

Campaign diagram

Set up campaign diagram

Version 8.0



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Set up campaign diagram

PRODUCTS: **MARKETING**

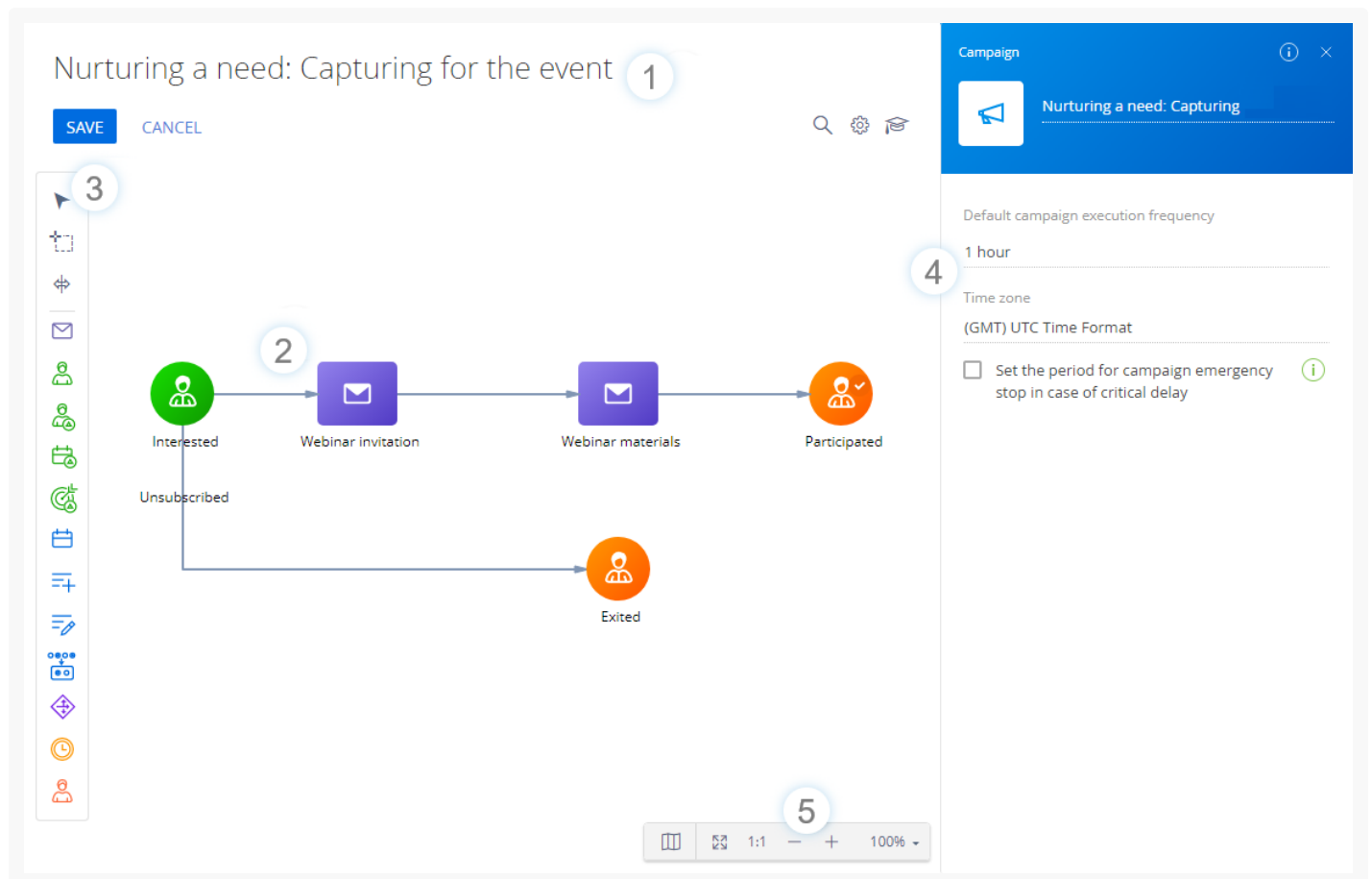
A campaign flow diagram (Fig. 1) includes:

- [Elements](#).
- [Flows](#) between campaign elements.
- [General campaign settings](#).

Use the Campaign designer to set up campaign flow diagrams. To open the Campaign designer:

1. Open the needed record in the [*Campaigns*] section.
2. Go to the [*Campaign flow*] tab and click [*Create*] if no diagram exists or [*Edit*] to change an existing diagram.

Fig. 1 Campaign designer overview



Campaign designer features

The Campaign designer lets you:

- **Save and cancel** changes using the toolbar (1).

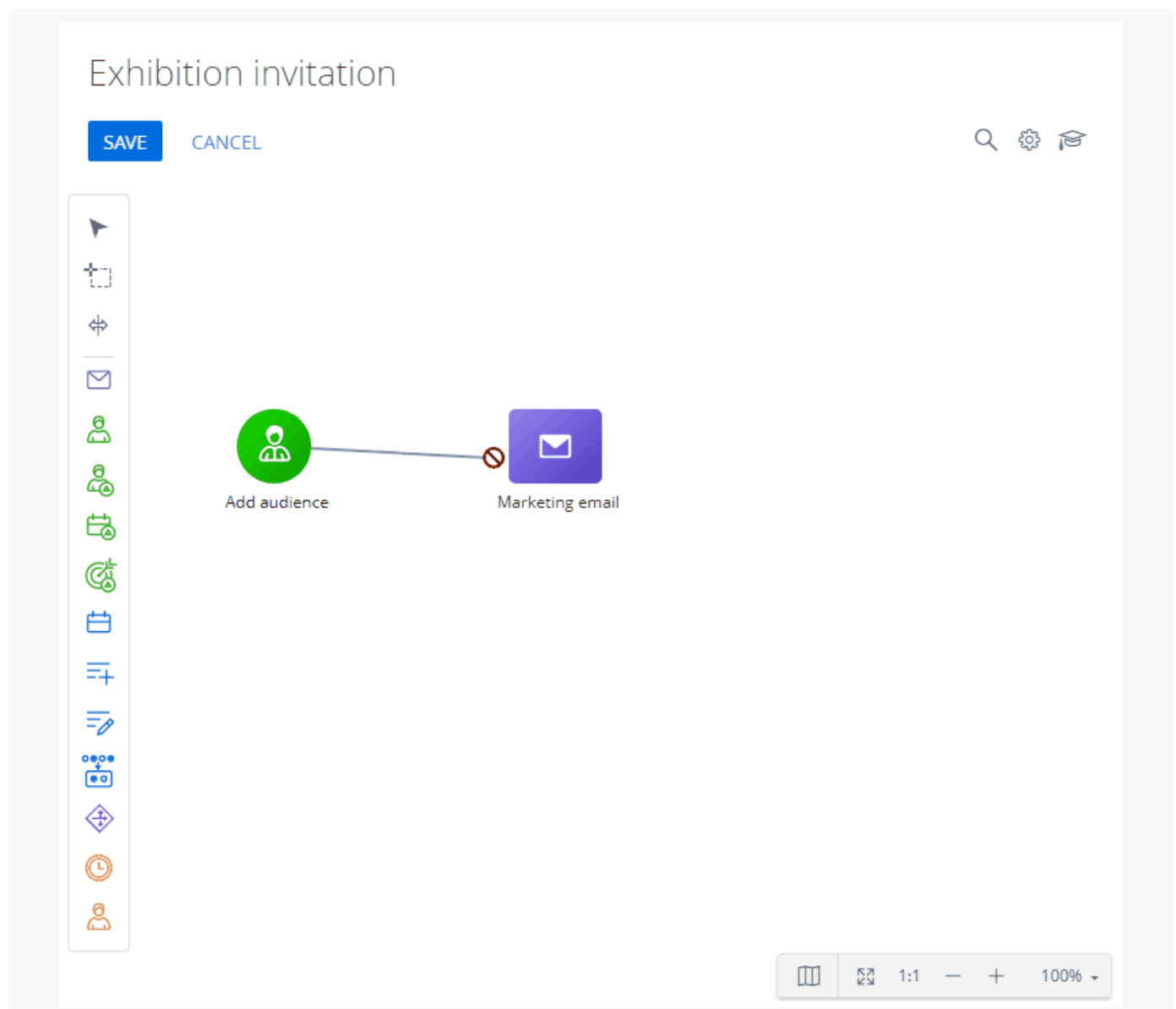
Note. Creatio saves campaigns automatically. If you close a campaign diagram without saving, you will be able to load the autosaved data later.

Use the corresponding buttons on the toolbar to open the element setup area, open the Academy, or search the diagram for campaign elements by name.

- **Set up the campaign diagram** using [elements](#) and [flows](#) in the Campaign designer working area (2). Select an element in the [*Elements*] area of the designer and drag it to the campaign area to add it to the diagram (Fig. 2).




Select an element and select “Delete” to delete it.

Fig. 2 Adding elements and flows to the working area




- **Select elements and tools** in the element area (3). The area contains the [campaign elements](#) and the

following tools:

-  **“Arrow.”** Use this tool to select and move separate elements on the diagram.
-  **“Lasso.”** Use this tool to select multiple elements on the diagram.
-  **“Space.”** Use this tool to move parts of the diagram left/right or up/down. For example, drag the cursor down to move all the elements below the cursor.
Learn more about these tools: [Process designer](#).
- **Specify parameter values** for campaigns and campaign elements in the **element setup area** (4).
- **Zoom and pan** the campaign diagram (5).

Set up the campaign properties

Configure the **campaign properties** in the element setup area (4). Click anywhere on the campaign designer working area or click the  button to open the campaign properties area.

1. [*Default campaign execution frequency*] – determines how often to execute the campaign steps without a set execution period.

The frequency specified in this parameter applies to:

- The campaign steps whose incoming [flows](#) do not specify an exact time.
- The [\[Add audience \]](#) element that adds new participants to the campaign.
- The [\[Exit from campaign \]](#) element that removes participants from the campaign.

2. [*Time zone*] – sets the time zone for all the campaign's time frames. For example, the execution time of conditional flows. By default, Creatio sets the campaign time zone to:

- The time zone of the user who created the campaign.
- The time zone specified in the “Default TimeZone” (“DefaultTimeZone” code) system setting if there is no time zone set in the user profile.

If Creatio cannot set the time zone according to the rules above, it will populate the [*Time zone*] field of the new campaign with the “(GMT) UTC Time Format” value. You can change the time zone at any time.

Note. Set up the execution time according to additional time zones within the campaign using the [\[Timer \]](#) element.

3. [*Set the period for campaign emergency stop in case of critical delay*] – select the checkbox to define the critical delay time. If the campaign does not run during this period, for example, due to application updates, Creatio will stop it automatically, and the campaign owner will receive a notification.
4. Specify the delay units and their value after selecting the checkbox.

Note. If you do not select the [*Set the period for campaign emergency stop in case of critical delay*] checkbox, the default campaign frequency will equal the time of critical delay.

Use preset campaign steps

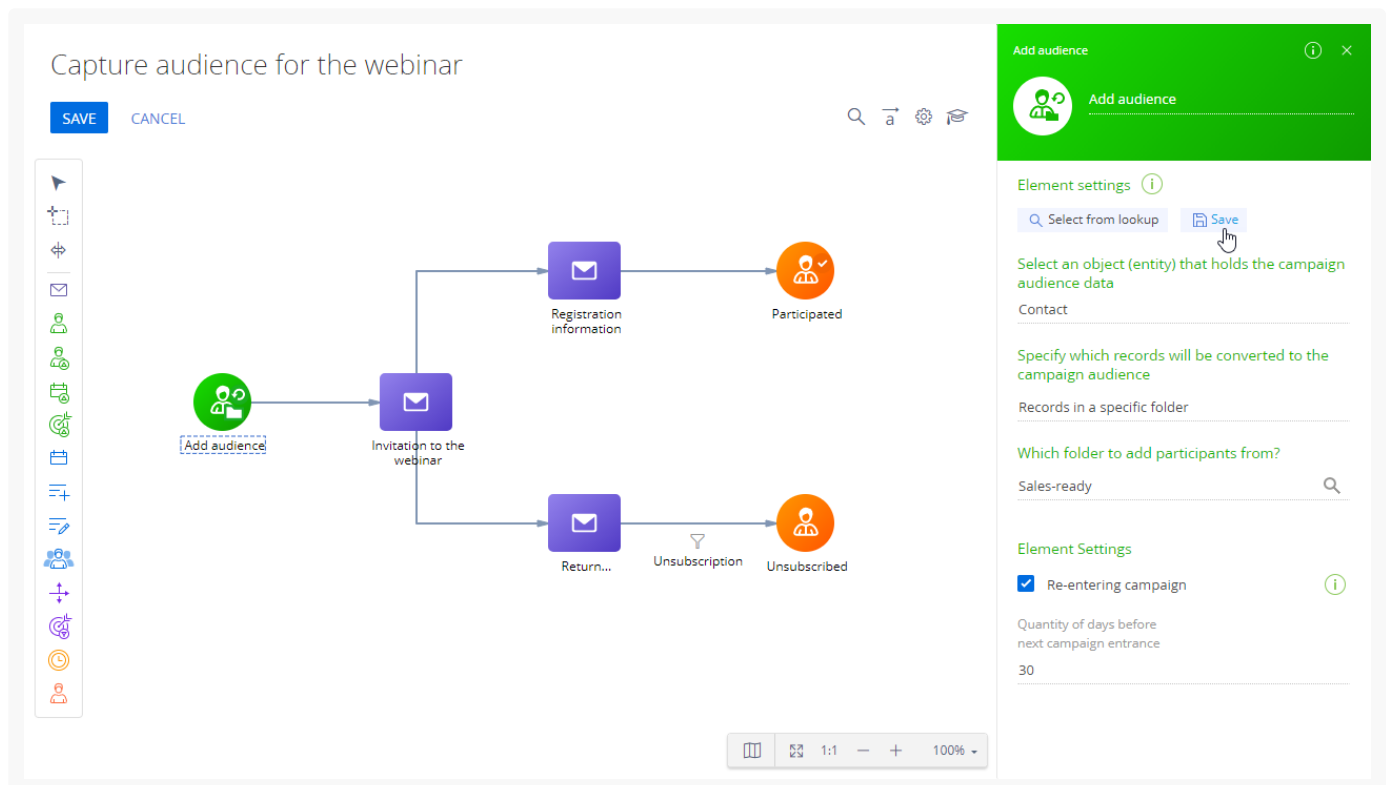
Save the element settings to reuse them in any campaign when setting up similar steps. This streamlines the campaign setup.

Example. Save and reuse the settings of the [*Add audience*] element that adds contacts from the “Sales-ready” dynamic folder to the campaign.

Create an element template

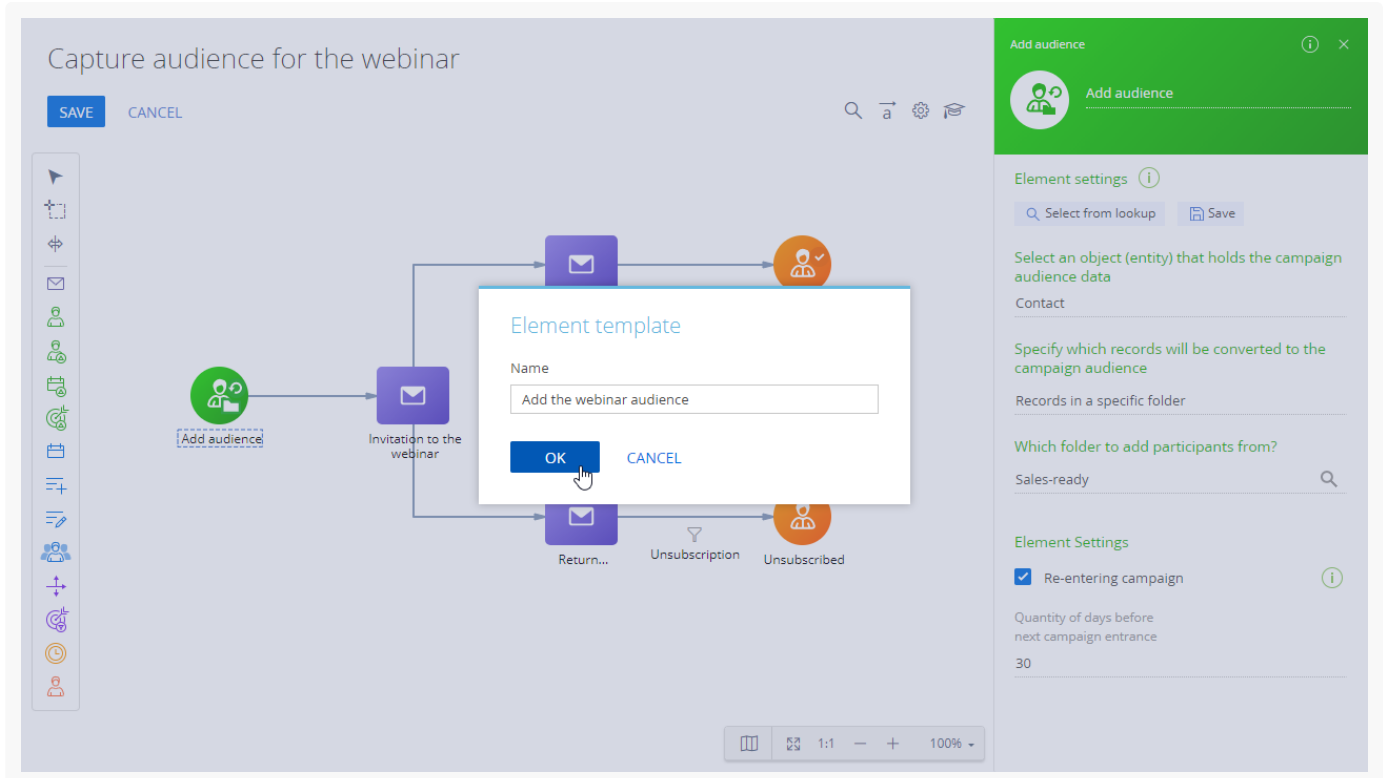
1. Drag the [*Add audience*] element to the campaign diagram and fill out its properties:
 - a. [*Select an object (entity) that holds the campaign audience data*] - “Contact.”
 - b. [*Specify which records will be converted to the campaign audience*] - “Records in a specific folder.”
 - c. [*Which folder to add participants from?*] - “Sales-ready.” Read more: [The \[*Add audience* \] element.](#)
2. Click [*Save*] (Fig. 3). This will open a dialog box.

Fig. 3 Save the element settings



3. Enter the template name and click [*OK*] in the box (Fig. 4).

Fig. 4 Save the element template



As a result, Creatio will save the template to the [*Campaign element templates*] lookup. You will be able to reuse the template during the campaign setup.

Use a preset element in the campaign

1. Add the element to the diagram and click [*Select from lookup*] in the element settings (Fig. 5).

Fig. 5 Add the template from the lookup

Capture audience for the webinar

SAVE CANCEL

The screenshot displays a campaign diagram titled "Capture audience for the webinar". The diagram starts with an "Add audience" element (green circle with a person icon) which leads to an "Invitation to the webinar" element (purple square with an envelope icon). From this central element, two paths emerge: one leading to "Registration information" (purple square with an envelope icon) and another leading to "Return..." (purple square with an envelope icon). The "Registration information" path leads to a "Participated" element (orange circle with a person icon and a checkmark), and the "Return..." path leads to an "Unsubscribed" element (orange circle with a person icon and a checkmark). A "Unsubscription" element (purple square with a funnel icon) is positioned between the "Return..." and "Unsubscribed" elements. On the left, a vertical toolbar contains various icons for editing the diagram. At the top right, there are search, zoom, and help icons. On the right side, a green "Add audience" settings panel is open, showing options like "Select from lookup", "Save", and "Element settings".

Element settings

Select from lookup Save

Select an object (entity) that holds the campaign audience data

Contact

Specify which records will be converted to the campaign audience

Records in a specific folder

Which folder to add participants from?

Enter a value

Element Settings

Re-entering campaign

2. Select the relevant template from the list.

As a result, the Campaign designer will apply the template settings to the element.

This feature copies the element settings as opposed to the element itself. As such, you must create a new element of the corresponding type and load the template settings every time when using the preset step.