**, click **Always**.

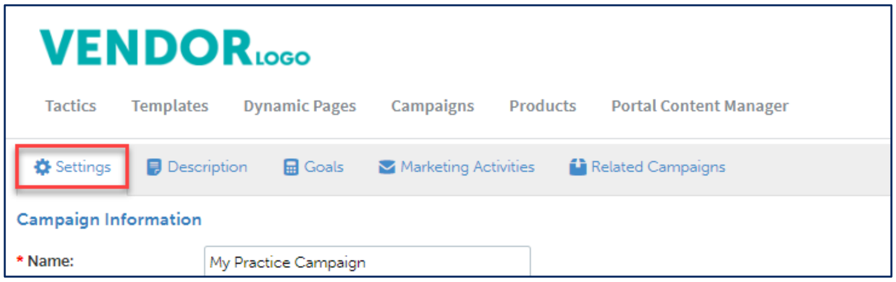
9 In **Which programs would you like to share the items with?**, click **Setup Content.**



10 Click **Next**. Then click **Save**.

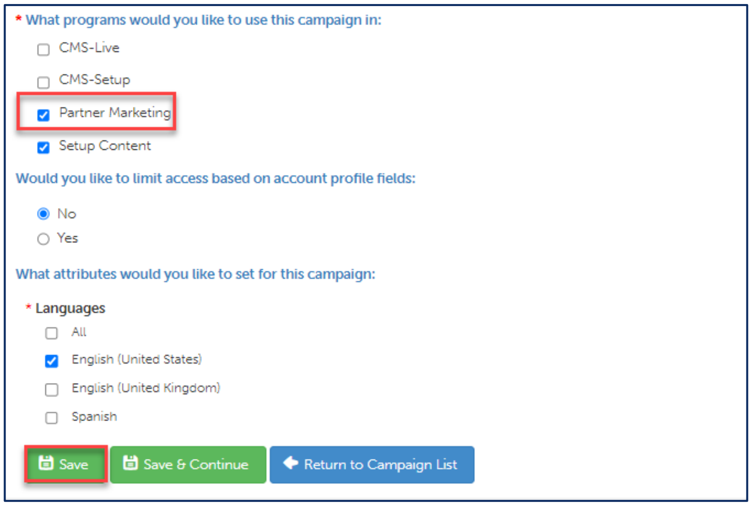
PUBLISH CAMPAIGN (THIS STEP IS FOR REFERENCE ONLY)

1 From the toolbar, click **Settings**.



2 From **What programs would you like to use this campaign in**, select the **appropriate program**. (in most cases, this will be partner marketing).

Note: All tactics must be published before publishing campaigns.



3 Click **Save**.