Campaign Management

Creating new Campaigns:

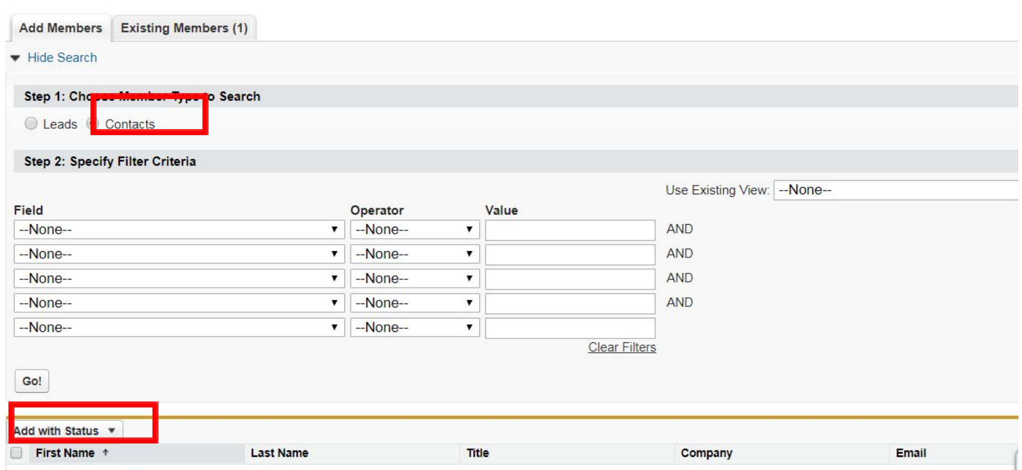
1. Search to determine if the campaign already exists in the system or use a Listview to view your Active Campaigns (and click Go).
2. If the campaign does not exist, go to the Campaigns tab and click "New".
3. Select the appropriate Campaign record type from the dropdown list.
4. Fill in all required 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:

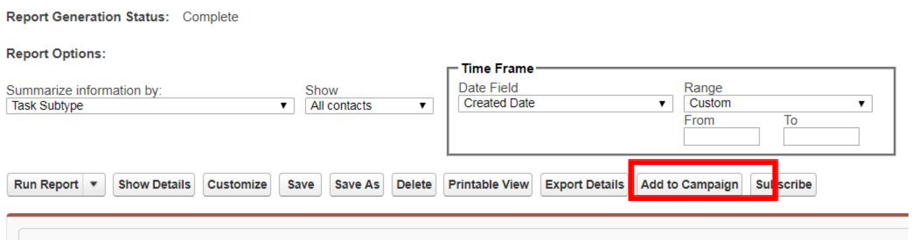
<u>From the campaign:</u>

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".



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.



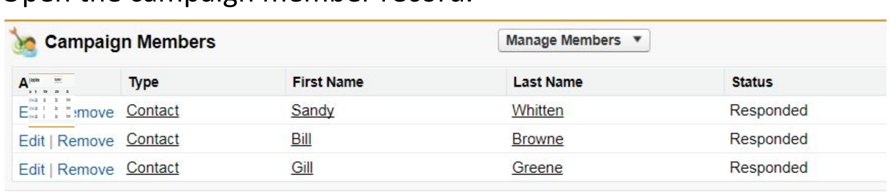
Updating Campaign Member Statuses

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.

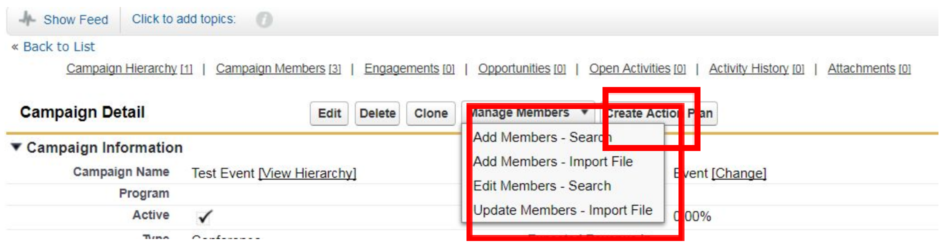
3. Open the campaign member record.



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

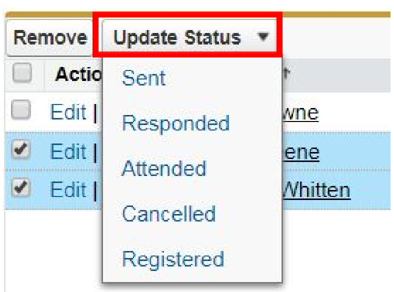
From the Campaign:

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:

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



4. The selected Campaign Member statuses will be updated.