



# Using the Campaign Builder

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## Overview

A campaign allows you to send a sequence of selected materials at pre-determined times to contacts belonging to users across your organization. This allows one user, such as a marketing administrator, to broadcast a unified message to a desired segment of your organization’s overall set of contacts.

The contacts who receive the materials from a campaign are determined by a combination of sender rules and audience rules:

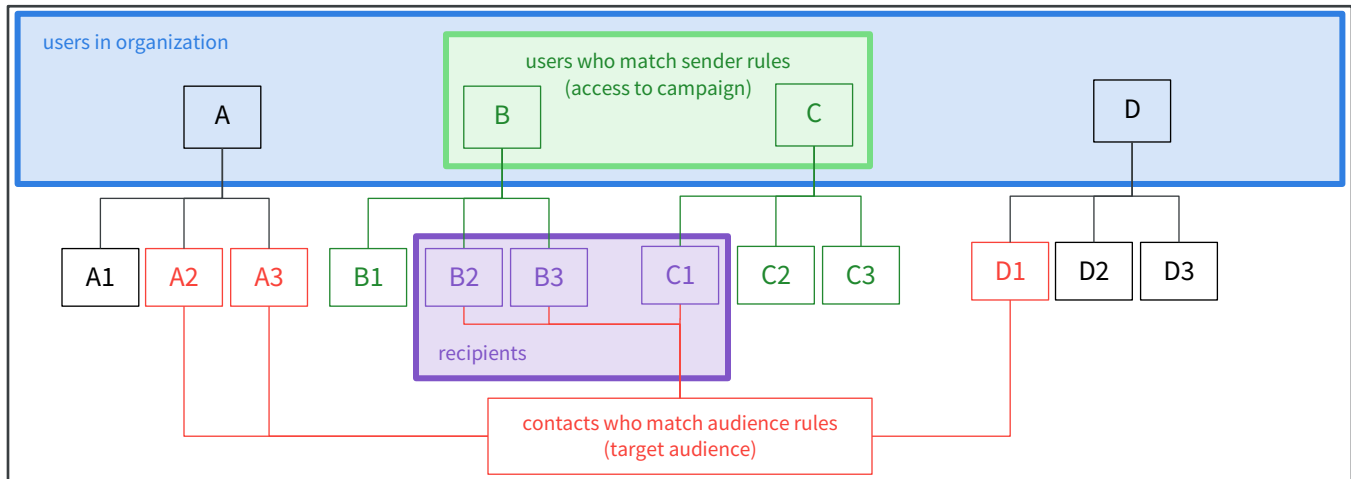
- Sender rules determine which users in your organization have access to the campaign.
- Audience rules define which contacts are the target audience of the campaign.
- The only contacts who receive campaign materials are those whose records *both*:
  - match the target audience rules
  - belong to users with access to the campaign

These contacts are called recipients.



Consider a simple organization with 4 users: A, B, C, and D, each with 3 contacts as shown in the diagram below. Suppose the sender rules only give access to a campaign to users B and C.

- None of user A's or user D's contacts are recipients, even though some of them match the audience rules.
- Some of user B's and user C's contacts are not recipients, because they do not match the audience rules.



Materials are automatically sent to each recipient on behalf of the user who owns the contact record. In the example above, contacts B2 and B3 will see the materials as coming from user B, while contact C1 will see them coming from user C. However, no manual action is needed from either user B or user C; the campaign sends the materials automatically on their behalf.

Relevant performance data is available once the campaign sends the first item. Use this data to help you evaluate whether the campaign is achieving the desired results.

## Creating a New Campaign

### From Scratch

1. Navigate to **Campaigns → Campaign Builder**. This page includes a list of tiles representing the campaigns that you have created and campaigns that were created by others who gave you access.
2. Click the **New campaign** button in the upper-right corner.
3. In the New campaign box:
  - a. In the **Name** field, enter a short, but descriptive, name for the campaign.
  - b. (optional) In the **Description (optional)** field, enter text summarizing the campaign.

#### Tip

Include the purpose and audience of the campaign so users are able to see the intent of the campaign.

- c. (optional) Check the **Remove audience recipients when they start a new loan (Recommended)** box to automatically prevent recipients from receiving further communication in this campaign when a new loan is associated with their contact record. (Uncheck the box to ensure all recipients receive all materials from this campaign, even if they open a new loan.) This is checked by default.
- d. Click the **Loan Statuses** field and select 1 or more statuses from the drop-down list. This field is required if the box above is checked. It is empty by default, so you cannot create the campaign



until you either uncheck the box above or select at least 1 status here. You can remove a status by clicking the small **x** next to its name.

- e. Under Availability Type, select either **Mandatory** or **Opt out**.
  - i. *Mandatory* campaigns send all materials to all identified recipients. Users identified by the sender rules in the campaign cannot stop it.
  - ii. *Opt out* campaigns give each user identified by the sender rules the opportunity to individually opt out of the campaign. If a sender opts out, the campaign is stopped for all their contacts who would be recipients and cannot be restarted. Other senders' recipients are not affected.

#### Note

You can modify these settings after the campaign has been created up until it has been triggered to start. From the tile on the campaign list or in the campaign builder, click the **Settings** button (gear icon) and select **Edit settings**.

- f. Click the **Create campaign** button.

A new campaign is created, and you are automatically routed to the campaign builder. This has 4 tabs:

- Overview (this tab is open by default)
- Audience
- Senders
- Content

If you navigate back to **Campaigns → Campaign Builder**, you will see a tile for the new campaign at the top of the list.

Each tile on this list includes:

- The name and description of the campaign. Click the name to edit a campaign that has not been started or to view metrics and definition of a campaign that has been started.
- For campaigns that have been started, the start and end dates of the campaign.
- The date the campaign was created.
- The current status of the campaign (see Campaign Statuses below). A new campaign has the status Draft.
- A settings button (gear icon). Click this button to see the following options:
  - **Edit settings** – Opens a slide-out panel where you can modify the information provided when the campaign was created.
  - **Copy** – Lets you create a duplicate of the campaign. See Copying an Existing Campaign below.
  - **Delete** – Lets you remove a campaign from the list. If a campaign is running when it is deleted, any remaining content is not sent and any metrics are lost. You are asked to confirm your decision to delete, but once you do, the deleted campaign cannot be recovered.
- For campaigns that you have created and have been started, a **■ Stop** button. This lets you end the campaign for all senders and recipients. For a stopped campaign, metrics for the portion of the campaign that did run are preserved.
- For opt out campaigns that were created by another user and have been started, an **∅ Opt out** button. This is not available for mandatory campaigns created by another user.



## Copying an Existing Campaign

You can create a new campaign using an existing campaign as a starting point, even if it is not fully defined. You can only copy campaigns that you created.

### Tip

If you expect to make multiple similar campaigns, create one with any setup that would be common to all of them and use it as a template. Then, each time you want a new campaign, copy the template and modify the new copy.

To copy a campaign:

1. Navigate to **Campaigns → Campaign Builder**.
2. Then either:
  - a. Click the **Settings** button (gear icon) in the lower-right corner of the tile for the campaign you want to copy and select **Copy** from the drop-down menu.  
or
  - a. Click the name of the campaign you want to copy.
  - b. On any tab of the campaign builder, click the **Settings** button (gear icon) in the upper-right corner and select **Copy** from the drop-down menu.
3. In the Copy campaign box:
  - a. Enter a name for the new campaign. The field is pre-populated by adding **Copy of** to the beginning of the original campaign's name. You can use this name as-is, modify it, or enter a completely new one.
  - b. Click the **Copy** button.

The new campaign is created. If you created the copy starting from the campaign list, the list is refreshed with the new campaign at the top of the list. If you created the copy from the campaign builder, the builder refreshes to the Overview tab of the new campaign.

## Campaign Builder

### Overview Tab

When you first create a new campaign (or when you return to the campaign builder later), the Overview tab is shown. Here, a Details tile lists the name and description that you defined when you created the campaign, and an Availability tile indicates whether this is a mandatory or opt out campaign. The remaining tiles summarize the results of the selections made on the other tabs. You can switch to another tab by clicking the tab at the top of the page or by clicking the link in the corresponding tile.

To modify the initial settings of the campaign:

1. Click the **Overview** tab.
2. Click the name of the campaign in the Details tile or the campaign type in the Availability tile. A slide-out panel opens on the right side of the screen.
3. In the slide-out panel:
  - a. Modify the settings as desired. The settings here are the same as those described in Creating a New Campaign above.



- b. Some further read-only information about the campaign is shown below the settings.
- c. Click the **Save and Close** button at the bottom of the panel (you may have to scroll down). Your changes will be lost otherwise.

Once a campaign is started, the Overview tab changes to a display of various performance statistics that should help you determine whether the campaign is adequately engaging the audience. A summary of the materials scheduled in the campaign including metrics relating to each item is also included.

The user who created the campaign sees statistics for all recipients of the campaign. Other users with access to the campaign see statistics only for the recipients from their own contact list.

## Audience Tab

The communication from the campaign is sent to a subset of your users' contacts. The contacts targeted by the campaign are determined by the audience rules you define.

There are 2 types of audience rules: inclusion and exclusion.

- Inclusion rules determine which contacts should be targeted to receive the materials sent by the campaign. A contact is included only if they match *all* of the inclusion rules.
- Exclusion rules omit contacts from the targeted audience, even if an excluded contact would otherwise be targeted by an inclusion rule. A contact is excluded if they match *any* of the exclusion rules.

Each rule checks the value of a field in each contact's record against a value (or range of values) specified by the rule. If the value matches what is given in an inclusion rule, the contact is targeted. If the value matches what is given in an exclusion rule, the contact is excluded.

### Note

If the field checked by an exclusion rule is blank for a particular contact record, that rule will not exclude that record (though it could still be excluded by a different rule).

Similarly, if an exclusion rule is checking any loan-related field, a contact will not be excluded if there is no loan tied to that record.

To define audience rules:

1. Click the **Audience** tab.
2. In the Inclusion Rules row, click the **+Add Rule** button. A slide-out panel opens. In the slide-out panel:
  - a. Click the name of the field your rule should be based on. You can use the Search field at the top of the panel to help you locate a field name.
  - b. Depending on the data type of the field you selected (such as date, text, or drop-down menu), enter or select the values or range of values that the rule should use when comparing with each contact record.
  - c. Click the **Save and Close** button.
3. In the Exclusion Rules row, click the **+Add Rule** button. A slide-out panel opens. In the slide-out panel:
  - a. Add rules here the same way you would add them to the inclusion rules.
  - b. Click the **Save and Close** button.
4. Add further rules to fully define the target audience for the campaign.



The rules you define are listed under the Inclusion Rules and Exclusion Rules headings. Each rule has a Delete Rule button (trash can icon) and an Edit Rule button (pencil icon). To delete a rule, click its **Delete Rule** button and the **OK** button in the confirmation box. To edit a rule, click the **Edit Rule** button, then make any changes and save the slide-out panel as you would when defining a new rule.

When a campaign is running, stopped, or completed, the rules are shown as read-only; the buttons are disabled. For users with access to the campaign other than the person who created the campaign, the rules are always read-only.

### *Recipients Count*

The Recipients count shown on the right side of the page displays an estimated count of the contacts who will be targeted by the current combination of audience and sender rules. Only contacts who belong to users identified by the sender rules are counted, so if the Senders count is 0, then the Recipients count is also 0—regardless of any audience rules. If the sender rules are updated, then both the Senders and Recipients counts may change.

After any updates to the audience rules, the estimated Recipients count updates automatically; this count is also shown on the Senders tab and the Audience tile on the Overview tab. (The Audience tile on the Overview tab shows “No audience rules added” when the Recipients count is 0, even if one or more rules are defined.)

The Recipients count emphasizes that it provides an estimated count by showing a tilde (~) before the number and the label *potentially targeted* below. The number of people who will actually receive the campaign materials may differ due to de-duplication rules or unsubscribe actions taken by recipients. To calculate the exact list of recipients, click the **Preview audience** button just below the Recipients count and the **Generate preview** button in the confirmation box.

Allow up to a few minutes for the audience preview query to run. While it is running, you can leave the campaign builder and complete other tasks in Total Expert. When the preview is complete, the count is updated on the Overview, Audience, and Senders tabs. The tilde is removed and the label changes to indicate better certainty; click the **Download list** button on either the Audience or Senders tab to save a CSV file with the results.

#### **Note**

The campaign must be in the Ready status before you can request an audience preview. This means that at least 1 item must be selected and scheduled on the Content tab and the Audience and Sender tabs must each have at least 1 rule defined.

#### **Tip**

If you add or remove any audience rules or sender rules after running an audience preview, the Recipients count does not change. If you want an updated count, you must delete the preview, which reverts the count to an estimation using the updated rules. You can then generate a new preview file.

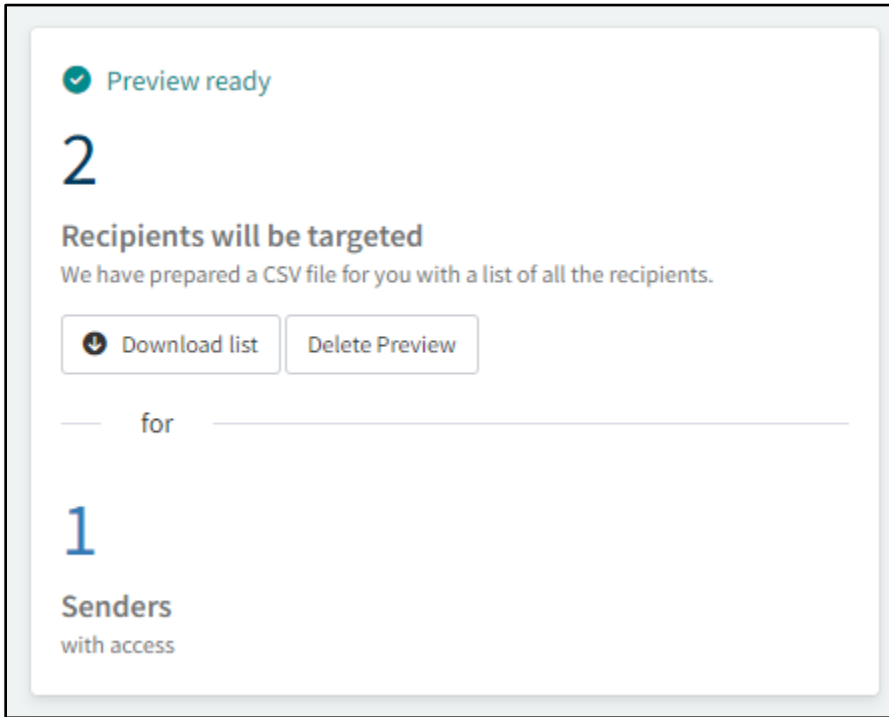
Therefore, use the estimation to guide you until you think your rules are fully defined and use the preview only as a final verification.

### *Deleting an Audience Preview*

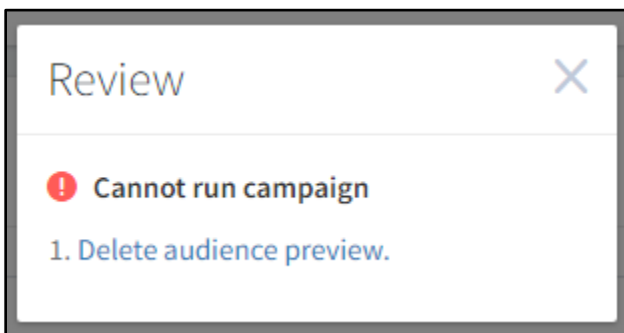
Audience preview files, especially large ones, have the potential to cause performance issues when the campaign runs. Therefore, before you can run the campaign, you must delete the audience preview (if you generated one).



You can do this by clicking the **Delete Preview** button in the Recipients count area on either the Audience tab or the Senders tab.



This is enforced by disabling the ► Run button while a preview file is present. If you hover the mouse pointer over the button or click it, a box appears with a message directing you to delete the preview. The link directs you to the Senders tab.



### Tip

Once the preview file has been generated, download the CSV file and review it, then you can delete it from the campaign.

## Senders Tab

The audience rules depend on sender rules to determine the Recipients count. Audience rules are only applied to the contact lists of users with access to the campaign; this access is determined by sender rules.

Similar to audience rules, there are 2 types of sender rules: inclusion and exclusion.



- Inclusion rules grant access to the campaign to any included users.
- Exclusion rules deny access to the campaign, even if an excluded user would otherwise be granted access by an inclusion rule. For example, if you include all users but then exclude an individual user, then everyone in your organization except that one user would have access.

To define sender rules:

1. Click the **Senders** tab.
2. In the Include row, click the **Edit** button. A slide-out panel opens. In the slide-out panel:
  - a. If you want to include everyone in your organization, switch the **Include all senders and teams** toggle switch to on (green). If this is turned on, the Senders and Teams fields are hidden.
  - b. To include individual users, click the **Senders** field and select 1 or more users from the drop-down list. You can remove a user by clicking the small **x** next to their name.
  - c. To include whole teams of users, click the **Teams** field and select 1 or more teams from the drop-down list. You can remove a team by clicking the small **x** next to its name.
  - d. Click the **Save and close** button.
3. In the Exclude row, click the **Edit** button. A slide-out panel opens. In the slide-out panel:
  - a. There is no option to exclude all.
  - b. Add individual senders and teams to the exclusion rules the same way you would add them to the inclusion rules.
  - c. Click the **Save and close** button.

The rules you define are summarized under the Include and Exclude headings. To modify any rules, re-open the corresponding edit panel, make changes, and save.

When a campaign is running, stopped, or completed, the rules are shown as read-only; the Edit buttons are disabled. For users with access to the campaign other than the person who created the campaign, the Senders tab is hidden.

### *Senders Count*

The Senders count shown on the right side of the page indicates the number of users who will have access to the campaign according to the inclusion and exclusion rules.

After any updates to the sender rules, the Senders count updates automatically, as does the count on the Audience tab and the Senders tile on the Overview tab. Note that updating the sender rules may also indirectly change the Recipients count and would require you to regenerate the audience preview if one has already been completed.

The Senders tile on the Overview tab shows “No sender access set” when the Senders count is 0, even if one or more rules are defined.

## **Content Tab**

Your selections on the Content tab determine what materials will be sent, and when, to the recipients identified by the audience and sender rules. At this time, only emails are available; more channels are being developed for future use with these campaigns.

To schedule emails to send as part of the campaign:





1. Click the **Content** tab. For a newly created campaign, no content is listed yet.
2. In the Email section, click the **+Add** button.
3. In the Select emails gallery, hover over an available message and click the **Select** button. A checkmark and a blue border appear on the selected messages. (Click a message again to deselect it.)
  - a. Select as many emails as you want at one time. A running count of selected messages appears at the bottom of the gallery near the Cancel button.
4. Click the **Add** button in the lower-right corner. The Emails section is updated with a row for each of the messages you selected. The rows are listed in the order that you selected the messages.
  - a. To add more messages, click the **+Add** button at the right end of the heading to reopen the Select emails box. Select and add more messages as described above. New rows are added to the existing list.

### Warning

Select messages carefully; you are not prevented from adding another copy of an email you selected previously.

5. There are 4 items at the right end of each email row:
  - a. A text summary of when the email is scheduled to send. For a new row, the message “This email has not been scheduled.” is displayed in red. You cannot start a campaign if any selected messages are not scheduled.
  - b. A delete button (trash can icon). Click this button to remove the email from the list. You are not prompted to confirm the choice.
  - c. An edit button (pencil icon). Click this button to open a slide-out panel. See *Editing a Selected Email* below for more information.
  - d. An options menu (ellipsis icon). Click this menu and select **Preview** to review the selected email in a pop-up window.

When a campaign is running, stopped, or completed, the email list is shown as read-only; the buttons are disabled. Users with access to the campaign other than the person who created the campaign only see the list of emails, with the scheduling information and a Preview button for each.

### *Editing a Selected Email*

To edit an entry in the list of emails, click the pencil icon to open the Email settings slide-out panel:

1. A thumbnail representing the selected template is shown at the top of the panel.
  - a. Click **Change** to open the Select emails gallery. Click an email in this box to replace the previously selected email with it. The new email is shown in the panel. When you save the panel, the existing row will be updated in the list of emails.
  - b. Click **Preview** to review the selected email in a pop-up window.
2. (optional) in the **Sending Profile** field, select a saved sending profile to apply to the selected email when the campaign sends it. A sending profile masks the sender of the selected email, so it appears in the recipient's inbox as if it had been sent by someone other than the user running the campaign.
  - a. You can create a new profile by clicking **Create New** and filling out the form. See *Sending Profiles* for more information on this feature.

### Note

The Sending Profile field may not be visible, depending on your permissions.



3. Determine the timing of the email. There are 2 options:
  - a. **Schedule** – The email will be sent at the specified date and time.
    - i. Click the **Date** field and select a specific date for that email to be sent.
    - ii. Click the **Time** field and select a time for the email to send on the selected date. You can pick any time from 6:00 AM to 11:00 PM in 15-minute increments.
  - b. **Start Send Immediately** – The email will be sent to all recipients as soon as the campaign begins running.
4. Click the **Save** button. If the combination of date and time is in the past (or if either field is left empty), a notification is displayed in red text below the date field and your selections will not save. Update the selections and click the Save button again. Your selections are updated in the message's row.

#### Note

Each time you add scheduling information to an email and save the panel, the list is reordered to reflect the order the messages will be sent. Unscheduled messages are listed between after any scheduled to send immediately and before the first message scheduled for a specific date and time.

## Campaign Statuses

A status is displayed in the lower-right corner of each tile on the campaign list at Campaigns → Campaign Builder. The status is also shown in the upper-right corner of the header of the campaign builder, so it is visible no matter which tab you are viewing. A campaign can be in any of 5 statuses:

- **Draft** – The campaign has been created but cannot be started because it is not fully defined.
  - For the status to progress to Ready, the campaign must have audience and sender rules defined such that there is at least one recipient, and each item on the Content tab must be scheduled for a date and time in the future.
- **Ready** – The campaign has enough information defined to allow it to run, but it has not been started yet.
  - A campaign with the Ready status may revert to Draft if its setup changes, such as when a new email is added without defining a date and time.
  - A campaign cannot be started unless the status is Ready.
- **Running** – The campaign has been started and will send each item listed on the Content tab at the scheduled time.
  - Once a campaign has been started, it cannot be modified.
  - When a campaign is started, the list of recipients is frozen. If a user with access to a campaign adds new contacts after the campaign is started, those contacts will not be added to the campaign, even if they satisfy its audience rules.
- **Completed** – The campaign has sent all the items on the Content tab and has concluded.
- **Stopped** – The campaign was started but was ended prior to sending all scheduled materials.
  - The person who created the campaign sees this status when they have clicked the **Stop** button on a campaign in the Running status. This terminates the campaign for all senders and recipients.
  - A user with access to the campaign sees this status when the campaign has been stopped either because the creator stopped it for everyone or because that user opted themselves out.



# Starting and Stopping a Campaign

## Starting

When a campaign you have created is in the Ready status, you can run it at any time. This will start it for all senders.

1. Navigate to **Campaigns → Campaign Builder**.
2. Click the name of the campaign you want to run.
3. On any tab of the campaign builder, click the ► **Run** button in the upper-right corner.

### Note

If you hover over or click the ► Run button while the campaign is in the Draft status, you will see a message stating that you cannot run the campaign and listing the aspects that you need to complete.

If you hover over or click the ► Run button while the campaign has an audience preview attached, you will see a message stating that you cannot run the campaign and directing you to delete the preview file.

4. The Review and run box appears summarizing the campaign. Review the following information before proceeding:
  - a. The number of recipients determined by the audience rules. If you have not run an audience preview using the current rules, the number is given as an estimate, but you can run the preview from here. If you have run a preview, the number shown reflects the results, and you can download a copy of the CSV file from here.
  - b. The number of senders determined by the sender rules.
  - c. The number of items the campaign is scheduled to send, along with the first and last send dates.
5. If anything is not satisfactory, click the **Cancel** button, make changes, and click the ► **Run** button again.
6. Keep the **Email users to notify them this campaign will run** box checked if you want all senders to be notified about this new campaign when you run it. Uncheck the box to suppress any notifications.
7. When you are satisfied with the settings, click the **Run campaign** button in the Review and run box.
8. The status changes to Running.
  - a. For the user who created the campaign, the ► Run button changes to a ■ Stop button.
  - b. For opt out campaigns, other users with access will see an ∅ Opt out button.

## Stopping

When a campaign you have created is in the Running status, you can stop it at any time for all senders.

1. Navigate to **Campaigns → Campaign Builder**.
2. Then do either of the following:
  - Click the ■ **Stop** button in the lower-right corner of the tile for the campaign you want to stop.
  - Click the name of the campaign you want to stop, then click the ■ **Stop** button in the upper-right corner of any tab.
3. In the confirmation box, click the **Stop** button. The status changes to Stopped. The campaign cannot be restarted.

A sender on an opt out campaign (which can include the user who created it) can stop it at any time for their own contacts by clicking the ∅ **Opt out** button on either the campaign list tile or in the campaign builder. When they



click the **Opt out** button in the confirmation box, progress is stopped for all their contacts, the status changes to Stopped, and they cannot opt back in. Contacts of other senders are unaffected.

**Note**

If a recipient chooses to unsubscribe from email sent by the Total Expert platform, they will be removed from any campaigns that count them as a recipient.