

## Campaign Management

### Creating new Campaigns:

1. Search to determine if the campaign already exists in the system or use a Listview to view your Active Campaigns (and click Go).
2. If the campaign does not exist, go to the Campaigns tab and click “New”.
3. Select the appropriate Campaign record type from the dropdown list.
4. Fill in all required fields (indicated with a red bar) and all other relevant fields.
5. Click “Save”.

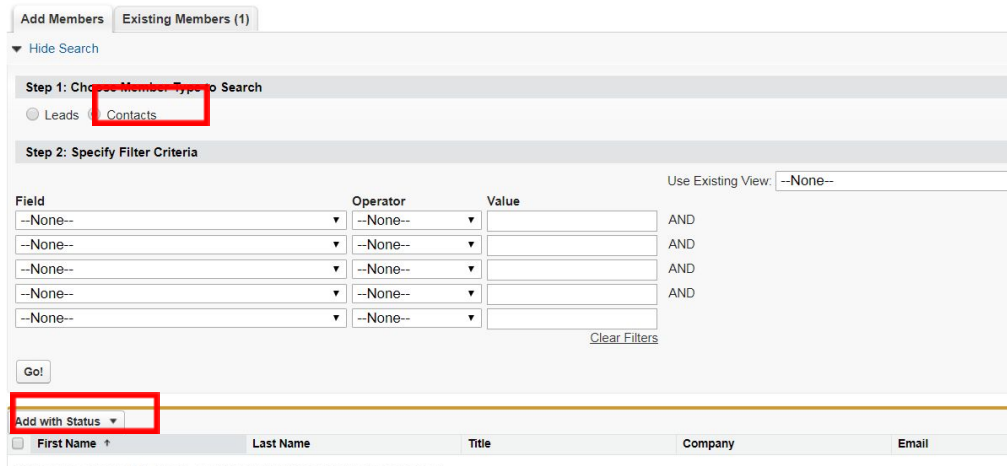


### Adding New Campaign Members:

Campaign Members can be added to Campaigns in different ways including:

#### From the campaign:

1. From the campaign record, select “Manage Members”, then “Add Members – Search”.
  2. Use filter criteria OR an existing Listview to find and select contacts, then add to campaign with the appropriate status by clicking the [Add with Status] button.
- Note: The Campaign Member status values may vary depending on the type of campaign. (Mail campaign may have “Sent” and “Responded” while an Event may also include “Attended” and “Cancelled”.



Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

**From reports:**

1. Create new (or customize existing) contact report including filter criteria specific for this campaign.
  - a. Be sure to include the Contact ID field as a column in the report results
2. Run the report; From the report results click “Add to Campaign” and select the appropriate status.

Report Generation Status: Complete

Report Options:

Summarize information by: Task Subtype Show All contacts

Time Frame  
 Date Field: Created Date Range: Custom  
 From: To:

Run Report Show Details Customize Save Save As Delete Printable View Export Details **Add to Campaign** Subscribe

**Updating Campaign Member Statuses**

Contacts will likely need to have their Campaign Member status updated to reflect their response/participation in a campaign. (EG., Update Campaign Member status from ‘Sent’ to ‘Responded’.) There are several

**From the Contact record:**

1. Open the Contact record
2. Scroll down to the ‘Campaign History’ related list.



**Campaign History**

Action	Campaign Name	Start Date
<a href="#">View</a>	Test Campaign	

3. Open the campaign member record.

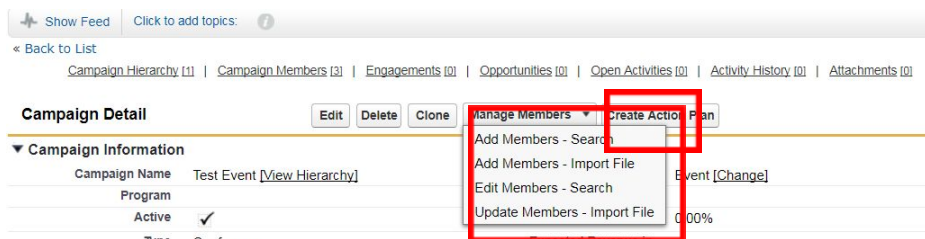
**Campaign Members** Manage Members

Type	First Name	Last Name	Status
Contact	Sandy	Whitten	Responded
Contact	Bill	Browne	Responded
Contact	Gill	Greene	Responded

4. Update the “Status” to the appropriate value. Click “Save”.

From the Campaign:

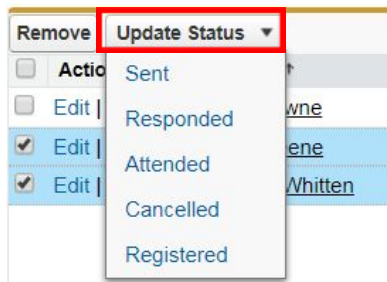
1. From the Campaign record, click “Manage Members” and choose Edit Members – Search.



2. On the lower section of the page, choose which Campaigns Members should be updated with the same status value:

Remove		Update Status ▾					
<input type="checkbox"/>	Action	Name ↑	Title	Company	Email	Type	Status
<input type="checkbox"/>	Edit   Remove	Bill Browne	Pres	Browne Administrati...	bb@acme.test	Contact	Sent
<input checked="" type="checkbox"/>	Edit   Remove	Gill Greene	VP	Greene Administrati...	gg@acme.test	Contact	Sent
<input checked="" type="checkbox"/>	Edit   Remove	Sandy Whitten		Whitten Administrati...	swhitten@acfsoluti...	Contact	Sent

3. Click the “Update Status” dropdown and select the appropriate status:



4. The selected Campaign Member statuses will be updated.

Remove		Update Status ▾					Edit
<input type="checkbox"/>	Action	Name ↑	Title	Company	Email	Type	Status
<input type="checkbox"/>	Edit   Remove	Bill Browne	Pres	Browne Administrati...	bb@acme.test	Contact	Sent
<input type="checkbox"/>	Edit   Remove	Gill Greene	VP	Greene Administrati...	gg@acme.test	Contact	Responded
<input type="checkbox"/>	Edit   Remove	Sandy Whitten		Whitten Administrati...	swhitten@acfsoluti...	Contact	Responded