How to Create a Campaign

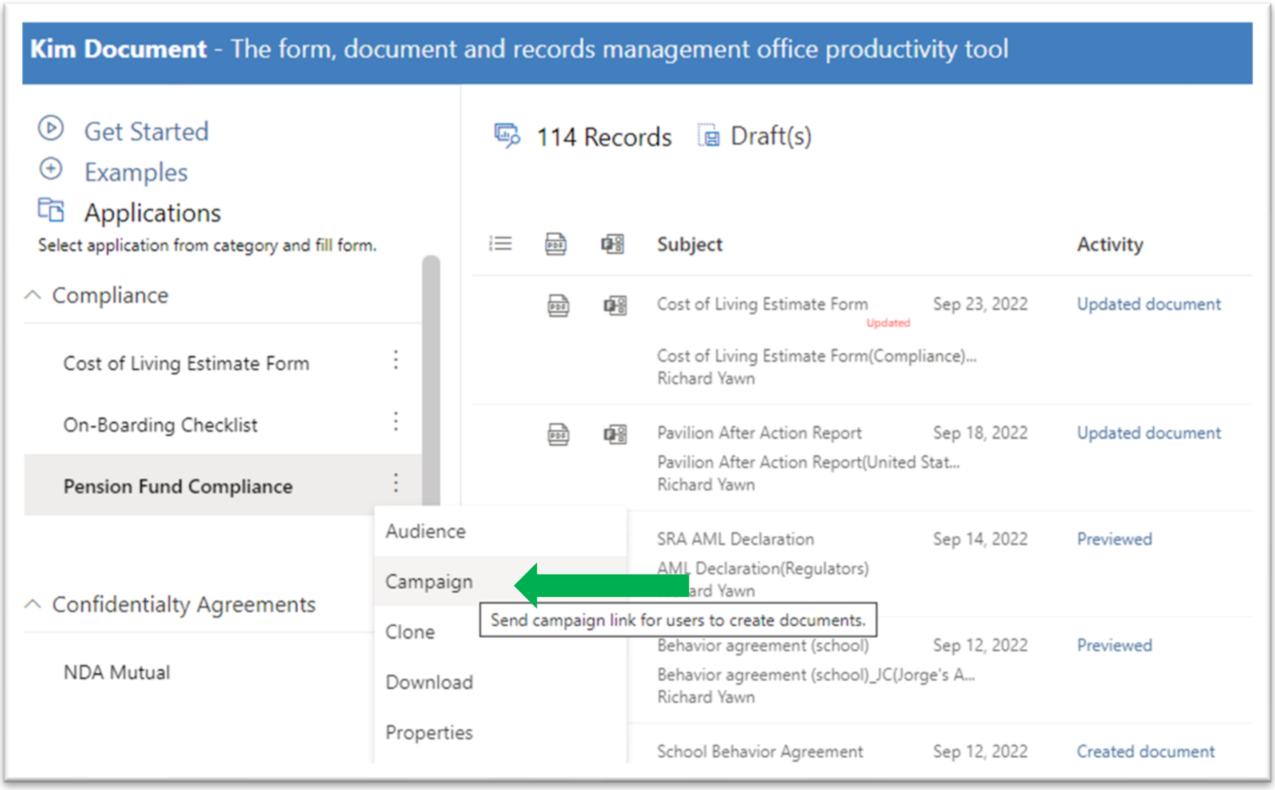
Campaign Overview

The core functionality of campaigns includes the ability to:

- send out a document/form link to a large list of respondents (which can be uploaded or managed manually);
- tailor the emails the respondents will receive which include the document link;
- track the responses received; and
- review and download campaign data.

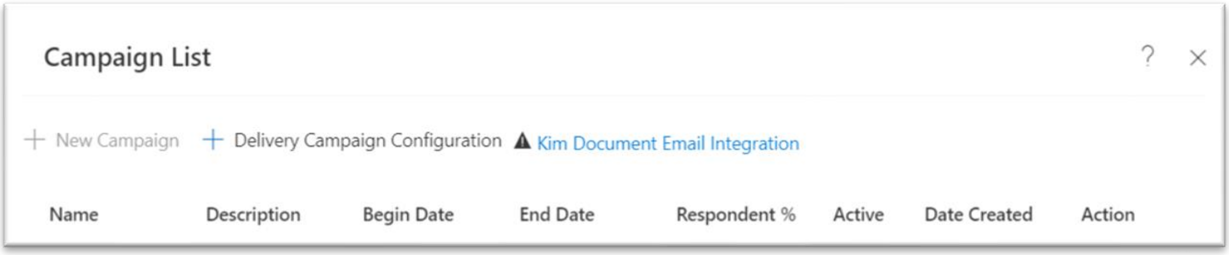
When a campaign email is received by a respondent, they select the link to the form, input the one-time-use access code they are provided, complete the form, and submit their response. Each recipient then receives an email confirming receipt which includes a pdf of the completed document. When submitted, the application audience receives a notification (if elected under the relevant Application settings) and can access the record and the data the respondent provided.

Campaigns are created from the application menu.



Campaign Delivery Method

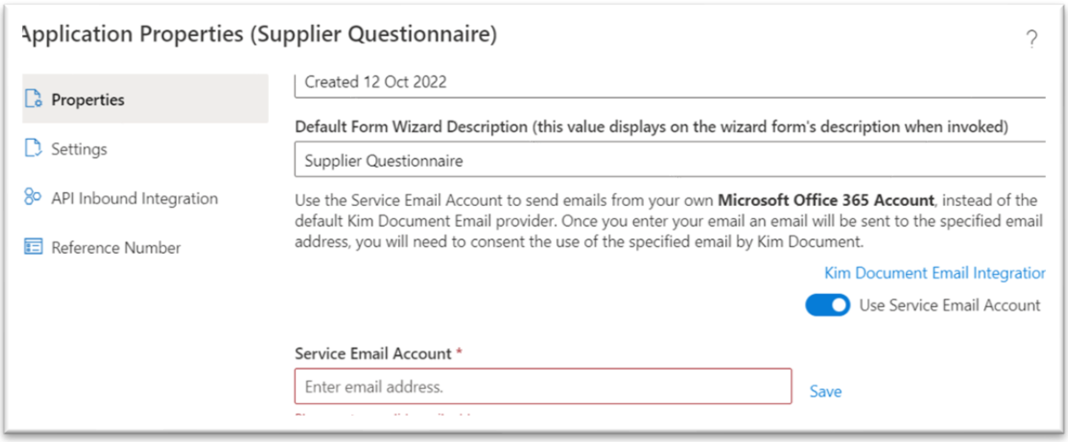
When creating a campaign, you will see that “New Campaign” is disabled unless an **Application Service Email Account** has been setup in application properties, or “Delivery Campaign Configuration” has been setup with an **SMTP server**.



Setting up an Application Service Email Account

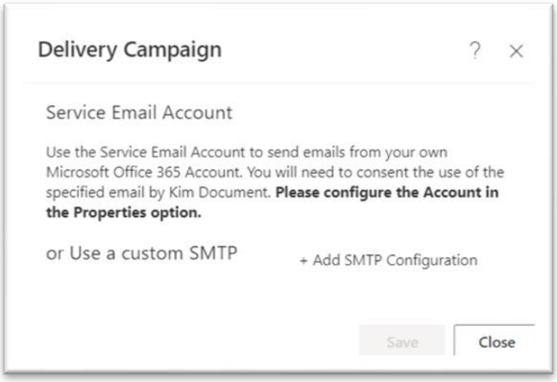
This must be setup using a Microsoft 365 account as follows.:

- Toggle “Use Email Service Account” in the Properties tab and type in the relevant email address, then click “Save”:

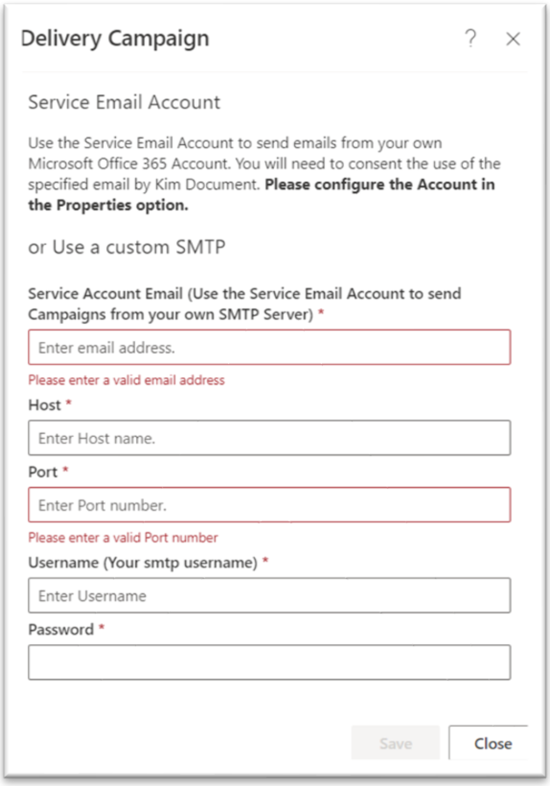


Setting up an SMTP Server Email

To setup an SMTP server email, select “Delivery Campaign Configuration” and then select “Add SMTP Configuration.



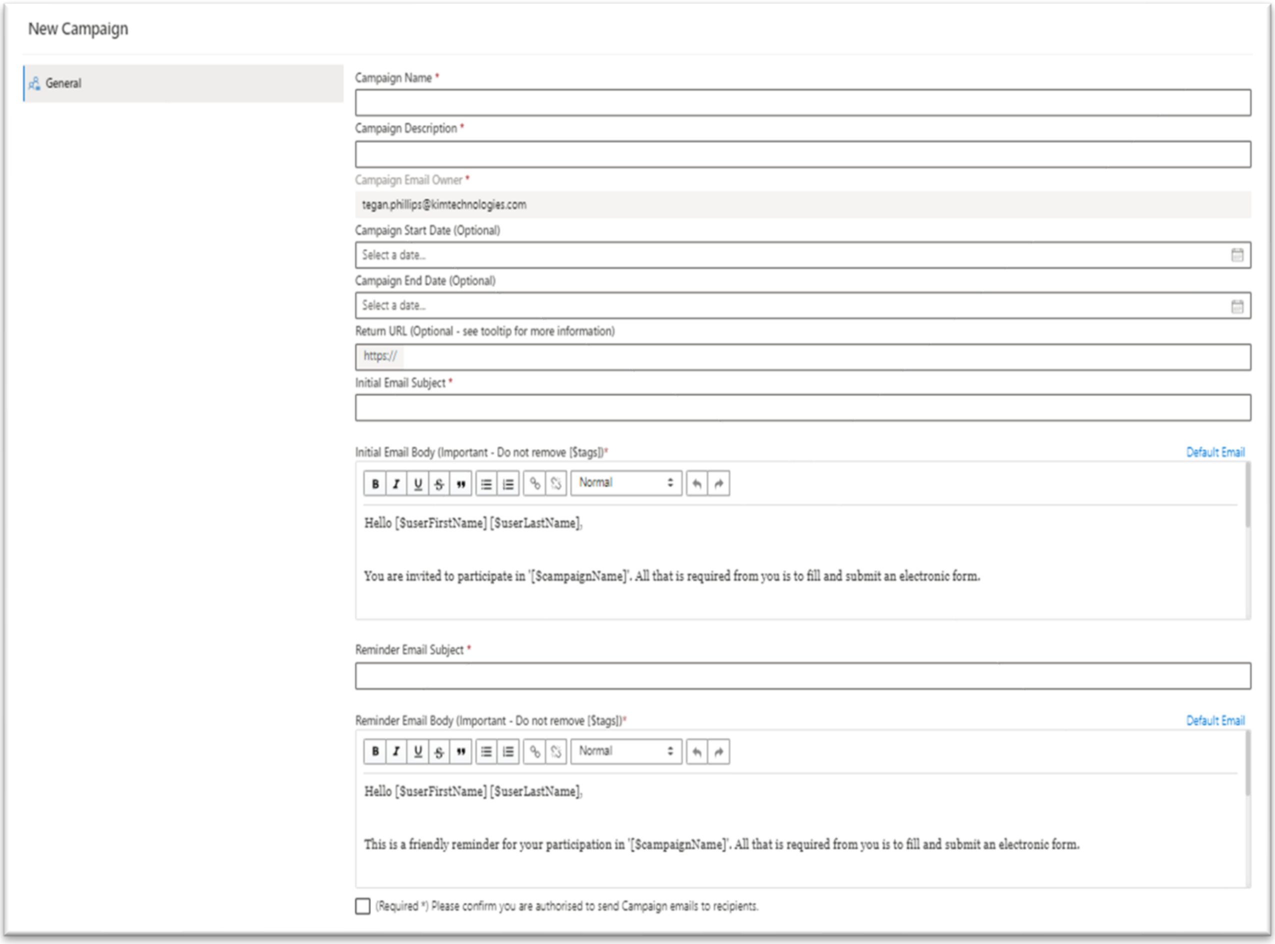
The following properties are required for SMTP connectivity.



Once either delivery method is set up and activated, “New Campaign” is then enabled.

Creating and Managing a Campaign

General



- **Campaign Name**: Be descriptive and name the campaign something that works now and in the future. This is the name that will appear to the respondents in the email they receive inviting them to respond.

- **Campaign Description**: Use this to help remember any specific or unique information for this campaign.

- **Campaign Email Owner**: This was set up with service delivery either through the service account or through the SMTP settings (see Campaign Delivery Method above).

- **Campaign Start Date (Optional):** If set, the campaign will not be available for your respondents until the start date.

- **Campaign End Date (Optional):** If set, the campaign will automatically end, and users will not be able to submit responses after this date.

- **Return URL (Optional):** If set, the respondent will be redirected to this location when they submit their response. If this is not set, the respondent will be automatically redirected to the Kim Document home page.
- **Initial Email Subject:** This will be what is in the subject line of the first email sent to the respondent.

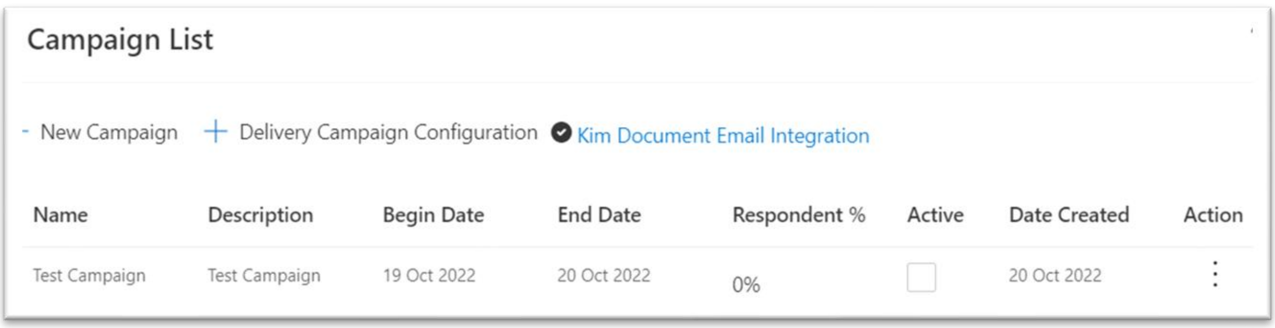
- **Initial Email Body:** This will be the content of the first email sent to the respondent. Please note that the tags should remain as is or removed if you do not want these details to auto-populate. Should you make changes to the body of the email and would like to start over, simply click on "Default Email" in the top right corner of the text box.

- **Reminder Email Subject:** This will be what is in the subject line of the second email sent to the respondent if elected under the "Send Reminders" tab.

- **Reminder Email Body:** This will be the content of the second email sent to the respondent if elected under the "Send Reminders" tab. Please note that the tags should remain as is or removed if you do not want these details to auto-populate. Should you make changes to the body of the email and would like to start over, simply click on "Default Email" in the top right corner of the text box.

- When the above has been configured, the campaign creator must tick the box at the end of the page which confirms they are authorized to send the campaign. They then click "Create Campaign".

- After you click on "Create Campaign", you will then see the basic campaign details in your campaign workspace.

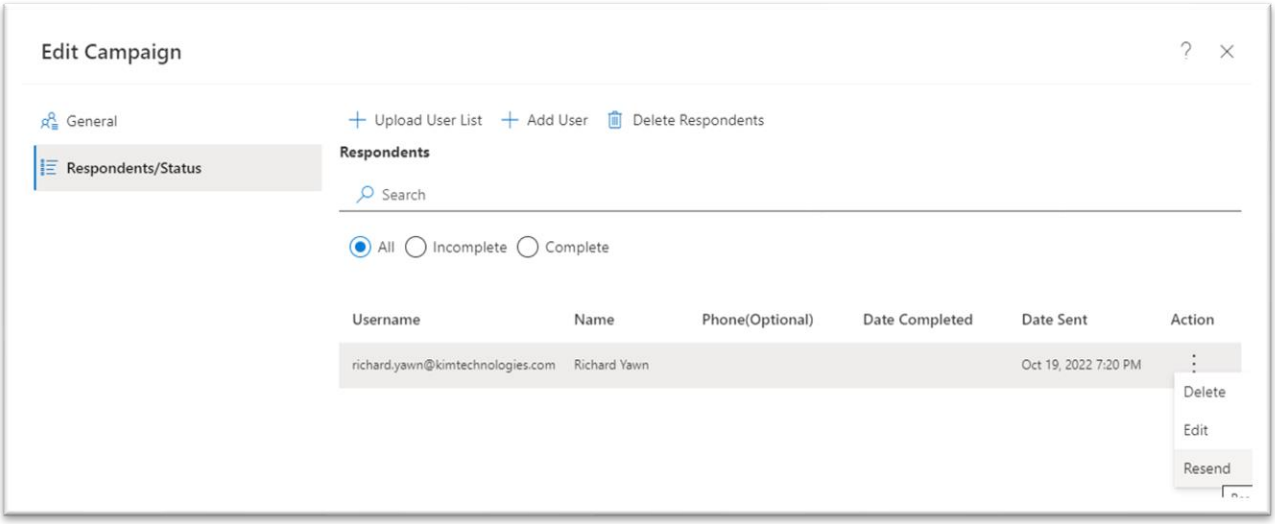


- Clicking on the three dots under the "Action" column next to a campaign allows you to either delete or edit/review the campaign.

- When editing or reviewing the campaign, you will be able to update the original settings you inputted however you will also now see some additional options at the bottom of the page:

- **Update Campaign**: This button allows you to save the changes you have made.
- **Send Reminders**: This allows you to send the reminder emails (see above).
- **Restart Campaign:** This will restart the campaign with all respondents being sent the initial email subject and body.

Managing a Campaign's Respondents/Status



- The various features of this tab include:
    - **Upload User List**: Upload a list of respondents to which you want the campaign to go.
    - **Add User:** Add a respondent manually.
    - **Delete Respondents:** Delete all the respondents you have uploaded for the campaign.

- Toggle between “All”, “Incomplete” and “Complete” or search manually via the search box to look up certain respondents.

- By clicking on the 3 action dots for each respondent you can update or delete their details or manually resend them the campaign email.

***Important points to note:**

- **Each campaign is limited to a maximum number of 2,000 respondents.**

- **As soon you add a user manually/upload the user list, the campaign email will be sent to them, so ensure you are happy with your campaign general details before adding users.**