

Marketing

Overview

To carry out your marketing and sales activities effectively, you can assign custom groups, industry sectors, and characteristics to your sales and purchasing master data. This makes it easy to run campaigns, send newsletters, or generate reports based on this information.

Your system already includes default groups, which you can adjust or expand at any time.

Create groups, industry sectors, and characteristics

Follow the steps below to create groups in your Backstage. Later, by assigning them in the master data, you can generate group-based evaluations of your customer, author, or partner records.

1. Navigate to one of the following areas:
 - **Marketing > Data Categorization > Groups**
 - **Marketing > Data Categorization > Industry Groups**
 - **Marketing > Data Categorization > Characteristics**
2. In the Overview window, select **Edit > New**.
3. Enter the name of the group, industry sector, or characteristic in the **Name** field.
 - **Optional:** Provide a name for each language you have in the system.
4. Select the master data areas where the new group, industry sector, or characteristic should be available.
5. Click **Save**.

Groups / Edit 'Advertising Agencies' Group

▼ Master Data

Name:

Advertising Agencies

Name English (USA):

Advertising Agencies

Name German:

Werbeagenturen

▼ Activation of the Data Categorization in the Master Data area

Customers

☒

Partner (Sales)

☒

Authors

☐

Partner (Purchasing)

☐

Author Pools, Syndicates

☐

Cancel and Back to Overview

Save

Marketing > Data Categorization > Groups: Group set up window

Note

If you have multiple active languages under **Administration > Language Settings > Languages**, the input form will have more **Name** fields. This lets you enter a name for the group, industry sector, or characteristic in each active system language.

Assign groups, industry sectors, and characteristics in master data

To use groups, industry sectors, or characteristics for marketing activities or evaluations, first assign them in the master data. Proceed as follows:

1. Navigate to one of the following areas:
 - **Sales > Customers**

- **Sales > Partners**
 - **Purchasing > Authors**
 - **Purchasing > Partners**
 - **Purchasing > Author Pools, Syndicates**
2. In the Overview window, and open a master data record.
 - To assign the information to several records, multi-select them and click **Edit > Batch Process**.
 3. In the master data record, open the **Marketing** subtab.
 4. In **Available Groups / Industry sectors / Characteristics**, select the desired items and click **Add** to assign them to the selected record.
 - To remove assigned items, use the **Remove** button.
 5. Click **Save**.

Customers / Editing 'CUST10390 Media Seven, ABCD Magazine' Customer / Marketing

Master Data	Contacts	Contact History	Accesses	Outputs	Prices	Financial Documents	Lightboxes	Document Management	Statistics
Common Data	Addresses	Finance	Bank Accounts	Marketing	Custom Fields				

Marketing

Available Groups

Quick Search Filter Sorting Views Export			
ID	Name		
22	Newspapers		
59	PR Firms		

Selected Groups

Quick Search Filter Sorting Views Export			
ID	Name		
4	Advertising Agencies		

Available Industry Sectors

Quick Search Filter Sorting Views Export			
ID	Name		
10	Agriculture, Farming and Horticulture		
11	Airline Transportation		

Selected Industry Sectors

Quick Search Filter Sorting Views Export			
ID	Name		
9	Advertising and Marketing		

Available Characteristics

Quick Search Filter Sorting Views Export			
ID	Name	Date Created	
30	Golfing Enthusiast	03/01/2011	
19	Trade Fair	02/03/2011	

Selected Characteristics

Quick Search Filter Sorting Views Export			
ID	Name	Date Created	
No entries exists			

Customer master data > Marketing subtab: Assign groups, industry sectors, or characteristics.

Tip

Export data

Use the **Export** function within the data table to quickly export address and contact data and process them externally. For detailed instructions, see [Advanced Table View](#).

Manage groups, industry sectors, and characteristics

You can view this marketing-related information in **Marketing > Data Categorization > Groups / Industries / Characteristics**. In a corresponding Overview window, proceed as follows:

- To create a record, click **Edit > New**.
- To edit a record, select it and click **Edit > Open**.
- To copy a record, select it and click **Edit > Copy**.
- To delete a record, select it and click **Edit > Delete**.
- To apply changes to multiple selected records at once:
 1. In the overview, multi-select the records you need to edit.
 - Continuous selection: Press Shift + Click
 - Non-continuous selection: Press Ctrl + Click (Windows) or Cmd + Click (Mac)
 2. Click **Edit > Batch Process**

Note

You can use the table's built-in tools to search, filter, and sort records. For more details, including how to create custom views and export data, see [Advanced Table Views](#).

Tip

Import data

If you need to integrate a large number of marketing groups, industry sectors, or characteristics, please contact support@picturemaxx.com. We will provide you with migration templates to fill out and return for a smooth import.