

# Create your first campaign

Create your first campaign in FlowDesk using Campaign Builder. This guide walks you through setting up, launching, and monitoring a campaign across multiple channels from a single dashboard.

## Before You Begin

Sign in to your FlowDesk account.

To use SMS and email campaigns, add contacts by uploading a CSV file, adding contacts manually, or importing from a supported CRM.

### Add contacts

Go to **Settings > Contacts**.

#### Import contacts from a CSV file

1. Format your CSV file with the following fields:
  - First Name
  - Last Name
  - Email
  - Phone
  - Company
  - Any additional custom fields
2. Save the file using UTF-8 encoding.
3. Select **Import CSV**, then upload your file.
4. Fix any errors shown in the validation step.
5. Choose an existing list or segment, or create a new one.
6. Select **Import**.

#### Add contacts manually

1. Select **Add Contact**.
2. Enter the required fields.
3. Add any custom fields if needed.
4. Assign the contact to a list or segment.
5. Select **Save**.

#### Import contacts from a CRM

1. Select **Import Contacts**.
2. Choose a supported CRM.

3. Sign in to your CRM account.
4. Select contacts, lists, or segments to import.
5. Assign them to a FlowDesk list or segment.

## Connect social media channels

Go to **Settings > Channels**.

1. Select a channel to connect.
2. Follow the prompts to sign in.
3. Allow permissions for publishing, content management, and analytics.

## Create A Campaign

1. Open Campaign Builder from the dashboard or quick actions menu.
2. Select **Create Campaign**.
3. (Optional) Select **Duplicate Campaign** to reuse an existing campaign.
4. (Optional) Select **New Smart Campaign** to generate a campaign based on previous activity.

## Set Campaign Details

1. Enter a name in the **Name** field.
2. Select a goal, such as:
  - Increase contact form submissions
  - Get more phone inquiries
  - Boost website traffic

## Select Your Audience

1. Choose one or more contact lists or segments.
2. (Optional) Adjust targeting settings if available.

## Choose Channels

1. Select the channels you want to use.
2. Enable **SMS** and **Email** if needed.
3. If a channel is not connected, follow the prompts to connect it.

## Add Content

1. Enter content for each selected channel.
2. Customize messaging per channel as needed.
3. Upload images, graphics, or media.
4. Use **Same as above** to reuse content across channels when appropriate.
5. For SMS, enter short-form copy.

6. For email, add content using text, images, or HTML.

## Review Your Campaign

Before launching, check the following:

- No validation or error messages
- Correct audience selected
- Correct channels selected
- Content is complete and accurate

## Save or Schedule Your Campaign

1. Select **Save** to store your campaign as a draft.
2. Select **Schedule** to publish later:
  - Choose a date and time
  - Confirm scheduling
3. Select **Launch** to publish immediately.

Campaign status updates to:

- Draft
- Scheduled
- Live

## View Campaign Performance

1. Go to the **Campaigns** page.
2. Select a campaign.
3. Open the **Results** tab.

View metrics such as engagement, delivery status, and channel performance.