

# Overview of Campaigns

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This guide reviews features in the Campaigns module. It is intended for general users.

The Campaigns module is a useful sales tool. You can create marketing campaigns, track discounts, and generate leads here.

To access the Campaigns module, navigate from Main Menu > CRM & Sales > Campaigns.

The screenshot displays the 'Campaigns' module interface. At the top, it shows 'Campaign: Teacher Appreciation Promo (50001)' with an 'OPEN' status. Below this, there are several sections:

- General Info (1):** Contains fields for Type (Discount Incentive), Manager (Katie Connolly), Start Date (05/14/20), End Date (06/30/20), Template (Teacher Appreciation Sale (TEACH)), and Rate Card.
- Description (2):** A text area containing the description: 'Now through June, teachers get 20% off tablet cases with the purchase of any tablet.'
- Performance (3):** A table showing key metrics:
 

| Orders > | Est Costs  | Est Total  | Est Margin    | Leads > | Total Goal | Recurring Transactions > | Total Value |
|----------|------------|------------|---------------|---------|------------|--------------------------|-------------|
| (17)     | 180,149.61 | 268,762.94 | 88,613.33 33% | (12)    | 138,000.00 | (0)                      | 0.00        |
- Lists (1):** A table with tabs for 'Gross Profit' and 'Gross Sales' (4). The table lists:
 

| List                     | Type    | Manager        | Status |
|--------------------------|---------|----------------|--------|
| > K-12 Education (50004) | Clients | Jamie Gianelli | 🚀 🟢    |

At the bottom, there are fields for 'Dept: AI-Dev' and 'Tracking Status: Currently Running'.

## 1. General Info

There are two types of out-of-the-box campaign records in aACE: discount incentives and lead generators. The campaign record type is specified in the General Info section. You can add types of campaigns by editing the Type field.

Additionally, you can specify the campaign manager, start & end dates, and related template and rate cards.

## 2. Description

You can enter a description of the campaign in the Description text field. This can be useful for organizing things for other team members.

### 3. Performance

aACE automatically calculates and displays how well a particular campaign is doing. From the Performance section, you can view calculations such as:

- The number of orders related to the campaign
- Estimated costs, total, and margin
- The number of leads related to the campaign
- Total goal
- The number of recurring transactions related to the campaign
- Total value of the campaign

aACE also provides go-to links to the campaign's related records. You can click the go-to links to display a list of related orders, leads, or recurring transactions.

### 4. Additional Sub-Tabs

These tabs track and provide links to related [lists](https://aace6.knowledgeowl.com/help/overview-of-the-lists-module) (https://aace6.knowledgeowl.com/help/overview-of-the-lists-module). These tabs also track the campaign's gross profit and gross sales.

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