

What Are Campaigns and How to Create One

By Zu Wei Published Mar 19, 2026 Campaigns 3 min read

What Is This?

Campaigns are automated or manual messages you send to your customers through WhatsApp, SMS, or Email. They help you stay in touch with your customers — welcoming new signups, wishing them on birthdays, winning back inactive customers, or promoting special offers.

Pixalink supports two types of campaigns:

- **Templated Campaigns** — Pre-built automations that trigger based on events (new customer joins, birthday, customer goes inactive, etc.)
- **Custom Campaigns** — Freeform messages you write for any purpose, then send via Broadcast

Real-Life Example

Encik Zul runs **Warung Sedap** in Cyberjaya. He sets up three campaigns:

1. A **New Customer** campaign that sends a welcome message with a 10% discount 30 minutes after signup
2. A **Birthday** campaign that gives customers a free dessert voucher on their birthday
3. A custom **Raya Promotion** campaign he broadcasts to all customers before Hari Raya


How to Create a Campaign

Step 1: Open the Campaigns Page

From the Admin Panel sidebar, go to **CRM** → **Campaigns**.

Pixalink

CRM

 Broadcast Batches

 Campaigns

 Customers

 QR Rewards

 Tags

Step 2: Choose Your Campaign Type

You have two options:

- **Create** (top-right button) — Creates a custom campaign with no trigger
- **Create Templated Campaign** — Choose from built-in automation types:
 - **New Customer** — Triggers when someone joins your loyalty programme
 - **Birthday** — Sends on the customer's birthday
 - **Win Back Lost Customer** — Triggers when a customer hasn't visited for X days
 - **Big Spender** — Triggers when a customer reaches a spending threshold
 - **Shop Anniversary** — Sends on a specific date each year
 - **Membership Day** — Sends on a recurring monthly/annual membership date
 - **Custom Anniversary** — Triggers on a custom date field you define

Campaign Type

Select Campaign Type

- New Customer
- Birthday
- Win Back Lost Customer
- Big Spender
- Shop Anniversary
- Membership Day
- Custom Anniversary

Step 3: Configure the Campaign

Fill in the campaign details:

- **Name** — Give your campaign a descriptive name
- **Via** — Choose your channel(s): WhatsApp, SMS, Email (you can select multiple)
- **Is Active** — Toggle on to enable the campaign

Then fill in the message for each channel you selected:

For WhatsApp:

- Write your message (up to 4,096 characters)
- Optionally attach an image, video, or PDF

For Email:

- Set the subject line and sender
- Write the email body using the rich editor
- Attach files if needed

For SMS:

- Write your SMS message (character counter shows remaining characters)

Campaign Details

Name

Via

WhatsApp

Is Active

Step 4: Configure Trigger Settings (Templated Only)

For templated campaigns, additional settings appear based on the type:

- **New Customer** — Set a delay (1 minute to 7 days) before the message is sent
- **Win Back** — Set the number of inactive days before triggering
- **Big Spender** — Set the minimum spending amount
- **Birthday/Anniversary** — Set the time of day to send

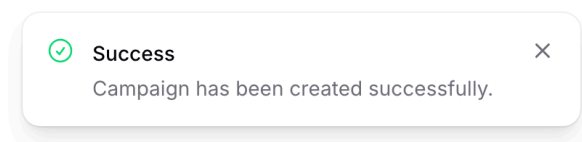
Broadcast Safety Settings

Message Interval

Include Weekends

Step 5: Save

Click **Create** to save your campaign. Templated campaigns start running automatically when active. Custom campaigns need to be sent manually via Broadcast.



Good to Know

- **Template variables** — Use placeholders like `{{CUSTOMER_NAME}}` in your messages to personalise them automatically.
- **Broadcast safety** — Each campaign has a Broadcast Safety Settings section where you select a message interval from a dropdown (1 minute, 2 minutes, 4 minutes, or 5 minutes) and toggle weekend sending on or off.
- **Send in advance** — For date-based campaigns (Birthday, Anniversary, Membership Day), you can toggle "Send X days before" to deliver the message ahead of the actual date.
- **Tabs in the list** — The Campaigns page has two tabs: "All" (custom campaigns) and "Templated" (automation campaigns).