Campaign Report

Report Module Guide: Campaign Report

Module Location

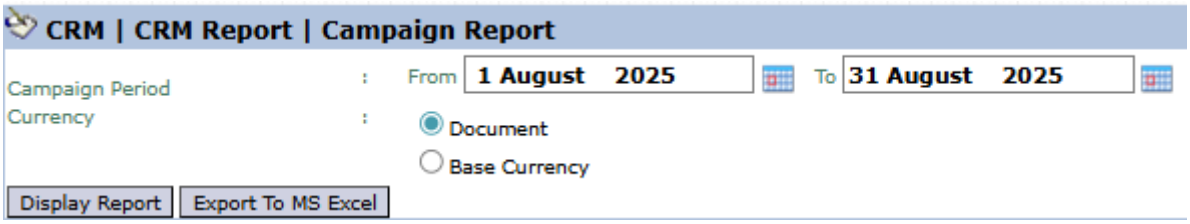
CRM > CRM Report > Campaign Report

Module Objective

The **Campaign Report** module is used to generate a report that summarizes all marketing campaigns or promotional events based on a specific time period. This report is used to review promotional activities that have been or are currently running, including a summary of their budgets and costs.

1. Report Parameters

The main page of this module is a simple form containing several parameters to customize the report that will be generated.



Here is an explanation for each parameter:

- **Campaign Period**:
  - Specify the **From** and **To** date range to display all campaigns that were active within that period (e.g., August 1, 2025, to August 31, 2025).

- **Currency**:
  - Choose how currency values will be displayed in the report.
  - **Document**: Displays values in the original currency used when creating the campaign document.
  - **Base Currency**: Converts all values to the company's base currency.

2. Steps to Generate the Report

Step 1: Set Report Parameters

Define the **Campaign Period** range and select the **Currency** option you want.



Step 2: Generate the Report

After all parameters are set, click one of the two buttons in the bottom-left section of the page:

- **Display Report**: To preview the campaign report directly on your screen.



- **Export To MS Excel**: To download the report data in an Excel file format.



Workflow & Integrated Business Process

This report pulls its data from the **Campaign Management Module**. To get an accurate report, ensure all campaign details, especially budgets and cost allocations, have been entered correctly.

Tips & Important Notes

- Use this report at the end of each month to review all promotional activities that have taken place.
- This report is an effective tool for the **Marketing and Sales teams** to measure the **Return on Investment (ROI)** of the promotional activities they have conducted.

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