

# Campaign Report

## Report Module Guide: Campaign Report

### Module Location

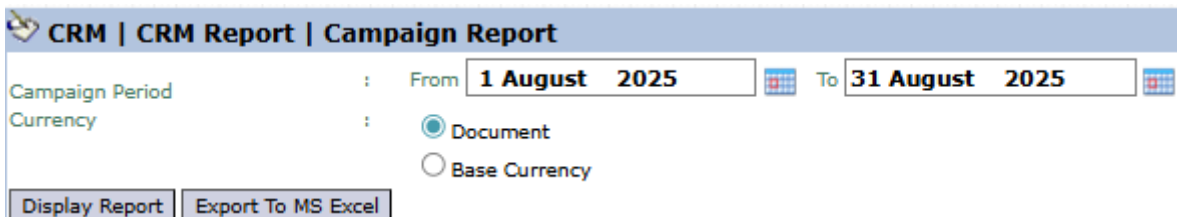
CRM > CRM Report > Campaign Report

### 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.



The screenshot shows a web form titled "CRM | CRM Report | Campaign Report". It contains the following fields and controls:

- Campaign Period:** A label followed by a colon and the text "From". To the right is a date input field containing "1 August 2025" with a calendar icon. To the right of this is the text "To" followed by another date input field containing "31 August 2025" with a calendar icon.
- Currency:** A label followed by a colon. To the right are two radio button options: "Document" (which is selected) and "Base Currency".
- Buttons:** At the bottom left are two buttons: "Display Report" and "Export To MS Excel".

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.

Campaign Period : From  To

Currency :  Document  
 Base Currency

### 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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