Managing Campaigns and Exporting Data

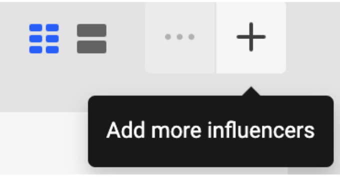
Note:

The features described in this article are available to Pro and Premium Influence clients. If you are interested in Influence's full suite, please contact your Customer Success Manager (CSM) for details.

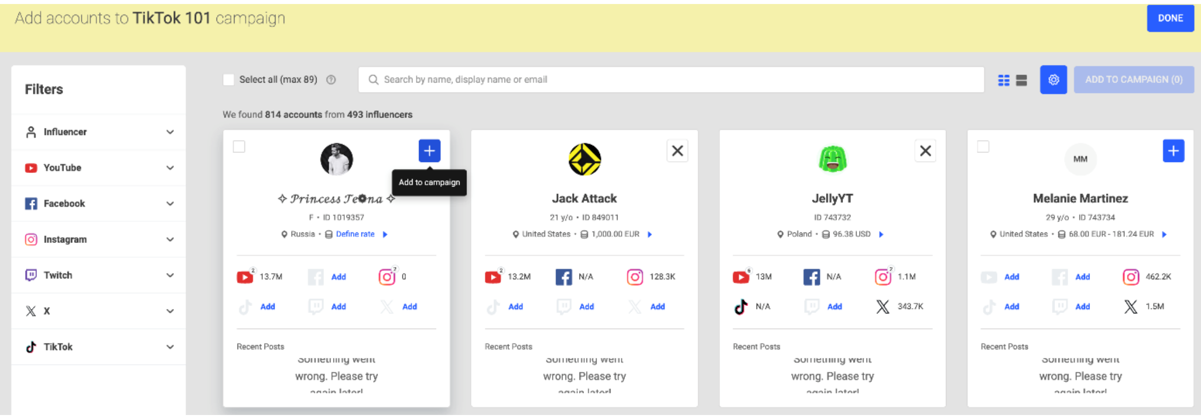
Managing campaigns

Adding additional influencers to campaigns

To add additional influencers into a campaign, first click into your campaign from the Campaigns tool. Once in the campaign, click the **+ icon** in the upper right corner of the Influencers tab.

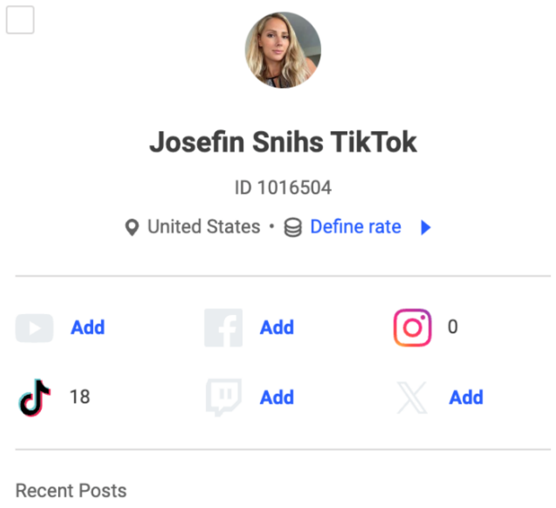


This will open the Influencers roster, where you can add influencers into your campaign as you did when you first created it. You can add influencers individually by clicking the **blue + button** in the top-right corner of their profile, or add influencers to your campaign in bulk by using the interface checkboxes. Select **Done** when finished to return to your campaign page.

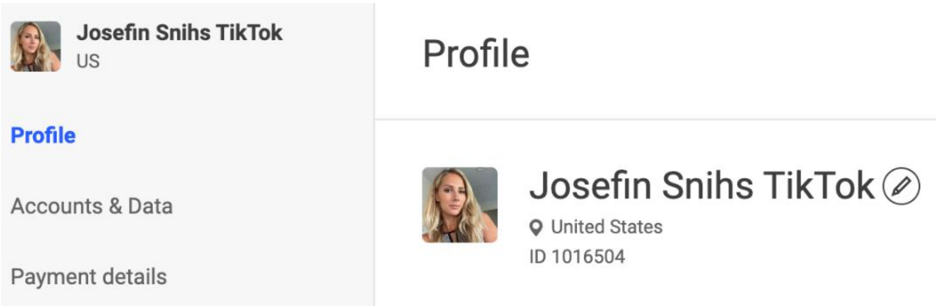


Editing an influencer's profile in campaigns

You can easily edit any influencer's profile information directly in campaigns by clicking on their name on their influencer card.



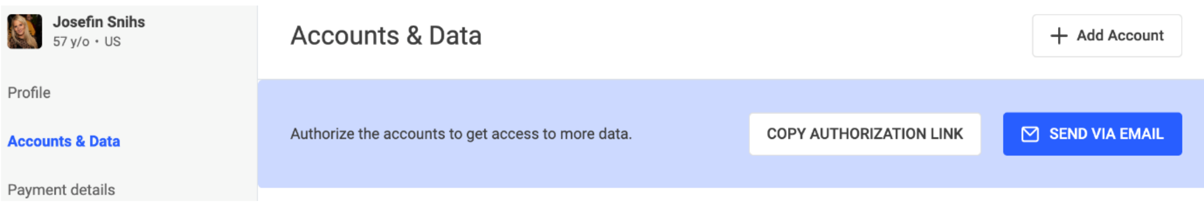
Hover your mouse over the field you'd like to edit, then select the **pencil icon** to edit the field.



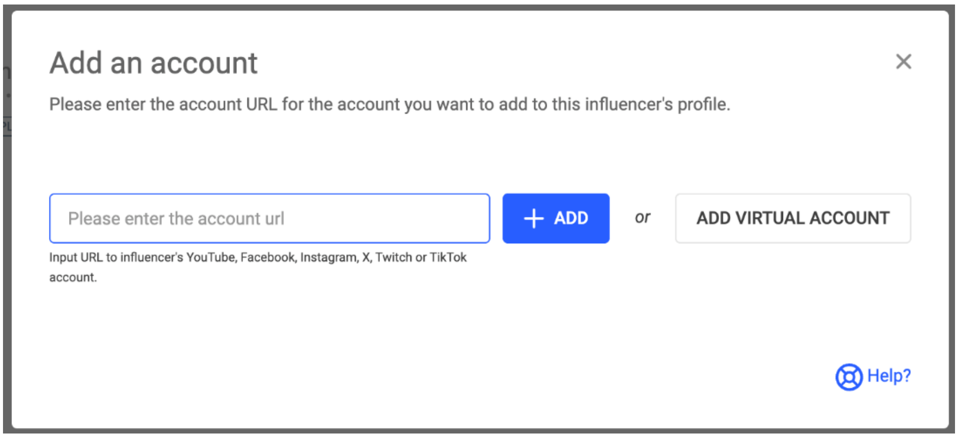
Once you've made the desired changes, exit out of the influencer's profile and the changes will be updated right away.

Adding additional social accounts to influencer profiles

If you need to add additional social accounts to an influencer's profile from the Campaigns tool, you can do so. Find the influencer in your campaign and then click on their influencer card. Then, go to the **Accounts** tab in their profile and click **Add Account.**



Enter the new social media account's URL and click to add it. This will add the account as a non-auth account, and you can track posts and other public data in campaigns.

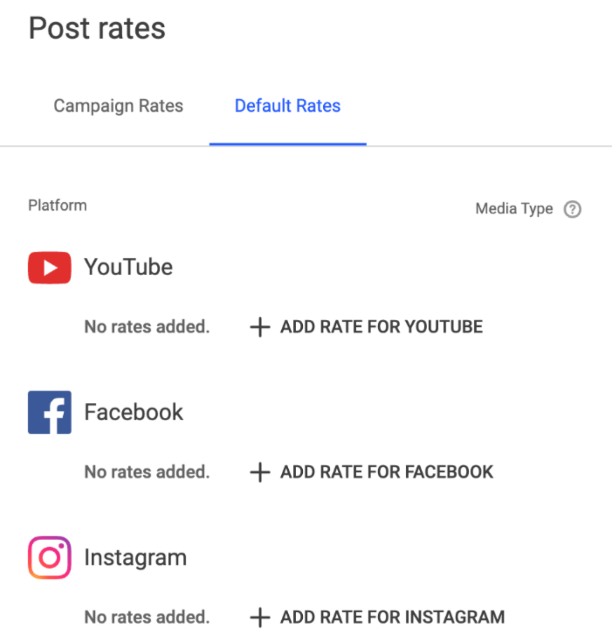


As mentioned above, this process will add the influencer's social media account as non-auth. If you would like to have the influencer authorize their account to pull in additional data to your campaigns (available for YouTube, Facebook, and Instagram accounts), you can send them a link to authorize the account by clicking **Copy authorization link** and messaging it to them.

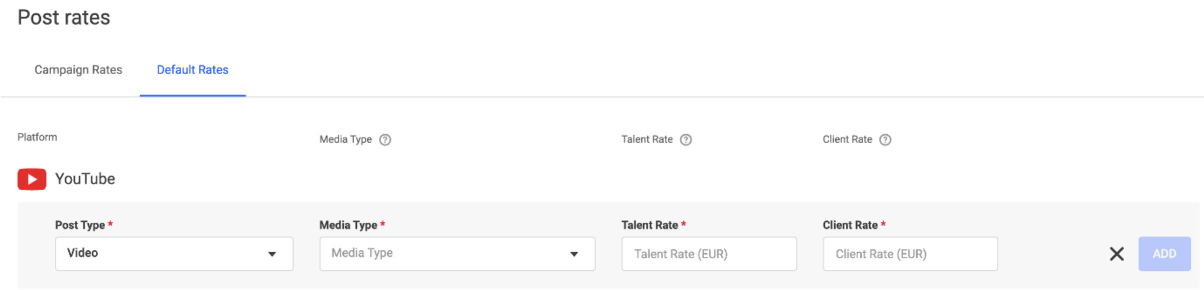
Setting an influencer's post rates for a campaign

To see an influencer's post rates, click into an Influencers profile from the Campaigns tool, then choose **Post Rates**. From here, you will be able to view the influencer's Default Rates or Campaign Rates.

Default rates



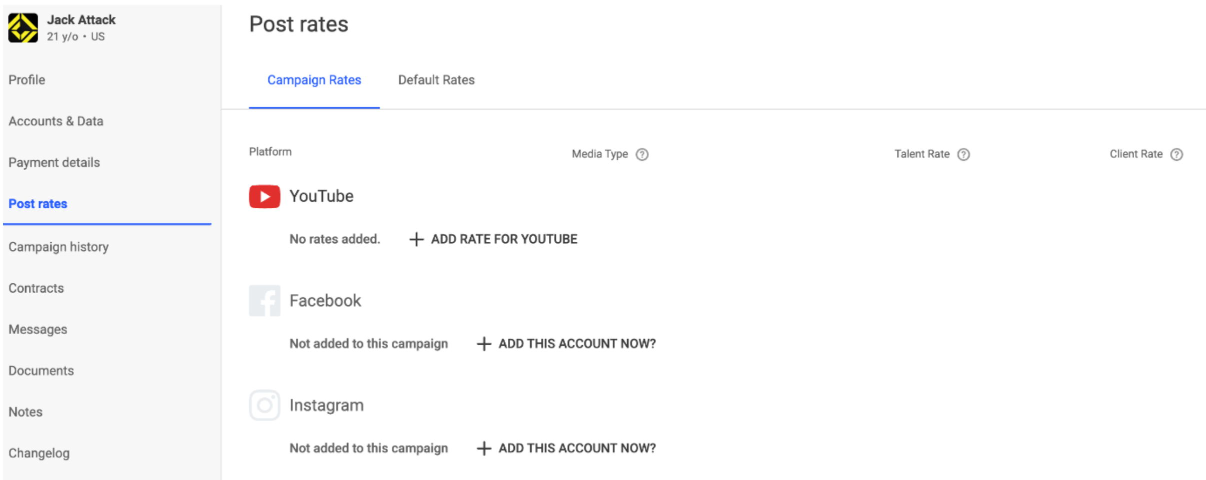
Go to the **Post Rates** tab in an influencer's profile, the **Default Rates** tab. You can input costs for different platforms, media types, and post types by clicking **+ Add Rates** next to a network.



add rate.png"

You will be able to input two different costs — the **Talent Rate** and the **Client Rate** — for the same type of post. The Talent Rate will only be visible to your team, and should be the cost that the influencer charges to post the specific post. The Client Rate is the rate you will be showing and charging the brand, in case your company charges anything on top of what the influencer charges.

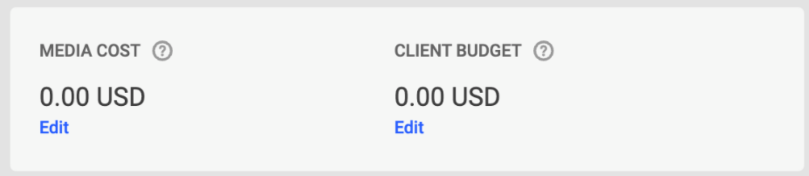
Campaign rates



If you're running a campaign with an influencer, you can apply their rates to the specific campaign so that these are included in the calculation of the total cost for the campaign, as well as of the campaign's ROI, CPV, CPM, and CPE. To do that, navigate to the **Post Rates** tab within the influencer’s profile, and click on the **Campaign Rates** tab where you set new rates that only apply to this campaign.

Editing a campaign's media cost and client budget

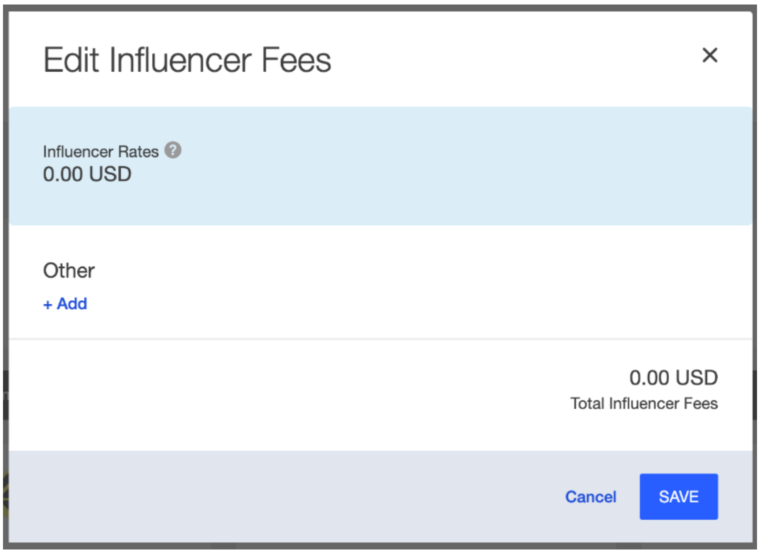
On the right-hand side of the Influencers tab in your campaign, you'll see the total **Media Cost** and **Client Budget**. Media cost is your company's internal cost for the campaign, and the client budget is your client's cost for the campaign. These amounts are made up of the total Influencer Rates and Client Rates, respectively, for the post requirements that you have set for the campaign.

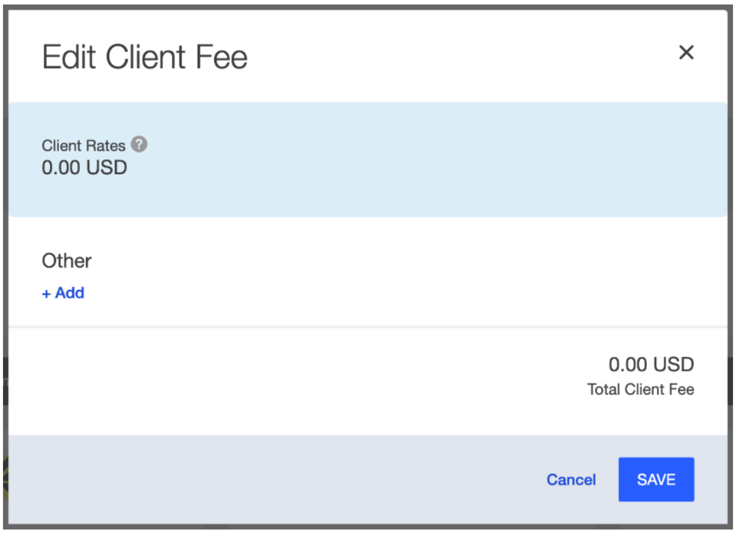


Example breakdown:

- Influencers in campaign: 1
- Post requirements: 2 YouTube videos
- Influencer Rate for a YouTube video: $100
- Client Rate for a YouTube video: $150
- Media Cost = 2 x $100 = $200
- Client Budget = 2 x $150 = $300

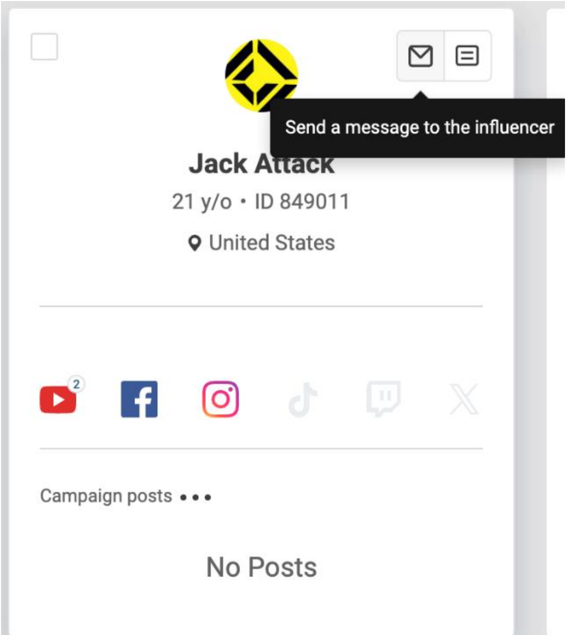
If you haven't set any rates for the influencers in the campaign, or have not specified the post requirements for the campaign, you can still add the total costs by clicking on the **Edit** button below the amounts and add line items. The client budget amount is then used to calculate the campaign's ROI, CPM, CPV, and CPE on the **Report** page.

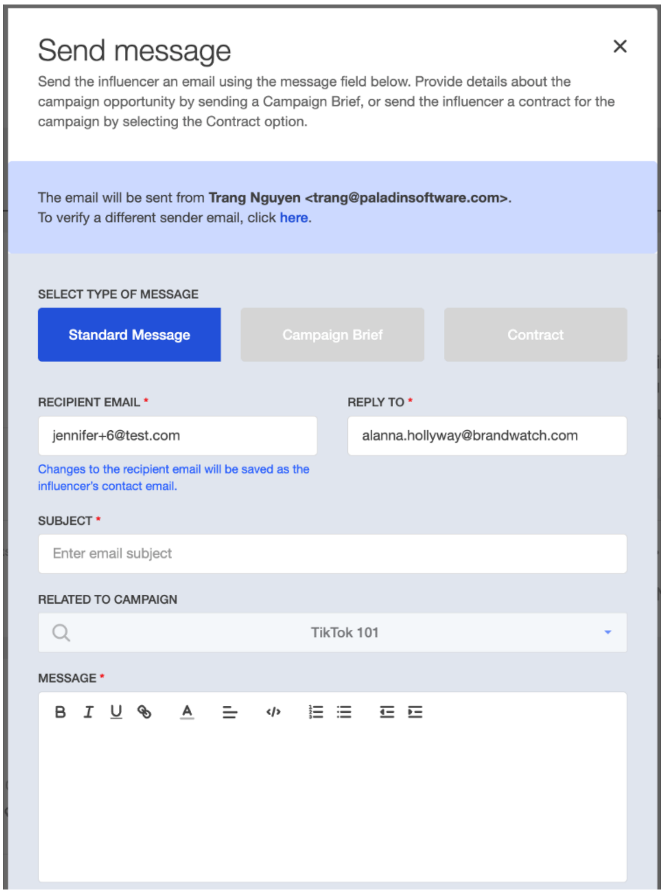




Sending general campaign messages to influencers

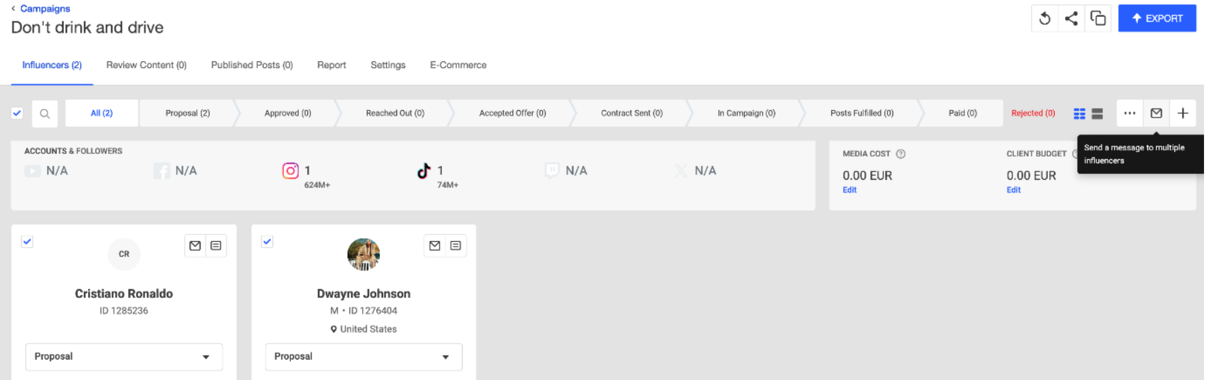
You can message one or multiple influencers at any time from the campaign page. Click the **envelope icon** in the top-right corner of an influencer's card to send them a message individually. In the following message window, select **Standard message** and customize the message as needed before sending.





To message multiple influencers at once, select each influencer's checkbox in the top-left corner of their influencer card from the campaign page, then click the **envelope**

icon in the top-right corner to send your bulk message.



Using Bitly with campaigns

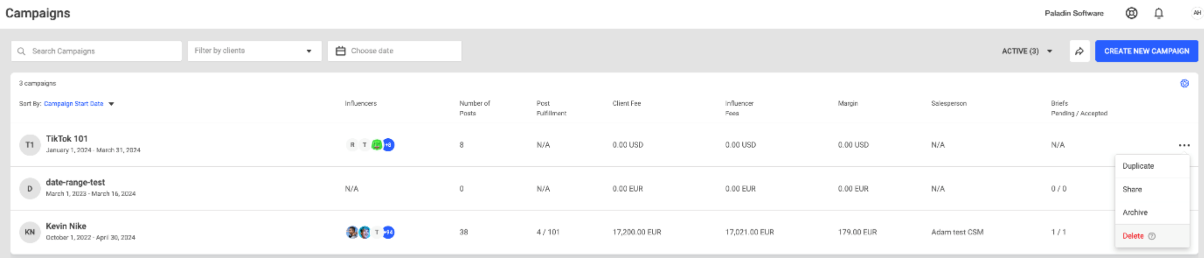
Visit our article on [Connecting Your Bitly Account] to Influence for full instructions.

Using Shopify with campaigns

Visit our article on [Connecting Your Shopify Account] to Influence for full instructions.

Deleting campaigns

In the Campaigns tool, click on the **ellipsis (three dots) button** next to the campaign you would like to delete and select **Delete**.



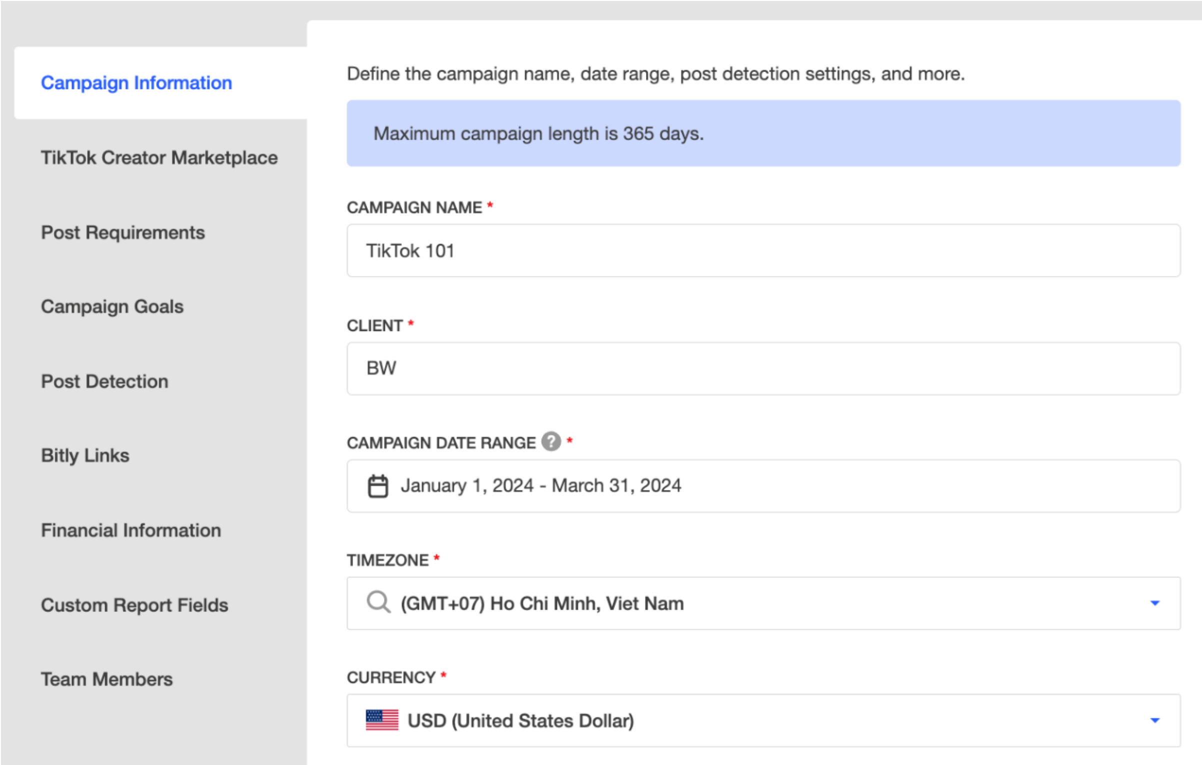
Campaign settings

The **Settings** tab in your campaign allows you to adjust general campaign settings like the campaign name, date range, salesperson, etc., as well as more detailed configurations like [post tracking] keywords, post requirements, financial data, custom fields, Bitly links, and more.

To adjust your campaign settings, navigate to any campaign and select the **Settings** tab from the top menu.

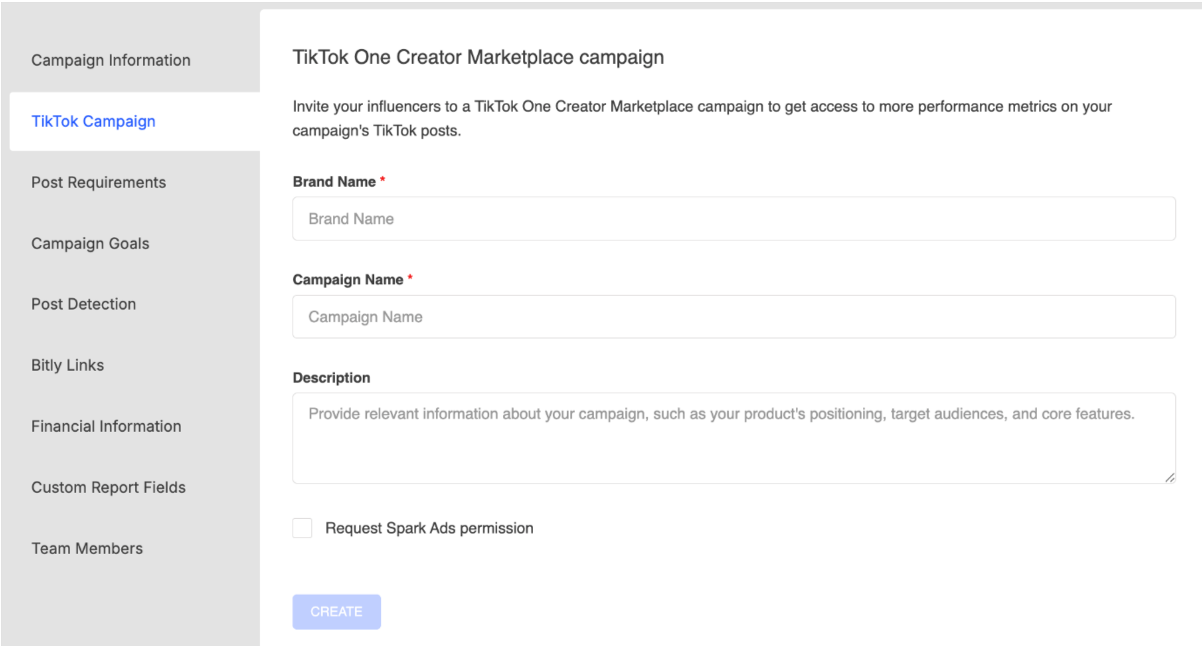
Campaign information

This section allows you to adjust your general campaign information like name, date range, timezone, and more.



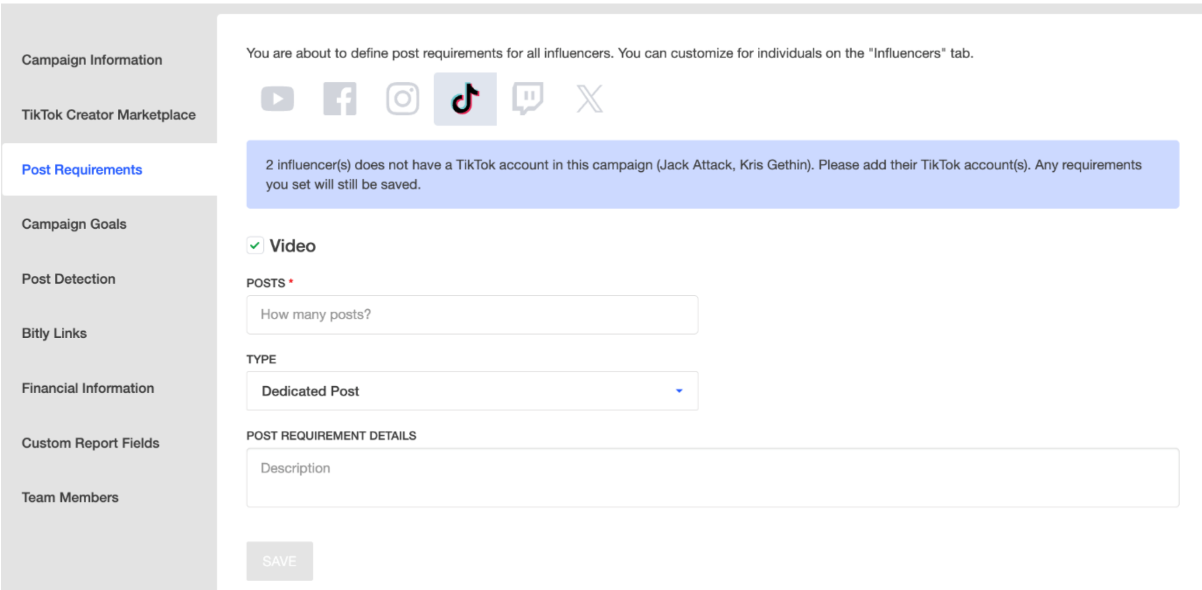
TikTok campaign

Keyword detection is not supported for TikTok account post tracking, so the TikTok campaign section in your Campaign settings allows you to send orders to your influencers with TikTok accounts to track their campaign posts. Learn more about how to set this up in our [Campaign Post Tracking] article.

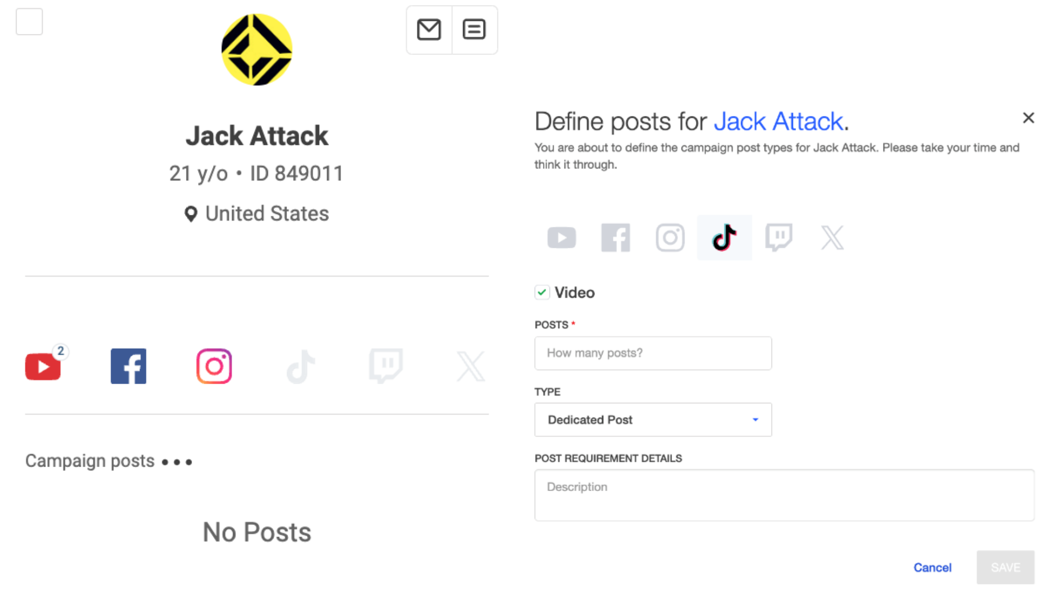


Post requirements

The **Post Requirements** section allows you to input the number and types of posts that the influencers participating in the campaign need to create in order to fulfill the campaign requirements.

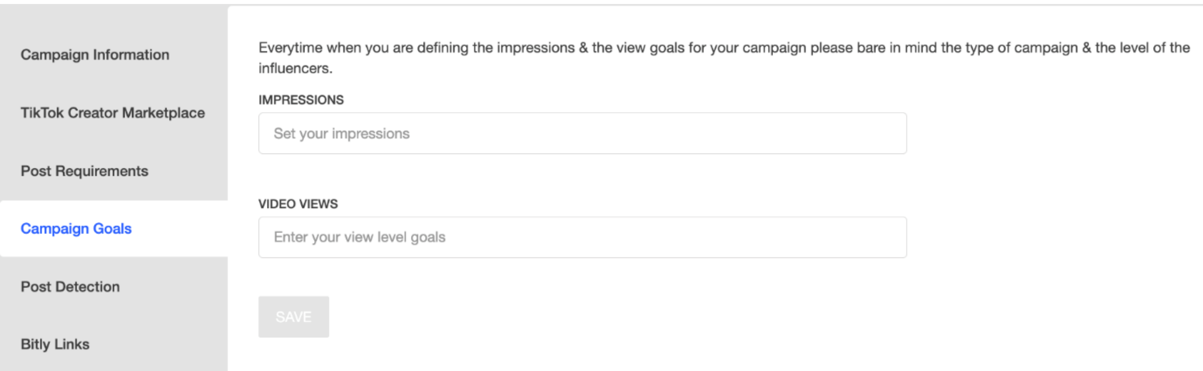


By setting the post requirements in this section, the requirements will apply to all of the influencers participating in the campaign. If you want to set different post requirements for different influencers, navigate to the Influencers tab of the campaign and click on the **ellipsis (three dots) icon** next to the Campaign Posts count, and you will be able to input custom post requirements for that influencer for each social network.



Campaign goals

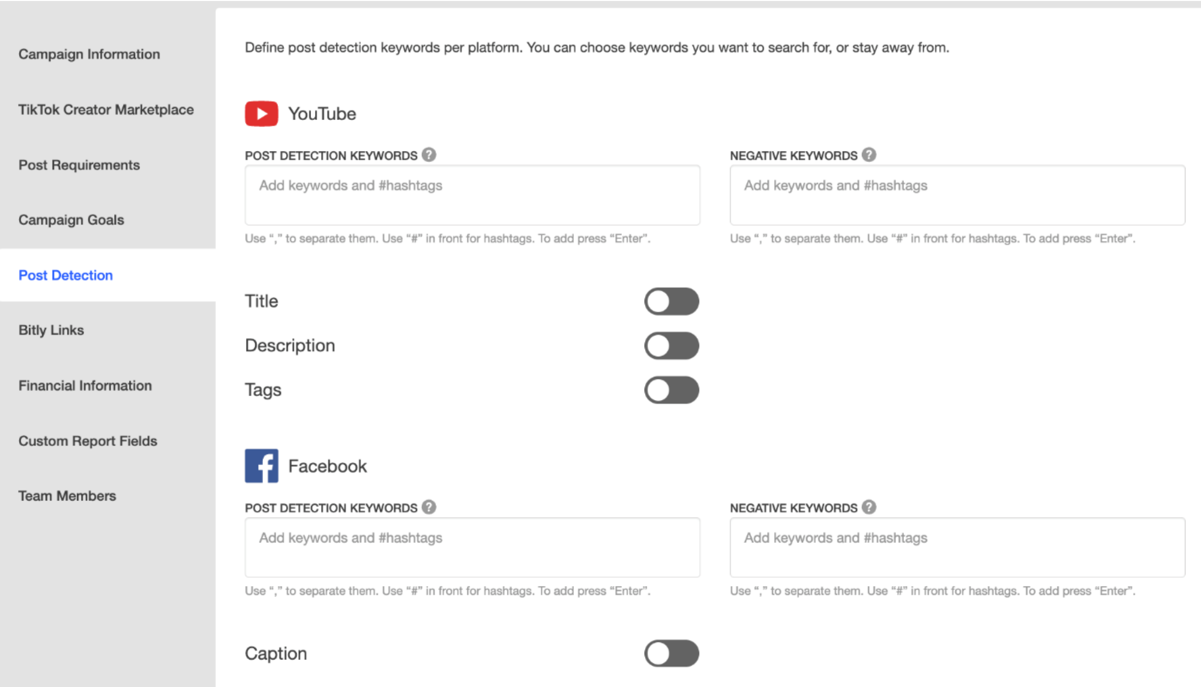
The **Campaign Goals** section of settings allows you to set overall Video View and Impression goals that the campaign has to reach. Available video views and impressions metrics from all posts participating in the campaign will count toward this goal.



You will be able to track the progress of the campaign and how close you and the influencers are to fulfilling your set goals at the top of the campaigns **Report** section.

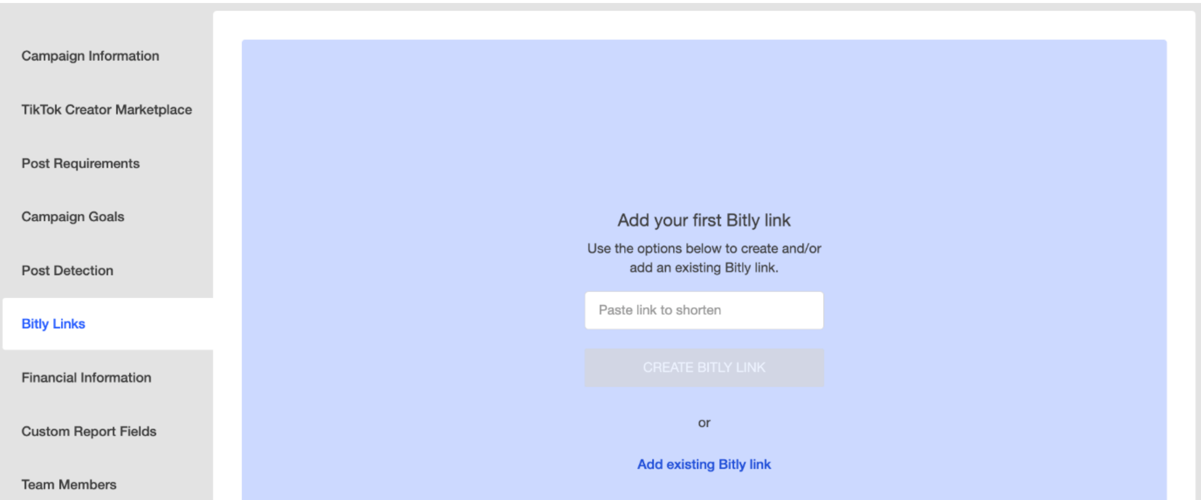
Post detection

Post detection is one of the most important features you will use within campaign settings. To automatically track and pull in campaign posts to our system, simply enter the keywords (including mentions or hashtags if needed) separated by commas. Influence will find the posts with these keywords from the influencers in the campaign within the date range and pull them into our system with their performance data. Learn more about post detection in our [Campaign Post Tracking]() article.



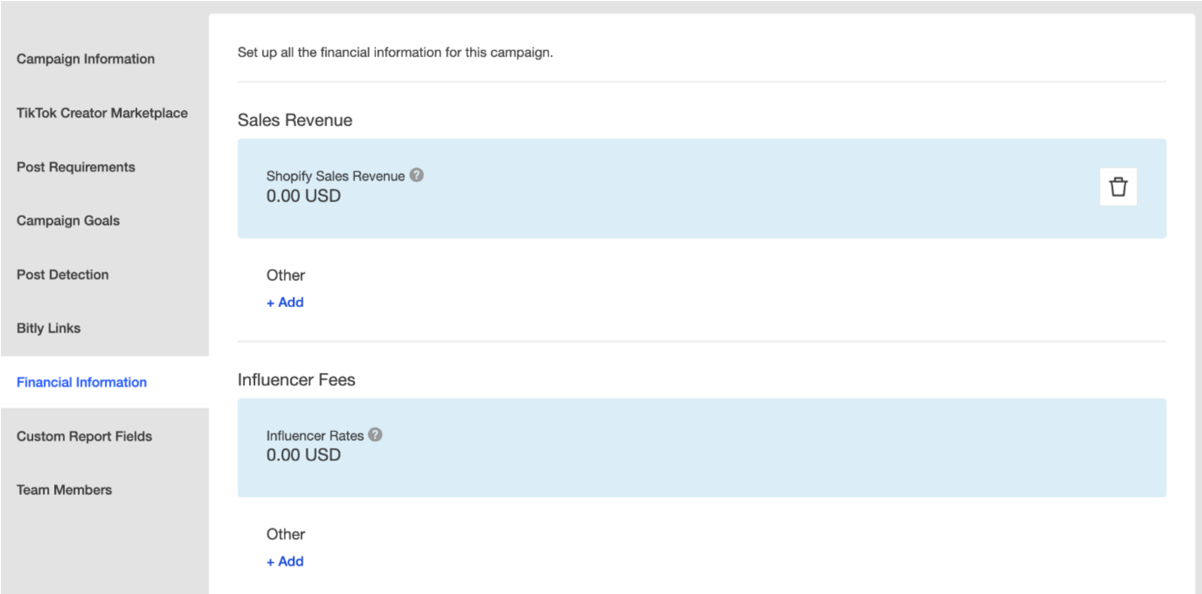
Bitly links

Use the Bitly Links section to easily [connect your Bitly account]() and generate tracking links for Instagram story posts.



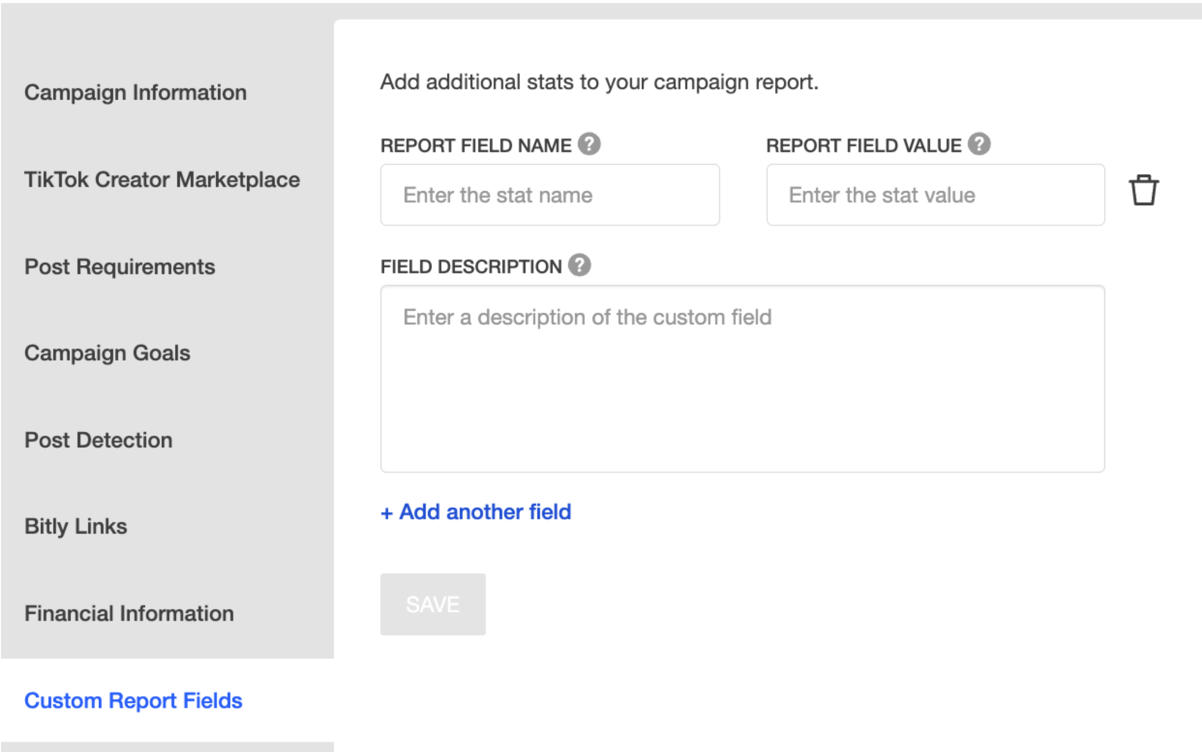
Financial information

Use the Financial Information section to keep track and edit your campaign sales, revenue, influencer fees, and client fees. This information is used to automatically keep track of your client budget, spend, ROI, CPM, CPE, and CPV.



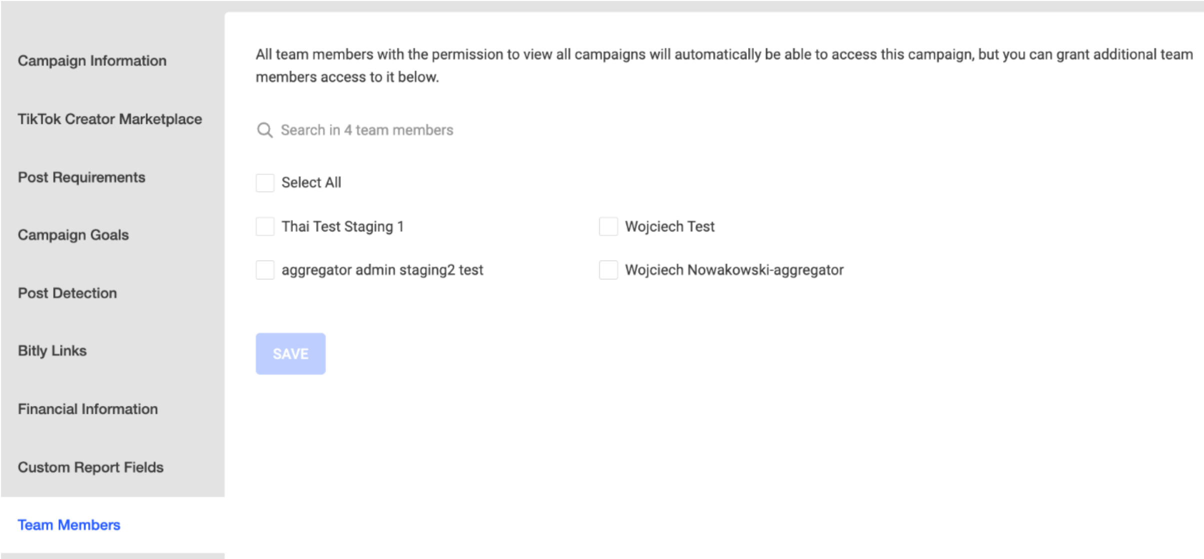
Custom reports fields

The Custom Report Fields section allows you to add custom fields to include additional KPIs, metrics, and data on your campaign reports.



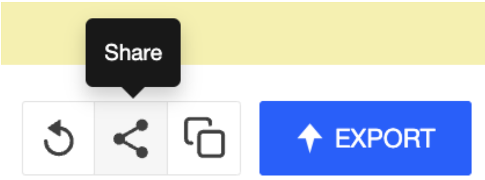
Team members

The Team members section allows you to select which team members in your organization have access to the campaign. You can select individual or all team members using the the checkboxes, or use the search bar to search for team members.

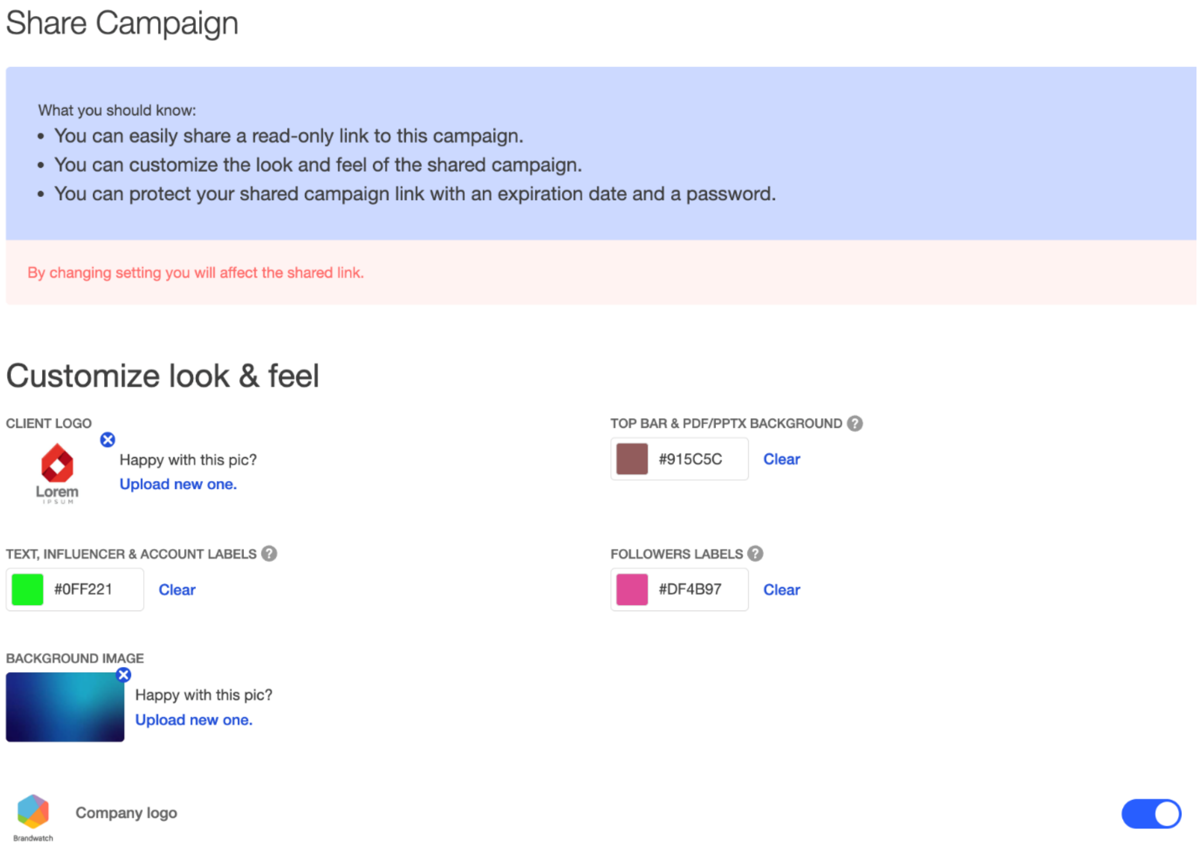


Sharing campaign data

At any moment, you can share your campaign with others by clicking on the **Share** button in the top-right corner of the Campaigns tool.



This feature allows you to share a live link to the Report, Posts, and Influencers sections of the campaign. You can password-protect the link as well as set an expiration date. There are also some customization options available, such as uploading the brand's logo, setting a background color, and hiding certain information that you don't want to share with others.

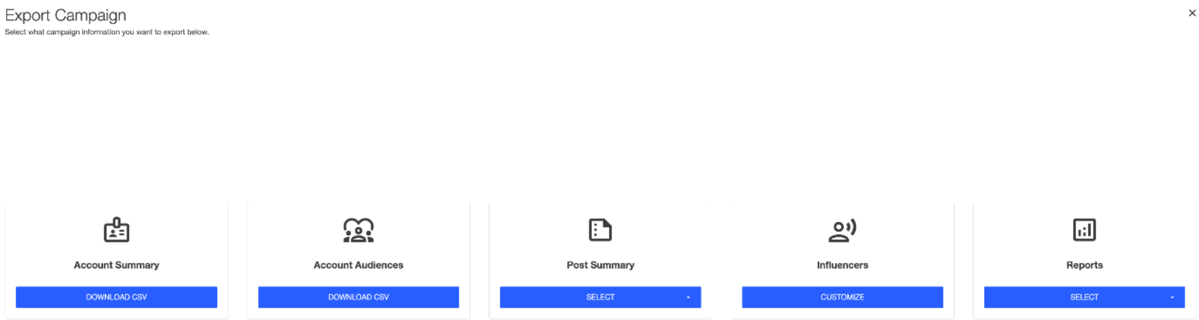


Exporting campaign data

By clicking the **Export** button in the top-right corner of a campaign, you can also download the campaign export.

At this time, you can download the campaign **Account Summary** and **Account Audiences** as a CSV file, and download the campaign **Post Summary**, **Influencers**, and **Reports** as either a CSV file or a customizable PPTX, PDF, or Google Slides. Slide downloads will include a campaign summary slide as well as charts for a variety of metrics depending on the social networks in your campaign, such as Total Engagements, Total Impressions, Total and Average Reels Plays (for Instagram), Total

Video Views and Watch Time, etc.



Note:

Due to limitations of the report size, if your file exceeds 10MB you will not be able to proceed with a PPTX export. As an alternative, you can select **Google Slides** to email yourself the report slides, then edit them in Google slides and export the slides in any format you'd like.