Managing Campaigns

Creating a campaign is similar to creating a record, if you are unsure of how to create a record, please refer to the video tutorial on Creating a Record. Once the Campaign has been created, you may start to add various metrics, as seen in the section on Campaign Performance Metrics. You can also add Leads or Contacts that you are marketing to. To add Leads and/or Contacts to the campaign, first select your filter using the dropdown from the Leads or Contacts section of the campaign and select to 'Load List'.

If you do not have a filter created, please view the video on Creating Filters. Individual Leads and Contacts can also be added by choosing the 'Select' button in the appropriate Lead or Contact section. The user also has the option to create records to add to a campaign on the fly. To create Leads or Contacts on the fly to add to a campaign, select the 'Add New' button in the appropriate Lead or Contact section. The user can also use the 'Find Existing' button to add existing Leads individually.

Creating a Campaign [Video]