

Creating and Running an Automated Campaign

<https://campus.barracuda.com/doc/88539907/>

You must [create a Dynamic Address Book](#) before you can create your Automated Campaign.

Sections that are not mentioned in these steps are not used for Automated Campaigns. Scroll down on the Campaign page until you get to the section described in the next step of the instructions.

To create an Automated Campaign:

Create the Basic Campaign

1. Navigate to **Campaigns > Campaign Manager**.
2. Click **New**.
3. For the **Campaign Type**, select **Email Campaign**.
4. Enter the following information. These values can be changed at any time.
 - **Campaign Name** - Enter a descriptive name for the campaign. Note it is helpful to use the word Automated in the name for an Automated Campaign.
 - **Description** - Optional. Enter text to describe the campaign.
 - **Enable Content Groups** - Not supported for Automated Campaigns.
 - **Plan** - Optional. Select a plan associated with this campaign. Create and review plans under **Plan > Plan Manager**.
 - **Campaign Intent** - Select one of the two Automated Campaign options:
 - **Immediate Feedback Automated Campaign** - A campaign that automatically sends an email a user, based on a specified action in another campaign. For example, a user who clicks on a link in another campaign will automatically receive an email inviting them to take a training.
 - **On-Demand Automated Campaign** - Enable the campaign Administrator to send a follow-up email to a manager, letting them know which of their employees clicked a link in a campaign or still needs to complete their training. Emails are sent to each manager separately and concern users who report to that manager.

Category - Enter Automated Campaign.

This step is essential to the creation of an Automated Campaign.

The words **This is an Automated Campaign** appear at the top of the page. This indicates that you have correctly followed the instructions up to this point.

5. Click **Save**. The page refreshes. Notice the Automated banner at the top of the page. At the top of the page, you can edit the information you entered in Step 4.

Set the Schedule

In the **Scheduling** section, specify the following information:

- **Schedule Based Upon** – Select **Administrator's Time Zone**.
- **Start Date** – Select a future date and time on which to start the campaign.
- **End Date** – Select a future date and time on which to end the campaign, for example 30 minutes after the Start Date. Automated Campaigns go through cycles and will restart each time there is a new email added to the Dynamic Address Book.
- **Cutoff Date** – Select a date and time far in the future when results will no longer be collected for reporting. Select a date like January 1, 2030, to ensure that this Automated Campaign will keep running until you decide to stop it.

Specify Targets

In the **Targets** section, specify the following information:

- **Emails to Send** – For Automated Campaigns, enter 9,999,999.
- **Select Address Books** – Select *one Dynamic* Address Book to include in the campaign. Only Dynamic Address Books can be used for Automated Campaigns.

Specify the Content

This procedure is the same as specifying content for any other Email Campaign. The content you specify here is the content that is sent either to users who performed a certain behavior or to managers regarding their employees.

1. In the Content section, click **Add New Email Template**. In the dialog box, click **Yes** to save the current campaign and add the email template. The Content Center displays available email templates.
2. Review the available templates and click the one you want to use in your campaign. You can optionally click Create Email Template to create a new template.

Barracuda PhishLine includes over 400 templates. Use the filter in the left navigation pane to locate templates for specific categories, like Training Announcements or Ransomware.

To use the filter, select your criteria, then click Apply. The matching templates display in the Content Center page.

3. Select the appropriate action. Available actions depend on whether the content has already been imported into your instance of Barracuda PhishLine.
 - If the content is *already imported* into your instance of Barracuda PhishLine, the following actions are available:
 - **Copy and Add to My Recent Campaign** – Duplicates the template and associates it with the most recently accessed campaign. Following the steps in this article, that is the campaign you just created.
 - **Copy and Edit** – Duplicates the template and opens the editor so you can customize the template. Note that this option does not associate the template with your campaign.
 - **Add to My Recent Campaign** – Associates the template with the most recently accessed campaign. Following the steps in this article, that is the campaign you just created.

- **Edit** – Opens the editor so you can customize the template. Note that this option does not associate the template with your campaign.
 - If the content is *not already imported* into your instance of Barracuda PhishLine, the following actions are available:
 - **Import and Add to My Recent Campaign** – Adds the content to your instance and associates it with most recently accessed campaign. Following the steps in this article, that is the campaign you just created.
 - **Import and Edit** – Adds the content to your instance and opens the editor so you can customize the template.
4. To specify additional templates, click **Return to Content Center**. Repeat Step 3 to add more templates. If you add multiple templates, Barracuda PhishLine will randomly assign a template to each email address selected when you generate the campaign.
To continue creating your campaign, click **Go to My Recent Campaign**. If needed, you can also click **Back to Recent Campaign** in the upper-right corner of the Content Center page.
 5. Back in the Content section of your campaign, click **Add New Landing Page**. In the dialog box, click Yes to save the current campaign and add the landing page. The Content Center displays available landing pages.
 6. Follow the instructions in Steps 2-4 above, this time for Landing Pages. Select a template, then select the appropriate action.
 7. Back in the Content section of your campaign, click **Add New Email Account for Sending**.
 - To optionally specify additional sending email addresses, click **Save now**. Add another address and repeat for each additional address. Then, continue the rest of the process below. If you add multiple email addresses here, Barracuda PhishLine will randomly assign a sender email address to each contact email address selected when you generate the campaign.
 8. Select an Email Account Name from the list that will be the sender of your outbound campaign emails.
 9. Select an Email Server Domain from the list that will be the domain of the sender of your outbound campaign emails.
 10. Click **Add New Web Server for Landing Pages**.
 - To optionally specify additional web servers, click **Save now**. Add another web server and repeat for each additional server. Then, continue the rest of the process below. If you add multiple web servers here, Barracuda PhishLine will randomly assign a web server to each contact email address selected when you generate the campaign.
Specify the following information:
 - **Protocol** – Select the HTTP or HTTPS protocol.
 - **Subdomain** – Optional. Specify a subdomain associated with the landing page.
 - **Web Server Host Domain** – Select the web server that hosts the landing page.
 - **Short URL** – Select the Short URL box if the web server uses shortened URLs.

Save the Campaign

When you have completed all of the required actions above, click **Save** to save the campaign. The page refreshes.

Trigger the Automated Campaign

These steps are specific for the type of Automated Campaign you are creating. Refer to the appropriate section below.

Immediate Feedback Automated Campaign

There must be at least one address in the Dynamic Address Book you associated with this Automated Campaign. The easiest way to achieve this is to send yourself a Sample Email from the Campaign you will be watching and to perform the watched behavior – like clicking a link – to add an address in the Dynamic Address Book.

The Dynamic Address Book takes about an hour to populate. You can then return to the Campaign Manager to Generate the Campaign and Go Live.

To Generate the Campaign:

Under **General Settings**, in the **Stage** area, click **Generate**. Click **Yes** when prompted. The campaign generates.

The generation process can take several minutes. You can move away from the screen or even log out without interrupting the generation process.

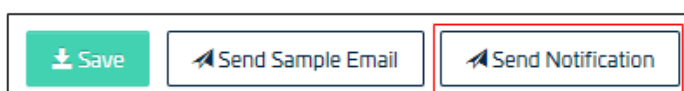
On-Demand Automated Campaign

First, generate the Campaign. On-Demand Automated Campaigns must be either in the Approve or Go Live stage before you can send notifications.

In the Go Live stage, you can only send on-demand notifications *after* the Cut-Off Date, providing managers with an account of activities during the course of the campaign.

Follow the instructions in the previous section to generate the campaign.

If you performed the steps above correctly, the **Send Notification** button displays at the top of the Campaign page.



When you are ready to send notifications to managers, click **Send Notification**. Specify the report template you want to send to managers, then click **Create Notification Email Queue**.

Send Notification ✕

This feature is used to send a summary notification of the outbound messages in this campaign grouped by Manager Email Address found in the address book associated with this campaign.

- Select the Notification Campaign Template from the list below.
- Click the **Create Notification Email Queue** button to have the system review the notification request.
- The system will then validate and create a campaign notification email queue from the information you submitted.
- Follow the instructions on the screen for the next steps to follow in the process. Click the confirmation button to complete your notification request, or correct errors so you can confirm.

• **NOTE:** If this campaign is in stage *3. Approve* it will only send notifications for Sample Emails that you have sent via the **Send Sample Email** button.

Notification Campaign Template: Automated:Report ▼

Create Notification Email Queue

A message displays, based on the content of your Dynamic Address Book:

- A warning message displays if you do not have any manager email addresses in your Dynamic Address Book. Go to your Dynamic Address Book and add manager email addresses. You are required to have at least one manager email address in the related Dynamic Address Book. Note that if your Dynamic Address Book has email addresses for some managers and not for others, only managers with email addresses will receive the on-demand notifications.
- A success message displays if you have manager email addresses in your Dynamic Address Book.

When you see the success message, click **Confirm and Send Notifications** to actually send the emails.

Figures

1. sendNotification.png
2. send notification.png

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