Campaigns Module

Table of Contents

1. [Campaign List 2](#_Toc377301901)
2. [Select Layout 3](#_Toc377301902)
3. [Customize 5](#_Toc377301903)
4. [Review & Send 10](#_Toc377301904)
5. [HTML Editor 13](#_Toc377301905)
6. [View Campaign 14](#_Toc377301906)

# Campaign List

**Functional Description**

This view displays one or more Campaigns in tabular form.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Campaign Name | Link | If Campaign status = Sent, then link to Campaign Analytics page  Otherwise, link to most recent step in the Campaign builder |  |
| Status | Text | Options include:   1. Draft 2. Scheduled 3. Sent |  |
| Sent | Text | Display as number |  |
| Delivery Rate | Text | Display as percentage and number of delivered  Delivered = Sent – Bounces  Example: 98% | 2,400  Percentage = Delivered / Sent |  |
| Open Rate | Text | Display as percentage and number of unique email opens  Example: 50% | 1,200  Percentage = Unique Opens / Delivered |  |
| Click Rate | Text | Display as percentage and number of unique clicks  Example: 50% | 600  Percentage = Unique Clicks / Delivered |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Showing | Dropdown | Filters list of Campaigns depending upon selection  Options include:   1. All Campaigns 2. Draft Campaigns 3. Scheduled Campaigns 4. Cancelled Campaigns 5. Sent Campaigns |  |
| Edit | Icon | Associated with a record  If Status = Draft or Scheduled |  |
| Delete | Icon | Associated with a record  If Status = Draft or Cancelled | Alert: “You’re about to delete 1 campaign. Are you sure you want to delete 1 campaign?”  Buttons: “Delete Campaign” and “Cancel” |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Campaign | Link |  |
| Edit Campaign | Link | If a Campaign is selected, and if the Campaign’s status is Draft or Scheduled |
| View Campaign | Link | If a Campaign is selected, and if the Campaign’s status is Sent |
| Save Campaign As… | Link | If a Campaign is selected  Prompts User for new campaign name and creates a new campaign by copying the existing campaign.  Applies if the ‘Select Layout’ step has been completed |

**Exceptions**

None

**Notes and Issues**

None

# Select Layout

**Functional Description**

This view allows the User to select a layout template or predesigned campaign. Or, the User may begin with a blank campaign or use the HTML editor.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Template Name | Text |  |  |
| Template Thumbnail | Image |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Select Template | Link | When selected, change state of thumbnail | If a Template has been selected and customized, then alert the user that customization and content will be lost.  Alert Message: “This campaign includes customization and content that will be lost by changing the template.”  Buttons: ‘Change Template & Lose Content’ or ‘Cancel’ |
| Preview Template | Link | When selected, popup a preview of the template |  |
| Layout Filters | Link | Filters list of templates  Options include:   1. All 2. Layouts 3. Predesigned |  |
| Customize | Link | Links to Customize step |  |
| Review & Send | Link | Links to Review & Send step |  |
| Next: Customize | Link | Links to Customize step |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Campaign | Link |  |
| Save Campaign As | Link | Prompts User for new campaign name and creates a new campaign by copying the existing campaign.  Applies if the ‘Select Layout’ step has been completed |
| Send Campaign | Link | Applies if all steps have been completed |

**Exceptions**

None

**Notes and Issues**

1. We need to provide options to start with a blank template and to start in HTML mode. I suggest that the first template be a blank template and then allow the User to select HTML mode on the next step.

# Customize

**Functional Description**

This view allows the User to customize the selected layout by adding or modifying content blocks.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Campaign Name\* | Text | Default value to “Untitled Campaign ([date])”  Example: Untitled Campaign (1/1/2014)  May be modified inline | Must be unique |
| Tag(s) | Textbox | Display existing tags within a textbox and allow new tags to be added within textbox  Use live search pattern to return matches as the user types |  |
| Campaign Content | WYSIWYG | Container with Campaign that can accept drag and drop elements |  |
| **Content Tab** | | | |
| Title | Icon | Titles are similar to Text, but their default state is larger, bold, and centered. |  |
| Text | Icon |  |  |
| Image | Icon | Allow linking from image  Allow |  |
| Image Over Text | Icon | Image above text |  |
| Text & Image | Icon | Text on the left and image on the right |  |
| Image & Image | Icon | Image on the left and text on the right |  |
| Button | Icon |  |  |
| Divider | Icon |  |  |
| Social | Icon | Options to insert social media icons and links |  |
| Sharing | Icon | Options to insert social media sharing or forward-to-a-friend icons and links |  |
| **Design Tab** | | | |
| *Backgrounds Accordion* | | | |
| Outer Background | Color-picker | Background outside of the email table |  |
| Inner Background | Color-picker | Background inside of the email table |  |
| *Borders Accordion* | | | |
| Border Color | Color-picker |  |  |
| Border Style | Dropdown | Options include:   1. None 2. Dotted 3. Dashed 4. Solid 5. Double |  |
| Border Thickness | Dropdown | Options include:   1. Thin 2. Normal 3. Thick |  |
| *Text Accordion* | | | |
| Heading Size |  | Default font size for headings |  |
| Heading Color |  | Default font color for headings |  |
| Font Size |  | Default font size for headings |  |
| Font Color |  | Default font color for headings |  |
| Footer Size |  | Default font size for headings |  |
| Footer Color |  | Default font color for headings |  |
| **Images Tab** | | | |
| Image Thumbnail | Thumbnail | Draggable thumbnail that may be dropped on an Image container |  |
| Image Name | Text |  |  |

**Text Toolbar**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Undo | Icon | Undo one step |  |
| Redo | Icon | Redo one step |  |
| Font Size | Dropdown |  |  |
| Font Type | Dropdown |  |  |
| Font Color | Dropdown with colorpicker |  |  |
| Bold | Icon |  |  |
| Italics | Icon |  |  |
| Underline | Icon |  |  |
| Numbered List | Icon |  |  |
| Bulleted List | Icon |  |  |
| Align Left | Icon |  |  |
| Align Center | Icon |  |  |
| Align Right | Icon |  |  |
| Justify | Icon |  |  |
| Link | Icon | Reveal textbox for link  If selected text matches URL pattern, then prepopulate with URL |  |
| Unlink | Icon | Remove link from selected text |  |
| HTML | Icon |  |  |
| Merge Fields | Dropdown | List of Contact fields that may be merged with the email |  |

**Image Toolbar**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Images Across | Dropdown | Allows the user to determine the number of images contained within a single row.  Users may select 1, 2, 3, or 4 images. |  |
| Link | Icon |  |  |
| Unlink | Icon |  |  |
| Add Caption |  | Adds left-aligned caption below the selected image |  |
| Add Alt Text |  |  |  |
| Add Image | Icon | If images across is less than 4 |  |
| Remove Image | Remove |  |  |

**Divider Toolbar**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Divider Color | Color-picker |  |  |
| Divider Style | Dropdown | Options include:   1. None 2. Thin 3. Normal 4. Thick |  |

**Button Toolbar**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Font Size | Dropdown |  |  |
| Font Type | Dropdown |  |  |
| Font Color | Dropdown with colorpicker |  |  |
| Align Left | Icon |  |  |
| Align Center | Icon |  |  |
| Align Right | Icon |  |  |
| Link | Icon | Reveal textbox for link  If selected text matches URL pattern, then prepopulate with URL |  |
| Unlink | Icon | Remove link from selected text |  |
| Background Color | Dropdown with color picker |  |  |
| Border Radius | Dropdown |  |  |
| Padding | Dropdown |  |  |
| Button Width | Dropdown | Options include:   1. Text-width 2. Full-width |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Save Campaign | Button |  |  |
| Back: [Step Name] | Link | Links to one step backwards |  |
| Layout | Link | Links to Layout step |  |
| Customize | Link | Links to Customize step |  |
| Review & Send | Link | Links to Review & Send step |  |
| Next: [Step Name] | Link | Links to one step forwards |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Campaign | Link |  |
| Save Campaign As | Link | Prompts User for new campaign name and creates a new campaign by copying the existing campaign. |
| Send Campaign | Link | Applies if all steps have been completed |

**Exceptions**

None

**Notes and Issues**

1. When creating or editing links, provide an option to configure Link Actions—just like in Automation. Link Actions include the following (Note: Users may apply multi-select or apply multiple actions to the same link):
   1. Add a tag
   2. Remove a tag
   3. Adjust Lead Score
   4. Update a field
   5. Notify a User or Team
2. If Link Actions are applied, then automatically create a workflow that contains just that email.
3. Images Tab displays previously-uploaded images

# Review & Send

**Functional Description**

This view allows the User to configure, review, and send the Campaign.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Campaign Name\* | Textbox | Default value to “Untitled Campaign ([date])”  Example: Untitled Campaign (1/1/2014) | Must be unique |
| Tag(s) | Textbox | Display existing tags within a textbox and allow new tags to be added within textbox  Use live search pattern to return matches as the user types |  |
| From\* | Dropdown | List of verified email addresses of Users  Include User’s name and email address |  |
| To\* | Textbox | Use live search pattern as the user types.  Valid entries are tags and saved searches. |  |
| Campaign Subject\* | Textbox |  |  |
| Social (Accordion) | | | |
| Post to Facebook | Checkbox | Display if User has connected their Facebook account |  |
| Post as | Checkbox | Reveal if ‘Post to Facebook’ is selected  Display one checkbox for each profile/page managed by the User |  |
| Post | Textarea | Reveal if ‘Post to Facebook’ is selected  Populate with the first 300 characters of the email text |  |
| Preview Thumbnail | Thumbnail | Reveal if ‘Post to Facebook’ is selected  Allow user to select from images within the Campaign |  |
| Preview Subject | Text | Reveal if ‘Post to Facebook’ is selected  Text equals the Campaign Subject |  |
| Preview Post | Text | Reveal if ‘Post to Facebook’ is selected  Initially populate with the first 300 characters of the email text  Update text to equal Post (if populated) |  |
| Preview Credit | Text | Reveal if ‘Post to Facebook’ is selected  SmartTouch URL (TBD) |  |
| Tweet on Twitter | Checkbox | Display if User has connected their Twitter account |  |
| Tweet | Text area | Reveal if ‘Post to Twitter is selected |  |
| Character Count | Text | Reveal if ‘Post to Twitter is selected |  |
| Review Campaign (Accordion) | | | |
| Campaign Preview | Preview |  |  |
| Send a test email | Textbox | Allow sending to Users and other email addresses |  |
| Status | Radio Buttons | Options include:   1. Draft (default) 2. Send Now 3. Schedule |  |
| Send Date | Date Picker | When selected, default to the current month | Date is greater than or equal to today |
| Send Time | Time Picker | When selected, default to 1 hour from now  Quarter-hour increments (0, 15, 30, or 45) | Date AND Time is greater than or equal to 30 minutes from now |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Connect to Facebook | Button | Display if User has not connected their Facebook account |  |
| Connect to Twitter | Button | Display if User has not connected their Twitter account |  |
| Computer | Button | Toggles the email container |  |
| Tablet | Button | Toggles the email container |  |
| Mobile | Button | Toggles the email container |  |
| Send Test Email | Button |  |  |
| Back: [Step Name] | Link | Links to one step backwards |  |
| Layout | Link | Links to Layout step |  |
| Customize | Link | Links to Customize step |  |
| Review & Send | Link | Links to Review & Send step |  |
| Next: [Step Name] | Link | Links to one step forwards |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Campaign | Link | If Status = ‘Draft’ |
| Save Campaign As | Link | Prompts User for new campaign name and creates a new campaign by copying the existing campaign. |
| Send Campaign | Link | Applies if all steps have been completed and Status = ‘Send Now’  Replace ‘Save Campaign’ button |
| Schedule Campaign | Link | Applies if all steps have been completed and Status = ‘Schedule’  Replace ‘Save Campaign’ button |

**Exceptions**

None

**Notes and Issues**

None

# HTML Editor

**Functional Description**

This view allows the User to create a campaign by pasting or writing HTML code.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| HTML | Textarea |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Save Campaign | Button |  |  |
| Back: [Step Name] | Link | Links to one step backwards |  |
| Layout | Link | Links to Layout step |  |
| Customize | Link | Links to Customize step |  |
| Review & Send | Link | Links to Review & Send step |  |
| Next: [Step Name] | Link | Links to one step forwards |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Campaign | Link |  |
| Save Campaign As | Link | Prompts User for new campaign name and creates a new campaign by copying the existing campaign. |
| Send Campaign | Link | Applies if all steps have been completed |
| Schedule Campaign | Link |  |
| Preview Campaign | Link | Popup preview of Campaign using code in HTML text area |

Rescinded

**Exceptions**

None

**Notes and Issues**

None

# View Campaign

**Functional Description**

This view allows the User to view a campaign that has been Sent.

**Fields**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Name | Type | | Additional Information | Validation |
| Campaign Name | Dropdown | | Display Workflow Name as text with an adjacent icon to dropdown other Workflows |  |
| Time Period | Dropdown | | Options include:   1. All (default) 2. Last 30 days 3. Last 60 days 4. Last 90 days 5. Custom |  |
| Custom Time Period | Date Pickers | | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates |  |
| **Engagement** | | | | |
| Open Rate | Text | Display as percentage and number of unique email opens  Example: 50% | 1,200  Percentage = Unique Opens / Delivered | |  |
| Click Rate | Text | Display as percentage and number of unique clicks  Example: 50% | 1,200  Percentage = Unique Clicks / Delivered | |  |
| **Deliverability** | | | | |
| Sent | Text |  | |  |
| Bounced | Text | Display as number | |  |
| Delivered | Text | Display as number  Delivered = Sent - Bounces | |  |
| **Churn** | | | | |
| Unsubscribed | Text | Display as number | |  |
| Complaints | Text | | Display as number |  |
| **Most Popular Links** | | | | |
| Link Description | Text | | Link text or alt text |  |
| Link | Link | |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Back to list | Link | Returns user to Campaign List |  |
| Time Period\* | Dropdown | Options include:   1. All (default) 2. Last 30 days 3. Last 60 days 4. Last 90 days 5. Custom |  |
| Custom Time Period | Date Pickers | If Time Period = Custom, then display Custom Time Period  Allows user to select a range of dates | Required if ‘Custom’ is selected as the value for ‘Time Period’ |
| Campaign Name | Dropdown | List of all workflows |  |
| View Contacts | Link or Button | Link or button (possibly with dropdown) to Contact List containing Contacts.  If dropdown, options may include: Opened, Clicked, Bounced, Unsubscribed, Complained, Delivered, and Sent to |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Campaign | Link |  |
| Save Campaign As… | Link | Prompts User for new campaign name and creates a new campaign by copying the existing campaign. |

**Exceptions**

None

**Notes and Issues**

None