Create New Campaign
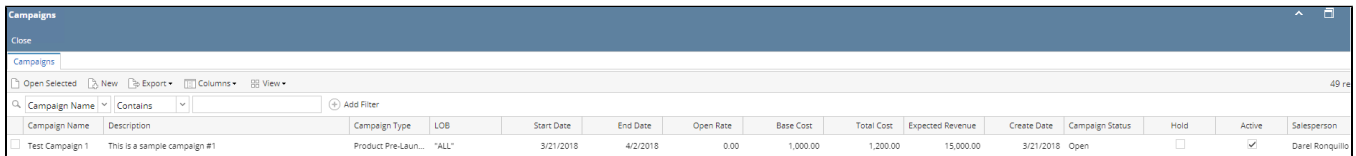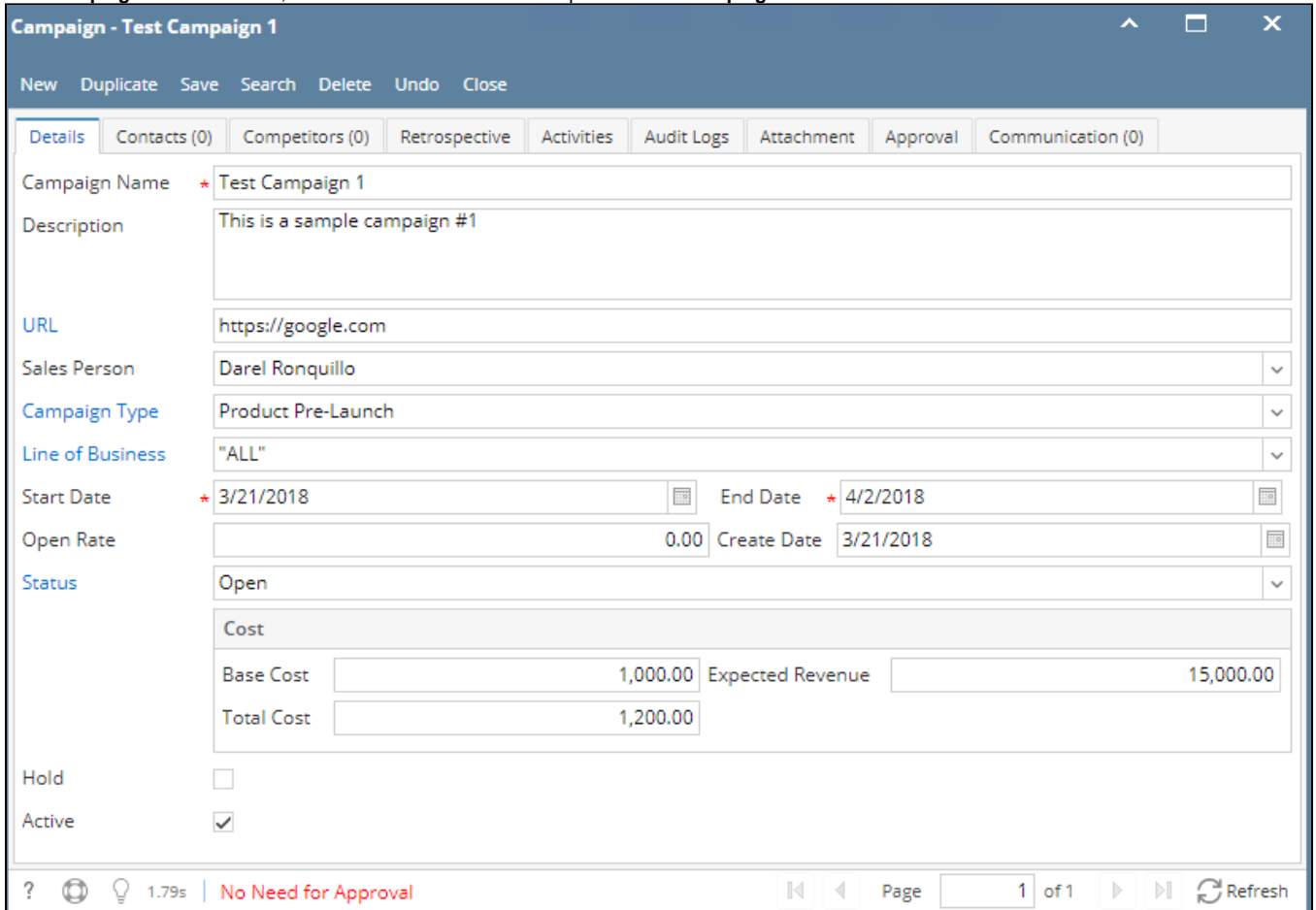
1. From **CRM** module, click **Campaigns**. Campaigns search screen will appear.

2. In **Campaigns s**earch screen, click the **New** toolbar button to open the **New Campaign** screen.

3. Enter unique *__Campaign Name__.

4. Enter *__Start Date__ and *__End Date__.

5. Enter Description, URL, Open Rate, Base Cost, Expected Revenue and Total Cost.

6. Select Sales Person, Campaign type, Line of Business and Status from their respective drop downs.

7. Click Save toolbar button to save the campaign.

Screen status should be of the following:

- "No Need for Approval" - campaign does not need an approval
- "Waiting for Approval" - campaign is subject for approval

8. To add **Contacts**, click Contacts tab. Add contact by searching the contact from the Contact Name grid drop down. Select Response(Yes, No, Stop, None) then save.

Campaign - Test Campaign 1

New   Duplicate   Save   Search   Delete   Undo   Close

| Details | Contacts (3) | Competitors (0) | Retrospective | Activities | Audit Logs | Attachment | Approval | Communication (0) |

+ Insert   📭 Export   ✕ Remove   No. of Attendees [   ]

	Contact Name	Company Name	Entity Type	Contact Email	Response	Comment	Op
☐	Test_Contact_493	Test_Customer_493	Customer	darelwebster2@gmail.c...	Yes		
☐	Darel Ronquillo	Darel Ronquillo	Salesperson, User	darel.ronquillo@irely.co...	Yes		
☐	Jayson Ramos	Jayson Ramos	User	jayson.ramos@irely.com	No		
☐							

No. Of Contacts [3]   Response (Yes) [2]   Response (None) [0]   Response (Not) [0]

Response (No) [1]   Response (Stop) [0]

? ⊕ ♀ 0.48s | No Need for Approval |◁ ◁ Page [1] of 1 ▷ ▷| ⟳ Refresh

9. To add **Competitors**, click Competitors tab. Add contact by searching the competitor from the Competitor Name grid drop down then save.

10. To add **Retrospective**, click Retrospective tab.Type in the space provided then save.

11. To add an activity, click **Activities** tab. Click New Event, New Task, New Comment, Log Call or Email then proceed.

12. To add **Attachments**, click Attachments tab. Click Add Item button then select attachment to be added.

13. To send email to the contacts added in the Contacts tab, click **Communication** tab. Provide Contact Description, Template, Type and Send To then save. To send, click the Send icon button.

Campaign - Test Campaign 1

New   Duplicate   Save   Search   Delete   Undo   Close

Details   Contacts (3)   Competitors (1)   Retrospective   Activities   Audit Logs   Attachment   Approval   Communication (2)

+ Insert   × Remove   Export ▾   ⊞ View ▾   Filter (F3)

	Contact Description*	Template*	Type*	Date Scheduled	Date Sent	Send	Send To*
☐	Contacts who said Y...	iRely Proposal	Email		03/21/2018 2:49PM		Yes
☐	Contacts who said NO	Services	Email	3/22/2018			No
☐							

? ⊕ ♀ 0.48s | No Need for Approval |◁ ◁ Page 1 of 1 ▷ ▷| ⟳ Refresh

*__text__ - denotes required field to create campaign