Campaigns Overview

Review the information below for an overview on Artera Campaigns and connect with your Customer Success Representative for more information.

> ❗ **Note**: Always follow the guidelines and governance set by your Enterprise, Practice, or organization when using Artera.

WHAT IS A CAMPAIGN?

Campaigns allow you to send large volume outreach to *up to 30,000* patients at once.

Campaigns are used to notify a targeted list of patients to announce a new service you are offering or to fill a gap in care.

Common Campaign Use Cases
- Annual Wellness Visit Reminders
- Back to School Physicals
- Blood Donation Drives
- Clinical Trial Recruitment
- COVID Precautions Reminder
- Oral Health Reminders
- Seasonal Precautions
- Summer Sun Safety

CAMPAIGN FEATURES

Target existing patients in Artera
Artera can only send Campaign messages to patients that have been added to your Artera Enterprise. Click here to learn more.

Campaign creation is permission-based
Campaigns can only be sent out by the User Type indicated on the Permissions page. This means you can choose to restrict Campaigns by User Type. Click here to learn more.

Flexible Delivery Timing
You can determine when a Campaign should be sent. Campaigns can be saved to send in real-time or scheduled to send at a later date/time. Click here to learn more.

Easy upload of targeted patients
Upload a .csv file of the patients you wish to target with your Campaign message. This file should only include the unique patient IDs of each targeted patient, with no additional information. Click here to learn more.

SMS, Call, Email Outreach
Campaigns can be created for each desired delivery method (Text, Call, Email). To increase deliverability, we recommend building messages for both Text and Call. Click here to learn more.

FUNCTIONALITY
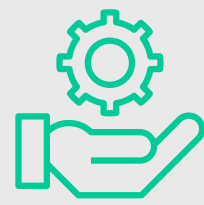
You can set how many Campaign messages you would like to send per hour. This rate can be set using increments of 12 messages per hour, with a maximum rate of 2,496 messages per hour.

Your .csv file must be under 500kb (which should hold ~30,000 patients) and include a single column of MRNs/patient IDs in Column A with no header and no additional information.

Typically, you can export a report from your EMR containing the patient IDs and remove any extra information.

ENABLING CAMPAIGNS

Once you have saved your Campaign, it will automatically be placed in the Pending status. To start the Campaign, click the **(...)** menu and choose **Start**. Once enabled, the Campaign will move into the Queued status until it reaches its indicated start date and time. At that point, it will transition to the Running status.

Click here to learn more about the Campaign statuses.

NOTE: Once a Campaign is started, it cannot be edited.

USING A CAMPAIGN AS A TEMPLATE

When you wish to create another Campaign with similar content to a previous Campaign, you can reuse a Campaign as a template. This allows for time savings and efficiency when creating a new Campaign with similar content.

To use a previous Campaign as a template select the **(...)** menu near the Campaign and click **Duplicate**. Click here to learn more.

Visit the Artera Knowledge Base: knowledge.artera.io