openCRX Campaign Management

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1 About this Book

This book is designed to help you understand how to create and manage a campaign with openCRX.

1.1 Who this book is for

The intended audiences are openCRX administrators and openCRX users.

1.2 What do you need to understand this book

A basic understanding of account management and activity management.

1.3 Tips, Warnings, etc.

We make use the following pictograms:

Information provided as a "Tip" might be helpful for various reasons: time savings, risk reduction, etc. - it goes without saying that we advise to follow our guides meticulously

> **meticulous** \muh-TIK-yuh-luhs\, *adjective*:
> Extremely or excessively careful about details.

You should carefully read information marked with "Important". Ignoring such information is typically not a good idea.

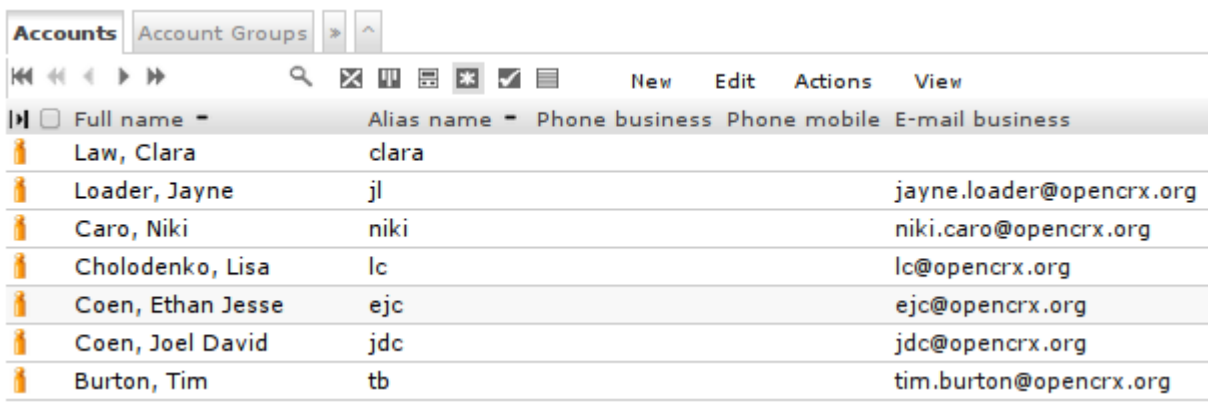Warnings should not be ignored (risk of data loss, etc.)

2   Prerequisites

If you intend to reproduce the examples given in this guide, you might want to make sure you have a access to a working instance of openCRX. For detailed information on how to setup/install an openCRX instance, see information at http://www.opencrx.org/server.htm

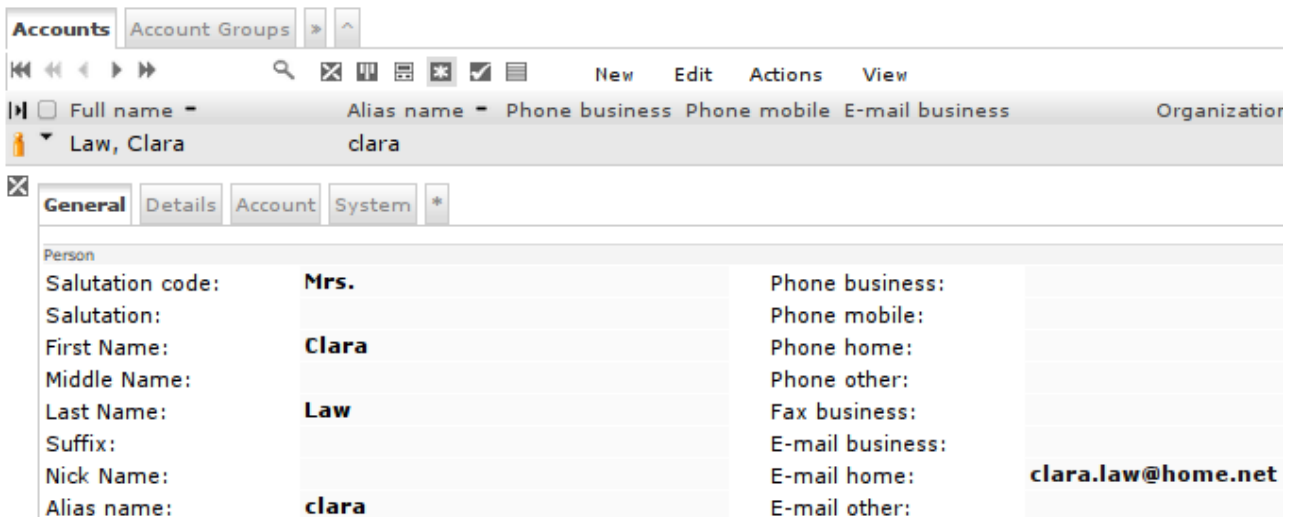Enter the sample data as explained below.

2.1   Sample data

Let's assume that we have the following 7 contacts available in openCRX:

Note that Clara Law doesn't have an active business e-mail address. She does have a home e-mail address, though:

In addition, Tim Burton has the flag "no E-Mail" set.

3   Create an e-mail campaign

An openCRX e-mail campaign consists of the following elements:

- a **campaign tracker** – all campaign activities are assigned to the campaign tracker (an Activity Tracker)

- a **campaign creator** – all campaign activities are created with the campaign creator (an Activity Creator); the campaign creator determines the type of activity that is created (e.g. e-mails)

- a **campaign target selector** – the targets of the campaign (accounts, e-mail addresses, postal addresses, etc.) are selected with the campaign target selector (can be a Group, an Address Group, a Saved Search Accounts or a Saved Search Addresses)

- a **campaign message** – an e-mail template (subject and body)

The basic steps for creating a campaign are:

- create/update a campaign target selector (unless you can use an existing target selector)

- create campaign tracker and creator

- create campaign with wizard "Bulk - Create Activities"

- send campaign e-mails with wizard "Bulk Activity Follow-Up"

Let's now create a simple e-mail campaign:

3.1   Create campaign target selector

Creating campaign target selectors can be quite involved depending on the requirements, and sometimes it is not even obvious which type of target selector is best suited for the job at hand. Nevertheless, the following overview should get you started:

Address Group	Address Groups are well suited to **manage a list of addresses, manually or automated**. Example: • e-mail addresses of people who subscriced to a news letter with an opt-in procedure
Group	Groups are well suited to **manage a list of accounts, manually or automated**. Examples: • list of your friends • members of a club
Saved Search Addresses	**A Saved Search for Addresses is an address filter, i.e. well suited for the fully automated management of address lists.** Addresses can be selected based on their attributes and/or attributes of their the parent account (or even more complex rules). It is important to note, however, that a saved search for addresses always produces a **list of addresses**. Example: • all e-mail addresses of the domain opencrx.org
Saved Search Accounts	**A Saved Search for Accounts is an account filter, i.e. well suited for the fully automated management of account lists. Accounts** can be selected based on their attributes (or even more complex rules that involve other objects, e.g. accounts with unpaid invoices, etc.). It is important to note, however, that a saved search for accounts always produces a **list of accounts**. Example: • list of contacts who are movie directors

As we want to create an e-mail campaign to movie directors, we create a Saved Search Accounts that we can use as our campaign target selector.

- navigate to [**Manage Accounts**] and click on [**>>**] to show hidden tabs

- click on tab [**Saved Search – Accounts**]

- choose **New > Saved Search – Accounts** and enter the following data:

General	System	*

Name:	Contacts who are Movie Directors
Description:	job title = Movie Director

Save Cancel

- click on [**Save**] to create the saved search

- under [**Search Criteria**], choose **New > Search Criteria – Disabled** and enter data as follows:

General	System	*

Name:	NOT disabled	Active:	☑
Description:		Filter operator:	[1] IS_IN ▾
		Filter quantor:	[2] THERE_EXISTS ▾
Disabled:	☐		

Save Cancel

- click [**Save**]

- under [**Search Criteria**], choose **New > SQL Query** and enter data as follows:
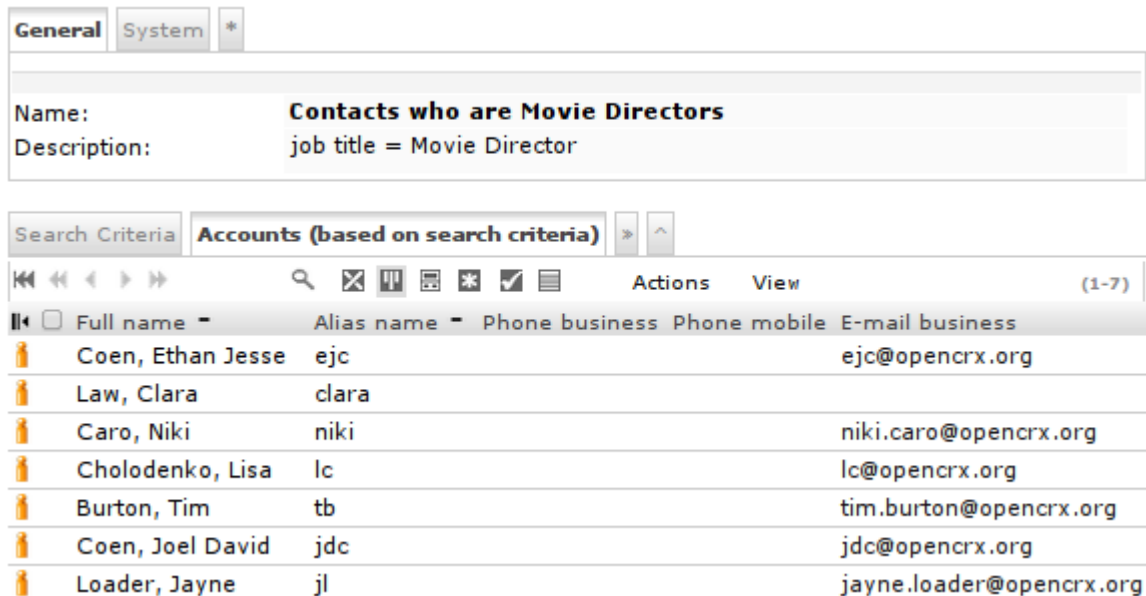
General	System	*

Name:	job role = Movie Director	Active:	☑
Description:			
Clause:	v.job_role in ('Movie Director')		

- click [**Save**] to store the query

- click on the tab [**Accounts (based on search criteria)**] to inspect the result set:

It is important that saved searches (both for accounts and addresses) are performing well. Queries which are too slow can easily bog down your system and result in very bad performance during the activity creation phase (creating the campaing activities will be very slow).

You can test the performance of a saved search with the following steps:

- navigate to the saved search

- choose **Actions > Count Accounts** (or choose **Actions > Count Addresses**) followed by a click on [**OK**]

- dermining the size of the result set with the above operation should not take more an 1 or 2 seconds, at most 5s; if you have a slow performing query, we strongly advise to restructure it for better performance BEFORE you actually create the campaign

3.2   Create campaign tracker and creator

With the following steps you can create both a campaign tracker and a campaign creator for e-mail activities:

- navigate to [**Manage Activities**]

- choose **File > New Campaign** and then enter the following values:

Note that you can use the auto-completer to select the target group; also, you can optionally choose multiple locales if your campaign is in more than one language.

- click [**New**] to create the campaign

- select the tab [**Activity Creators**] and verify that the creator for bulk e-mails was created as well:

Please note that the user who will eventually create the campaign activities needs to have update permission for the campaign creator. Use Security > Check Permissions on the campaign creator to verify whether the respective user actually has update permission:

3.3   Create campaign with wizard "Bulk - Create Activities"

Most of the tasks related to creating a campaign are done with the wizard "Bulk – Create Activites". This wizard enables you to configure all the details of your campaign, create test activities, save and load campaign configurations, and also prepare the workflow to create all the campaign activities.

At any stage of the campaign management process you can save the current configuration and then reload it again at a later time to continue working on the campaign. Please note that the configuration of a campaign is specific to

- a campaign target selector

- a campaign creator

- a locale

In order to reload a previously saved campaign configuration, simply follow these steps:

1. navigate to the campaign tracker

2. choose **Wizards > Bulk – Create Activities**

3. choose the locale and the target selector

4. click [**Reload**]

Let's get started creating our campaign to movie directors:

- navigate to the campaign tracker, e.g. "Mailing to Movie Directors"

- choose **Wizards > Bulk – Create Activities**

- leave the locale set to English (unless you want to do a mailing in another language) and verify the target group:

- click [**Reload**] to load the configuration of the mailing; since we are creating a new campaign (i.e. there does not exist any previously saved campaign configuration), an empty default configuration is loaded

- as we are creating an e-mail campaign, you must enter some values into the fields "Sender", "Subject" and "Message":

- click [**Save**] to store your campaign configuration; note that the wizard added some information to the field "Text":

Let's look at some of the fields in more detail:

Field	Explanation
Name	name of the campaign default value is the name of the campaign creator
Description	a short description of the campaign
Detailed description	a more detailed description of the campaign

Scheduled start	date/time the campaign is scheduled to start
Scheduled end	date/time the campaign is scheduled to be completed
Priority	priority of the campaign
Due by	latest date/time the campaign must be completed
Sender	the e-mail address of the sender of the campaign's e-mails; if a recipient inspects an e-mail, he will see this e-mail address in the e-mail's field "from"
Gateway (Fax, SMS, MMS)	if the e-mails generated by this campaign are to be delivered as facsimile/SMS/MMS to the recipients (and hence need to be routed through an appropriate gateway, e.g. an e-mail-to-SMS gateway) you can enter the gateway's e-mail address into this field
Usage	here you can enter (optionally) a list of address usages; any addresses provided by the campaign target selector will be filtered so that only addresses that contain all the listed usages will be used for the campaign; by default, the usage "Business" is entered, i.e. only business addresses will be used for the campaign
Subject	enter the subject line of the campaign e-mail; placeholders are supported
Message	enter the message body of the campaign e-mail; placeholders are supported; note that you can use your favorite (external) e-mail design tool to create hand-crafted "HTML blobs" outside of openCRX and then copy them into this field
Text	this is the area where all the place holders in use (automatically collected from the fields subject and message) are listed together with their default values, e.g. `lastName=N/A` `firstName=N/A` The syntax for place holders is ${<placeholderName>} where <placeholderName> is typically the name of an attribute of the objects produced by the campaign target selector. If the campaign target selector – for example – produces objects of type "Contact" then ${firstName} and ${lastName} are valid place holders. Please refer to the UML model to find out more about attributes of openCRX objects: http://www.opencrx.org/uml.htm A somewhat more advanced use of place holders is also possible: You can write a Janino-Script (basically a bit of Java code) that calculates the values that will replace the place holders on the fly during the generation of the campaign activities. The use of such scripts allows you to fully control the replacement of place holders and create impeccable campaign e-mails even if your data is not in perfect shape (e.g. missing first names, missing salutations, etc.). See chapter "BulkScript" for more information.

> **Important** Do not forget to click [**Save**] to store your campaign configuration before you leave the wizard. Closing the wizard without saving resets values to the last saved configuration.

- click on the button [**Create/Update 3 Test Activities**]

| Save | Create/Update 3 Test Activities | Create/Update all Activities | Close |

Optional: Additional Test Recipient
Account:

☑ skip e-mail addresses of contacts marked "No E-Mail"
Do you really want to create/update the activities listed in the report? OK Cancel

- click [**OK**] and the wizard will create 3 test activities (or update existing test activities if you already created them earlier); the execution report contains information about the number of activities created/updated:
  ```
  Report @Tue Jul 23 08:05:49 CEST 2013
  {Updated=0, Created=0, Failed=0, Pending=7, Skipped=0, Missing e-mail=0, Total=7}
  Report – Complete
  {Updated=0, Created=3, Failed=0, Pending=3, Skipped=0, Missing e-mail=1, Total=7}
  ```
  and the grid [**Activities**] contains the 3 test activities:

		Activity-#	Name	Assigned to	Reporting contact
		1001480	Mailing to Movie Directors - Bulk E-Mails / Coen, Ethan Jesse / ejc	admin-Standard,	Coen, Ethan Jesse
		1001481	Mailing to Movie Directors - Bulk E-Mails / Caro, Niki / niki	admin-Standard,	Caro, Niki
		1001482	Mailing to Movie Directors - Bulk E-Mails / Cholodenko, Lisa / lc	admin-Standard,	Cholodenko, Lisa

- you can inspect individual test activities (hold down the <CTRL>-key and click on the icon to open an activity in a new browser tab/window) and even send the rendered e-mail as an attachment to your own e-mail address:
  - open a test activity (e.g. by holding down the <CTRL>-key and clicking on the icon)
  - select **Actions > Follow-Up** and then select the transition "*Export as mail attachment to current user*" and click [Save]; during the next run of the workflow handler the mail will be generated and mailed to the e-mail address of the current user (as defined in [**Home**] > **Edit** > **User Settings**)

- you can edit/change the campaign configuration as many times as you like (don't forget to save your changes) and then create/update the test activities again until you are happy with the result

● click on the button [**Create/Update all Activities**] and then click [**OK**] to create all campaign e-mail activities – please note that the wizard tests the query execution time (slow queries would slow down the system for all users – if you're query is too slow, you need to optimize the query before you can create the campaign):
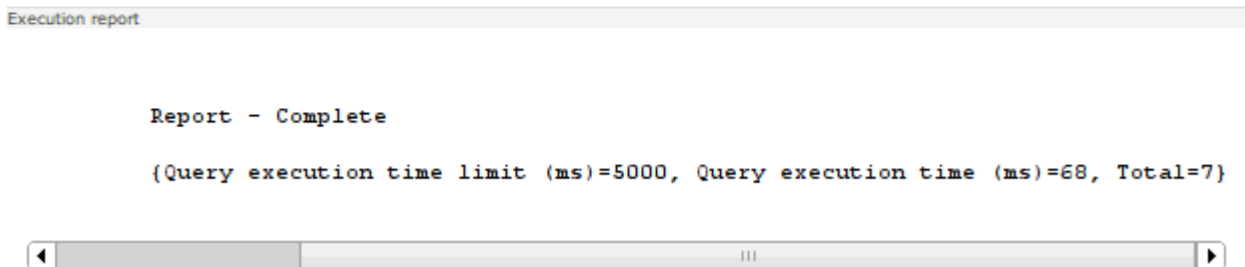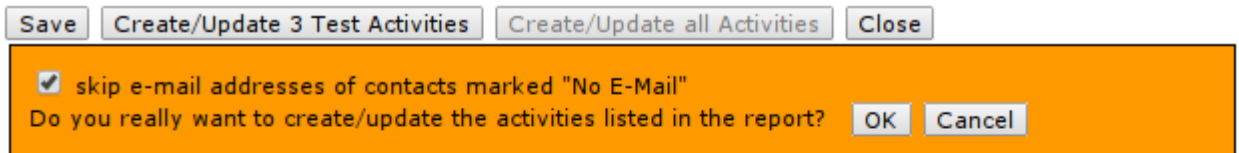
the wizard creates a workflow (so that the e-mail activities can be created in the background with multiple threads) and then forward you to the campaign tracker
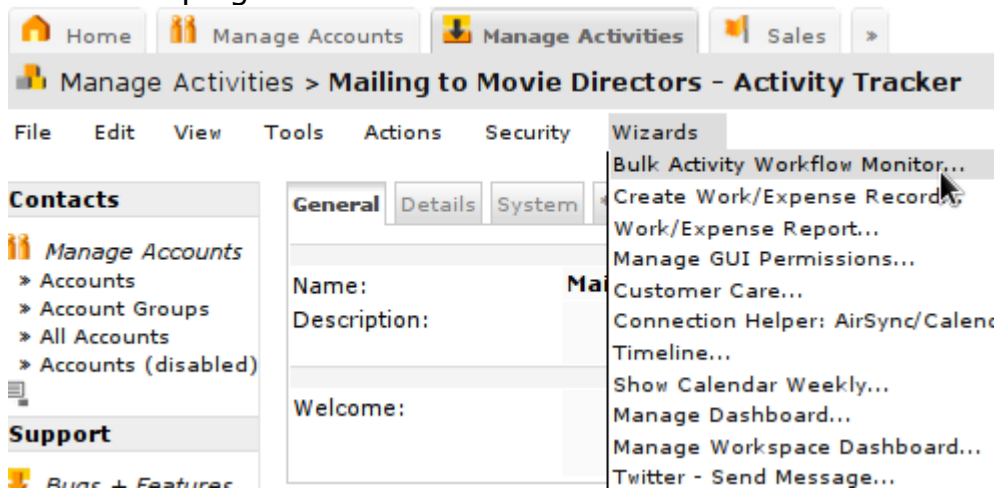
● start the wizard "**Bulk Activity Workflow Monitor**" to monitor progress of the activity creation workflow

3.4   Send Campaign E-mails with Bulk Activity Follow-Up

While it's possible to send out each e-mail individually, it is more convenient to create a workflow that sends out your campaign's e-mails in a bulk fashion, optionally at future date/time. Here is how you can do that:

- navigate to any of your campaign's e-mail activities

- select **Wizards > Bulk Activity Follow-Up**

- the wizards counts the number of activities that are assigned to the same tracker and in the same state as the activity you navigated to and then offers you to choose up to 2 transitions that will be executed on the respective activities; before an activity can be mailed it needs to be approved, i.e. the first transition should be "Approve"; if you select "Send as mail" as the second transition then all your e-mail activities created for the campaign will be sent:

- optionally you can set a timer if you want to start processing/mailing your campaign's e-mails at a future date/time

- click [**OK**] to create the workflow; afterwards you will be forward to the campaign tracker

- start the wizard "**Bulk Activity Workflow Monitor**" to monitor progress of the activity creation workflow

3.5   The Bulk Activity Workflow Monitor

The Wizard Bulk Activity Workflow Monitor can be started from the campaign tracker and provides overview information about workflows and progress related to the campaign – you can refresh the view at any time by clicking the button [**Reload**]:
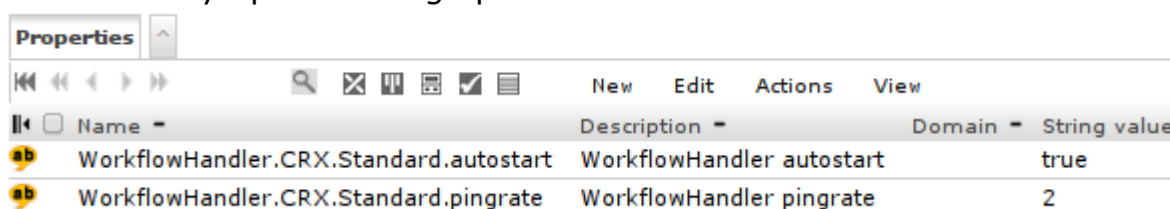
3.6 The Bulk E-Mail Process

E-mail campaigns are controlled by the activity process "Bulk E-Mail"; the following chart shows all the relevant states and transitions:
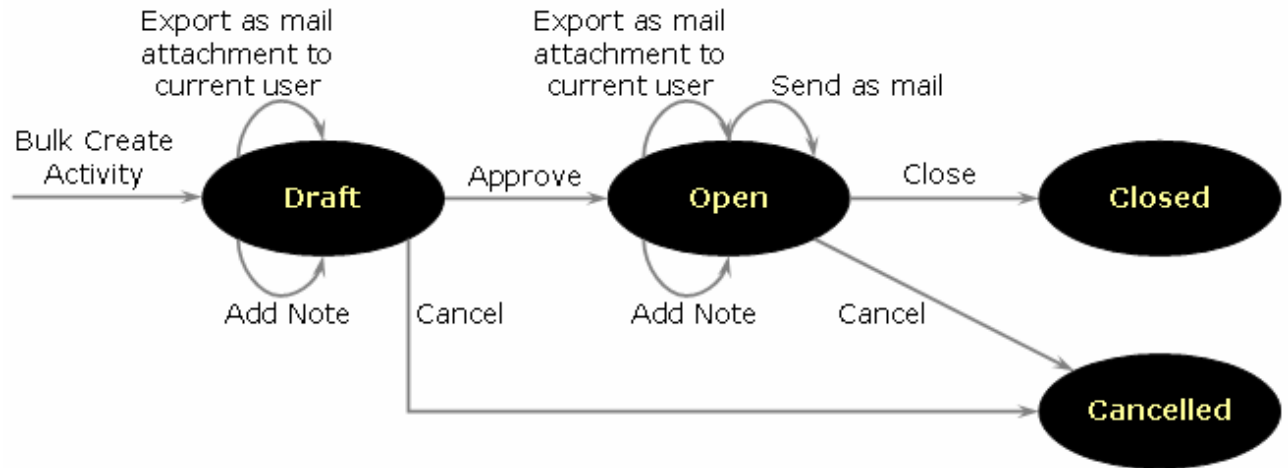
3.7   Troubleshooting

3.7.1   Activities are not created/updated

- verify that you have sufficient permissions to actually create/update activities – you might want to create an activity manually (navigate to the respective Activity Creator and select **File > New Activity**) and verify that this works as expected

- verify that the workflow handler is active (login as admin-Root and select Wizards > openCRX Workflow Controller); if it is not active, turn it on – you can configure the workflow handler in such a way that it starts automatically upon starting openCRX:

3.7.2   E-mails are not sent

- verify that your mail resource is correctly configured (see openCRX Admin Guide, chapter E-mail Services)

- verify that the workflow handler is active (see above)

- inspect mail workflows and look at the error messages:

    - navigate to the userhome of admin-Standard

    - click on [>>] to expand the grid tab row and select the tab [Pending / Completed Workflows]

    - use the filters to find failed workflows or workflows with a high step counter (the sendmail workflow does not fail immediately, i.e. there are multiple retries...)

    - inspect the workflows and their action log entries – maybe the mail server is down or the mail server rejects the sender or certain recipients; quite likely you will have to work together with the mail server admin to solve any open issues

4 Next Steps

You might want to have a look at some of the additional documentation published at http://www.opencrx.org/documents.htm.