Emails With Quick Campaign

CRM 2016

Campaign Emails in CRM

- Use to send bulk email to lists in CRM
- When sending direct email should not send to lists over 100 in size
  - Restriction is Office 365/Exchange not CRM
- Larger lists and more features supported with Click Dimensions Q4 2017

Step 1 : Create a Marketing List

1. Marketing -> Marketing Lists
2. New
3. Give your list a name.
4. Select "Static" for list type
    1. Static lists are generated one time and are only edited by you. Dynamic lists can be edited by the system as new records that match your criteria are added to the system. In the long term dynamic lists are better for automated list management, but static lists are easier to originally setup and control.
5. Select targeted at – Account, Lead or Contact
6. Click Save

Step 2 : Add Marketing List Members

1. Click the + sign next to the members for your marketing list

2. Select Add using Advanced Find

3. Construct an advanced find that filters out the records you want

4. You can select to add all the records that match, or only ones you specifically select

Campaigns vs Quick Campaigns

- Campaigns
  - Multiple activities – for example an initial email and a follow up, or direct mail piece, an email and a phone call
- Quick Campaign
  - Single activity – for example sending an email

Step 3 : Create and Send Quick Campaign

1. Click the + sign next to "Quick Campaigns"
2. Give your campaign a name
3. Select "Email" as activity type
4. Leave activities assigned to "me". Leave mark email messages to be sent as checked
5. Give your email a subject and message OR select an email template
6. Click Next and Create – the campaign will be sent and emails sent out