

Marketing Campaigns

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Purpose and when to use this record

Draft, schedule, target, and monitor a store marketing message without losing its delivery history.

At a glance

- **Identify it by:** **Name**, and **From Name**.
- **Check its business context:** **Store**, and **Segment**.
- **Why care:** Store, publication, consent, payment, and fulfillment states affect what customers see and what staff must act on; check the correct store before saving.
- **Why care:** Availability and publication flags affect future use without erasing history. Prefer disabling an obsolete setup record when existing transactions still refer to it.

Before you begin

You need the Brisk permission for the action you are taking on marketing campaigns. If a Create, Edit, or Delete control is absent, do not work around it with another user's account; ask an administrator to review your role.

Have valid **Store** records ready first. Those selections determine where this Marketing Campaign belongs and which later screens can find it.

Create a Marketing Campaign

The Marketing Campaigns create screen in the Brisk documentation demo.

Create a Marketing Campaign after searching for the person, organization, item, location, or resource under alternate names and identifiers. Merge or correct an existing master record instead of creating a duplicate.

1. Select the business context first: **Store**, and **Segment**.
2. Enter the required identifying and operational values: **Store**, **Name**, and **Subject**.
3. Review **Is Active**, **Trigger Type**, and **Channel** deliberately; these choices control availability or workflow rather than merely describing the record.
4. Save the Marketing Campaign, then confirm **Name**, and **From Name** on its detail page before continuing.

After saving: Review delivery results by Sent, Skipped, and Failed, and correct audience or consent problems before sending another campaign.

Delete a Marketing Campaign

Delete this Marketing Campaign only if it is an unused duplicate or setup mistake. Once other records refer to it, preserve that history and make the value inactive when the screen provides that option.

If the record is merely obsolete, use **Is Active** to remove it from future use while preserving existing references.

Before confirming, check for related **Campaign Deliveries**. Brisk may refuse deletion when another record depends on this one; resolve the duplicate or use the supported correction workflow instead of breaking the trail.

On the confirmation page, verify **Name**, and **From Name**. After confirmation, return to the Marketing Campaigns list and make sure only the intended Marketing Campaign was removed.

Review Marketing Campaign details

Use the detail page as the shared record of what this Marketing Campaign currently means. Verify **Is Active**, **Trigger Type**, **Channel**, **Win Back Inactive Days**, and **Total Sent** before relying on it for a decision.

Follow **Store**, and **Segment** to determine whether the issue is on this Marketing Campaign or on one of those linked records.

Next check: Review delivery results by Sent, Skipped, and Failed, and correct audience or consent problems before sending another campaign.

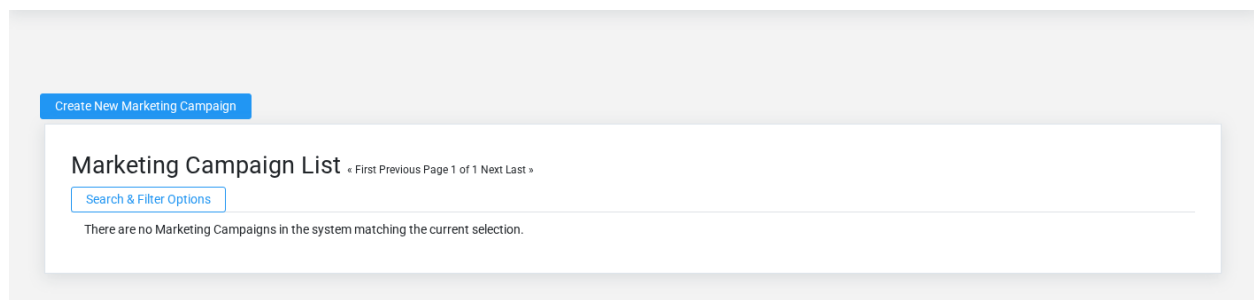
Edit an existing Marketing Campaign

Edit this Marketing Campaign to keep the same real-world party, item, location, or resource accurate. Do not repurpose it for a different entity after activity is attached.

1. Open the detail page. Compare **Store**, and **Segment** with the supporting document or approved request.
2. Recheck **Is Active**, **Trigger Type**, **Channel**, **Max Sends Per Customer**, **Win Back Inactive Days**, and **Total Sent**. These values are most likely to change storefront visibility, customer communication, payment, or fulfillment.
3. Save the change, return to the list, and confirm that the Marketing Campaign now appears under the expected **Is Active**, **Trigger Type**, **Channel**, and **Win Back Inactive Days**.

After the change: Review delivery results by Sent, Skipped, and Failed, and correct audience or consent problems before sending another campaign.

Find and review marketing campaigns



The Marketing Campaigns list screen in the Brisk documentation demo.

Use the Marketing Campaigns list to find the correct record before opening or changing it. Compare **Name**, and **From Name**. Records with similar names or numbers can still belong to different **Store**, and **Segment**.

- Keyword search checks **Name**, **Slug**, **Subject**, and **Description**.
- Narrow the list with **Store**, and **Segment** filters.
- The initial order emphasizes **Name**. Select a column heading when you need a different comparison.

Open the Marketing Campaign whose **Name**, and **From Name** match the task. If it is missing, clear the list filters and recheck **Store**, **Segment**, **Is Active**, **Trigger Type**, **Channel**, and **Win Back Inactive Days** rather than creating a replacement immediately.

Fields and business rules

Brisk stores 23 user-relevant fields for this Marketing Campaign, including 2 linked-record selections and 2 controlled-choice fields. Create and edit screens may hide calculated or workflow-managed values from this full reference.

Field	Required	What it controls
Store	Yes	The store associated with this marketing campaign.
Segment	No	The segment associated with this marketing campaign.
Name	Yes	Human-readable name for this marketing campaign.
Slug	No	URL-safe identifier for this marketing campaign.
Description	No	Description of this marketing campaign.
Is Active	No	Whether this marketing campaign is active.

Field	Required	What it controls
Trigger Type	No	The trigger type recorded for this marketing campaign. Available values: Welcome Series, Post Purchase, Win-Back.
Channel	No	The channel recorded for this marketing campaign. Available values: Email.
Subject	Yes	The subject recorded for this marketing campaign.
Preview Text	No	The preview text recorded for this marketing campaign.
Body Html	No	The body HTML recorded for this marketing campaign.
Body Text	No	The body text recorded for this marketing campaign.
From Name	No	The from name recorded for this marketing campaign.
Reply To	No	Email address recorded as reply to for this marketing campaign.
Send Delay Minutes	No	The send delay minutes value recorded for this marketing campaign.
Cooldown Days	No	The cooldown days value recorded for this marketing campaign.
Max Sends Per Customer	No	The max sends per customer value recorded for this marketing campaign.
Win Back Inactive Days	No	The win back inactive days value recorded for this marketing campaign.
Utm Source	No	The utm source recorded for this marketing campaign.
Utm Campaign	No	The utm campaign recorded for this marketing campaign.
Last Run At	No	Date and time recorded for last run at on this marketing campaign.
Last Sent At	No	Date and time recorded for last sent at on this marketing campaign.
Total Sent	No	The total sent value recorded for this marketing campaign.

What happens next

Review delivery results by Sent, Skipped, and Failed, and correct audience or consent problems before sending another campaign.

Common mistakes and troubleshooting

- **The record will not save:** Recheck **Store**, **Name**, and **Subject** and any message beside the field. A required related record may also be inactive or unavailable to your role.
- **The record saved but is not available where expected:** Recheck **Is Active**, **Trigger Type**, **Channel**, and **Win Back Inactive Days**, then clear the filters on the destination list. A saved record can still be inactive, unpublished, locked, unapproved, or in the wrong workflow state.
- **The values look right but the result is wrong:** Open **Store**, and **Segment** from the detail page. Correct the specific relationship that is wrong instead of forcing a total or status to compensate for it.

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