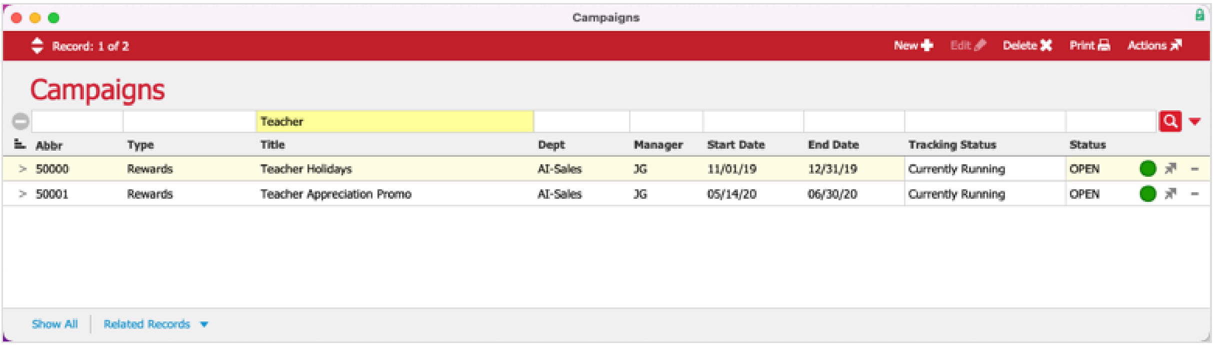
Using Templates in Campaigns

Last Modified on 06/21/2022 10:31 am EDT

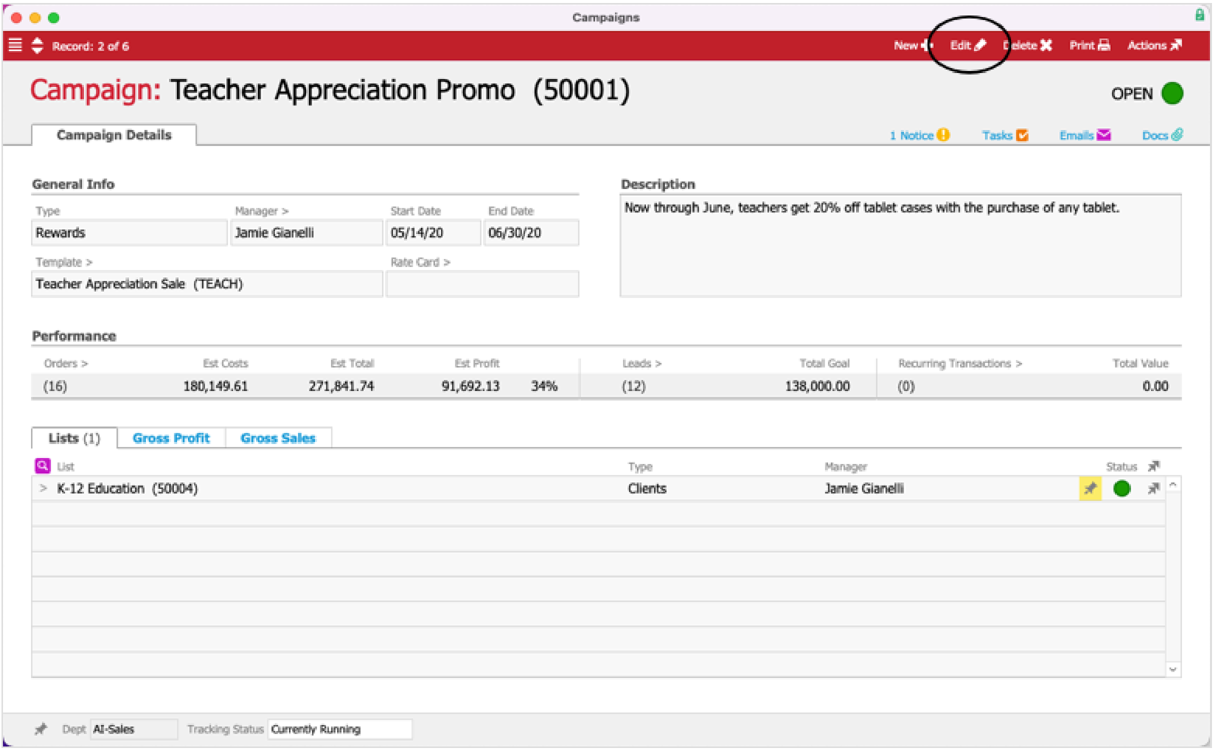
This guide explains how to link a template to a campaign. It is intended for general users.

You can assign an existing template (https://aace6.knowledgeowl.com/help/building-a-template) to a campaign. This can help users recording new leads (https://aace6.knowledgeowl.com/help/creating-leads) to quickly build orders based on the campaign. For an example of how campaigns can help your team, read our feature highlight (https://www.aacesoft.com/resources/gain-visibility-into-your-marketing-roi-with-aace-newsletters-campaigns).

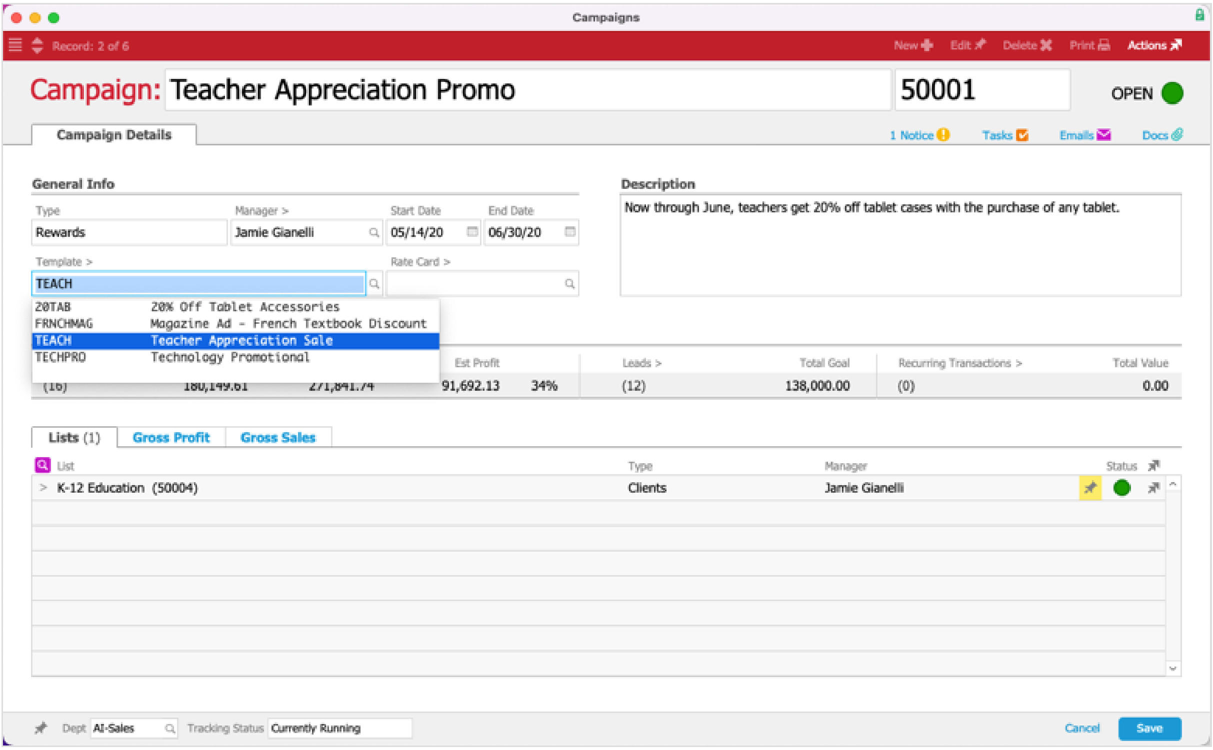
1. Navigate from **Main Menu** > **CRM & Sales** > **Campaigns**.
2. Use the Quick Search bar (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) to locate and select the desired campaign.



3. In the detail view, click **Edit**.

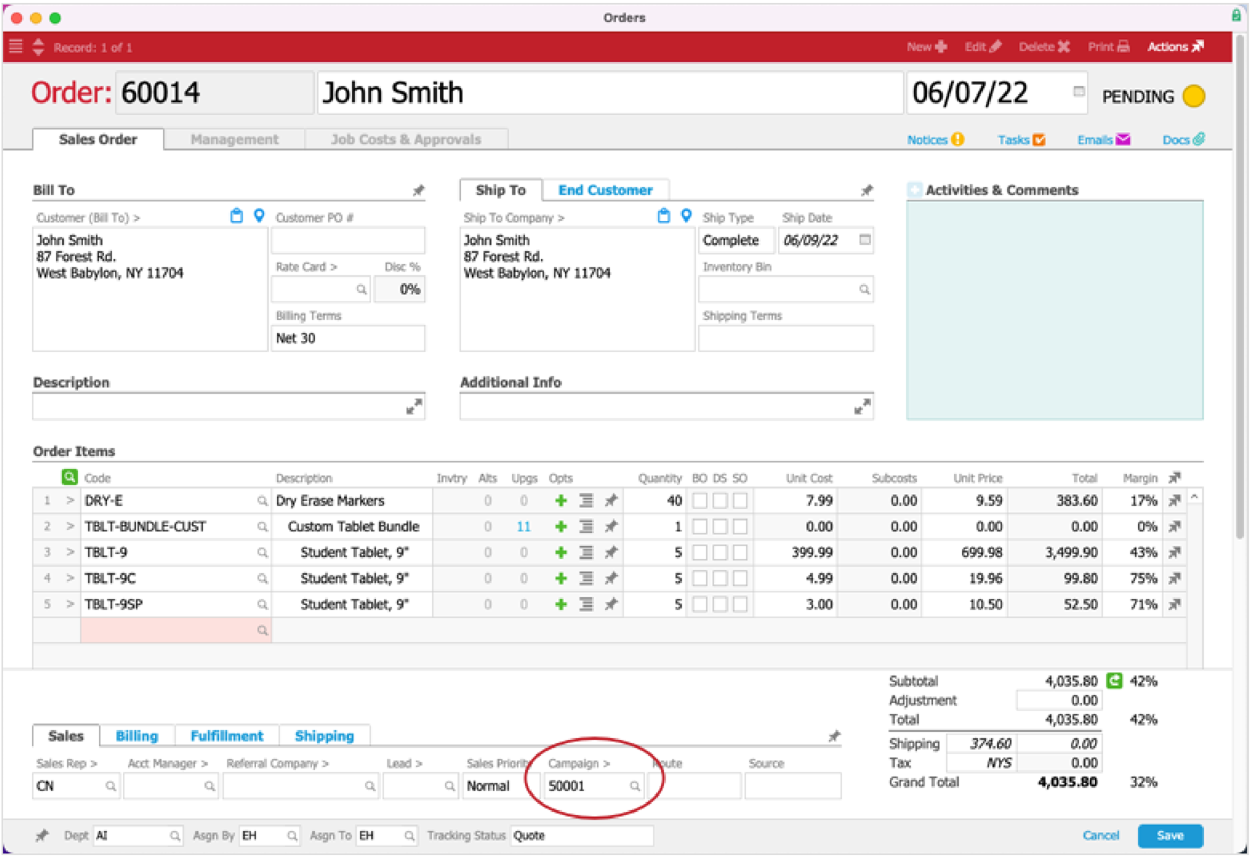


4. Click the Template field and select from the drop-down list, or click the selector (🔍) button next to the field, then pick a template.



5. Fill in the rest of the Campaign and click **Save.**
6. At the confirmation dialog, click **Open**.

When users later assign a campaign to an order, the line items from the template automatically fill in the line items for the order. The transaction is now linked and tracked against the campaign.


Orders
Record: 1 of 1
New
Edit
Delete
Print
Actions
Order: 60014
John Smith
06/07/22
PENDING
Sales Order
Management
Job Costs & Approvals
Notices
Tasks
Emails
Docs
Bill To
Customer (Bill To) >
John Smith
87 Forest Rd.
West Babylon, NY 11704
Customer PO #
Rate Card >
Disc %
0%
Billing Terms
Net 30
Ship To
End Customer
Ship To Company >
John Smith
87 Forest Rd.
West Babylon, NY 11704
Ship Type
Complete
Ship Date
06/09/22
Inventory Bin
Shipping Terms
Activities & Comments
Description
Additional Info
Order Items
Code
Description
Invtry
Alts
Upgs
Opts
Quantity
BO
DS
SO
Unit Cost
Subcosts
Unit Price
Total
Margin
DRY-E
Dry Erase Markers
TBLT-BUNDLE-CUST
Custom Tablet Bundle
TBLT-9
Student Tablet, 9"
TBLT-9C
Student Tablet, 9"
TBLT-9SP
Student Tablet, 9"
Subtotal
4,035.80
Adjustment
0.00
Total
4,035.80
Shipping
374.60
Tax
NYS
Grand Total
4,035.80
Sales
Billing
Fulfillment
Shipping
Sales Rep >
Acct Manager >
Referral Company >
Lead >
Sales Priority
Campaign >
Route
Source
CN
Normal
50001
Dept
Asgn By
Asgn To
Tracking Status
Quote
Cancel
Save