

# Using Templates in Campaigns

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You can assign an [existing template](http://aace5.knowledgeowl.com/help/building-a-template) (<http://aace5.knowledgeowl.com/help/building-a-template>) to a campaign. This can help users [recording new leads](http://aace5.knowledgeowl.com/help/creating-leads) (<http://aace5.knowledgeowl.com/help/creating-leads>) to quickly build orders based on the campaign. For an example of how campaigns can help your team, read our [feature highlight](https://www.aacesoft.com/resources/gain-visibility-into-your-marketing-roi-with-aace-newsletters-campaigns) (<https://www.aacesoft.com/resources/gain-visibility-into-your-marketing-roi-with-aace-newsletters-campaigns>).

1. Navigate to **Menu > CRM & Sales > Campaigns**.
2. In the menu bar, click **Edit**.
3. Click the Template field and select from the drop-down list, or click the selector button next to the field.

The screenshot displays the 'Campaigns' interface for a campaign named 'Spring Into Science' with ID 50001. The campaign is currently in a 'PENDING' state. The 'General Info' section includes fields for Type (TV), Manager (Caitlin Nascher), Start Date (01/30/18), and End Date (03/31/18). A dropdown menu for 'Template' is open, showing options 50005, 50004 (Magazine Ad - French Textbook Discount), and 50005 (Technology Promotional). The 'Description' field contains 'Discounts on technology geared towards science programs.' Below this, a table shows 'Leads' (0), 'Goal Total' (0.00), 'Recurring Transactions' (0), and 'Account Value' (0.00). At the bottom, there are tabs for 'Lists' (Gross Profit, Gross Sales) and a table with columns for 'List', 'Type', 'Manager', and 'Status'. The interface includes a top navigation bar with 'New', 'Edit', 'Delete', 'Print', and 'Actions' buttons, and a bottom bar with 'Cancel' and 'Save' buttons.

4. Fill in the rest of the Campaign and click **Save**, then when prompted by the dialog box click **Open** to open the campaign.
5. When users assign a campaign to an order, the line items from the template automatically fill in the line items for the new order.

New Edit Delete Print Actions
Record: 10 of 10

Order: 50049
Technology Promotional

01/30/18
PENDING

Sales Order
Management
Job Costs & Approvals

Notices Emails Docs

**Bill To**

Customer (Bill To) >  Contact >

A/R Balance >  Credit Available  Rate Card >

Sales Rep >  Customer PO #  Billing Terms  Disc %

**Ship To**

Ship To Company >  Use Bill To  Ship To Contact >

Delivery Type  Courier Service

Courier Account #  Shipping Terms  FOB

**Activities & Comments**

**Description**

**Additional Info**

**Order Items** Build Items from Template:

Type	Line Item Code	Description	Invtry	Alts	Upps	Cases	Quantity	BO	Unit Price	Adjustment	Extended Price	Total	Tax Profile
1 >	Technology Tech-001a	Electronic Whiteboard	0	1	0	0.2	1		5,000.00	-10.00%	4,500.00	4,500.00	DEF
2 >	Technology Tech-001c	Electronic Whiteboard Pens /	0	0	0		3		24.99	-5.00%	23.7405	71.22	DEF
3 >	Technology Tech-001b	Whiteboard Stand	0	0	0		1		149.99	-15.00%	127.4915	127.49	DEF
4 >	Technology Tblt-1	Student tablet	50	0	0		30		336.00	-7.00%	312.48	9,374.40	DEF

**Sales / Fulfillment**

Campaign >  Type  Account Manager >  Referral Company >

Lead >  Sales Priority >  Job >  Fulfillment Priority >  Start Date  End Date

Subtotal

Adjustment

**Total 13,874.40**

Shipping   *PSO*

Tax    *Exempt*

**Grand Total 13,874.40**

Payment Due

Dept  Assigned By  Assigned To  Tracking Status  Cancel Save

6. The transaction is now linked and tracked against the campaign.