



Quick Campaigns

Quick Campaigns in Dynamics 365 are frequently used to connect with customers through both routine and targeted marketing activities. In this course we will focus on creating a targeted email campaign for two different groups. While mostly focused on the marketing functionality this course will touch on other topics such as email templates and the activity view on contact and account records.

COURSE OBJECTIVE: Be able to manage marketing lists and utilize them with Quick Campaigns.

LESSON 1: Components of a Quick Campaign

- Task 1: Identify marketing lists
- Task 2: List the default types of activities available
- Task 3: Find and review email templates

LESSON 2: Create and Manage Marketing Lists

- Task 1: Compare dynamic and static lists
- Task 2: Add and remove members from lists
- Task 3: Discuss importing lists

LESSON 3: Create the Campaign

- Task 1: Compare quick campaign with campaigns
- Task 2: Navigate through the wizard
- Task 3: Check for records