Creating Campaigns in Salesforce

## Create the Campaign Record

1. Click on the **Campaigns** tab

(If you don’t have a Campaigns tab, click on the plus sign at the far right of the tab line, and then select Campaigns from the list of all available tabs)

1. Click the **New** button
2. Choose **iContact Email Campaign** if you think you might want to send email related to this campaign to clients; otherwise choose either type of campaign
3. Click **Continue**
4. **Fill in the fields:**
5. Enter a **Campaign Name** (short but specific)
6. Click the **Active** checkbox
7. Choose a Type
8. Choose a **Status**
9. Enter **Start** and **End** dates
10. Enter a **Description**
11. Fill in other fields if you like

6. Click **Save**

## Link Opportunities to the campaign

1. Open the first Opportunity
2. Scroll down to **Campaign Influence** tab and click Add to Campaign:



1. Enter the name of the campaign in the **Campaign name** field, click **Primary Campaign Source** checkbox, and select the lookup button



1. Select “All Active Campaigns” in the drop down (defaults to My Active campaigns) and click on the link for your campaign.



1. This takes you back to the Edit Campaign Influence page, simply click the Save button and you’re done!