Lab A: Quick Campaigns

Scenario

The marketing manager has customized the "Account Reconnect" e-mail template and wants to send a copy of it to every active account.

Note: *An email template allows users or administrators to design organizational or personal templates that will give the creator the ability to pull in values from selected records. This allows an email to have a more personal tone to it versus a non-specific email.*

Goal Description

Use the Quick Campaign feature to send an e-mail to all active accounts, using the "Account Reconnect" e-mail template and assigning all activities to the Sales team for follow-up.

Objectives

During this lab, you will create a Quick Campaign for all active accounts.

Exercise 1: Step by Step

Exercise Scenario

Perform the following steps to complete this lab:

1. In the **Navigation Bar**, click **Microsoft Dynamics CRM**, click **Marketing**.
2. Click or hover over **Marketing**, and then click **Accounts.**
3. Change the view to **Active Accounts** from the drop-down list.
4. Select all records in the view by clicking the check-box at the top of the data grid.
5. Click the **Ellipse (...) on the Command Bar** and then click **Quick Campaign**.
6. Select **For Selected Records**.
7. After the **Create Quick Campaign Wizard** opens, click **Next**.
8. In the **Name** box, type "**Account Reconnect"** and then click **Next.**
9. In the **Activity Type** box, select **E-mail.**
10. Select the **Assign to another user or team** option, and then click the Lookup button to the right of the field.
11. Select **Team** in the **Look for** drop-down list, and then select the Sales team. Click **OK**.

12. Click **Next**.
13. Click the **Use Template** checkbox, and then click the **Select Template** button at the right of the field.
14. In the **Select Template** dialog, select the **Account Reconnect** template and then click **OK**. Notice that the **Subject** and **E-mail** body fields are read-only. This is because the e-mail template already contains that information.
15. Click **Next** and then click **Create**.
16. On the Navigation Bar, click Marketing, and then click Quick Campaigns.
17. Open the **Quick Campaign** you just created by clicking **Account Reconnect** in the **My Quick Campaigns** list, and then click **E-mail Messages Created**, and review the list of emails that were generated.

Lab B: Create a Marketing Campaign

Scenario

The Marketing Manager is in charge of planning the company's annual marketing event. This year's event is a Customer Appreciation Golf Tournament for all new customers. The marketing manager must reserve a golf course to host the event and e-mail the invitations a month prior to the event. The event is for July 1 of this year. The Marketing Manager needs to create a campaign for the golf tournament and create activities so that emails are sent to all of the players in the tournament.

Objectives

During this lab, you will create a new Marketing Campaign. As you perform the instructions, use the information in the Scenario and Goal Description to complete the lab.

Goal Description

Create a new Marketing Campaign enter the following information for the Marketing Campaign:

- **Name:** Customer Appreciation Golf Tournament
- **Status Reason:** Ready to Launch
- **Campaign Code:** CAGT
- **Campaign Type:** Event
- **Expected Response:** 40
- **Budget Allocated:** $25,000 USD
- **Miscellaneous Costs:** $2,500 USD

The campaign will include the following activities:

- Planning activity: **Reserve Country Club**
    - **Owner:** Administrator
    - **Priority:** Normal
    - **Due:** May 1
- Subject: **Invitation E-Mail**
    - **Channel:** E-mail
    - **Type:** Direct Initial Contact
    - **Priority:** High
    - **Scheduled Start Date:** February 15

The campaign will use the marketing list, "Active Accounts".

Exercise 1: Step by Step

Exercise Scenario

Perform the following steps to create the campaign, the planning and campaign activities, and add the marketing list:

18. Click **Microsoft Dynamics CRM**, click **Marketing**, and click **Marketing List**.
19. On the **Marketing List Command Bar**, click **New**.
20. In the **New Marketing List** window, enter the following information:
    a. **Name:** Active Accounts from Washington
    b. **List Type**: Dynamic
    c. **Targeted At:** Account
21. Click **Save** on the **Marketing List Command Bar**.
22. On the **Marketing List Command Bar**, click **Manage Members**.
23. In the **Manage Members** dialog, click **New**.
24. In the **New Marketing List** window, enter the following information:
    a. **Name**: Accounts From Washington
    b. **Targeted At:** Account
25. Click **Save.**
26. Click **Manage Members**.
27. On the **Manage Members** dialog, click **Add Using Advanced Find**. Click **Continue**.
28. In the **Advanced Find** window, change the **Use Saved Views** to *Active Accounts*.
29. In the filtering section of the window, click **Select** and choose *Address 1: State/Province*.
30. To the right of the **Select** drop-down, leave the operator value as *Equals*.
31. In the **Enter Text** box, type "WA".
32. Click **Find.**
33. Select **Add all the members returned by the search to the marketing list** and click **Add to Marketing List**.
34. On the **Navigation Bar**, click **Microsoft Dynamics CRM**, click **Marketing**, and then click **Campaigns**.
35. On the **Campaigns Command Bar**, click **New**.
36. In the **Campaign** section of the form:
    a. **Name :** type "Customer Appreciation Golf Tournament"
    b. **Status Reason** : select Ready to Launch
    c. **Campaign Code** : type "CAGT"
    d. **Campaign Type** : select Event

e. **Expected Response** : type "40"

37. In the **Financials** section of the form:
    a. **Budget Allocated** : type "25000"
    b. **Miscellaneous Costs** : type "2500"
38. On the **Campaign Command Bar**, click **Save**.
39. In the **Collaboration Pane** of the **Campaign** form, click **Activities**.
40. On the **Activities** menu bar, click **Add Task.**
41. In the **Task** section of the form:
    a. **Subject :** type "Reserve Country Club", and then click **OK**.
42. In the **Campaign Activities** list located on the right side of the form, click **Add New Campaign Activity.** This will appear as a plus sign (+).
43. In the **Campaign Activity** section:
    a. **Channel :** select Email
    b. **Type**: select Direct Initial Contact
    c. **Subject :** type "Invitation E-Mail"
    d. **Scheduled Start** : 2/15
44. On the **Campaign Activity Command Bar**, click **Save**.
45. Click the hyperlink on the **Campaign** lookup field to return to the campaign record.
46. On the right side of the campaign form, in the **Marketing** section, click **Target Marketing Lists** (+).
47. Select "Accounts from Washington"
48. Click **Select** and click **Add**.
49. In the **Add Marketing Lists to Campaign** dialog, accept the default values and click **Add**.

Lab C: Create a Campaign Response

Scenario

The marketing department at Adventure Works recently created a Marketing Campaign titled "Product launch campaign". You later discuss this campaign with your contact at Active Cycling, who is interested in receiving information about a new road bike that is the basis for this campaign.

After sending the literature, you capture Active Cycling's interest through a Campaign Response. You then convert the response into an opportunity.

Goal Description
Create a campaign response for the Marketing Campaign titled "Product launch campaign." The campaign response will be for Active Cycling, and it should include the following information:

- **Response Code:** Interested
- **Channel:** Phone
- **Subject:** Interested in road bikes

Once the campaign response has been created, convert it to an opportunity for follow up by your sales department. Verify the opportunity record was created.

Objectives

During this lab, you will use Microsoft Dynamics CRM to locate information regarding a campaign that is specific to a customer.

Exercise 1: Step by Step

Exercise Scenario

50. On the **Navigation Bar**, click **Microsoft Dynamics CRM**, click **Marketing** and then click **Campaigns.**
51. From the View drop-down list, click **All Campaigns and Campaign Templates.**
52. Select the **Product launch campaign** and open the form. (If this campaign does not exist, create the campaign).
53. On the campaign form, locate the **Campaign Response** section.
54. Click **Add New Campaign Response** (this will appear as a plus sign (+)).
55. In the **Campaign Response** section of the form, enter or select the following:
    e. **Subject:** type **“**Interested in road bikes”.
    f. **Response Code:** select *Interested*.

g. **Customer:** click the Lookup icon, then select **Fourth Coffee**. Click **OK.**

h. **Channel:** select Phone.

56. On the **Campaign Response Command Bar**, click **Save.**
57. On the **Campaign Response Command Bar**, click **Convert Campaign Response**.
58. In the **Close and Convert the Response** dialog:

i. Click **Create a quote, order, or opportunity for an account or contact**.

j. Select **Opportunity** in the **Select Record Type** drop-down list.

k. Click **OK.**