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 <u>existing template (https://aace6.knowledgeowl.com/help/building-a-template)</u> to a campaign. This can help users <u>recording new leads</u> (https://aace6.knowledgeowl.com/help/creating-leads)</u> to quickly build orders based on the campaign. For an example of how campaigns can help your team, read our <u>feature highlight</u> (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 <u>Quick Search bar (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar)</u> to locate and select the desired campaign.

Actions A
G
0
جر 🔵 🗧
ج 🔵

3. In the detail view, click Edit.

ith the purchase of any tablet.	ers get 20% off tablet cases with the p	Now through June, te	End Date				General Info
			LING Drate	Start Date	>	Manager	Туре
			06/30/20	05/14/20	ianelli	Jamie G	Rewards
				Rate Card >			Template >
						tion Sale (TEACH)	Teacher Apprecia
					Sales	Gross Profit Gross	
Status 🖈 🔵 🖈						on (E0004)	
	Janine Graneni					(3004)	~ K-12 LUUCOU
	Manager Jamle Gianelli	Type Clients			Sales		Lists (1) C Ust > K-12 Education

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

						Description			
Type Manager > Start Date							e, teachers get 20% off ta	blet cases with the purcha	se of any tablet.
Jamie G	ianelli ୍	05/14/20) 🗆	06/30/20					
		Rate Card	>						
	Q				Q,				
207AB 20% Off Tablet Accessories RNCHMAG Magazine Ad - French Textbook Discount FACH Teacher Appreciation Sale EECHPRO Technology Promotional				ofit		Leads >	Total Goal	Recurring Transactions >	Total Value
180,149.61	2/1,841./4		91,692.	.13 349	6	(12)	138,000.00	(0)	0.00
s Profit Gross	Sales					-			
600041								Status 🛪	
(0004)						cients	Jamie Gi	drielii	× • ×
	Jamie G % Off Tablet Acc gazine Ad - Fren accher Appreciati chnology Promoti 180,149.01	Jamie Gianelli Q Xi Off Tablet Accessories gazine Ad - French Textbook Di tacher Appreciation Sole tchnology Promotional 180,149.01 2/1,841./4 s Profit Gross Sales	Jamie Gianelli Q 05/14/20 Rate Card W Off Tablet Accessories ggazine Ad - French Textbook Discount uccher Appreciation Sole tchnology Promotional 180,149.01 2/1,841./4 s Profit Gross Sales	Jamie Gianelli Q 05/14/20 Rate Card > W Off Tablet Accessories ggazine Ad - French Textbook Discount tacher Appreciation Sole technology Promotional EstPr 180,149.61 2/1,841./4 91,692 s Profit Gross Sales	Jamie Gianelli Q 05/14/20 06/30/20 Rate Card > W Off Tablet Accessories ggazine Ad - French Textbook Discount uccher Appreciation Sale technology Promotional 180,149,01 2/1,841./4 91,692.13 345 s Profit Gross Sales	Jamie Gianelli Q 05/14/20 D6/30/20 Rate Card > Rate Card > X Off Tablet Accessories Gazine Ad - French Textbook Discount Accher Appreciation Sole cchnology Promotional Est Profit 180,149.01 2/1,041./4 91,692.13 34% s Profit Gross Sales	Jamie Gianelli 05/14/20 06/30/20 Rate Card > Rate Card > <td>Jamie Gianelli Q 05/14/20 06/30/20 Rate Card > W Off Tablet Accessories igazine Ad - French Textbook Discount ischer Appreciation Sole ischnology Promotional Isu,149.51 2/1,091./4 91,692.13 34% (12) 138,000.00 s Profit Gross Sales Type Manager</td> <td>Jamie Gianelli Q 05/14/20 06/30/20 Rate Card > Rete Card > W. Off Tablet Accessories Q Q igazine Ad - French Textbook Discount iccher Appreciation Sole ichnology Promotional Est Profit Leads > Total Goal Recurring Transactions > 180,149.01 2/1,841./4 91,692.13 34% (12) 138,000.00 (0)</td>	Jamie Gianelli Q 05/14/20 06/30/20 Rate Card > W Off Tablet Accessories igazine Ad - French Textbook Discount ischer Appreciation Sole ischnology Promotional Isu,149.51 2/1,091./4 91,692.13 34% (12) 138,000.00 s Profit Gross Sales Type Manager	Jamie Gianelli Q 05/14/20 06/30/20 Rate Card > Rete Card > W. Off Tablet Accessories Q Q igazine Ad - French Textbook Discount iccher Appreciation Sole ichnology Promotional Est Profit Leads > Total Goal Recurring Transactions > 180,149.01 2/1,841./4 91,692.13 34% (12) 138,000.00 (0)

- 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.

		r: 60014	John Sm	icii								06/07	//22 =	PENDIN	ig 🦰		
s	ales	Order Manageme	nt Job Costs & Ap	provals								Notices 😣	Tasks 🗹 🛛 Emi	niis 🔛	Docs @		
Bill To 📌					Ship To End Customer								Activities & Comments				
Susto	mer (l	Bill To) > 💼 오	Customer PO #	Ship To	o Compa	ny >		Ô 오	Ship Type	Ship Date							
West Babyion, NY 11704				John S					Complete	06/09/22							
			Rate Card > Disc %		rest Rd. Rahvlor	h, NY 11	704	4	Inventory Bir	1							
		,,	୍ ୦%	The buying it are t						Q,							
			Billing Terms					Shipping Terms									
	r Ite		Description	Invtry Alts	Upgs	Opts		Quantity E	10 DS 50	Unit Cost	Subo	osts Unit I	Price Total	Margin	۳ _κ		
1	> D	RY-E a	Dry Erase Markers	0	0	+ 3		* 40 [7.99	(0.00	9.59 383.60		^ %		
2	> TI	BLT-BUNDLE-CUST	Custom Tablet Bundle	0	11	+ 3		* 1 [0.00	(0.00	0.00 0.00	0%	Fr.		
3	> TI	BLT-9 a	Student Tablet, 9*	0	0	+ 3		* 5		399.99	(0.00 699	9.98 3,499.90	43%	The state		
4	> 11	BLT-9C	Student Tablet, 9*	0	0	+ 3		* 5		4.99	(0.00 19	9.96 99.80	75%	F K		
5	> 1	BLT-9SP a	Student Tablet, 9*	0	0	+ 3		* 5 [3.00	(0.00 10	0.50 52.50	71%	PK.		
		q	L														
										4	ubtotal djustment otal	0.00					
	es	Billing Fulfillment	Shipping			_				*	-		4,035.80 74.60 0.00				
Sa				Sales	Drivit	Campai	an :	> Noute	Sou	100		ax ax	NYS 0.00				
	Rep >	> Acct Manager > Referral	Company > Lead >														