

Campaigns and appointments

Selling and customers

Documentation version 1.0
Published 17 November 2026
https://www.hesabuerp.co.ke/documentation/

Selling and customers

Campaigns and appointments

Run marketing campaigns, track which leads they bring in and book customer appointments.

Intermediate · About 25 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Included in the **Enterprise** plan. Contact us if you want to upgrade.

Overview

A **Campaign** groups the leads you gain from one marketing effort, such as a radio advert, a Facebook post or a trade show. An **Appointment** books a meeting with a lead or customer. Together they show what works and keep follow-up from slipping.

Steps

Create a campaign

1. Search for **Campaign** and click **Add Campaign**.
2. Enter the **Campaign Name**, such as *Back to School 2027*, and a description.
3. Save.
4. When you log a lead, choose the **Campaign** (and the **Source**) on the lead. Leads from the campaign are listed in the campaign.

Email the leads

1. Search for **Email Group** and add a group such as *Newsletter*. Add the leads or contacts in it.
2. Search for **Newsletter**, click **Add Newsletter**, choose the email group, write the subject and content, and click **Send**.
3. Only send to people who agreed to receive your messages.

Book an appointment

1. Search for **Appointment** and click **Add Appointment**.
2. Enter the **Scheduled Time**, the customer's name, email and phone, and any notes.
3. Save. If your calendar is connected, it appears there, and the customer can be sent a confirmation.

Check what works

Open **Lead Source** and **Campaign Efficiency** reports to compare the number of leads and orders per campaign.

Practical example

A school supplier runs a *Back to School 2027* SMS and Facebook campaign. Leads from it are tagged. At the end, the report shows the SMS brought 40 leads and 12 orders, and Facebook 25 leads and 3 orders, so next year more budget goes to SMS.

Important notes

- Tag every lead with a source. Without it, you cannot compare campaigns.
- Respect the Kenya Data Protection Act. Keep proof of consent, and give an easy way to unsubscribe.

Common mistakes

- Sending a newsletter to people who did not agree.
- Not recording the source at the time of the lead.

Next steps

Read Sales pipeline and CRM reports.

Related documentation

- Leads and opportunities
- Sales pipeline and CRM reports
- Calendar, events and notes