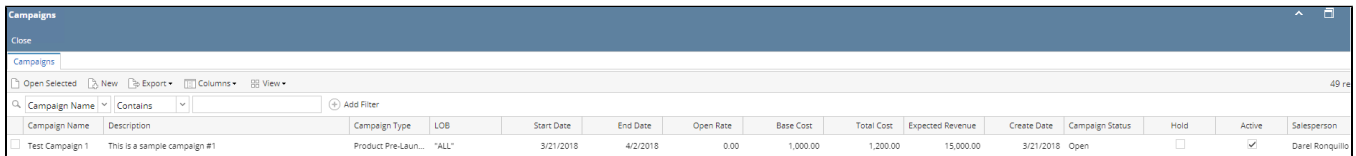


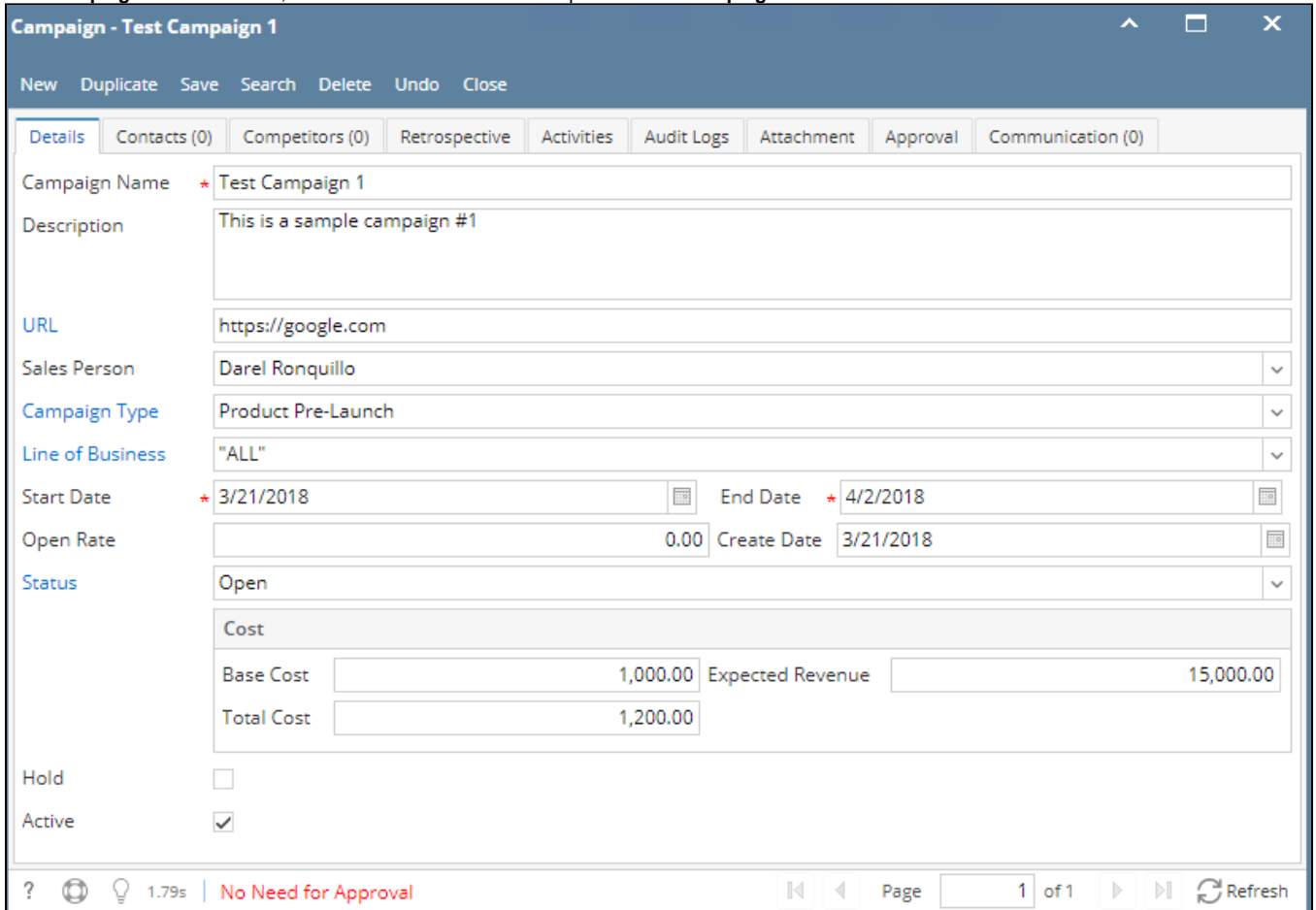
Create New Campaign

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



Campaign Name	Description	Campaign Type	LOB	Start Date	End Date	Open Rate	Base Cost	Total Cost	Expected Revenue	Create Date	Campaign Status	Hold	Active	Salesperson
Test Campaign 1	This is a sample campaign #1	Product Pre-Launch	"ALL"	3/21/2018	4/2/2018	0.00	1,000.00	1,200.00	15,000.00	3/21/2018	Open	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Darel Ronquillo

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



Campaign - Test Campaign 1

New Duplicate Save Search Delete Undo Close

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

Campaign Name * Test Campaign 1

Description This is a sample campaign #1

URL https://google.com

Sales Person Darel Ronquillo

Campaign Type Product Pre-Launch

Line of Business "ALL"

Start Date * 3/21/2018 End Date * 4/2/2018

Open Rate 0.00 Create Date 3/21/2018

Status Open

Cost

Base Cost 1,000.00 Expected Revenue 15,000.00

Total Cost 1,200.00

Hold ☐

Active ☒

? 1.79s | No Need for Approval Page 1 of 1 Refresh

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

<input type="checkbox"/>	Contact Name	Company Name	Entity Type	Contact Email	Response	Comment	Op
<input type="checkbox"/>	Test_Contact_493	Test_Customer_493	Customer	darelwebster2@gmail.c...	Yes		
<input type="checkbox"/>	Darel Ronquillo	Darel Ronquillo	Salesperson, User	darel.ronquillo@irely.co...	Yes		
<input type="checkbox"/>	Jayson Ramos	Jayson Ramos	User	jayson.ramos@irely.com	No		
<input type="checkbox"/>							

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.

Campaign - Test Campaign 1
^
□
X

New Duplicate Save Search Delete Undo Close

Details Contacts (3) Competitors (1) Retrospective Activities Audit Logs Attachment Approval Communication (0)

+ Insert X Remove

☐ Competitor Name

☐ Will not disclose

☐

? ⓘ 0.48s | No Need for Approval
Page 1 of 1 Refresh

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
^
□
X

New Duplicate Save Search Delete Undo Close

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

+ Insert X Remove Export View Filter (F3)

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

?

0.48s
No Need for Approval
Page 1 of 1
Refresh

***text** - denotes required field to create campaign