

Add Contact to Campaign

- 1. From **CRM** module, click **Sales Entities**. Sales Entity screen will appear.
- 2. Click **Sales Entity Contact** tab. Sales Entity Contacts search screen will appear.
- 3. To add contacts to a campaign, select the contacts to be added.
- 4. Once the contacts are selected, click **Add to Campaign** button. Campaign screen will appear:

Campaigns

NewOKCancel

Details

OpenView

Filter (F3)

<input type="checkbox"/>	Campaign	Description	Hold	Active	Sales Person	LOB	Type	Status
<input type="checkbox"/>	Sample_Campaig...	New_This is just a...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Darel the Salespe...	Automotive Softw...	CRMTType	CRMStatus
<input type="checkbox"/>	New_Sample_Cam...	fromExisting_This...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Darel the Salespe...	Automotive Softw...	CRMTType	CRMStatus
<input type="checkbox"/>	Copy of New_Sam...	Duplicate_This is ...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Darel the Salespe...	Automotive Softw...	CRMTType	CRMStatus
<input type="checkbox"/>	Sample_Campaig...	New_This is just a...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Darel the Salespe...	Automotive Softw...	CRMTType	CRMStatus
<input type="checkbox"/>	Copy of New_Sam...	Duplicate_This is ...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Darel the Salespe...	Automotive Softw...	CRMTType	CRMStatus
<input type="checkbox"/>	Delete_Campaigh...	Delete_Campaign...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Darel the Salespe...	Automotive Softw...	CRMTType	CRMStatus
<input type="checkbox"/>	Delete_Campaigh...	Delete_Campaign...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Darel the Salespe...	Automotive Softw...	CRMTType	CRMStatus
<input type="checkbox"/>	Delete_Campaigh...	Delete_Campaign...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Darel the Salespe...	Automotive Softw...	CRMTType	CRMStatus
<input type="checkbox"/>	test111	test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	George M Olney			
<input type="checkbox"/>	test4	TEst	<input type="checkbox"/>	<input checked="" type="checkbox"/>	George M Olney			
<input type="checkbox"/>	Referral Incentive	We will offer a 2%...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Kris Helms	Propane	Referral	Open
<input type="checkbox"/>	test1	test1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	George M Olney			
<input type="checkbox"/>	test	test	<input type="checkbox"/>	<input checked="" type="checkbox"/>	George M Olney			
<input type="checkbox"/>	Price Update Noti...	This campaign ha...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Bob Smith	Edible Beans	Price Update Noti...	Open
<input type="checkbox"/>	Updated Pricing N...	This campaign wil...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	George M Olney	Edible Beans	Price Update Noti...	Open
<input type="checkbox"/>	Popcorn Campaig...		<input type="checkbox"/>	<input checked="" type="checkbox"/>	George M Olney	Automotive Softw...	Call	Open

- 5. Select campaign from the list then click **OK** button. (user can also create new campaign, click New button then proceed in creating the campaign)

i

iRely i21

You have successfully added the contact(s) to campaign.

OK