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2.01.13 Campaign

The **campaign** mask manages the marketing and sales campaigns in the system. It lists, among other things, the person responsible for the campaign, the class and status, the time period, the target group and goals, and the key financial figures of the campaign.

The mask consists of the following elements:

Master Sheet

Kampagne 1 Weihnachtsaktion 2019

Dokument Bearbeiten Ansicht Rückverweise Aktionen

Stammblatt Ziele & Finanzen Sonstiges

Basisinformationen

Kürzel: WA 2019 Status: 02 - Aktiv

Bezeichnung: Weihnachtsaktion 2019

Art: Roadshow

von: 28.10.2019 bis: 20.12.2019

Bemerkung:

Kontakte

Ansprechpartner

	Name	Vorname	Kontakt	Telefon	E-Mail	Straße	PLZ	Ort
1	Franke	Uwe	AB Autobau AG	+4989 458701	u.franke@autobau.de	Breite Strasse 673	80030	München
2	Jansen	Susanne	AB Autobau AG	+4989 458702	s.jansen@autobau.de	Breite Strasse 673	80030	München
3	Jansen	Martina	AB Maschinenbau GmbH	+49711 655590	jansen.maschbau.com	Bahnhofstraße 23	70020	Stuttgart
4	Klauser	Ingo	AB Maschinenbau GmbH	+49711 655590	klauser.maschbau.com	Bahnhofstraße 23	70020	Stuttgart
5	Nahl	Lisa	CS Consult Systeme AG	+4989 7312-100	nahl@consult.de	Bahnhofstr. 12	55120	Mainz
6	Rahn	Olaf	AB Autobau AG	+4989 458704	o.rahn@autobau.de	Breite Strasse 673	80030	München
7	Sander	Peter	CS Consult Systeme AG	+4989 7312-120	sander@consult.de	Bahnhofstr. 12	55120	Mainz

Kampagne 1 Weihnachtsaktion 2019

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Kontakte

Ansprechpartner

Reaktionen auf Kampagne

	Ansprechpartner	Status	Datum	Bemerkung
1	Franke Uwe	nicht geantwortet		Urlaub
2	Jansen Martina	teilgenommen	24.10.2019 00:00	
3	Jansen Susanne	teilgenommen	24.10.2019 00:00	
4	Klauser Ingo	nicht geantwortet		Ausgeschieden?
5	Nahl Lisa	nicht teilgenom...		
6	Rahn Olaf	teilgenommen	28.10.2019 00:00	

• Basic Information:

- **Abbreviation:** A campaign abbreviation can be entered in this field.
- **Status:** This field indicates whether the campaign is entered, active or completed. When a new campaign is created, the system enters a default value in this field. Further characteristics (interrupted, terminated) can be defined by the administrator.
- **Description:** This field describes the project.
- **Type:** In the type field, defined types of campaigns (for example, e-mail, television, mailing, trade fair, etc.) can be assigned in the collections (see administration guide).
- **Period from/to:** The from field defines the expected start and the To field defines the expected end of the campaign. An entry for these fields is mandatory.
- **Comment:** This field allows you to enter comments about the customer.
- **Contacts:** This field identifies the companies as target group for the campaign. The contacts can be defined and modified in the [contacts](#) mask.
- **Contact Person:** This field identifies the contact person at the customer (see mask [contact person](#)).
- **Reactions to Campaign:** In this field, the reactions to the campaign can be inserted for the individual contact persons.

Targets & Finances

Kampagne 1 Weihnachtsaktion 2019

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Stammblatt Ziele & Finanzen Sonstiges

Ziele

	Zielsetzung	Messgröße	Einheit	Ist	Bemerkung
1	Kundenbindung		Stück		
2	Umsatzsteigerung	80.000,00	Euro		
3	Imagegewinn				
+					

Finanzen

Budget 12.000,00 EUR

Planaufwand 40:00 5,000 Pt Plankosten EUR

Istaufwand Pt Istkosten EUR

- **Targets:** Here you can define the goals of the campaign. These goals can be managed in the mask [campaign goal](#).
- **Finances:**
 - **Budget:** The budget for the campaign can be defined here.
 - **Planned Effort:** This field defines the expected expenses for the campaign.
 - **Plan Costs:** The planned costs of the campaign are entered here.
 - **Actual Effort:** Here you can enter the actual expenses of the campaign.
 - **Actual Costs:** The costs incurred for the campaign are entered here.

Miscellaneous

Kampagne 1 Weihnachtsaktion 2019

Dokument Bearbeiten Ansicht Rückverweise Aktionen

Stammblatt Ziele & Finanzen Sonstiges

technische Einstellungen & Details

Projekte

	Projekt-Nr.	Bezeichnung	Status	Projektmanager	Plan-Beginn	Plan-Ende
1	37	Marketing - Sonstiges	aktiv	014 Meier Paula	16.10.2019	31.12.2019
2	39	Marketing - Roadshow	aktiv	022 Möller Uwe	21.10.2019	09.12.2019

- **Technical Settings & Details:**
 - **int. Key:** This alphanumeric field clearly identifies the campaign in the system.
- **Projekte:** Here you can add the projects that have been won through campaigns. The [projects](#)

can be defined and changed in the project mask.

Actions

The document class contains the following actions:

- **Create Actions:** This action allows you to create a new action for the campaign from within the system.
- **Add Contact Person:** This action allows you to add a contact person for the campaign from the system.
- **Open Importer:** This action opens the Importer, it is used, among other things, to upload files and allows you to view various configurations.
- **Add Contact:** This action allows you to add a contact for the campaign from the system.
- **Create Project:** This action allows you to create a new project for the campaign from within the system.

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