



5 Ways to Get the Most from Your Trial

Campaign Calendar's powerful drag-and-drop tools allow you to easily **visualize**, **manage** and **share** all of your marketing programs. Its versatility even helps you share "what's happening in Marketing" with the rest of the company. Here's a quick and handy guide to help you get the most out of Campaign Calendar.

FAST SETUP TIPS FOR ADMINS

Campaign Calendar gives you a simple, intuitive way to share your Campaign schedule with your entire Salesforce user base *without* opening the Campaigns tab. Set-up tips:

- Ensure each user has the **"Marketing User"** checkbox enabled.
- Set **"Read"** access on Campaign object for users outside Marketing. This ensures minimum profile permissions.
- Add the **Campaign Calendar** tab to your User's default Applications (Campaigns tab is not required).

Role	Bracket Labs
User License	Salesforce
Profile	System Administrator
Active	☒
Marketing User	☒
Offline User	☒

NOTE: If you enabled new Profiles after your initial installation, you may need to manually enable the appropriate Apex Classes and Visualforce Pages located at the bottom of the profile.

GET YOUR DATA "CALENDAR READY"

With Campaign Calendar, it's easy to schedule new campaigns and exclude perpetual ones. Here are two data-prep steps:

1. Ensure your Campaigns have the standard **Start Date** and **End Date** fields populated. Need help getting started? Try sprucing up your data in bulk fashion by using inline editing:
 - Start by creating a list view of all data with criteria **Start Date = 'null'** or **End Date = 'null.'**
 - If you want to leave historical data aside, add an additional criteria set to further reduce your list. **'Active = True'** (if you keep the Active filter up to date) or Campaign **'Created Date = THIS YEAR.'**
 - Check the boxes in the result set, and mass update selected records with dates. You can also mass update to the approximate month and then easily drag-and-drop to move them around on the calendar.
 - If you have a high volume of Campaigns, you may want to leverage the **Data Loader** to update your **Start** and **End Dates**.
2. Do you have perpetual campaigns? It may not make sense to display every Campaign on the calendar. Two common scenarios include Parent Campaigns and perpetual Web Forms such as your "Contact Us" landing page.
 - Add the **'Exclude from Calendar'** checkbox to the Campaigns page layout.

Filter By Additional Fields (Optional):		
Field	Operator	Value
1. Start Date	equals	
2. End Date	equals	

LEARN MORE

Check it out in the Salesforce
AppExchange.
<http://bit.ly/campcal>

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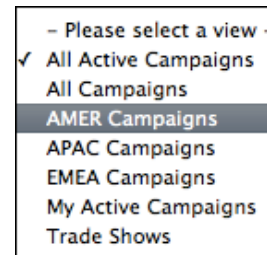
CREATE LIST VIEWS

Whether you are rolling out Campaign Calendar to Marketing or your entire organization, the power of the calendar lies in your List Views. Order your list views according to how your company is organized: By product, geography or channel. List views are a great way to provide selected information that is valuable to specific users. To create:

1. From the Campaigns tab, click **Create New View** and enter **View Name**.
2. Select **All Campaigns**.
3. Add your filter criteria to create subsets of your campaign data. Common criteria include **Type 'equals' Trade Shows** or **Type 'equals' Blog**. Add custom field criteria if you track **Channel**, **Product** or **Region** on your Campaigns.

NOTE: We recommend using 'equals' instead of 'contains' for better results.

4. Select **Fields to Display**. The calendar does not use this selection, so either skip it or customize it to your liking.
5. **Restrict Visibility**. This is a powerful step that makes the calendar relevant to the user. By selecting '**Visible to Certain Group of Users**,' you can display views based on a user's **Role** or **Group**.

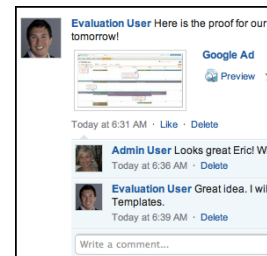


CHATTER

Campaign Calendar leverages Chatter to make it easy for your team to collaborate on Campaigns. With Chatter enabled, you can upload content, including sample emails, press releases and blogs to your Campaign Calendar. Campaign Calendar also includes a personal Chatter update box in the upper right hand corner. This lets you update your own Chatter feed to notify your followers (as opposed to Campaign followers) about items that occur to you as you review the Calendar. To set-up:

1. Navigate to **Setup | Customize | Chatter | Feed Tracking**
2. Select the Campaign object and check **Enable Feed Tracking**.
3. Select the fields that are relevant to your organization such as **Start** and **End Dates**, **Status**, etc.

With **Campaign Feed Tracking** enabled, the calendar will automatically track changes. Click on any campaign in Campaign Calendar to **Show/Hide** an individual Campaign feed, and follow only those that interest you.

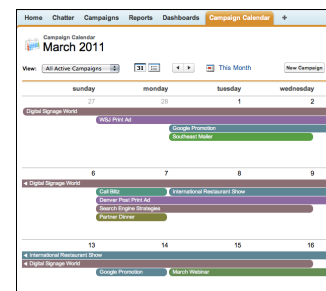


USE CAMPAIGN CALENDAR AS A NEW TRAFFIC BOARD

Do you remember monitoring your campaigns on a white board in your company's meeting room? A great tool for communicating status, but a truly messy and painful process to keep current. With Campaign Calendar, those days are over. Now you can simply project your calendar at marketing team meetings.

Using Campaign Calendar "real-time" in meetings lets everyone clearly see all activities. The team can note what's going to happen that month, recognize potential roadblocks, share updates and needs for all team members. In other words, boost productivity by spending meeting focused on top priorities and upcoming campaigns. Here's a sample meeting flow using Campaign Calendar:

- **Project** the marketing calendar, starting with the current month's campaigns.
- **Filter** the calendar according to each team member's responsibility as they provide current status.
- **Review** campaign collateral, budgets, resource scheduling and roadblocks, updating Chatter with current status.
- **Look ahead**, making necessary scheduling changes with drag-and-drop.
- **Schedule** newly planned campaigns by clicking on start dates.



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