How to create a campaign.

Learn how to use the Kim Campaign Functionality to allow for one-to-many distribution.

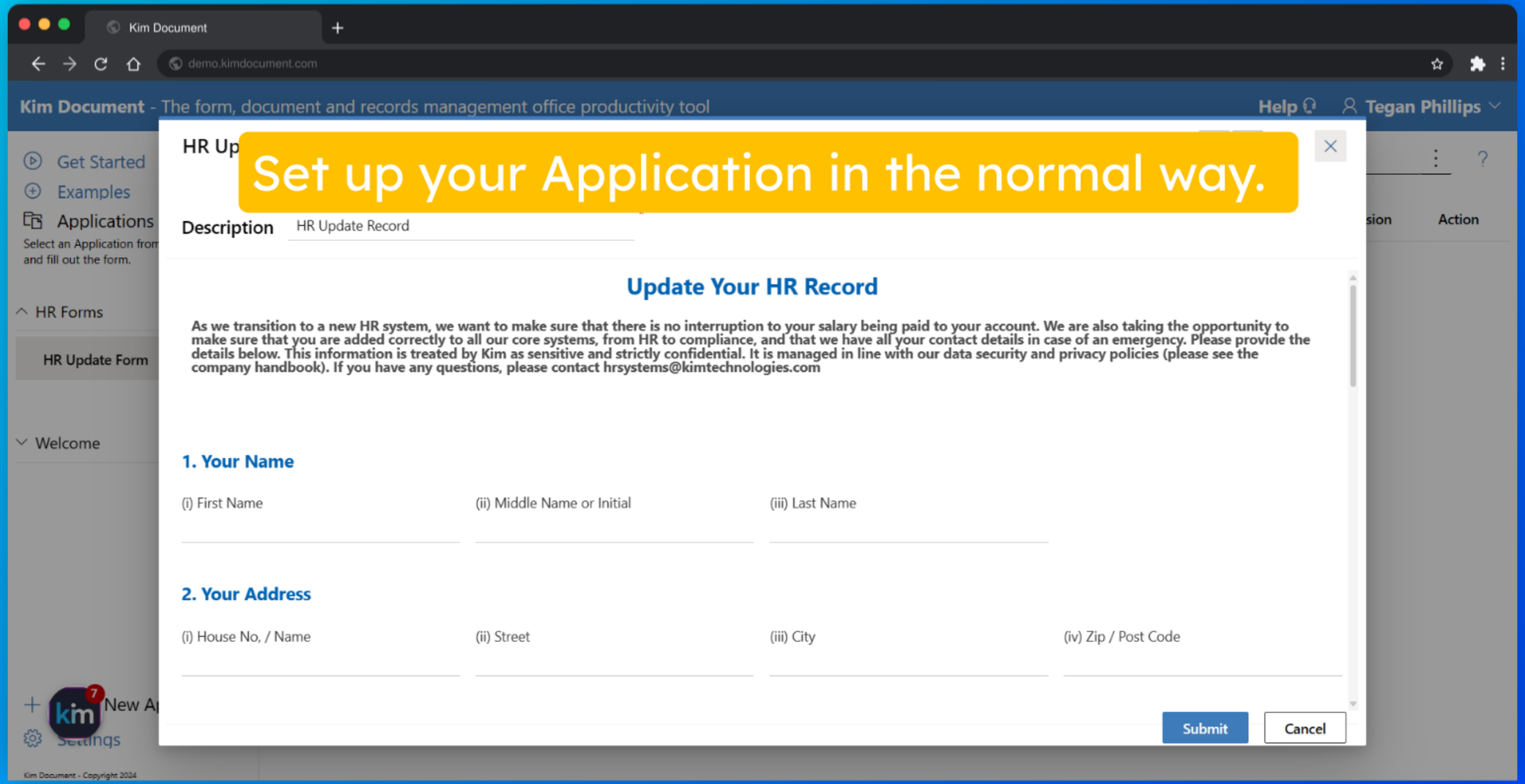
March 2024

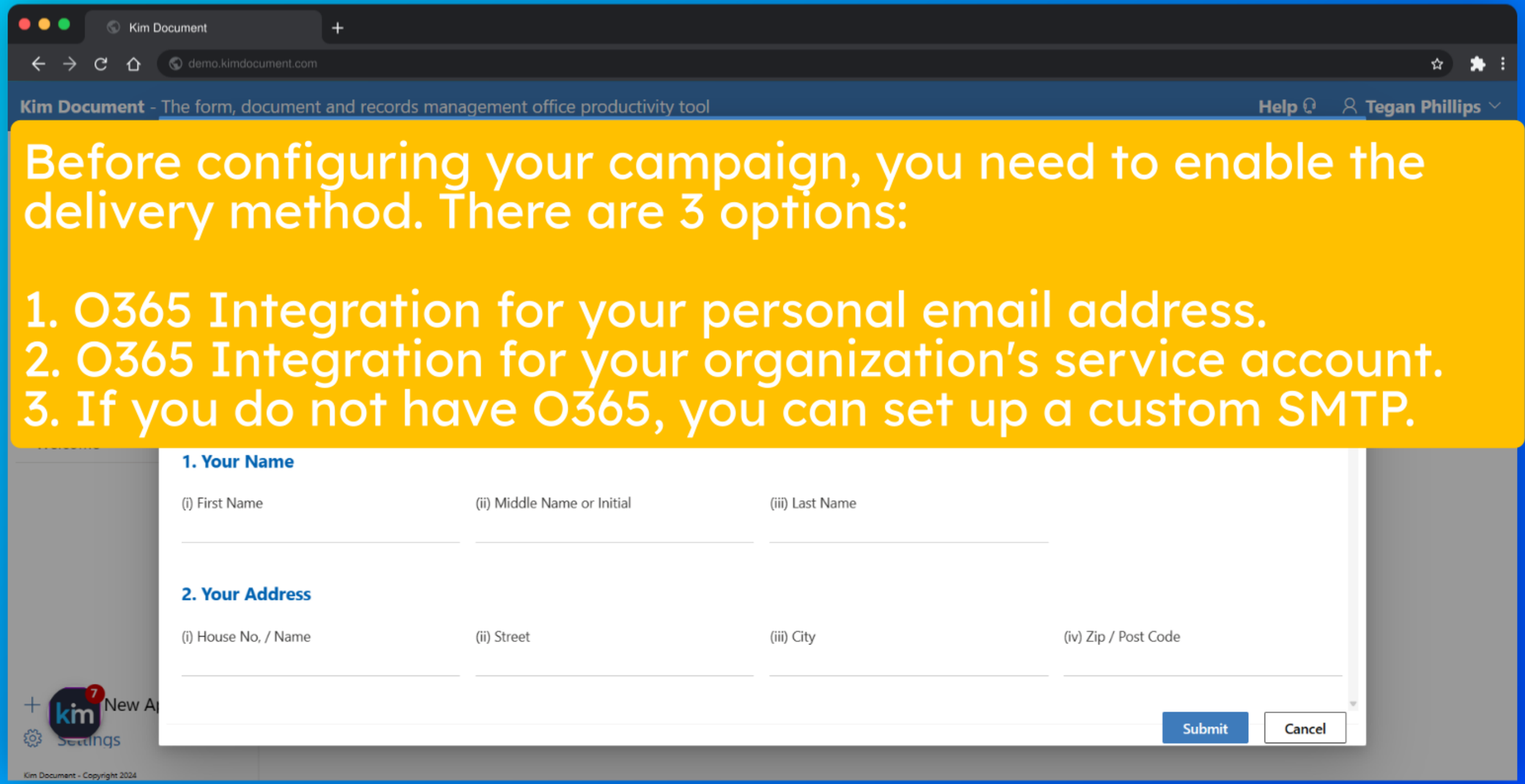
This Video

Our Campaign feature is designed to capture and/or confirm data from multiple recipients via one-to-many distribution.

Its uses include information security checklists, compliance campaigns, RFP responses, client surveys and data cleansing exercises.

Upload the form you want to complete, send it to multiple recipients, and receive the responses and data. By incorporating personalized campaign creation, reminders, and comprehensive tracking and reporting, this feature ensures that compliance, data collection, and information sharing are streamlined for optimal efficiency.


Kim Document
demo.kimdocument.com
Kim Document - The form, document and records management office productivity tool
Help
Tegan Phillips
Get Started
Examples
Applications
Select an Application from
and fill out the form.
HR Forms
HR Update Form
Welcome
New A
Settings
Kim Document - Copyright 2024
HR Up
Set up your Application in the normal way.
Description
HR Update Record
Update Your HR Record
As we transition to a new HR system, we want to make sure that there is no interruption to your salary being paid to your account. We are also taking the opportunity to make sure that you are added correctly to all our core systems, from HR to compliance, and that we have all your contact details in case of an emergency. Please provide the details below. This information is treated by Kim as sensitive and strictly confidential. It is managed in line with our data security and privacy policies (please see the company handbook). If you have any questions, please contact hrsystems@kimtechnologies.com
1. Your Name
(i) First Name
(ii) Middle Name or Initial
(iii) Last Name
2. Your Address
(i) House No, / Name
(ii) Street
(iii) City
(iv) Zip / Post Code
Submit
Cancel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Before configuring your campaign, you need to enable the delivery method. There are 3 options:
1. O365 Integration for your personal email address.
2. O365 Integration for your organization's service account.
3. If you do not have O365, you can set up a custom SMTP.
1. Your Name
(i) First Name
(ii) Middle Name or Initial
(iii) Last Name
2. Your Address
(i) House No, / Name
(ii) Street
(iii) City
(iv) Zip / Post Code
Submit
Cancel
New Ap
Settings
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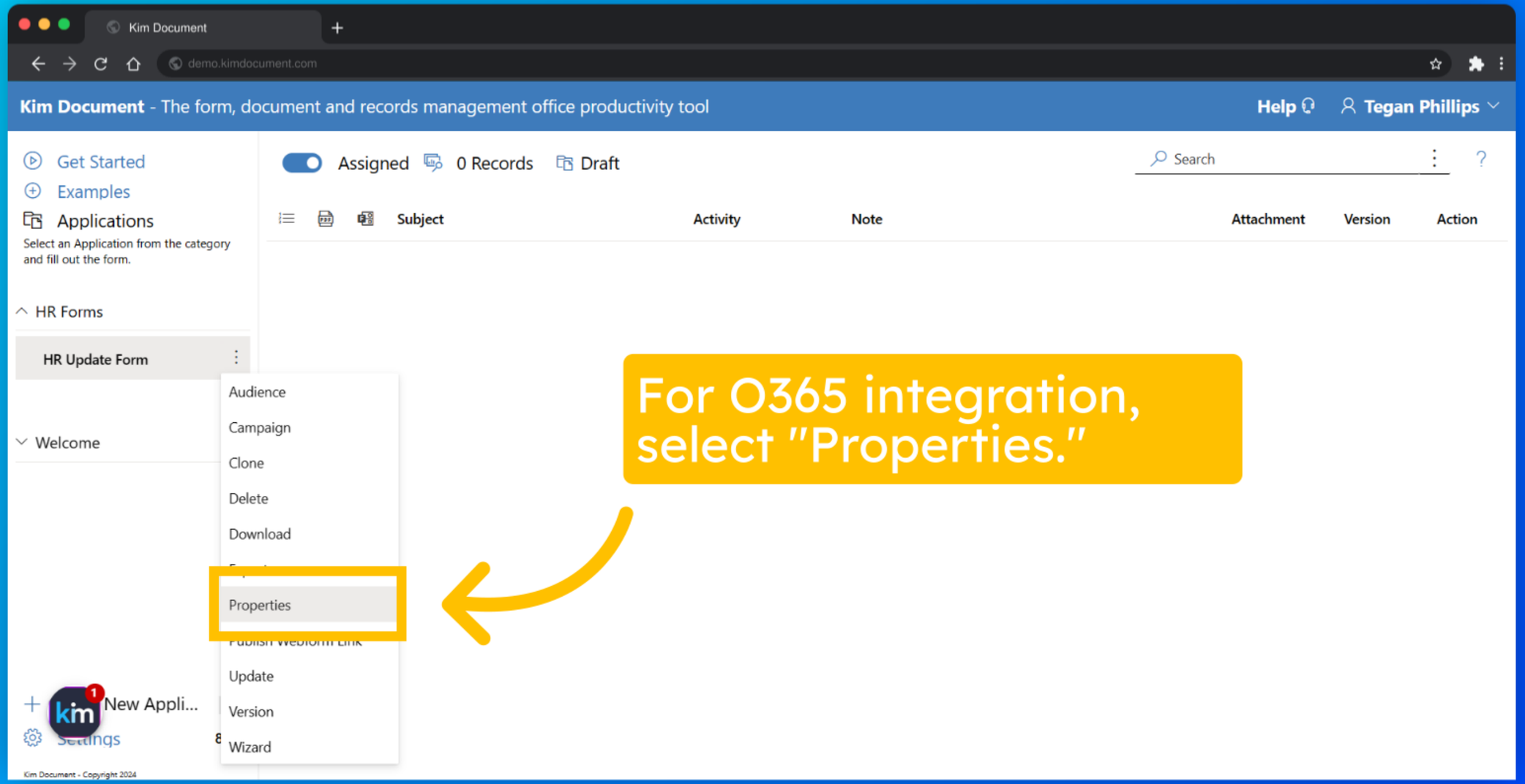
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0 Records
Draft
Search
Subject
Activity
Note
Attachment
Version
Action
Audience
Campaign
Clone
Delete
Download
Properties
Update
Version
Wizard
New Appli...
Settings
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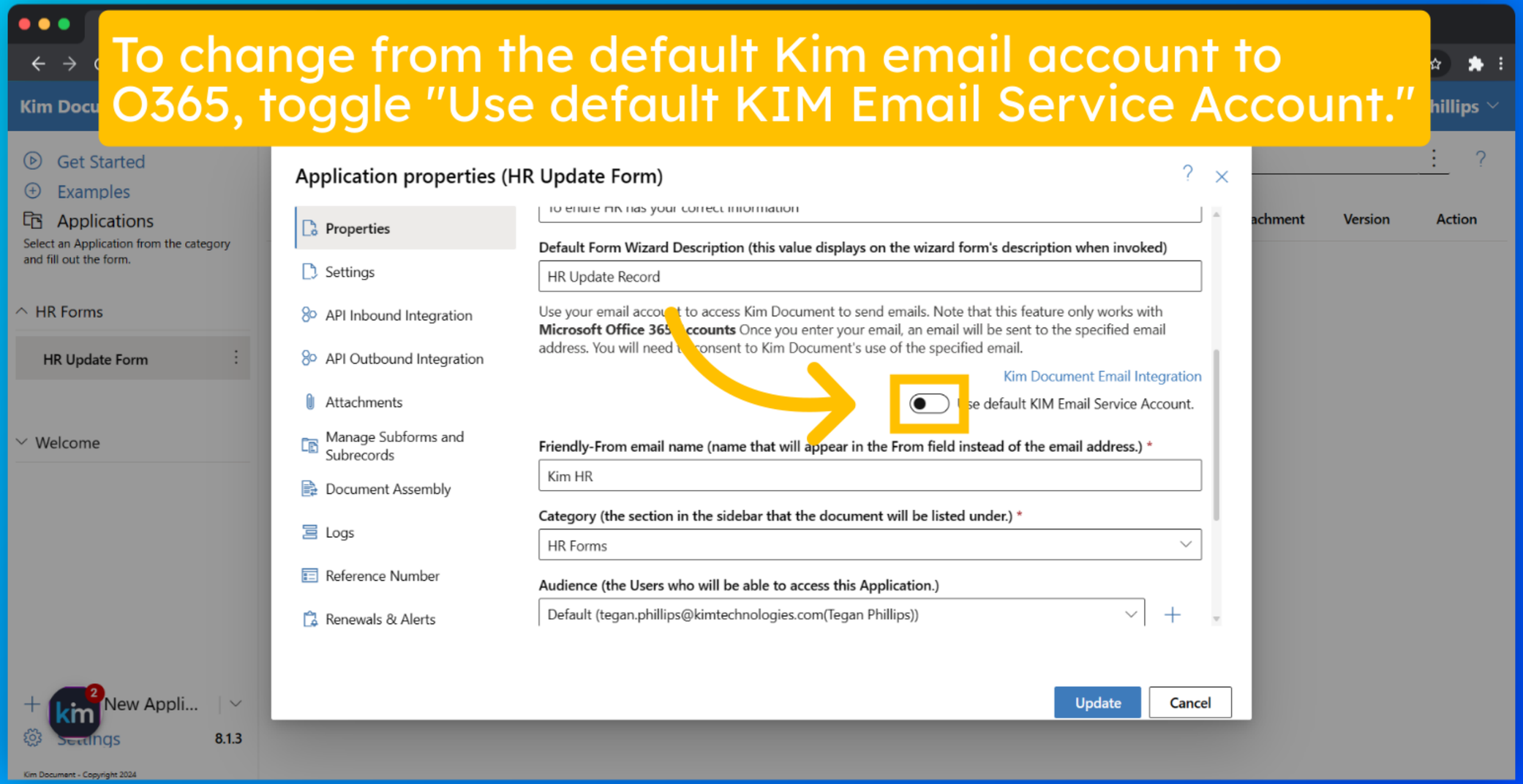
For O365 integration, select "Properties."


To change from the default Kim email account to O365, toggle "Use default KIM Email Service Account."
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Applications
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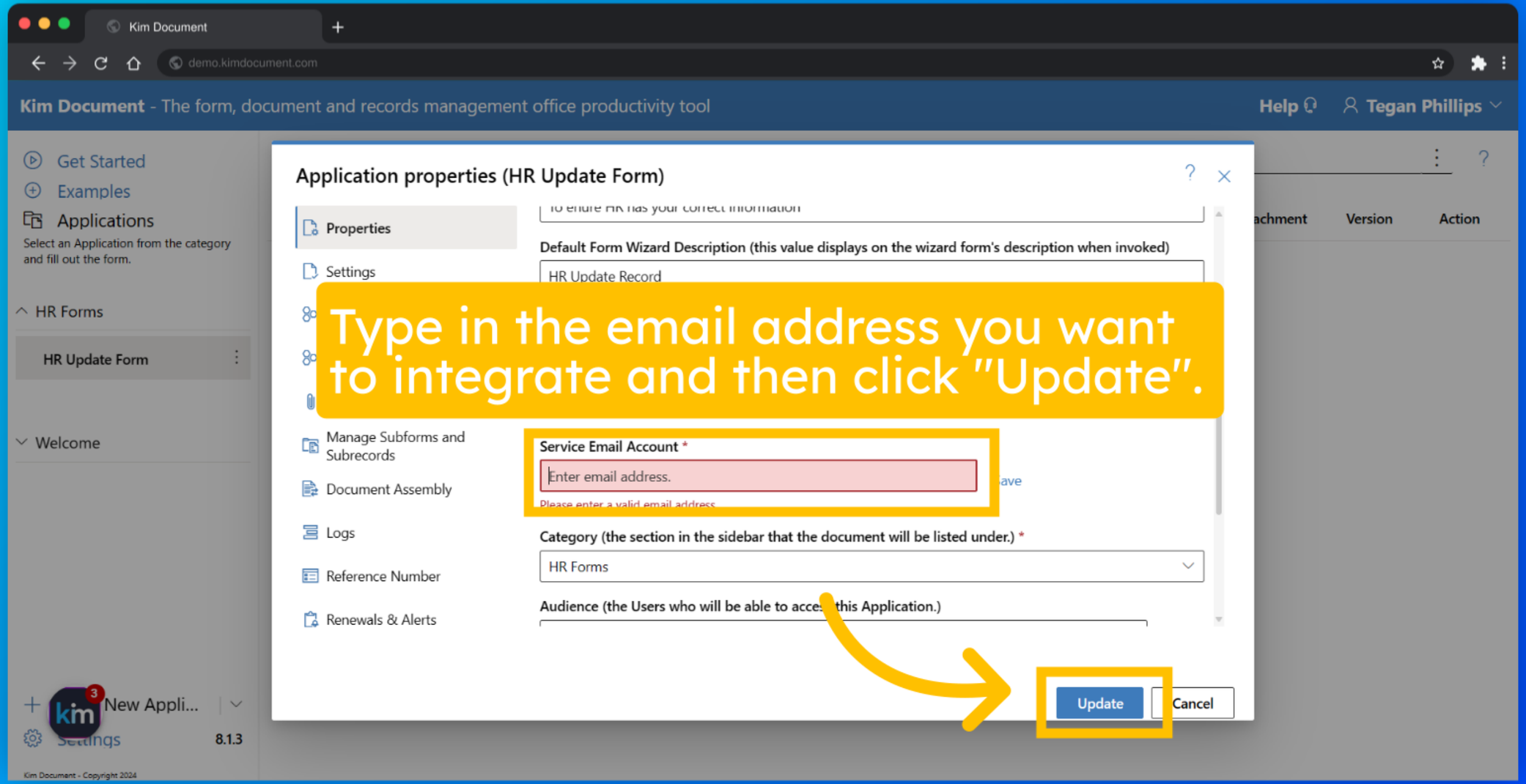
Application properties (HR Update Form)
Properties
Settings
API Inbound Integration
API Outbound Integration
Attachments
Manage Subforms and Subrecords
Document Assembly
Logs
Reference Number
Renewals & Alerts
Default Form Wizard Description (this value displays on the wizard form's description when invoked)
HR Update Record
Use your email account to access Kim Document to send emails. Note that this feature only works with Microsoft Office 365 accounts Once you enter your email, an email will be sent to the specified email address. You will need to consent to Kim Document's use of the specified email.
Kim Document Email Integration
Use default KIM Email Service Account.
Friendly-From email name (name that will appear in the From field instead of the email address.) *
Kim HR
Category (the section in the sidebar that the document will be listed under.) *
HR Forms
Audience (the Users who will be able to access this Application.)
Default (tegan.phillips@kimtechnologies.com(Tegan Phillips))
Update
Cancel
Version
Action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Select an Application from the category and fill out the form.
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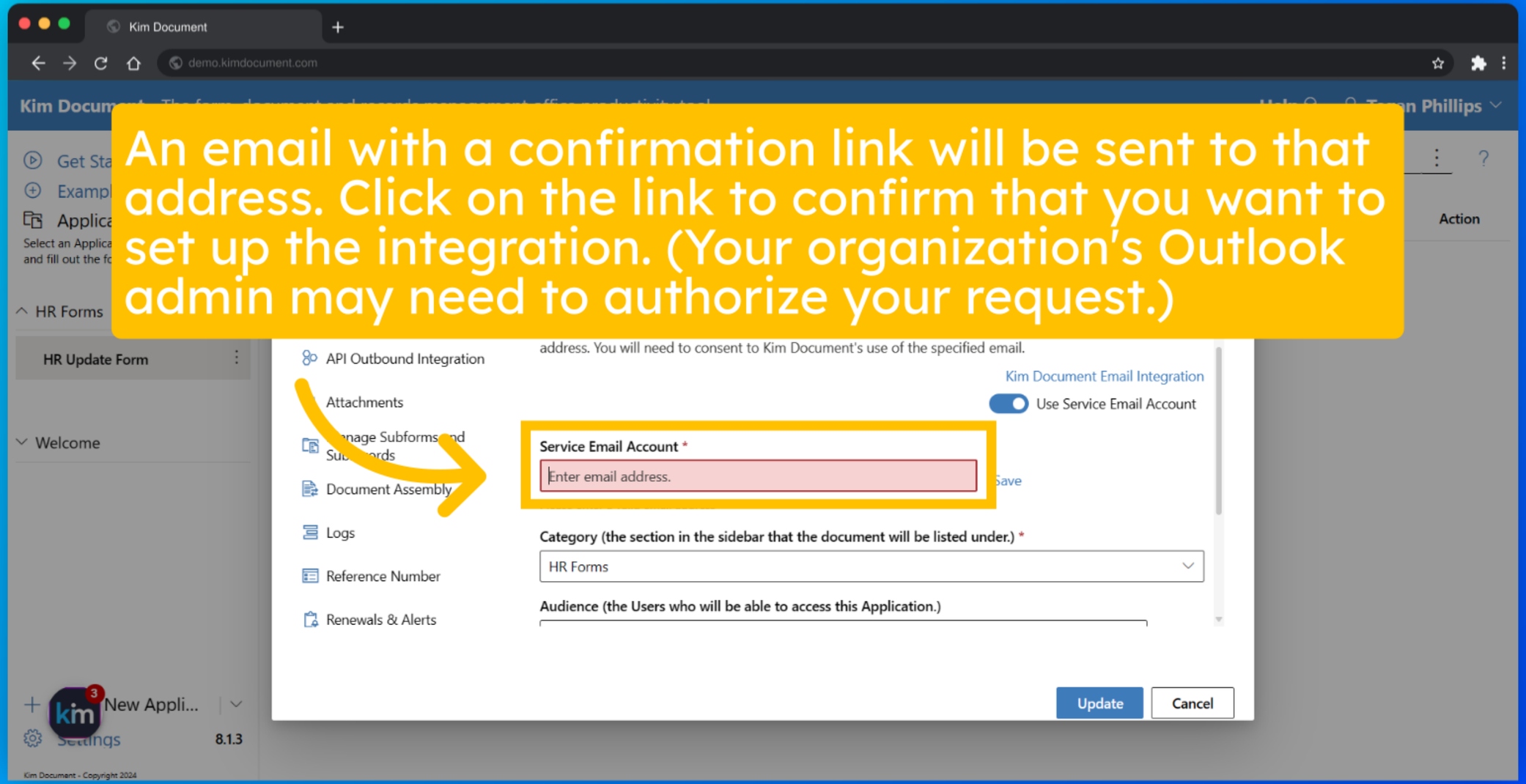
Application properties (HR Update Form)
Properties
Settings
Manage Subforms and Subrecords
Document Assembly
Logs
Reference Number
Renewals & Alerts
Default Form Wizard Description (this value displays on the wizard form's description when invoked)
HR Update Record
Type in the email address you want to integrate and then click "Update".
Service Email Account *
Enter email address.
Please enter a valid email address
Category (the section in the sidebar that the document will be listed under.) *
HR Forms
Audience (the Users who will be able to acce this Application.)
Update
Cancel
Version
Action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An email with a confirmation link will be sent to that address. Click on the link to confirm that you want to set up the integration. (Your organization's Outlook admin may need to authorize your request.)
HR Forms
HR Update Form
Welcome
New Appli...
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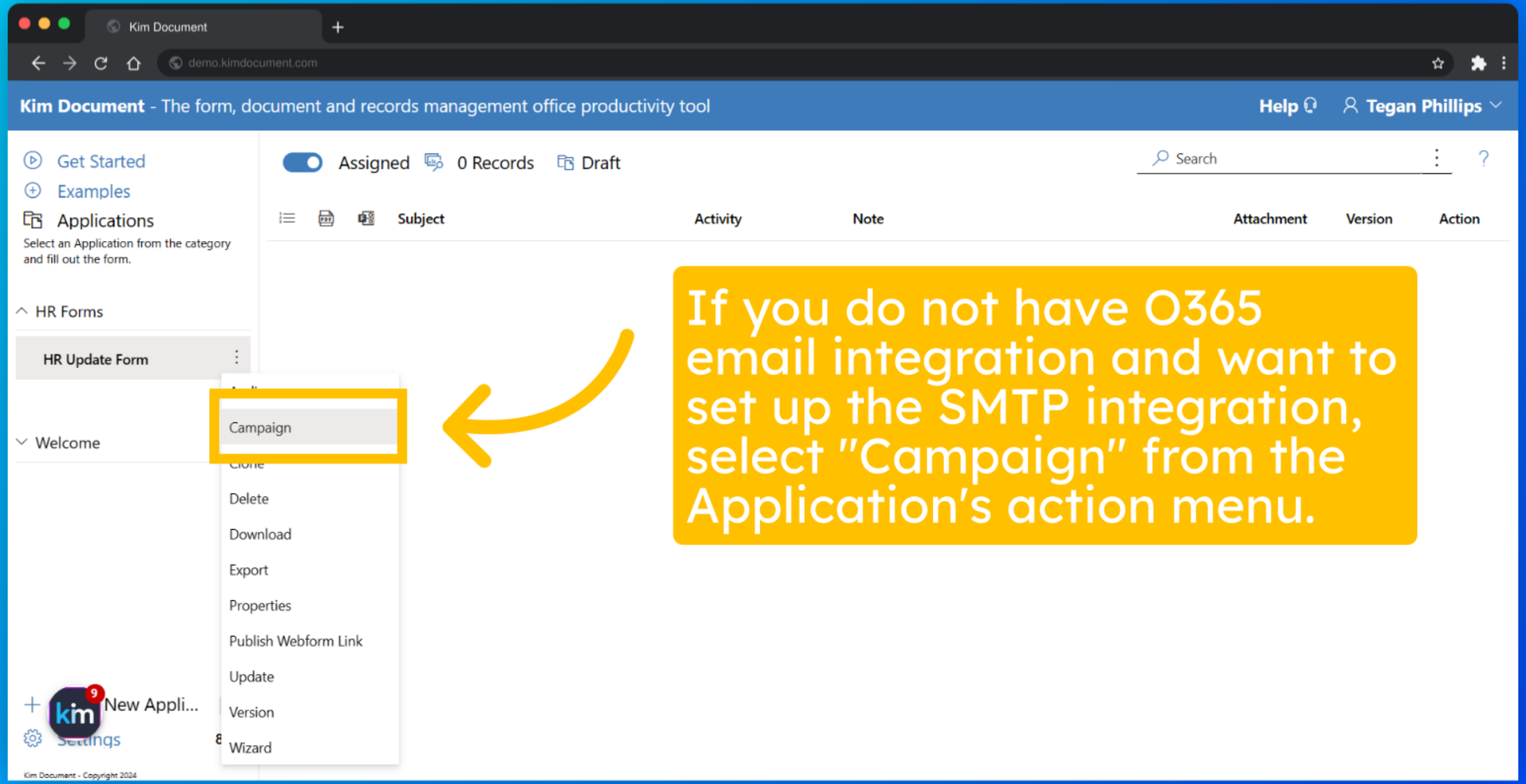
API Outbound Integration
Attachments
Document Assembly
Logs
Reference Number
Renewals & Alerts
address. You will need to consent to Kim Document's use of the specified email.
Kim Document Email Integration
Use Service Email Account
Service Email Account *
Enter email address.
Save
Category (the section in the sidebar that the document will be listed under.) *
HR Forms
Audience (the Users who will be able to access this Application.)
Update
Cancel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Search
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Note
Attachment
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Action
Campaign
Clone
Delete
Download
Export
Properties
Publish Webform Link
Update
Version
Wizard
New Appli...
Settings
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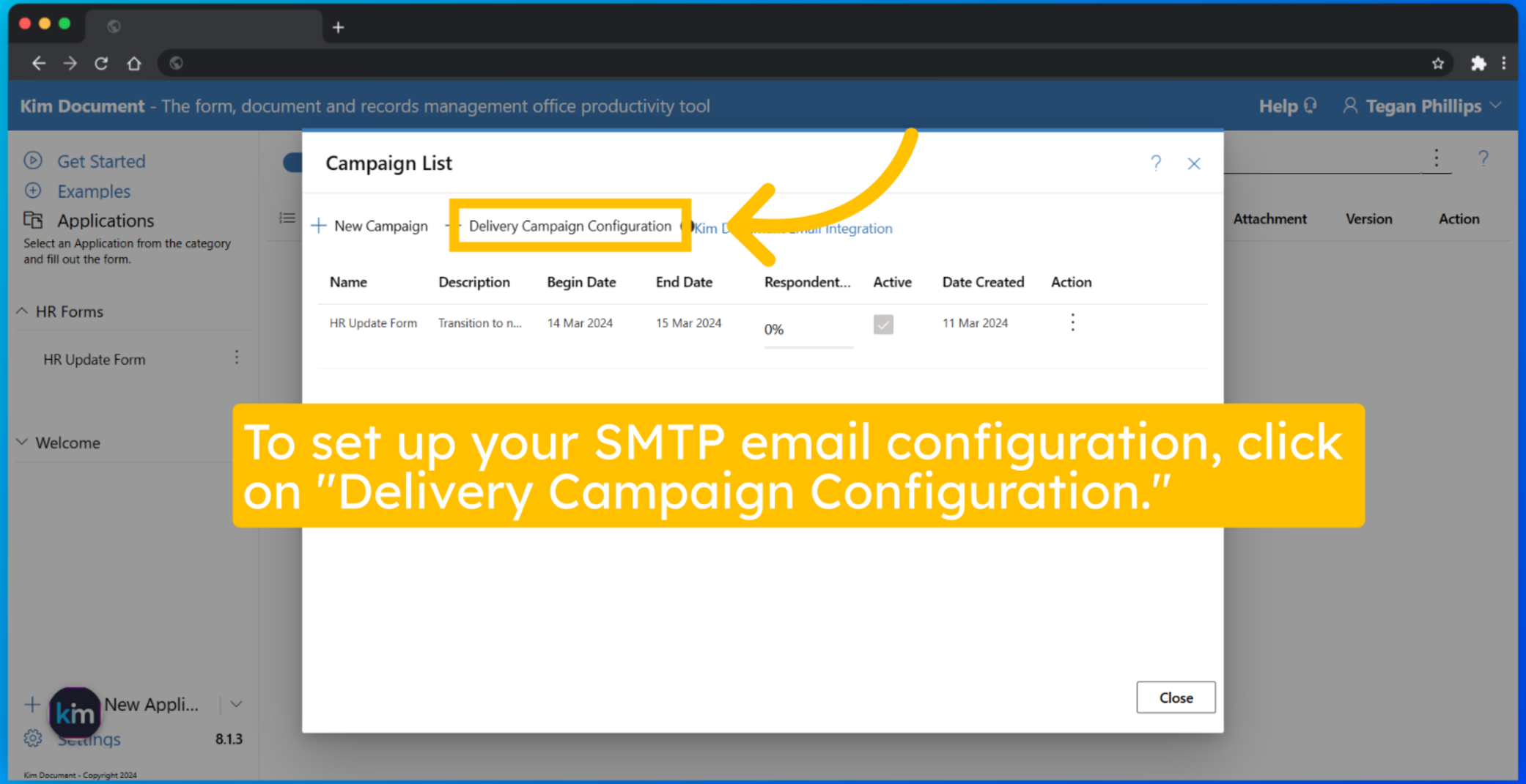
If you do not have O365 email integration and want to set up the SMTP integration, select "Campaign" from the Application's action menu.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Select an Application from the category and fill out the form.
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Welcome
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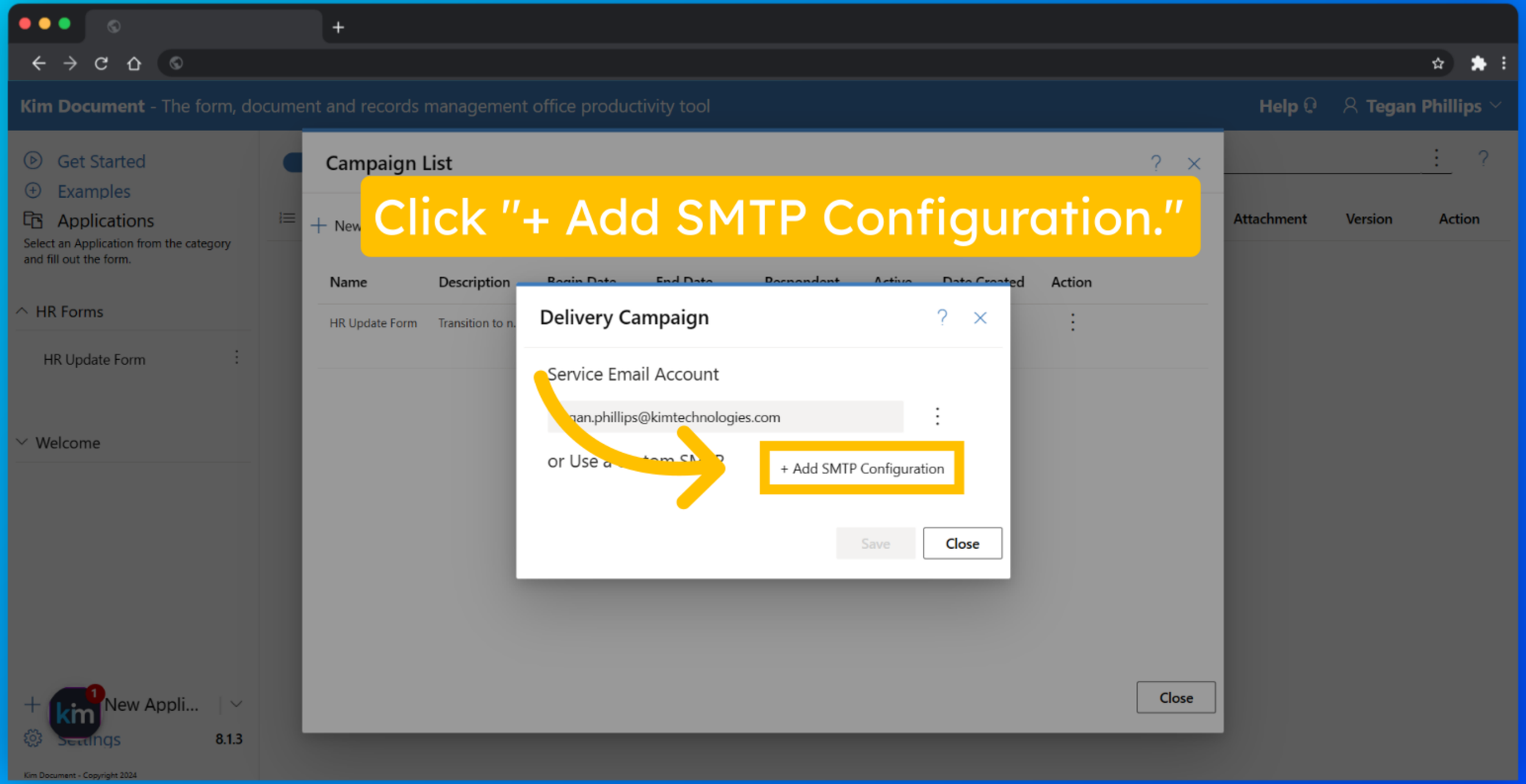
Campaign List
New Campaign
Delivery Campaign Configuration
Name
Description
Begin Date
End Date
Respondent...
Active
Date Created
Action
HR Update Form
Transition to n...
14 Mar 2024
15 Mar 2024
0%
11 Mar 2024
Close
Attachment
Version
Action
To set up your SMTP email configuration, click on "Delivery Campaign Configuration."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Applications
Select an Application from the category and fill out the form.
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Welcome
New Appli...
Settings
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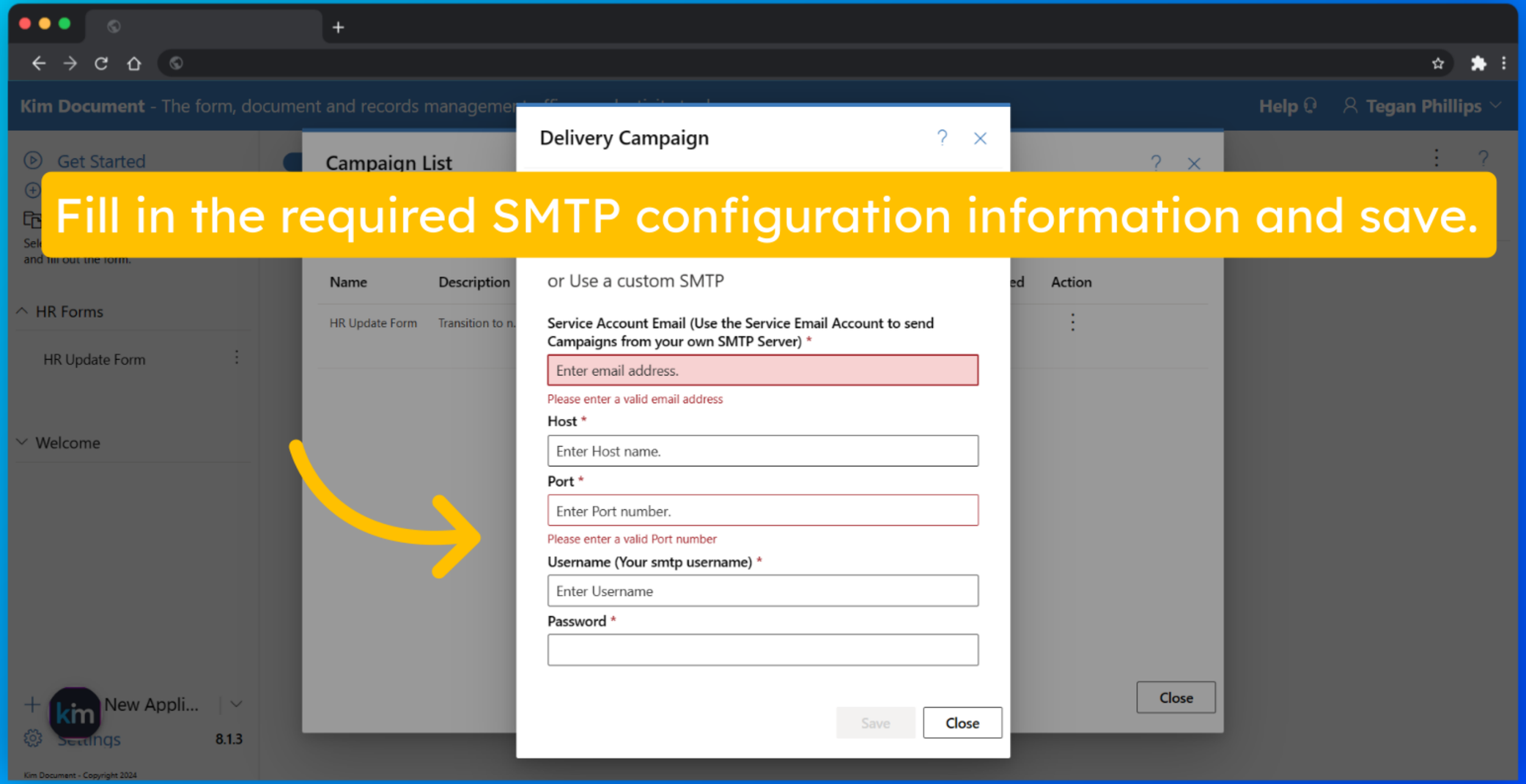
Campaign List
Click "+ Add SMTP Configuration."
New
Name
Description
Action
HR Update Form
Transition to n...
Attachment
Version
Action
Delivery Campaign
Service Email Account
an.phillips@kimtechnologies.com
or Use a
+ Add SMTP Configuration
Save
Close
Close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HR Forms
HR Update Form
Welcome
New Appli...
Settings
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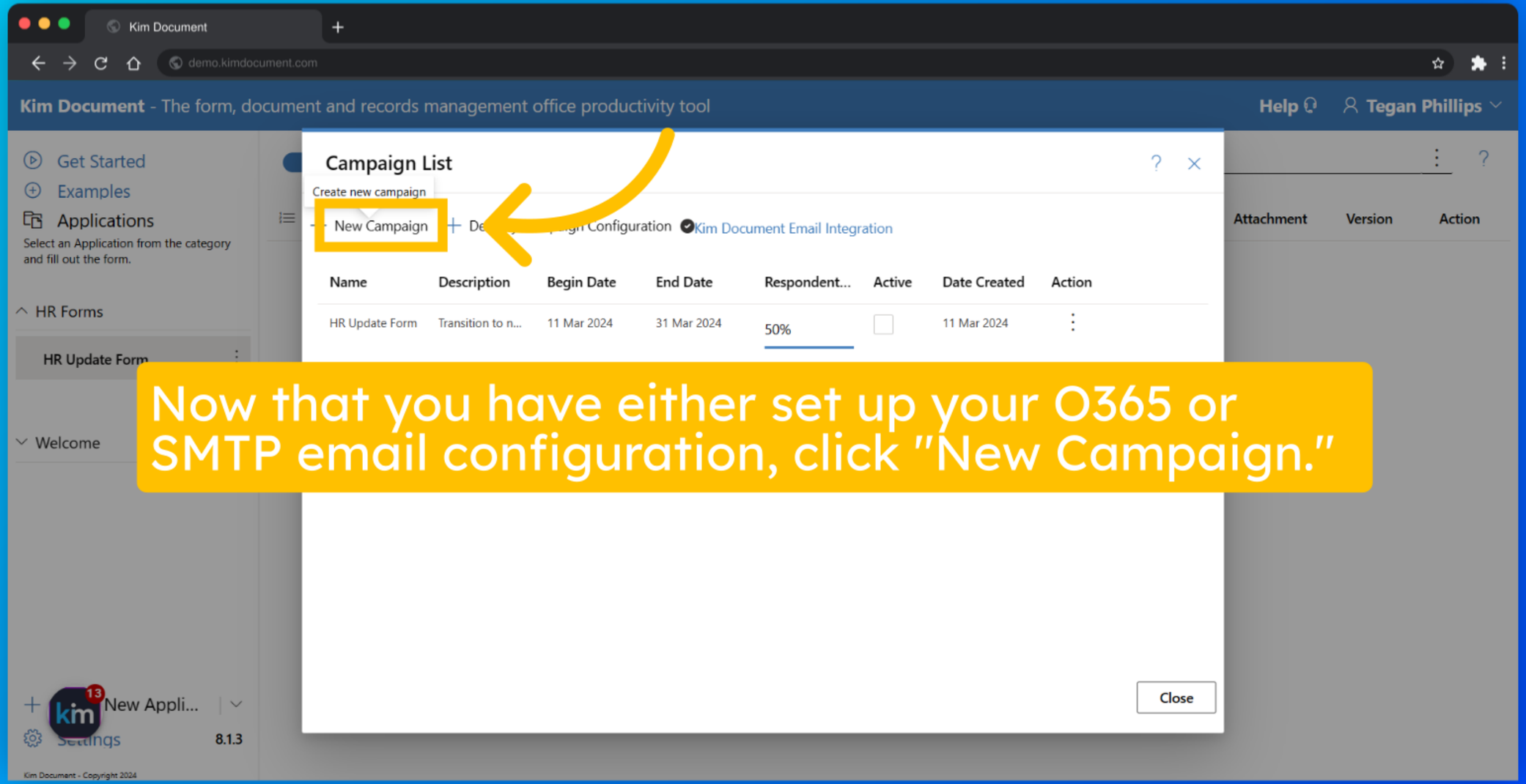
Campaign List
Name
Description
Action
HR Update Form
Transition to n.
Close
Delivery Campaign
Fill in the required SMTP configuration information and save.
or Use a custom SMTP
Service Account Email (Use the Service Email Account to send Campaigns from your own SMTP Server) *
Enter email address.
Please enter a valid email address
Host *
Enter Host name.
Port *
Enter Port number.
Please enter a valid Port number
Username (Your smtp username) *
Enter Username
Password *
Save
Close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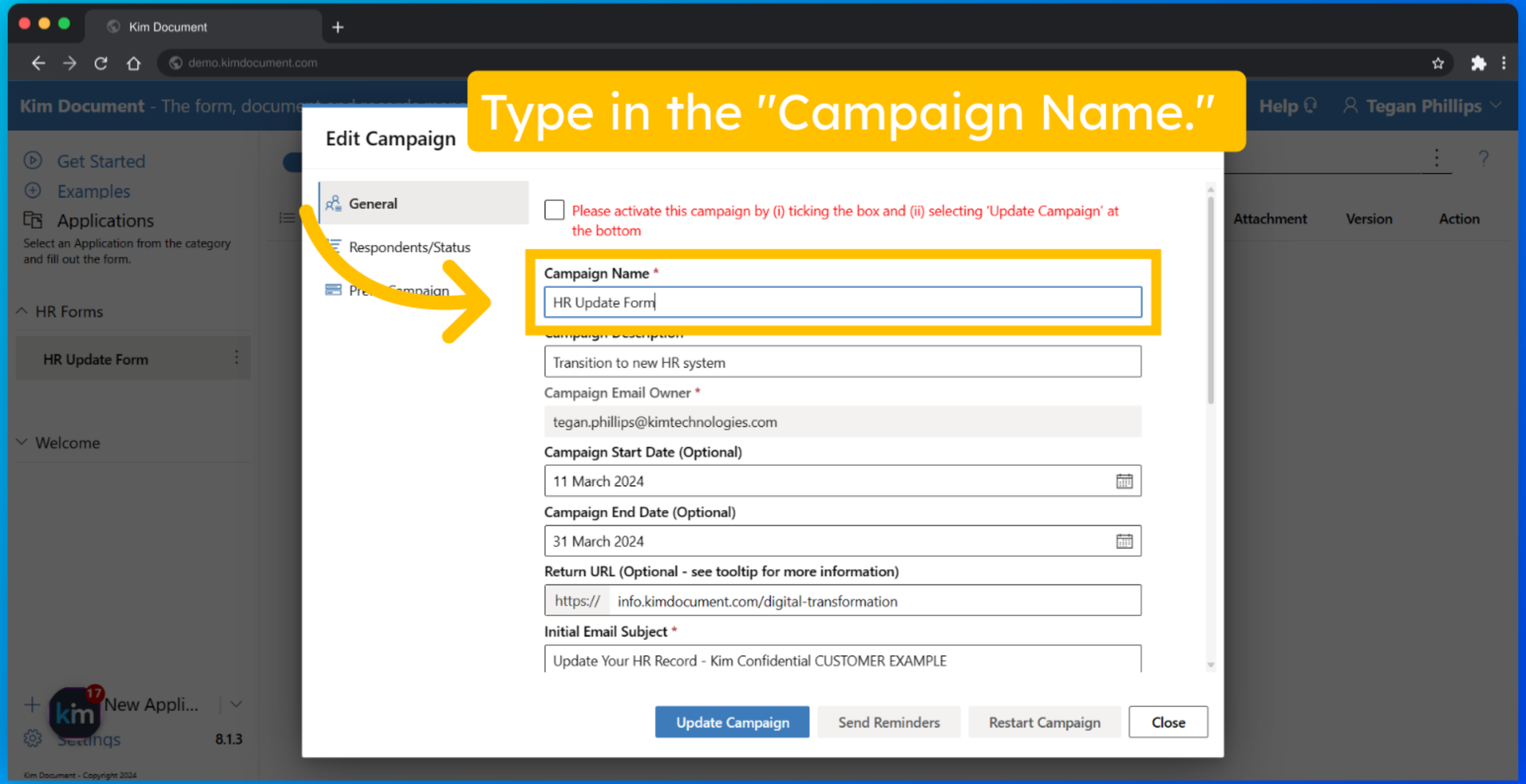
Campaign List
Create new campaign
New Campaign
Configuration
Kim Document Email Integration
Name
Description
Begin Date
End Date
Respondent...
Active
Date Created
Action
HR Update Form
Transition to n...
11 Mar 2024
31 Mar 2024
50%
11 Mar 2024
Close
Attachment
Version
Action
Now that you have either set up your O365 or SMTP email configuration, click "New Campaign."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Select an Application from the category and fill out the form.
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Welcome
New Appli...
Settings
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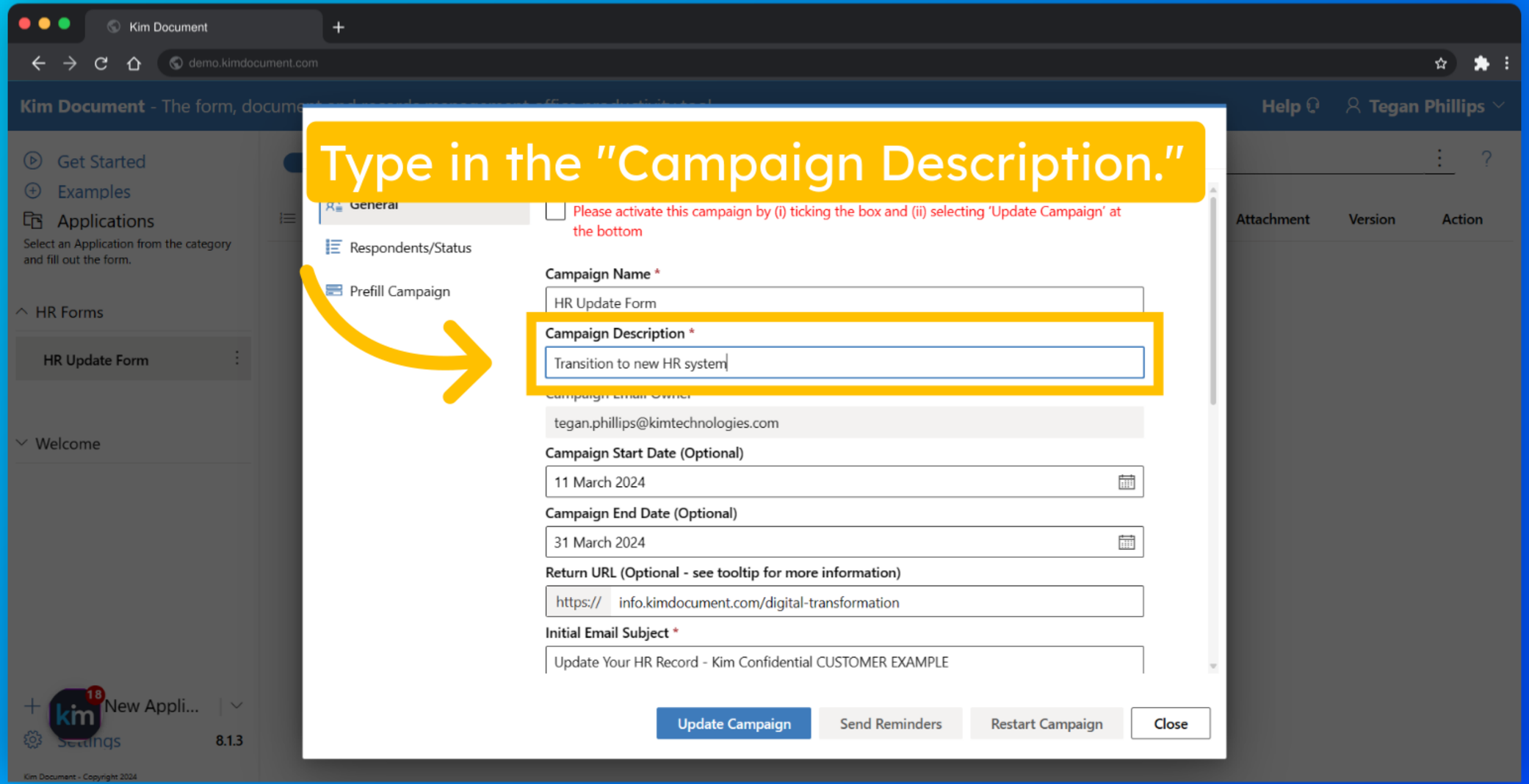
Kim Document - Copyright 2024
Attachment
Version
Action
Type in the "Campaign Name."
Edit Campaign
General
Respondents/Status
Pre... Campaign
Please activate this campaign by (i) ticking the box and (ii) selecting 'Update Campaign' at the bottom
Campaign Name *
HR Update Form
Transition to new HR system
Campaign Email Owner *
tegan.phillips@kimtechnologies.com
Campaign Start Date (Optional)
11 March 2024
Campaign End Date (Optional)
31 March 2024
Return URL (Optional - see tooltip for more information)
https://
info.kimdocument.com/digital-transformation
Initial Email Subject *
Update Your HR Record - Kim Confidential CUSTOMER EXAMPLE
Update Campaign
Send Reminders
Restart Campaign
Close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Applications
Select an Application from the category and fill out the form.
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HR Update Form
Welcome
New Appli...
Settings
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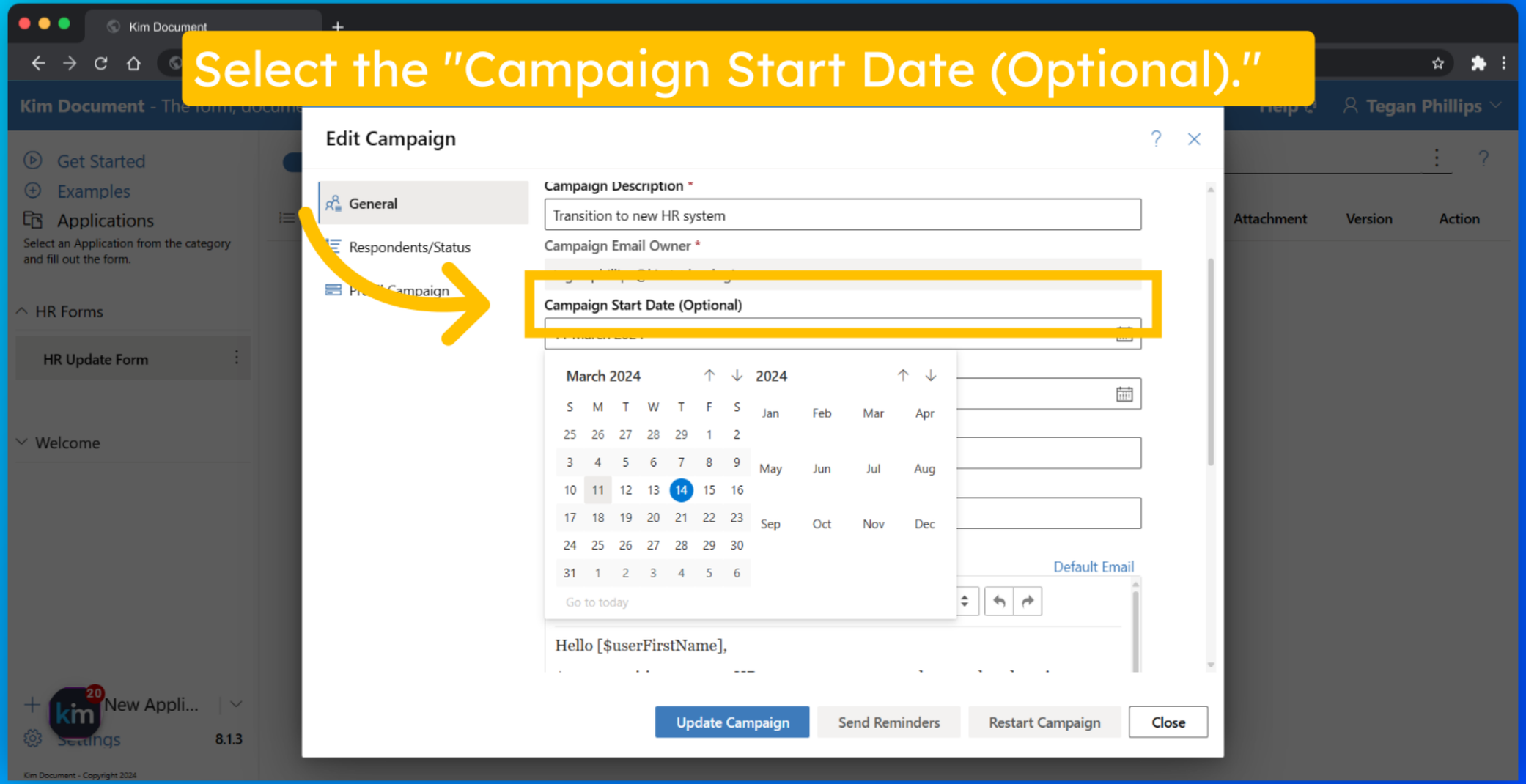
Attachment
Version
Action
Type in the "Campaign Description."
General
Respondents/Status
Prefill Campaign
Please activate this campaign by (i) ticking the box and (ii) selecting 'Update Campaign' at the bottom
Campaign Name *
HR Update Form
Campaign Description *
Transition to new HR system
tegan.phillips@kimtechnologies.com
Campaign Start Date (Optional)
11 March 2024
Campaign End Date (Optional)
31 March 2024
Return URL (Optional - see tooltip for more information)
https://
info.kimdocument.com/digital-transformation
Initial Email Subject *
Update Your HR Record - Kim Confidential CUSTOMER EXAMPLE
Update Campaign
Send Reminders
Restart Campaign
Close


Select the "Campaign Start Date (Optional)."
Kim Document
Kim Document - The form, docume
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Applications
Select an Application from the category and fill out the form.
HR Forms
HR Update Form
Welcome
New Appli...
Settings
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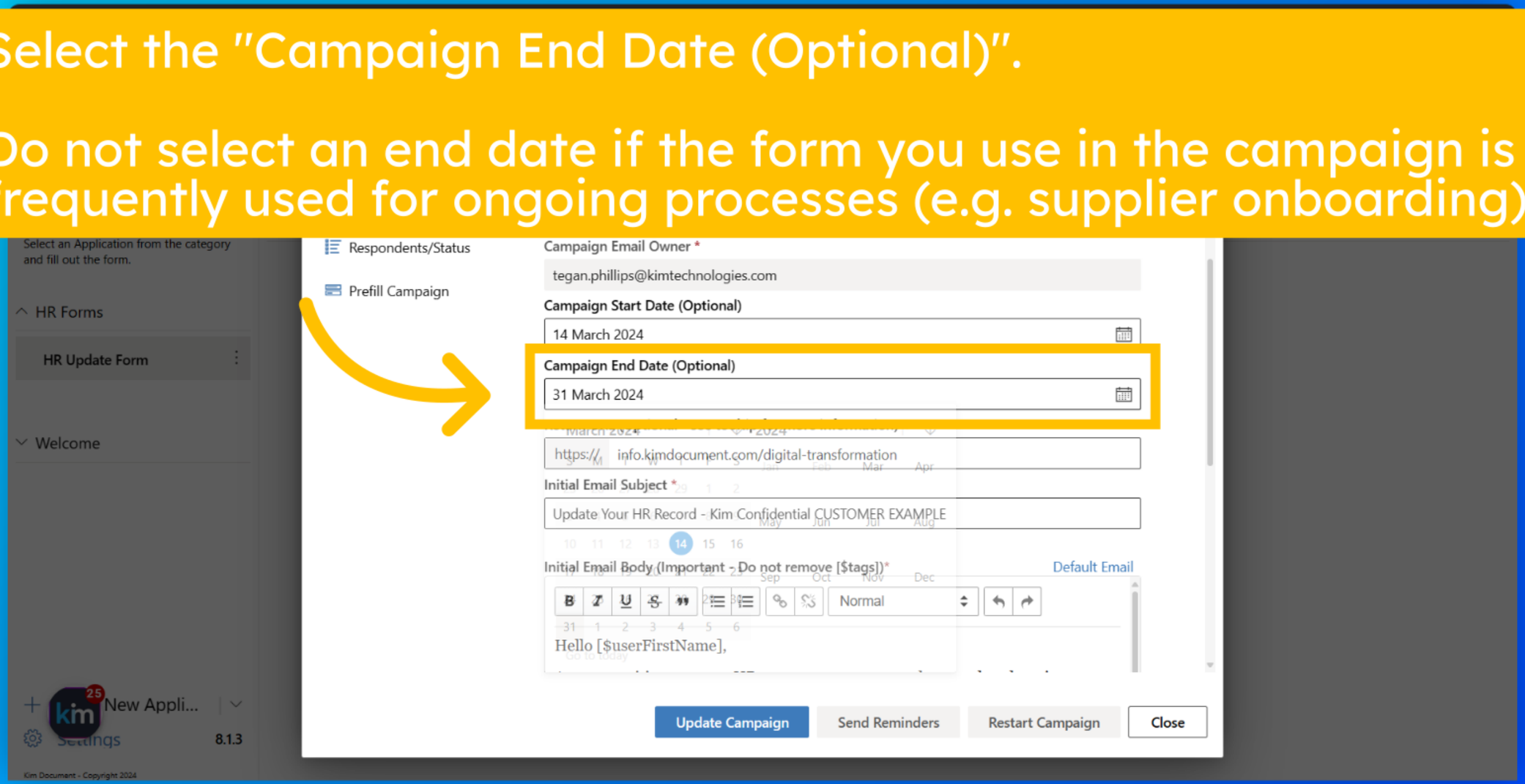
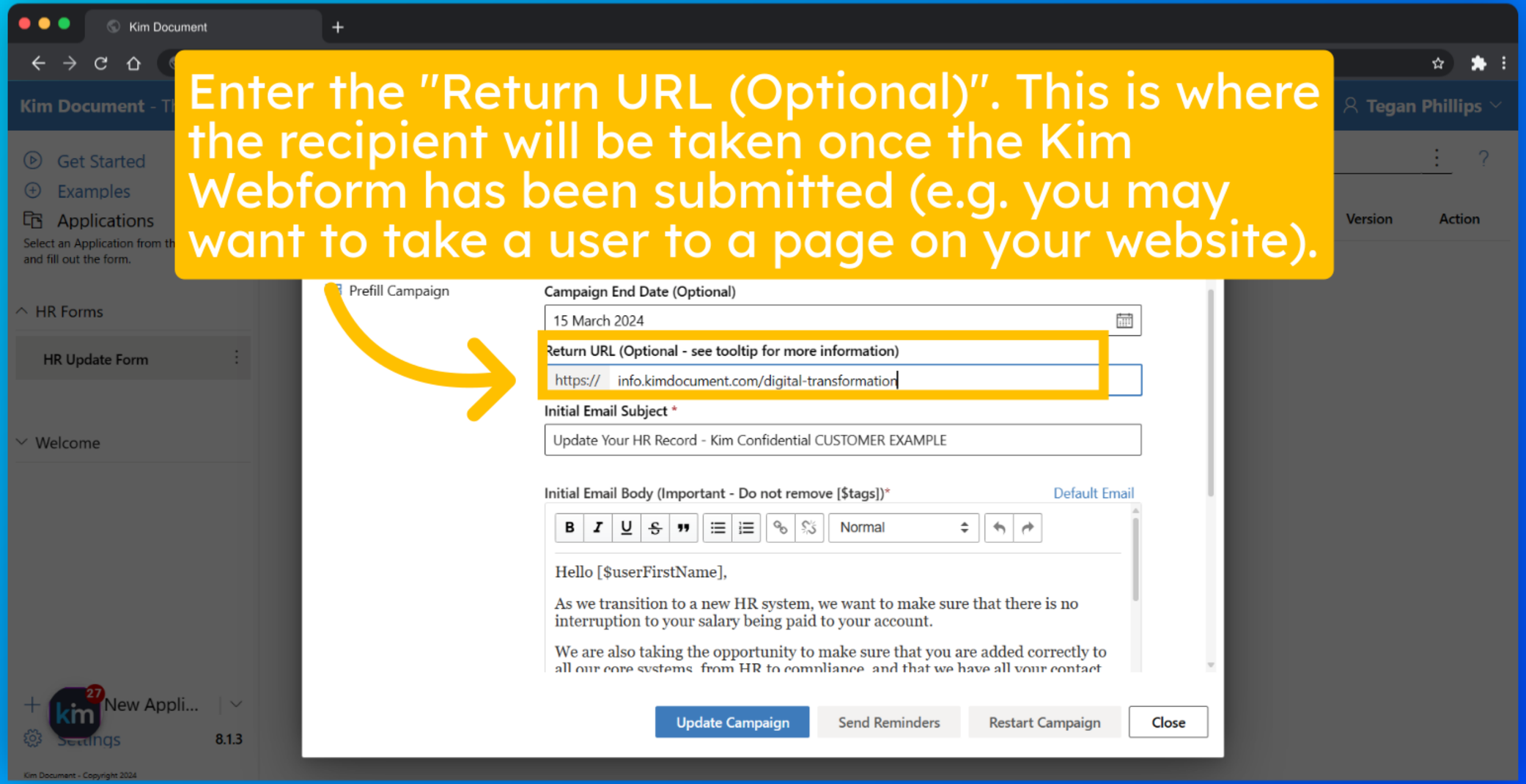
Attachment
Version
Action
Edit Campaign
General
Respondents/Status
Campaign
Campaign Description *
Transition to new HR system
Campaign Email Owner *
Campaign Start Date (Optional)
March 2024
2024
S M T W T F S
25 26 27 28 29 1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31 1 2 3 4 5 6
Jan Feb Mar Apr
May Jun Jul Aug
Sep Oct Nov Dec
Go to today
Default Email
Hello [$userFirstName],
Update Campaign
Send Reminders
Restart Campaign
Close

Select the "Campaign End Date (Optional)".

Do not select an end date if the form you use in the campaign is frequently used for ongoing processes (e.g. supplier onboarding).




Kim Document
Enter the "Return URL (Optional)". This is where the recipient will be taken once the Kim Webform has been submitted (e.g. you may want to take a user to a page on your website).
Kim Document - T
Tegan Phillips
Get Started
Examples
Applications
Select an Application from th
and fill out the form.
HR Forms
HR Update Form
Welcome
Version
Action
New Appli...
Settings
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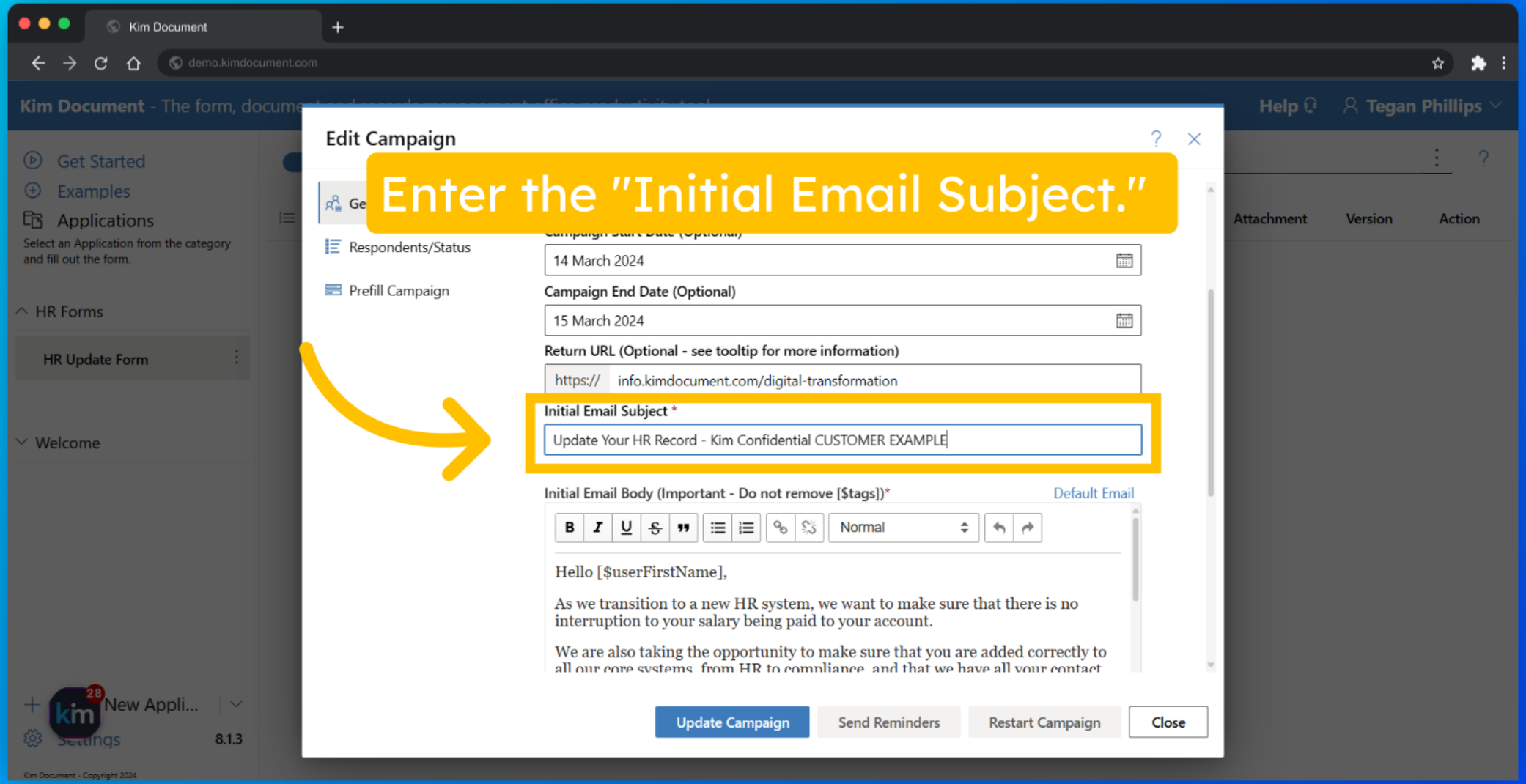
Kim Document - Copyright 2024
Prefill Campaign
Campaign End Date (Optional)
15 March 2024
Return URL (Optional - see tooltip for more information)
https://
info.kimdocument.com/digital-transformation
Initial Email Subject *
Update Your HR Record - Kim Confidential CUSTOMER EXAMPLE
Initial Email Body (Important - Do not remove [$tags])*
Default Email
Normal
Hello [$userFirstName],
As we transition to a new HR system, we want to make sure that there is no interruption to your salary being paid to your account.
We are also taking the opportunity to make sure that you are added correctly to
Update Campaign
Send Reminders
Restart Campaign
Close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Select an Application from the category and fill out the form.
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HR Update Form
Welcome
New Appli...
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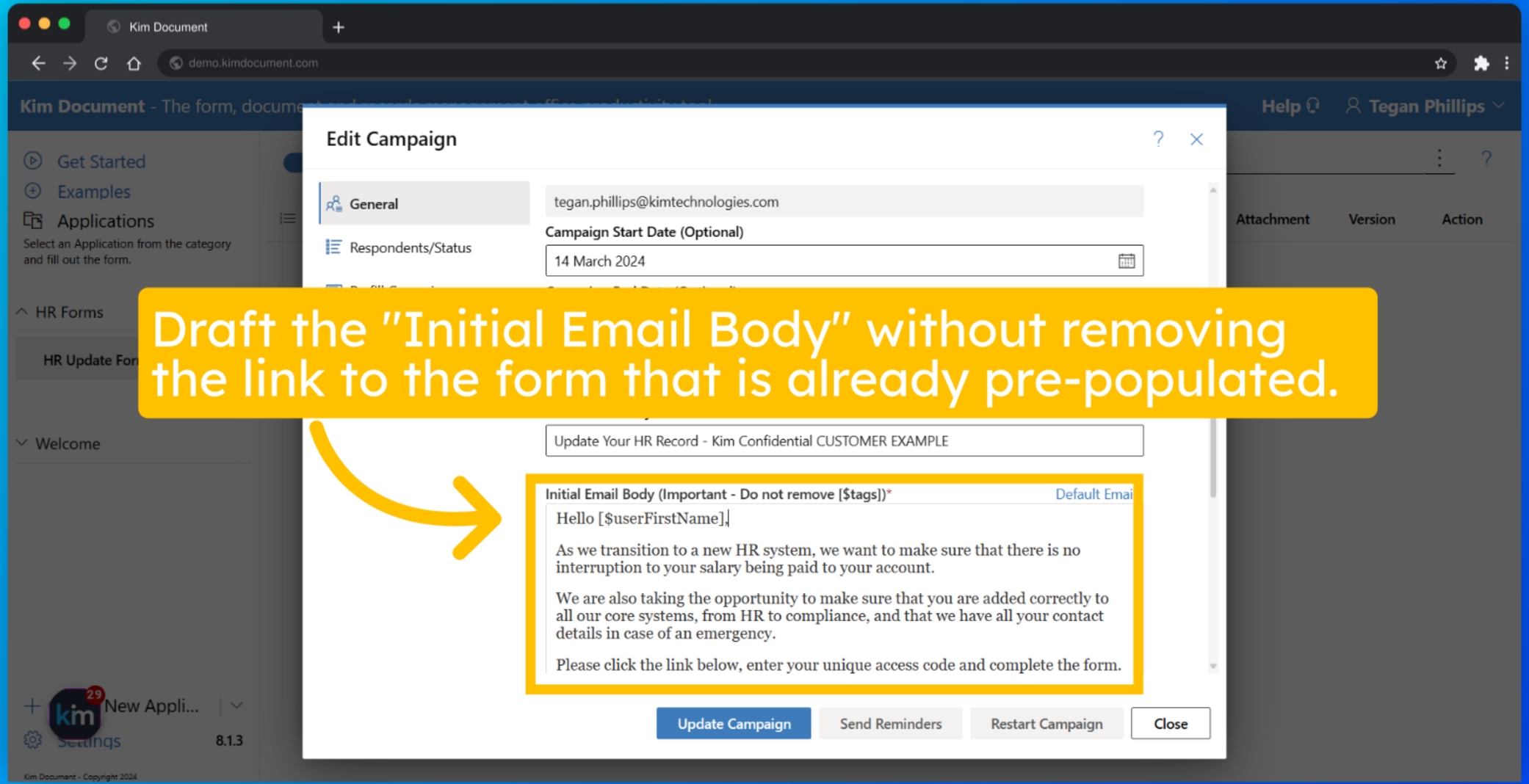
Attachment
Version
Action
Edit Campaign
Enter the "Initial Email Subject."
Respondents/Status
Prefill Campaign
14 March 2024
Campaign End Date (Optional)
15 March 2024
Return URL (Optional - see tooltip for more information)
https://
info.kimdocument.com/digital-transformation
Initial Email Subject *
Update Your HR Record - Kim Confidential CUSTOMER EXAMPLE
Initial Email Body (Important - Do not remove [$tags])*
Default Email
Normal
Hello [$userFirstName],
As we transition to a new HR system, we want to make sure that there is no interruption to your salary being paid to your account.
We are also taking the opportunity to make sure that you are added correctly to all our core systems, from HR to compliance, and that we have all your contact
Update Campaign
Send Reminders
Restart Campaign
Close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Applications
Select an Application from the category and fill out the form.
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HR Update For
Welcome
New Appli...
Settings
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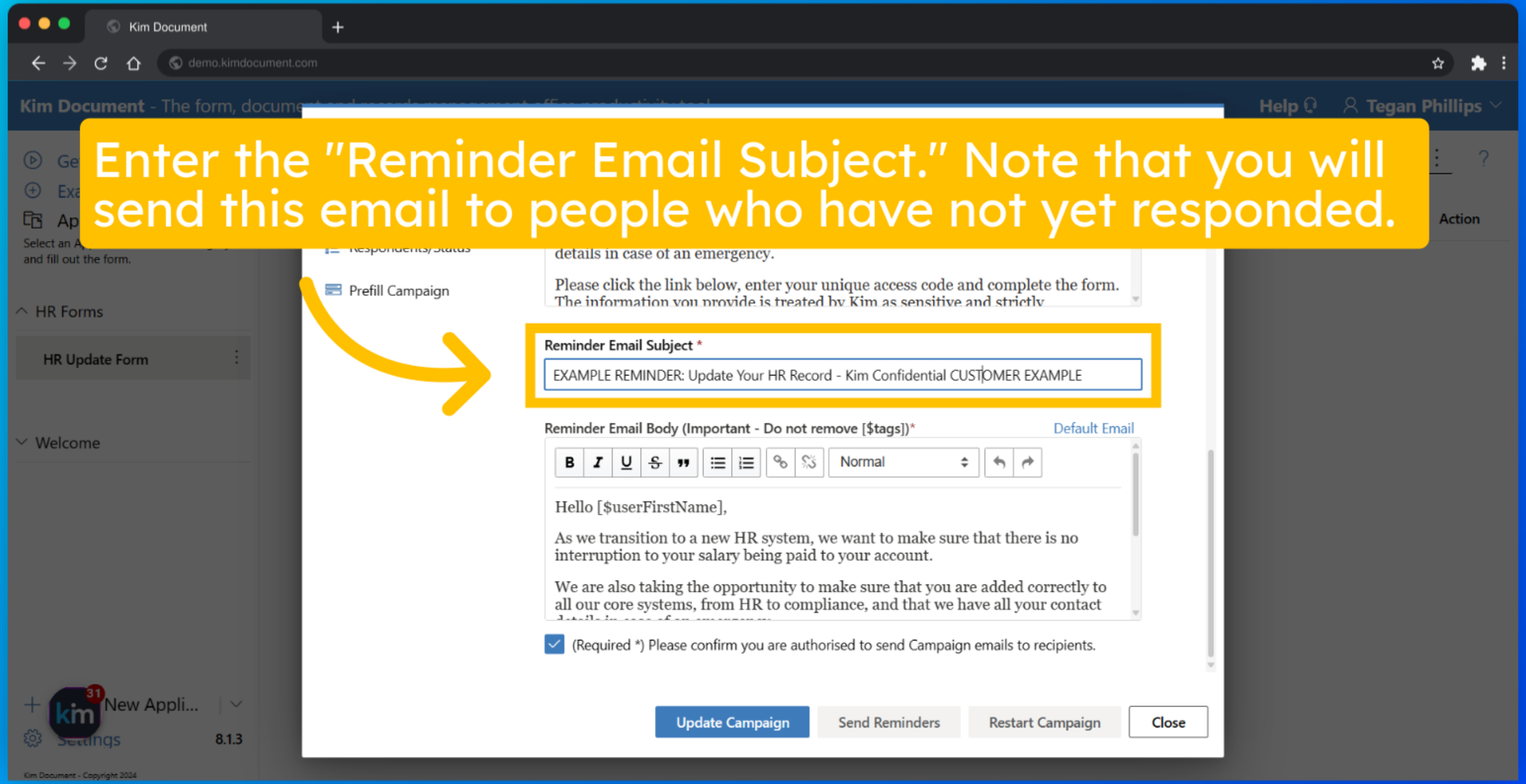
Kim Document - Copyright 2024
Attachment
Version
Action
Edit Campaign
General
Respondents/Status
tegan.phillips@kimtechnologies.com
Campaign Start Date (Optional)
14 March 2024
Draft the "Initial Email Body" without removing the link to the form that is already pre-populated.
Update Your HR Record - Kim Confidential CUSTOMER EXAMPLE
Initial Email Body (Important - Do not remove [$tags])*
Default Emai
Hello [$userFirstName],
As we transition to a new HR system, we want to make sure that there is no interruption to your salary being paid to your account.
We are also taking the opportunity to make sure that you are added correctly to all our core systems, from HR to compliance, and that we have all your contact details in case of an emergency.
Please click the link below, enter your unique access code and complete the form.
Update Campaign
Send Reminders
Restart Campaign
Close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Enter the "Reminder Email Subject." Note that you will send this email to people who have not yet responded.
Action
HR Forms
HR Update Form
Welcome
Prefill Campaign
details in case of an emergency.
Please click the link below, enter your unique access code and complete the form.
The information you provide is treated by Kim as sensitive and strictly
Reminder Email Subject *
EXAMPLE REMINDER: Update Your HR Record - Kim Confidential CUSTOMER EXAMPLE
Reminder Email Body (Important - Do not remove [$tags])*
Default Email
Normal
Hello [$userFirstName],
As we transition to a new HR system, we want to make sure that there is no interruption to your salary being paid to your account.
We are also taking the opportunity to make sure that you are added correctly to all our core systems, from HR to compliance, and that we have all your contact
(Required *) Please confirm you are authorised to send Campaign emails to recipients.
Update Campaign
Send Reminders
Restart Campaign
Close
New Appli...
Settings
8.1.3
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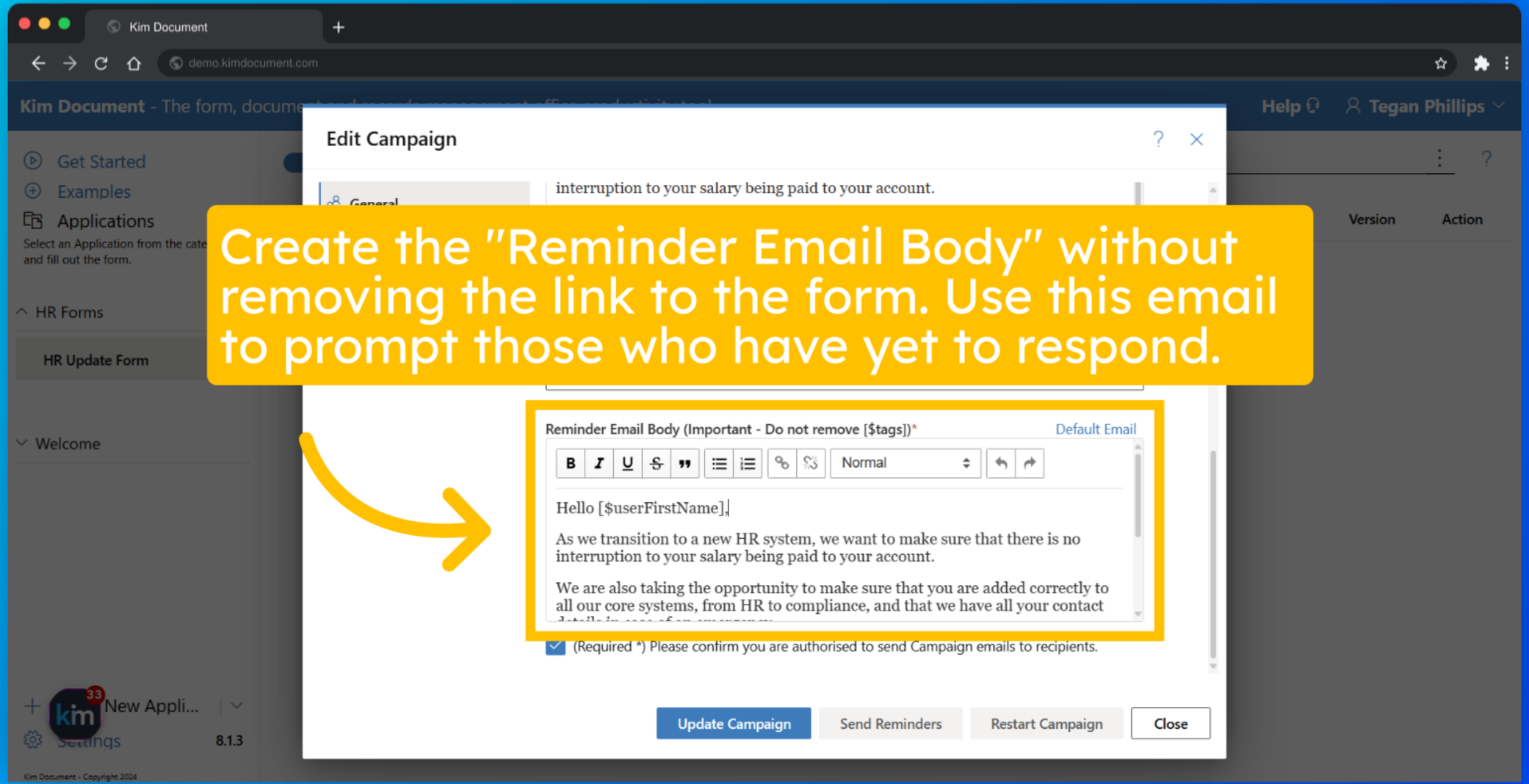
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Select an Application from the cate
and fill out the form.
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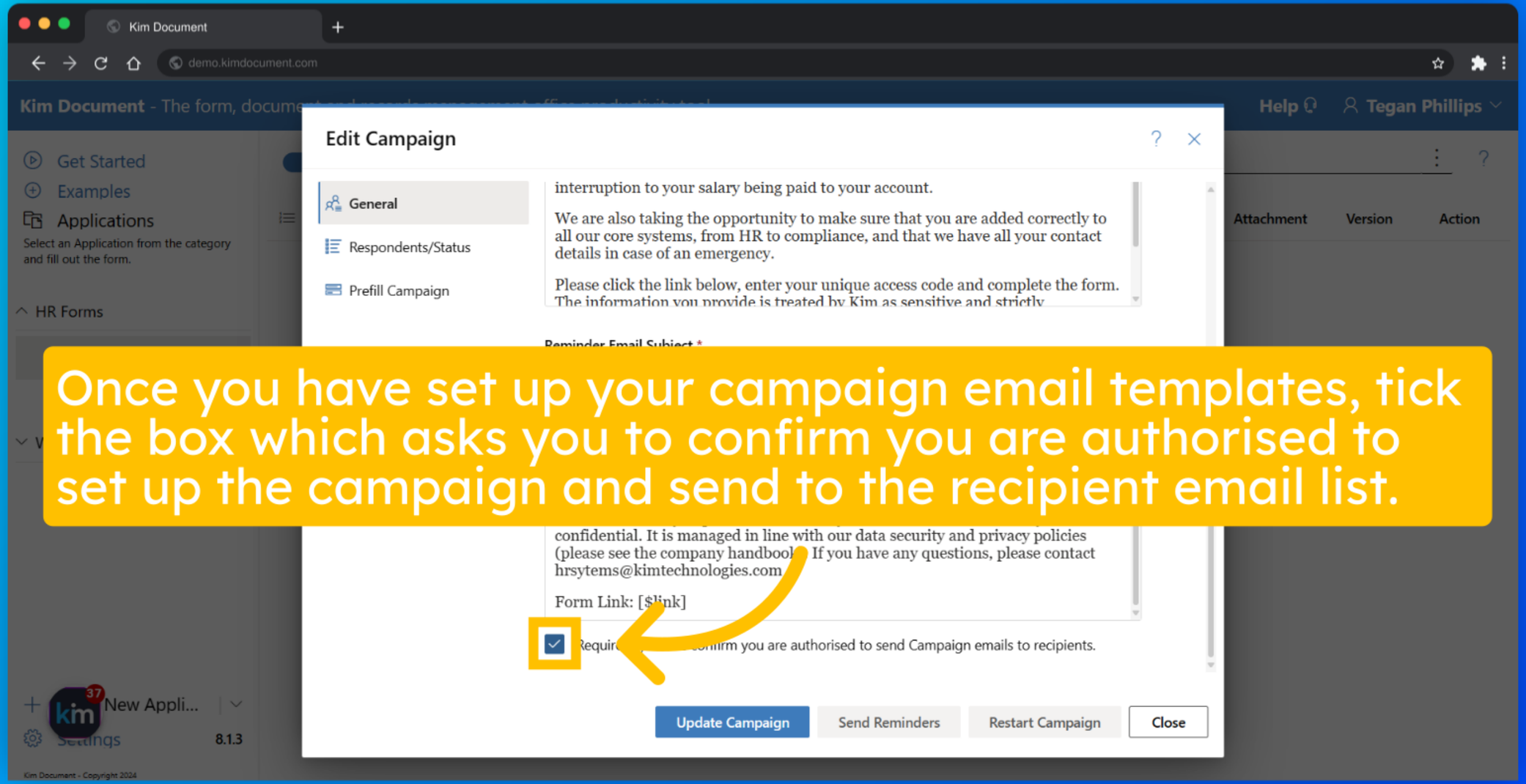
Kim Document - Copyright 2024
Edit Campaign
General
interruption to your salary being paid to your account.
Create the "Reminder Email Body" without removing the link to the form. Use this email to prompt those who have yet to respond.
Reminder Email Body (Important - Do not remove [$tags])*
Default Email
Normal
Hello [$userFirstName],
As we transition to a new HR system, we want to make sure that there is no interruption to your salary being paid to your account.
We are also taking the opportunity to make sure that you are added correctly to all our core systems, from HR to compliance, and that we have all your contact
(Required *) Please confirm you are authorised to send Campaign emails to recipients.
Update Campaign
Send Reminders
Restart Campaign
Close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Select an Application from the category and fill out the form.
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Attachment
Version
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Settings
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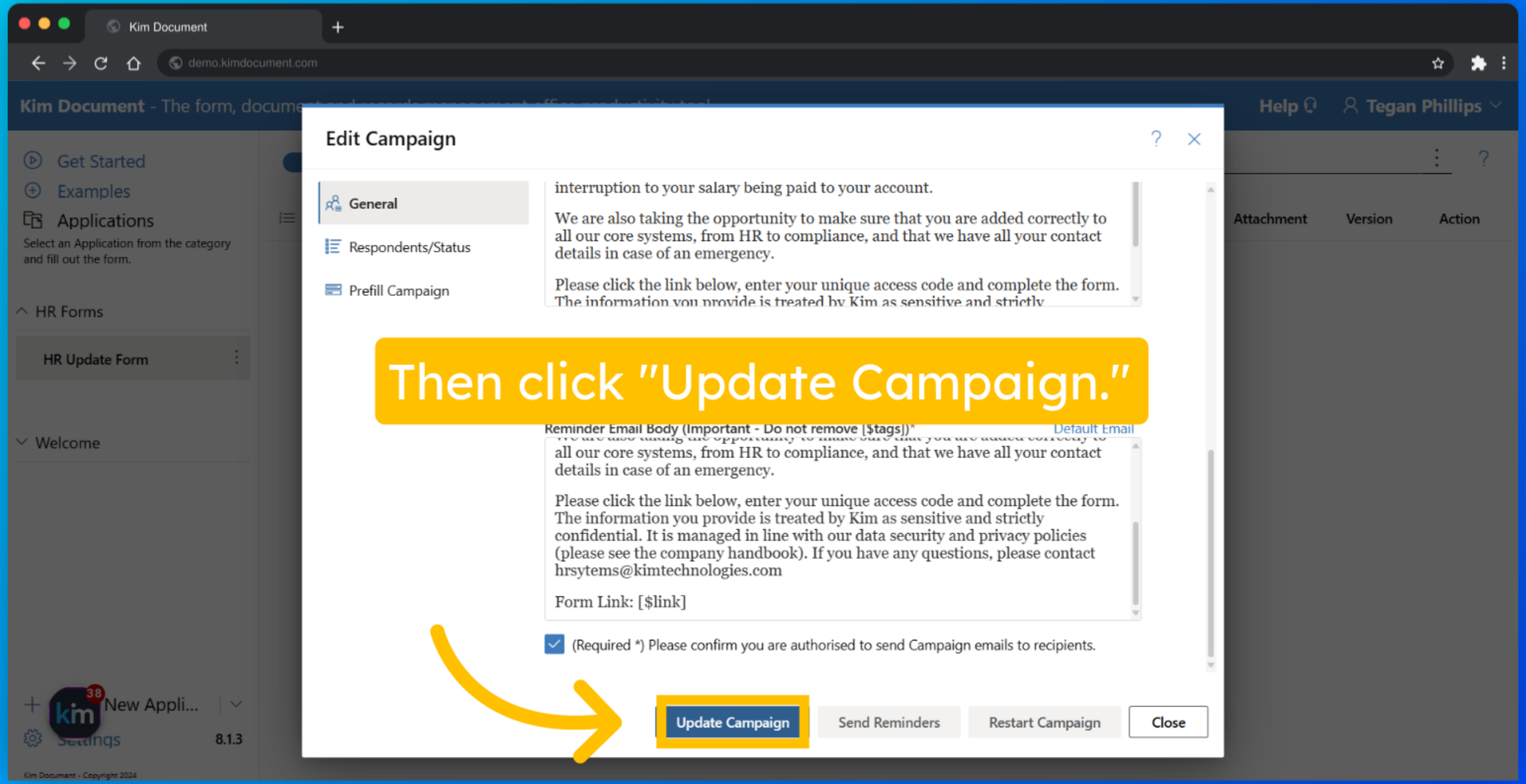
Edit Campaign
General
Respondents/Status
Prefill Campaign
interruption to your salary being paid to your account.
We are also taking the opportunity to make sure that you are added correctly to all our core systems, from HR to compliance, and that we have all your contact details in case of an emergency.
Please click the link below, enter your unique access code and complete the form. The information you provide is treated by Kim as sensitive and strictly
Reminder Email Subject *
confidential. It is managed in line with our data security and privacy policies (please see the company handbook). If you have any questions, please contact hrsytems@kimtechnologies.com
Form Link: [$link]
confirm you are authorised to send Campaign emails to recipients.
Update Campaign
Send Reminders
Restart Campaign
Close
Once you have set up your campaign email templates, tick the box which asks you to confirm you are authorised to set up the campaign and send to the recipient email list.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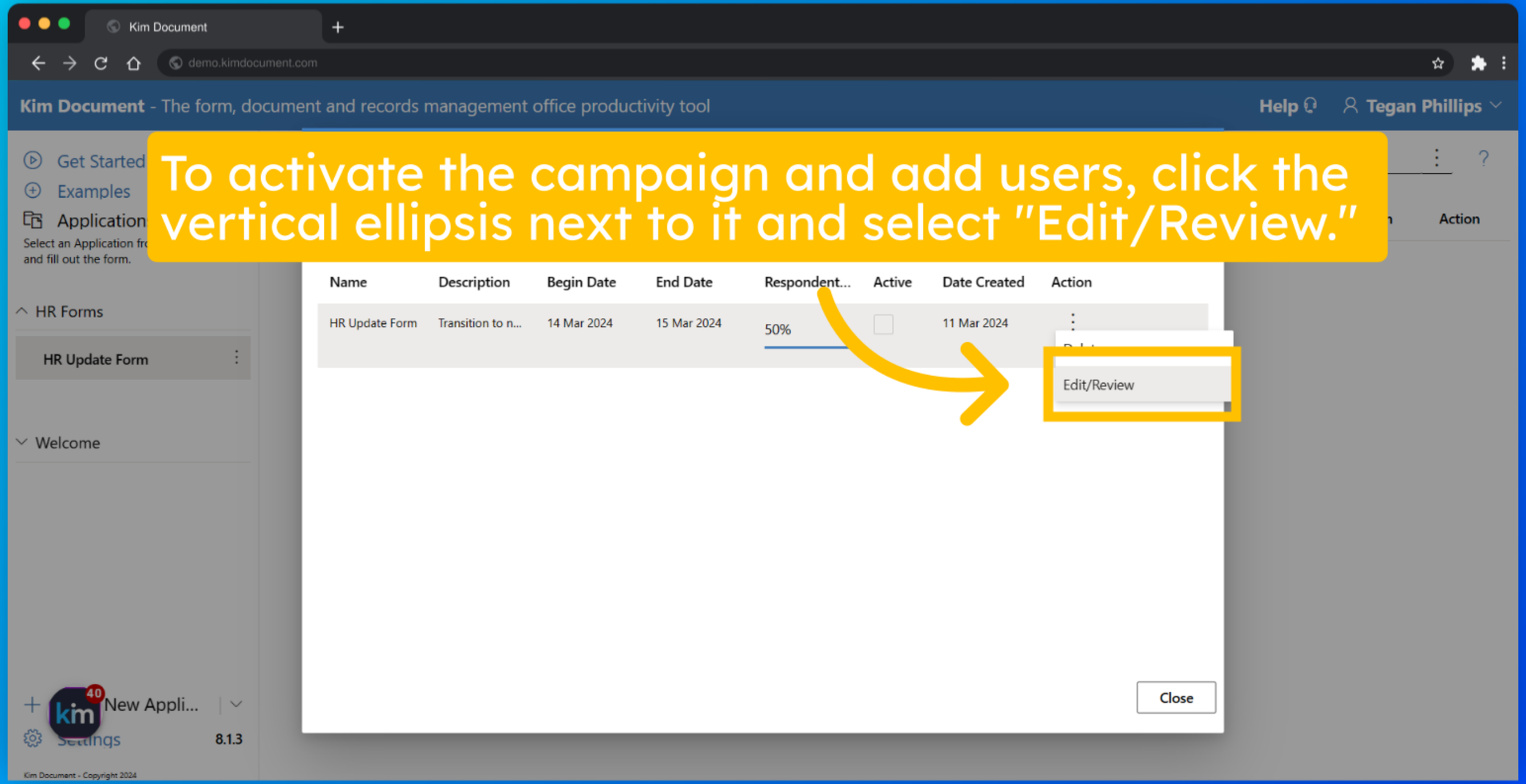
interruption to your salary being paid to your account.
We are also taking the opportunity to make sure that you are added correctly to all our core systems, from HR to compliance, and that we have all your contact details in case of an emergency.
Please click the link below, enter your unique access code and complete the form. The information you provide is treated by Kim as sensitive and strictly
Then click "Update Campaign."
Reminder Email Body (Important - Do not remove [$tags])*
Default Email
all our core systems, from HR to compliance, and that we have all your contact details in case of an emergency.
Please click the link below, enter your unique access code and complete the form. The information you provide is treated by Kim as sensitive and strictly confidential. It is managed in line with our data security and privacy policies (please see the company handbook). If you have any questions, please contact hrsytems@kimtechnologies.com
Form Link: [$link]
(Required *) Please confirm you are authorised to send Campaign emails to recipients.
Update Campaign
Send Reminders
Restart Campaign
Close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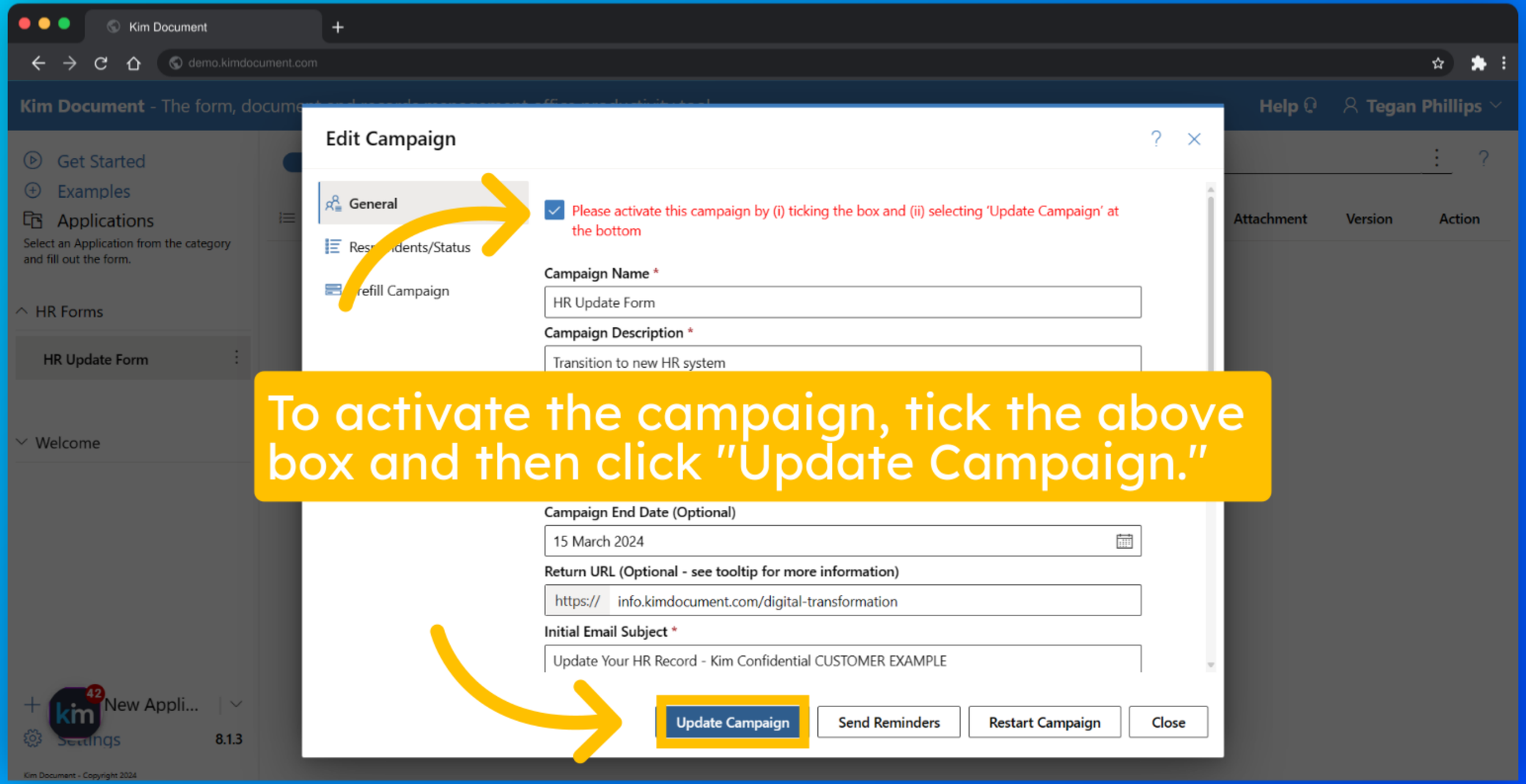
To activate the campaign and add users, click the vertical ellipsis next to it and select "Edit/Review."
Name
Description
Begin Date
End Date
Respondent...
Active
Date Created
Action
HR Update Form
Transition to n...
14 Mar 2024
15 Mar 2024
50%
11 Mar 2024
Edit/Review
Close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Edit Campaign
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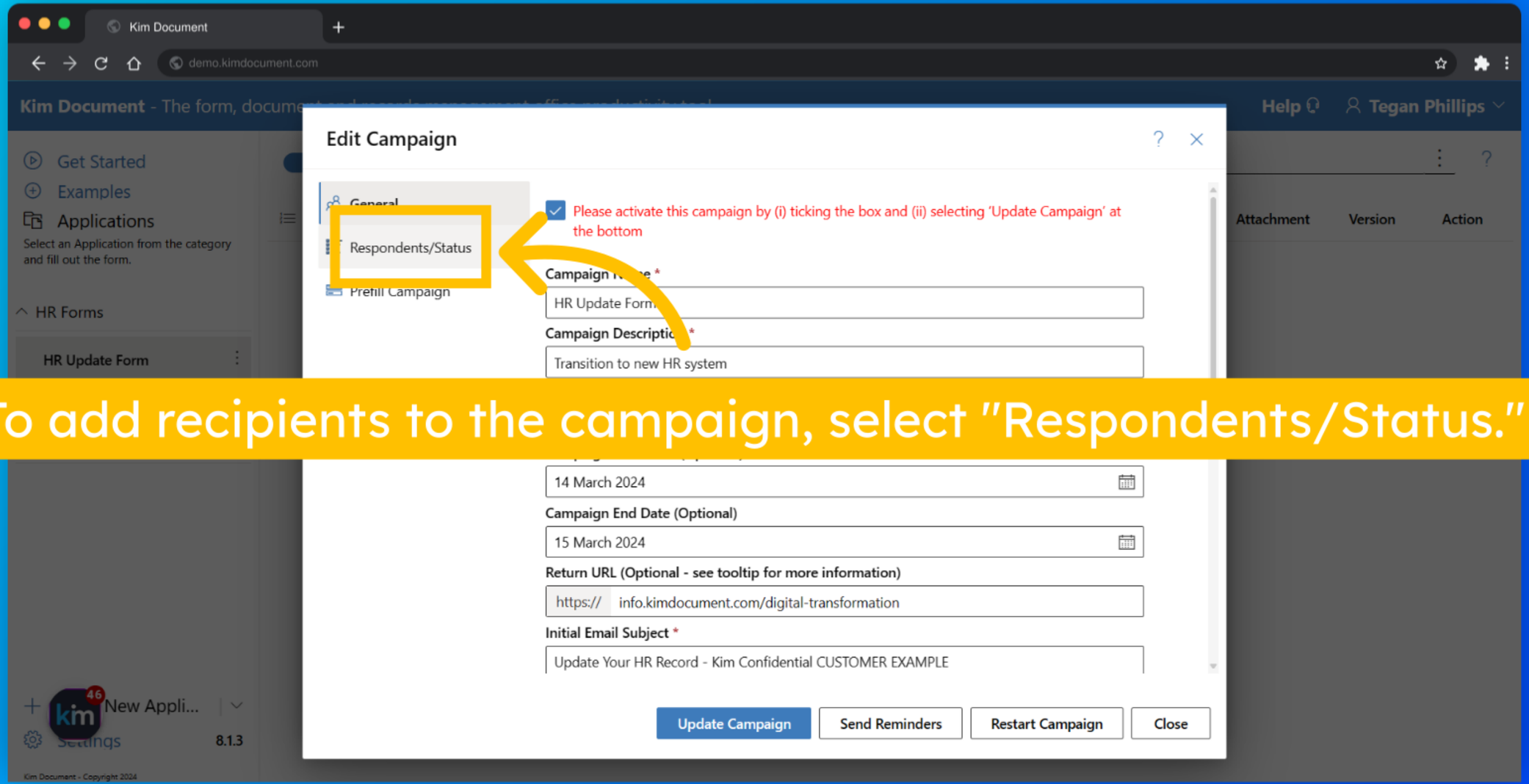
Prefill Campaign
Please activate this campaign by (i) ticking the box and (ii) selecting 'Update Campaign' at the bottom
Campaign Name *
HR Update Form
Campaign Description *
Transition to new HR system
To activate the campaign, tick the above box and then click "Update Campaign."
Campaign End Date (Optional)
15 March 2024
Return URL (Optional - see tooltip for more information)
https://
info.kimdocument.com/digital-transformation
Initial Email Subject *
Update Your HR Record - Kim Confidential CUSTOMER EXAMPLE
Update Campaign
Send Reminders
Restart Campaign
Close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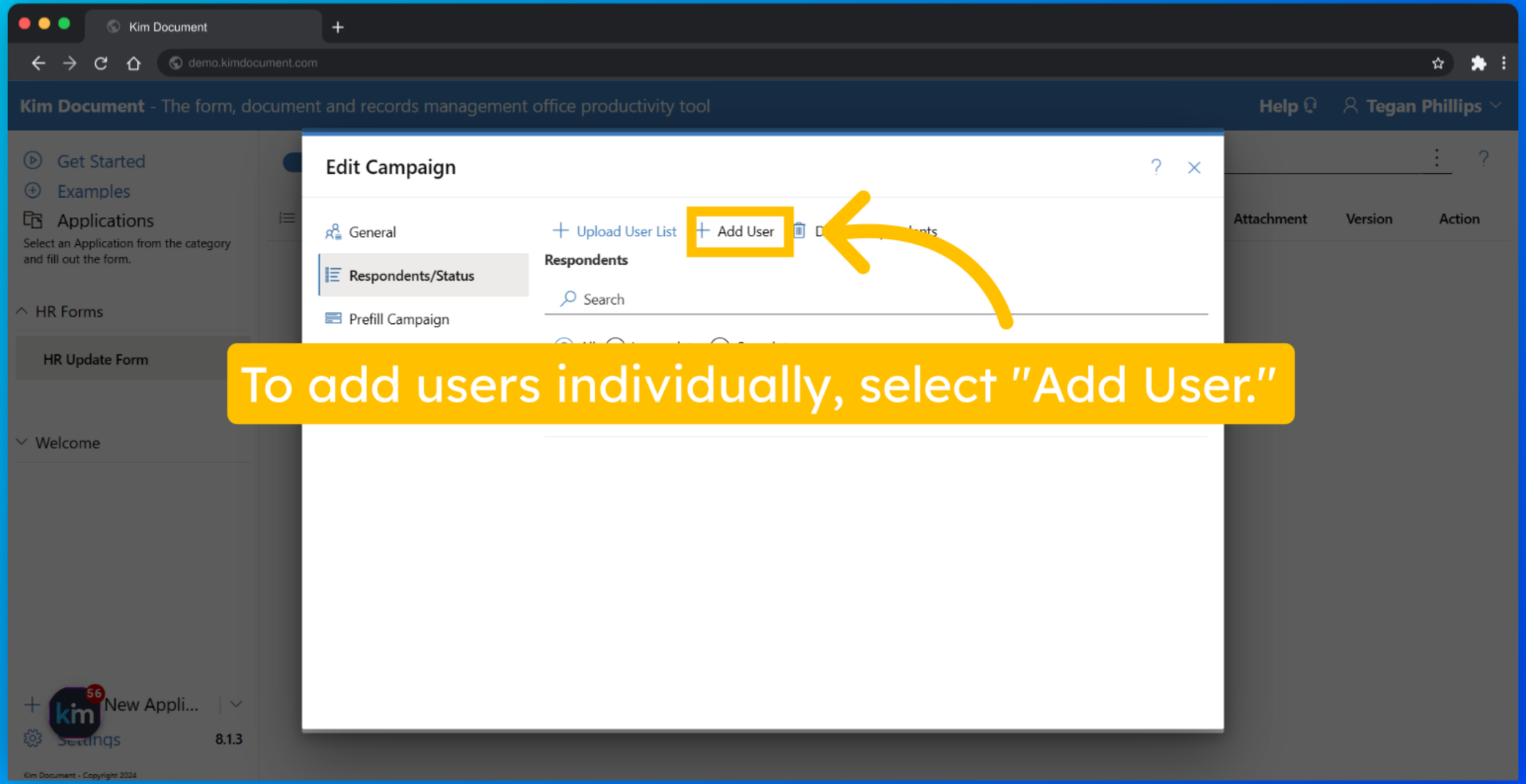
Edit Campaign
General
Respondents/Status
Prefill Campaign
Please activate this campaign by (i) ticking the box and (ii) selecting 'Update Campaign' at the bottom
Campaign Name *
HR Update Form
Campaign Description *
Transition to new HR system
14 March 2024
Campaign End Date (Optional)
15 March 2024
Return URL (Optional - see tooltip for more information)
https://
info.kimdocument.com/digital-transformation
Initial Email Subject *
Update Your HR Record - Kim Confidential CUSTOMER EXAMPLE
Update Campaign
Send Reminders
Restart Campaign
Close
To add recipients to the campaign, select "Respondents/Status."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Edit Campaign
General
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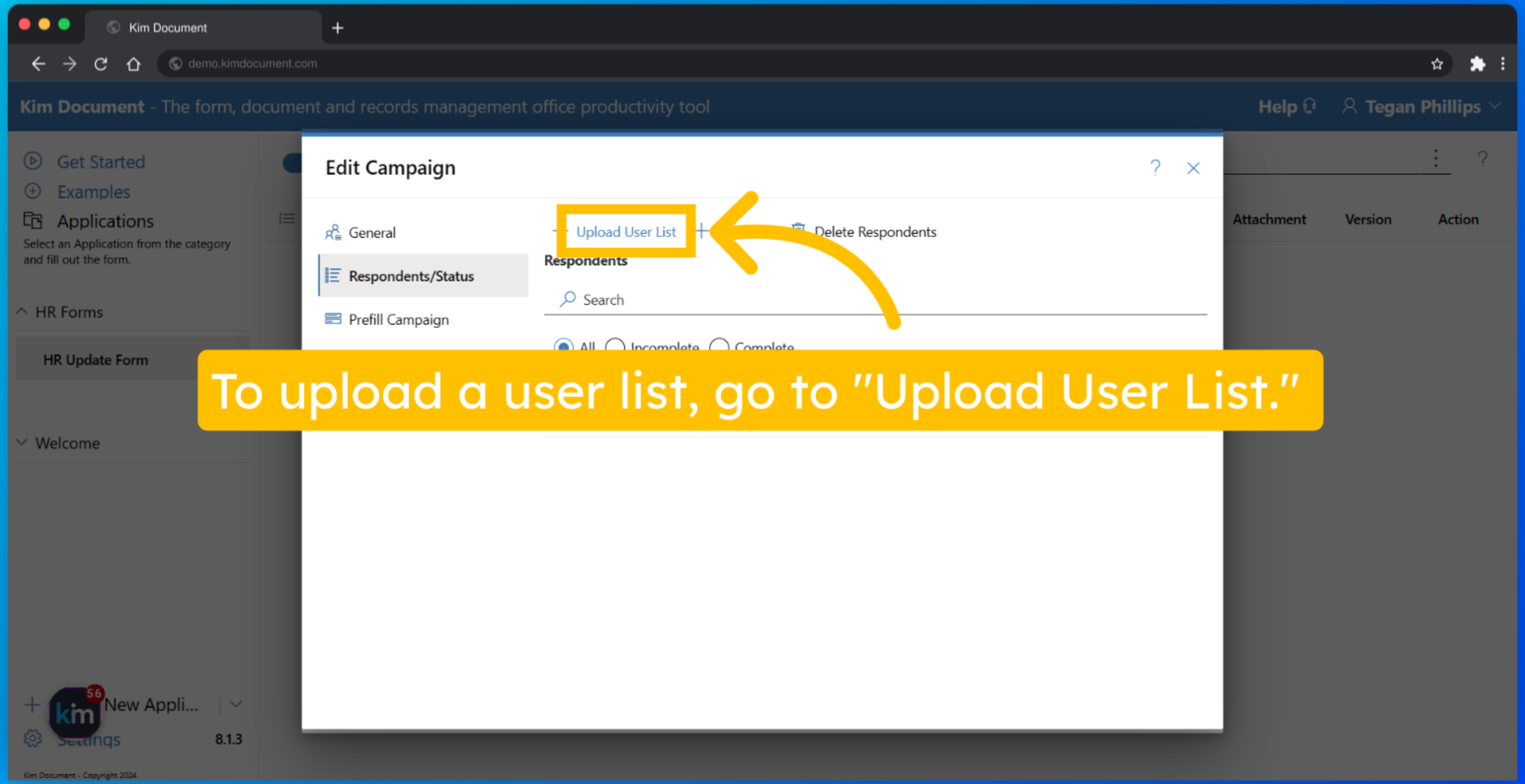
Prefill Campaign
Upload User List
Add User
Respondents
Search
To add users individually, select "Add User."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Edit Campaign
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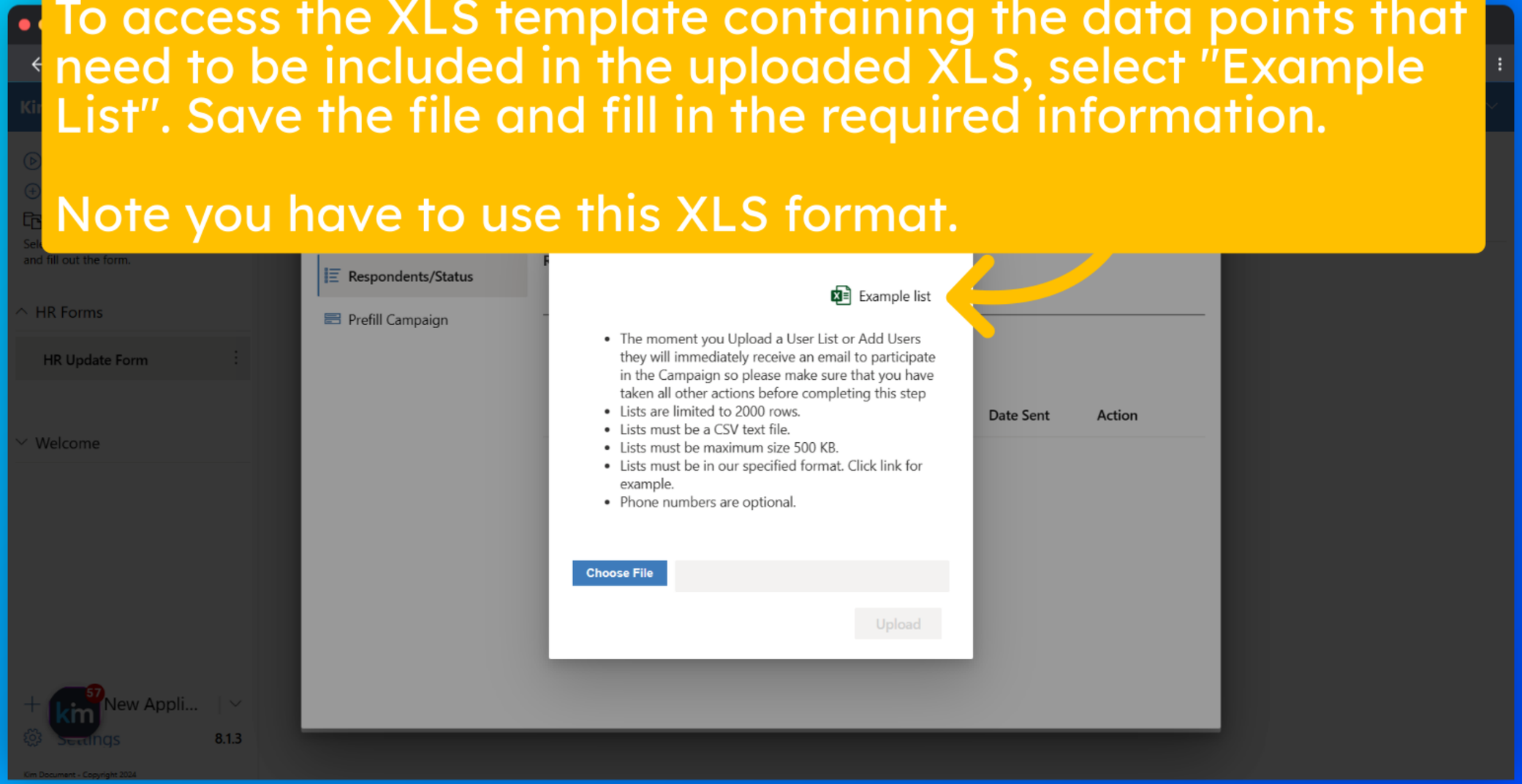
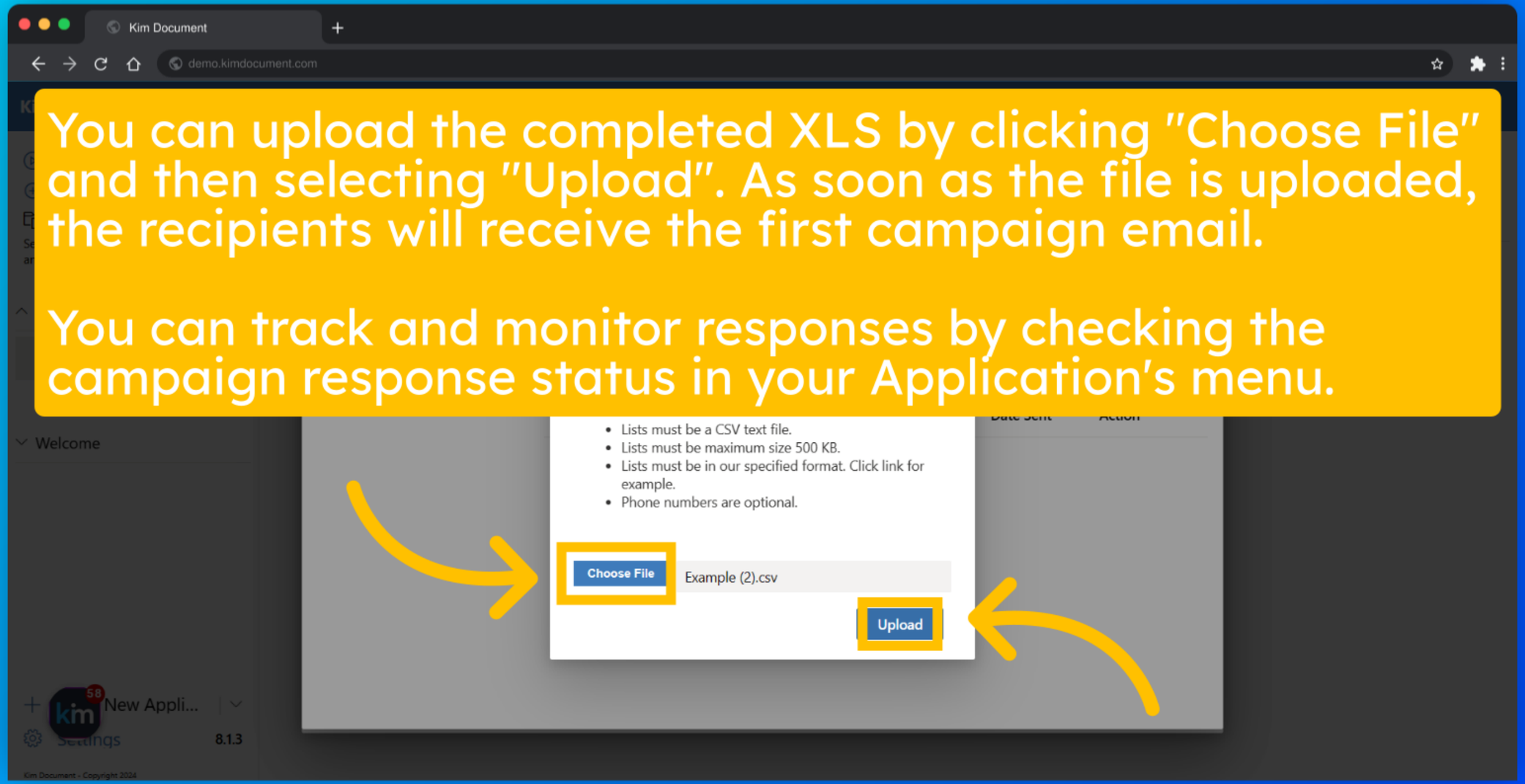
Prefill Campaign
Upload User List
Delete Respondents
Respondents
Search
All
Incomplete
Complete
To upload a user list, go to "Upload User List."


To access the XLS template containing the data points that need to be included in the uploaded XLS, select "Example List". Save the file and fill in the required information.
Note you have to use this XLS format.
HR Forms
HR Update Form
Welcome
New Appli...
Settings
8.1.3
Respondents/Status
Prefill Campaign
Example list
The moment you Upload a User List or Add Users they will immediately receive an email to participate in the Campaign so please make sure that you have taken all other actions before completing this step
Lists are limited to 2000 rows.
Lists must be a CSV text file.
Lists must be maximum size 500 KB.
Lists must be in our specified format. Click link for example.
Phone numbers are optional.
Choose File
Upload
Date Sent
Action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You can upload the completed XLS by clicking "Choose File" and then selecting "Upload". As soon as the file is uploaded, the recipients will receive the first campaign email.
You can track and monitor responses by checking the campaign response status in your Application's menu.
Welcome
Lists must be a CSV text file.
Lists must be maximum size 500 KB.
Lists must be in our specified format. Click link for example.
Phone numbers are optional.
Choose File
Example (2).csv
Upload
New Appli...
8.1.3

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