

# How-To: Create a New Campaign




This guide provides a straightforward process for creating a new email campaign in Resident Engagement. By following the steps outlined, users can efficiently set up campaigns that engage qualifying residents and ensure timely communications.

- 1 Navigate to the Resident Engagement platform.

**Note:** Campaigns should be created *after* your email template is complete.

Marketing Admin Test

MARKETING ADMIN



CAMPAIGNS

TEMPLATES

+ Add Campaign

Campaigns

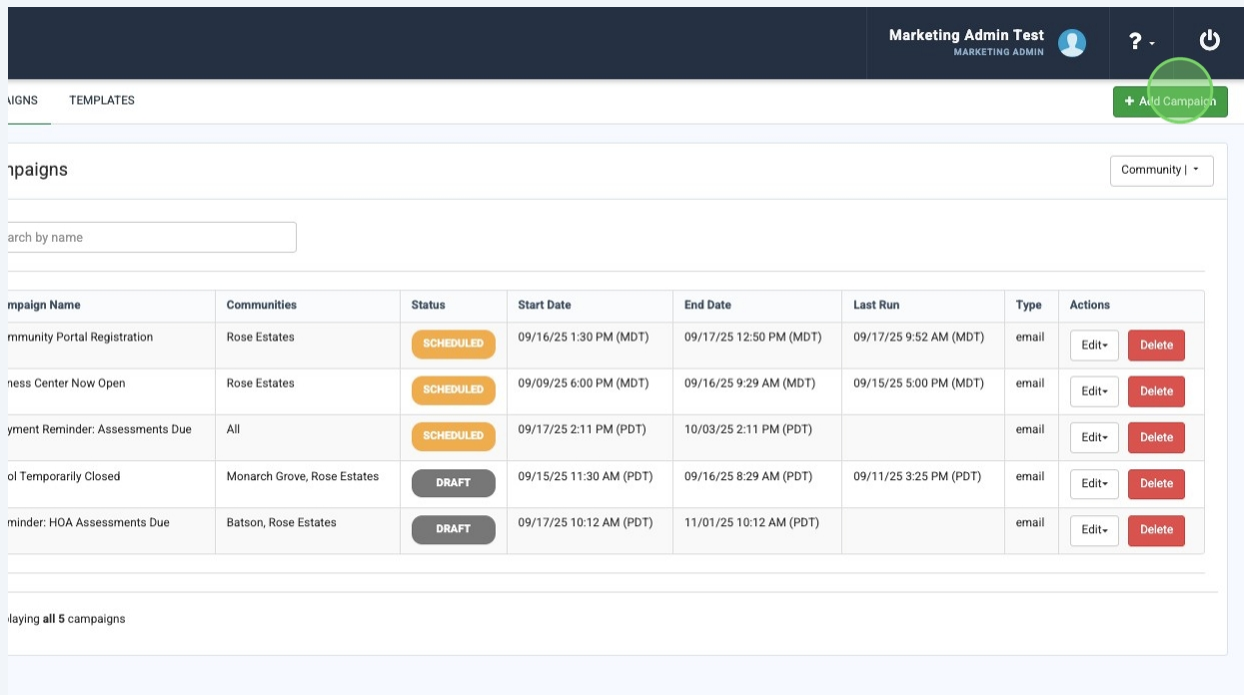
Community |

Search by name

Campaign Name	Communities	Status	Start Date	End Date	Last Run	Type	Actions
Community Portal Registration	Rose Estates	SCHEDULED	09/16/25 1:30 PM (MDT)	09/17/25 12:50 PM (MDT)	09/17/25 9:52 AM (MDT)	email	<div>Edit</div> <div>Delete</div>
Fitness Center Now Open	Rose Estates	SCHEDULED	09/09/25 6:00 PM (MDT)	09/16/25 9:29 AM (MDT)	09/15/25 5:00 PM (MDT)	email	<div>Edit</div> <div>Delete</div>
Payment Reminder: Assessments Due	All	SCHEDULED	09/17/25 2:11 PM (PDT)	10/03/25 2:11 PM (PDT)		email	<div>Edit</div> <div>Delete</div>
Payment Reminder: Assessments Due	All	SCHEDULED	10/02/25 12:47 PM (PDT)	02/02/26 12:47 PM (PST)		email	<div>Edit</div> <div>Delete</div>
Pool Temporarily Closed	Monarch Grove, Rose Estates	DRAFT	09/15/25 11:30 AM (PDT)	09/16/25 8:29 AM (PDT)	09/11/25 3:25 PM (PDT)	email	<div>Edit</div> <div>Delete</div>
Reminder: HOA Assessments Due	Batson, Rose Estates	DRAFT	09/17/25 10:12 AM (PDT)	11/01/25 10:12 AM (PDT)		email	<div>Edit</div> <div>Delete</div>

Displaying all 6 campaigns

## 2 Click "Add Campaign" to start a new email campaign.

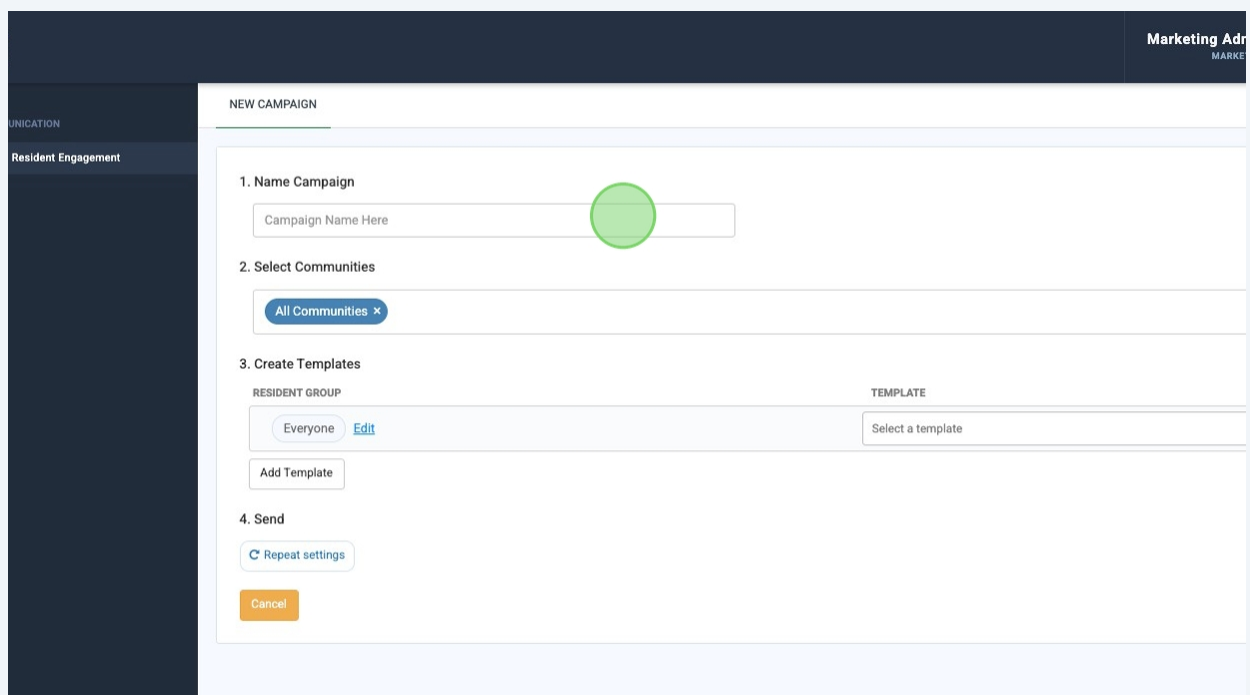


The screenshot shows the Marketing Admin interface. At the top right, there's a header with "Marketing Admin Test", a user icon, a help icon, and a power icon. Below the header, there's a navigation bar with "SIGNS" and "TEMPLATES" tabs. On the right side of the navigation bar, there's a green button labeled "+ Add Campaign" which is highlighted with a green circle. Below the navigation bar, there's a section titled "Campaigns" with a search bar labeled "Search by name". Below the search bar, there's a table with columns: Campaign Name, Communities, Status, Start Date, End Date, Last Run, Type, and Actions. The table contains five rows of campaigns. The first three rows have a status of "SCHEDULED" and the last two rows have a status of "DRAFT". Each row has "Edit" and "Delete" buttons in the Actions column. Below the table, there's a link that says "Viewing all 5 campaigns".

Campaign Name	Communities	Status	Start Date	End Date	Last Run	Type	Actions
Community Portal Registration	Rose Estates	SCHEDULED	09/16/25 1:30 PM (MDT)	09/17/25 12:50 PM (MDT)	09/17/25 9:52 AM (MDT)	email	Edit Delete
Business Center Now Open	Rose Estates	SCHEDULED	09/09/25 6:00 PM (MDT)	09/16/25 9:29 AM (MDT)	09/15/25 5:00 PM (MDT)	email	Edit Delete
Payment Reminder: Assessments Due	All	SCHEDULED	09/17/25 2:11 PM (PDT)	10/03/25 2:11 PM (PDT)		email	Edit Delete
Pool Temporarily Closed	Monarch Grove, Rose Estates	DRAFT	09/15/25 11:30 AM (PDT)	09/16/25 8:29 AM (PDT)	09/11/25 3:25 PM (PDT)	email	Edit Delete
Reminder: HOA Assessments Due	Batson, Rose Estates	DRAFT	09/17/25 10:12 AM (PDT)	11/01/25 10:12 AM (PDT)		email	Edit Delete

## 3 Click on the "Campaign Name Here" field to enter a name for your campaign.

**Note:** The campaign name will also appear as the email subject line seen by residents. Be sure to choose a clear and appropriate name.



The screenshot shows the "NEW CAMPAIGN" form in the Marketing Admin interface. The form is divided into four sections: 1. Name Campaign, 2. Select Communities, 3. Create Templates, and 4. Send. In the "1. Name Campaign" section, there's a text input field labeled "Campaign Name Here" which is highlighted with a green circle. In the "2. Select Communities" section, there's a button labeled "All Communities x". In the "3. Create Templates" section, there's a "RESIDENT GROUP" section with a dropdown menu showing "Everyone" and an "Edit" link, and a "TEMPLATE" section with a dropdown menu labeled "Select a template". There's also an "Add Template" button. In the "4. Send" section, there's a "Repeat settings" button and a "Cancel" button.

4

Click the dropdown menu under **"Select Communities"** to choose which communities you'd like to target.

**Note:** By default, **'All Communities' is automatically selected** when creating a new campaign. Be sure to update this if you want to target specific communities only.

The screenshot shows a 'NEW CAMPAIGN' form with the following structure:

- 1. Name Campaign**: A text input field containing 'Payment Reminder: Assessments Due'.
- 2. Select Communities**: A dropdown menu showing 'All Communities' with a green circle highlighting it.
- 3. 1213 Bluebird Test**: A list of community names including 'Accounting BE Test', 'Arizona Gates', 'Barbara DH', 'Batson', 'Beacon Street', 'Bent Creek Trial', 'Berryhill\_QA', and 'Blue Oak'.

The left sidebar shows 'COMMUNICATION' and 'Resident Engagement'.

5

By default, the email campaign will target **"Everyone"**—meaning all residents in the selected communities above will receive the email.

To target specific resident groups instead, click **"Edit"** and choose your desired groups.

COMMUNICATION

Resident Engagement

NEW CAMPAIGN

1. Name Campaign

Payment Reminder: Assessments Due

2. Select Communities

All Communities x

3. Create Templates

RESIDENT GROUP	TEMPLATE
Everyone <a href="#">Edit</a>	Select a template

Add Template

4. Send

Repeat settings

Cancel

Powered by FRONTSTEPS

6

Define the residents you'd like to target by selecting the appropriate **Registration Status** and/or **Account Balance** criteria.

**Note:** In the example shown, only residents with an outstanding balance will be targeted in the campaign.

The screenshot shows the 'Select Audience' modal in the Marketing Admin interface. The modal has two sections: 'Registration Status' and 'Account Balance'. Under 'Registration Status', the 'Registered' button is highlighted. Under 'Account Balance', the 'Outstanding' button is highlighted. The 'Save' button is circled in green. The background shows the 'Create Campaign' form with fields for 'Name Campaign', 'Payment Reminder: Assessments Due', 'Select Communities' (set to 'All Communities'), 'Create Templates' (set to 'Everyone'), and 'Resident Group' (set to 'Outstanding').

7

Click "Select a template" to assign your targeted Resident Group(s) an email template.

The screenshot shows the 'Create Campaign' form in the Marketing Admin interface. The 'Resident Group' dropdown is set to 'Outstanding'. The 'Template' dropdown is set to 'Select a template' and is circled in green. The 'Save Campaign' button is at the bottom right. The background shows the 'Create Campaign' form with fields for 'Name Campaign', 'Payment Reminder: Assessments Due', 'Select Communities' (set to 'All Communities'), 'Create Templates' (set to 'Everyone'), and 'Resident Group' (set to 'Outstanding').

8

Choose a template from the dropdown list.

**Note:** Email templates must be created before setting up the campaign.

ame Campaign

Payment Reminder: Assessments Due

Select Communities

All Communities ×

Create Templates

RESIDENT GROUP	TEMPLATE
Outstanding <a href="#">Edit</a>	Select a template
Add Template	Fitness Center Now Open
	Online Payment Template
	Pool Temporarily Closed for Repairs
	Portal Registration Template
	Reminder: Upcoming Community BBQ

Cancel

FRONTSTEPS

9

Click "**Repeat settings**" to define the campaign schedule.

Payment Reminder: Assessments Due

2. Select Communities

All Communities ×

3. Create Templates

RESIDENT GROUP	TEMPLATE
Outstanding <a href="#">Edit</a>	Online Payment Template
Add Template	

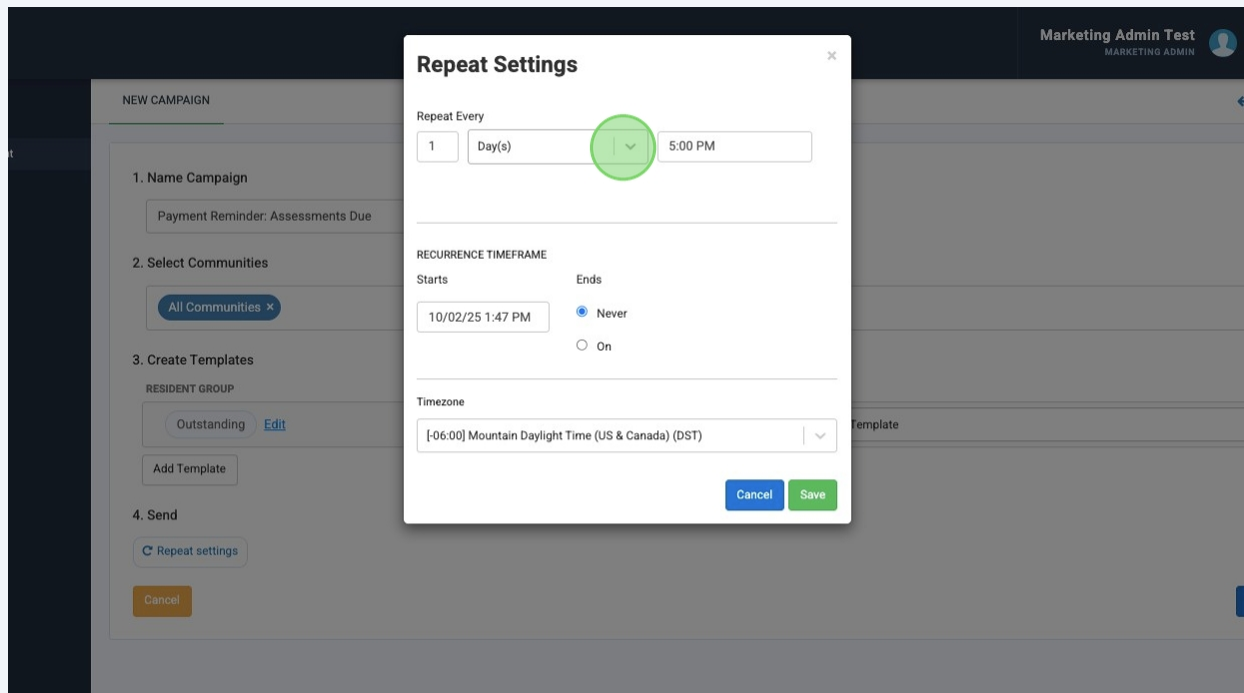
4. Send

[Repeat settings](#)

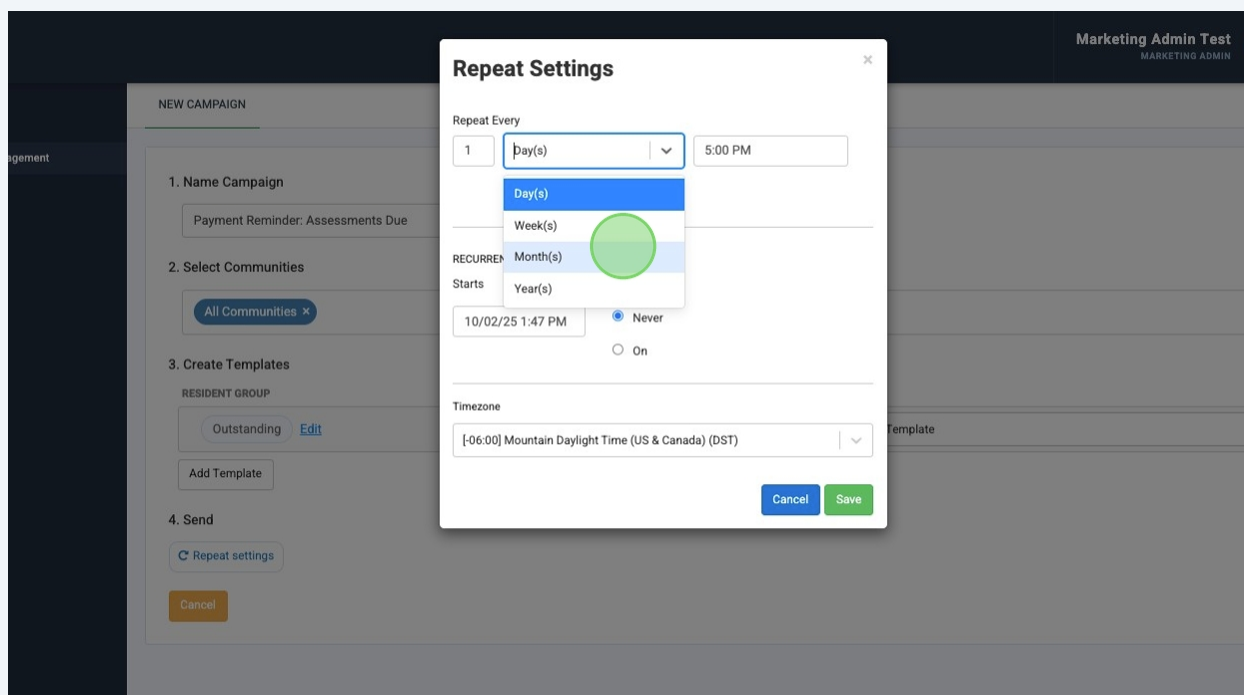
Cancel

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10 Define how often the campaign will repeat here.



11 Use the options under "Repeat Every" to choose how often the campaign will automatically repeat.



## 12 Select the day you'd like the campaign to send on.

The screenshot shows a 'NEW CAMPAIGN' form with four steps: 1. Name Campaign, 2. Select Communities, 3. Create Templates, and 4. Send. A modal dialog titled 'Repeat Settings' is open over the 'Send' step. The dialog has a close button (X) in the top right corner. It contains the following fields:

- Repeat Every:** A text input with '1' and a dropdown menu showing 'Month(s)'.
- On day / Or the:** Two radio buttons. 'On day' is selected and highlighted with a green circle. It has a text input with '1' and a time input with '5:00 PM'. 'Or the' is unselected and also highlighted with a green circle. It has a dropdown menu showing 'First', a dropdown menu showing 'Monday', and a time input with '5:00 PM'.
- RECURRENCE TIMEFRAME:** A section with the label 'Ends' and two radio buttons: 'Never' (selected) and 'On'.
- Timezone:** A dropdown menu showing '[-06:00] Mountain Daylight Time (US & Canada) (DST)'.
- Buttons:** 'Cancel' (blue) and 'Save' (green) buttons at the bottom right.

The background form shows the 'Send' step with a 'Repeat settings' button and a 'Cancel' button.



13

Under "**Recurrence Timeframe**", select the day you want the campaign to end.

**Note:** If you don't want your campaign to repeat, choose an end date that is **before** the next scheduled automated email.

For example, you can set the campaign to repeat monthly, but end it the day after the first email is sent to prevent further sends.

The screenshot shows a campaign configuration modal. The 'Repeat Every' section is set to '1' month. The 'On the' option is selected with 'First' of the month on 'Monday' at '5:00 PM'. In the 'RECURRANCE TIMEFRAME' section, 'Ends' is set to 'On' with the date '10/02/25' highlighted by a green circle. The 'Timezone' is set to '[-06:00] Mountain Daylight Time (US & Canada) (DST)'. The modal has 'Cancel' and 'Save' buttons at the bottom.

14

Click the drop-down menu under "**Timezone**" to select the timezone your campaign will use.

This screenshot is similar to the previous one but highlights the 'Timezone' dropdown menu with a green circle. The dropdown is currently showing '[-06:00] Mountain Daylight Time (US & Canada) (DST)'. The background shows the campaign configuration steps: 1. Name Campaign, 2. Select Communities, 3. Create Templates, and 4. Send.

15 Click **"Save"** after your campaign schedule is complete.

The screenshot shows a web application interface for scheduling a campaign. A modal dialog is open in the center, titled "On the" with a dropdown menu set to "First", "Monday", and "5:00 PM". Below this, the "RECURRENCE TIMEFRAME" section has an "Ends" label and two radio buttons: "Never" (unselected) and "On" (selected). The "On" option is followed by a date input field containing "02/02/26". Below the recurrence settings, the "Timezone" section has a dropdown menu showing "[ -07:00 ] Pacific Daylight Time (US & Canada) (DST)". At the bottom of the modal are two buttons: "Cancel" (blue) and "Save" (green, highlighted with a green circle). The background interface is dimmed and shows a sidebar with options like "Select Communities", "All Communities x", "Create Templates", "Outstanding", "Add Template", and "Repeat settings". A "Save Campaign" button is visible in the bottom right corner of the background interface.

16

Click **"Save Campaign"** to save your campaign.

### Campaign Save Options:

- "Save" - The campaign will be saved and sent on the scheduled start date. *(Recommended)*
- "Save as Draft" - The campaign will be saved as a draft. No emails will be sent.
- "Save & Send Now" - The campaign will be saved and sent immediately.

**Note:** No campaign metrics will be collected if you chose this option. **"Save & Send Now."** For best results, we recommend using the **"Save"** option.

The screenshot displays a web interface for configuring a campaign. At the top, there is a tab labeled "All Communities" with a close icon. Below this, the "Create Templates" section is visible, featuring a "SIDENT GROUP" dropdown set to "Outstanding" and an "Edit" link. To the right, a "TEMPLATE" dropdown is set to "Online Payment Template" with a trash icon. Below these, there is a "Add Template" button and a "Send" button. A scheduling box indicates "Recurs monthly at 17:00 (PDT) on the First Monday". An orange "Cancel" button is located on the left. On the right side, a "Save Campaign" dropdown menu is open, showing three options: "Save", "Save as Draft", and "Save & Send Now". The "Save" option is highlighted with a green circle.