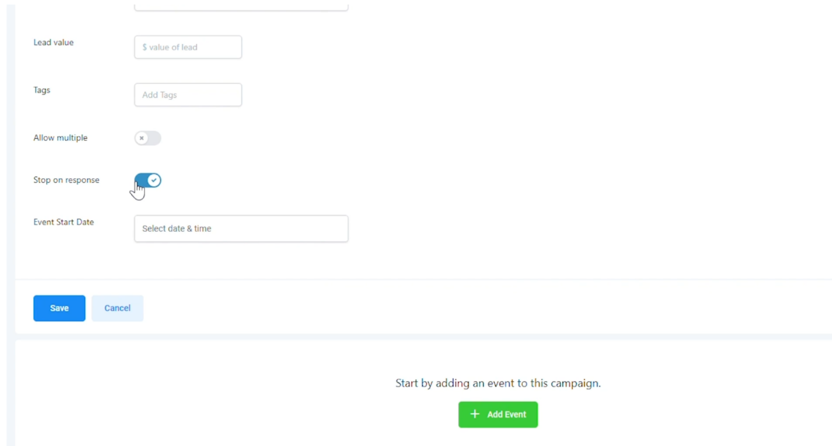
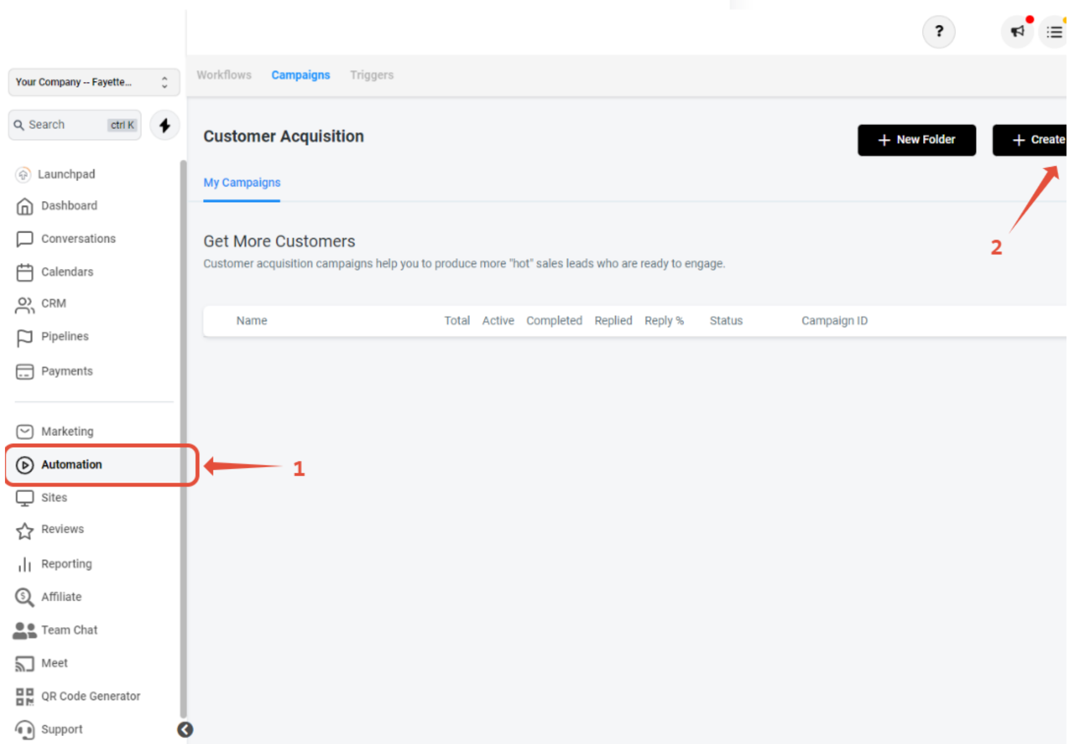


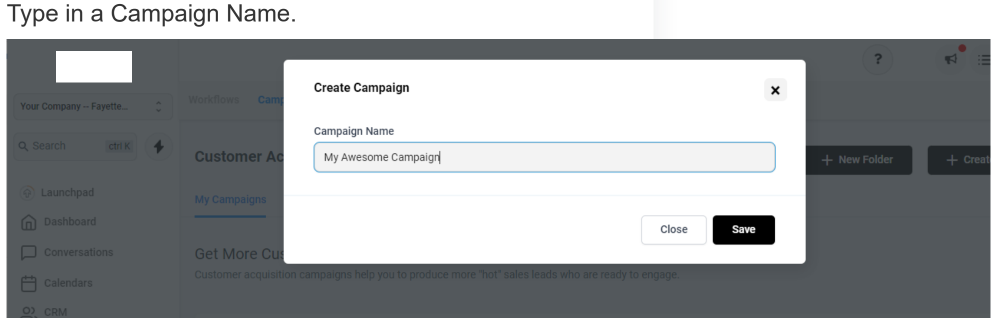
Manual Actions are tasks added to your system in the form of a queue. They become ava
in a user's account and are marked as complete once the user manually completes a tasl
create and manage manual actions, follow the steps below.

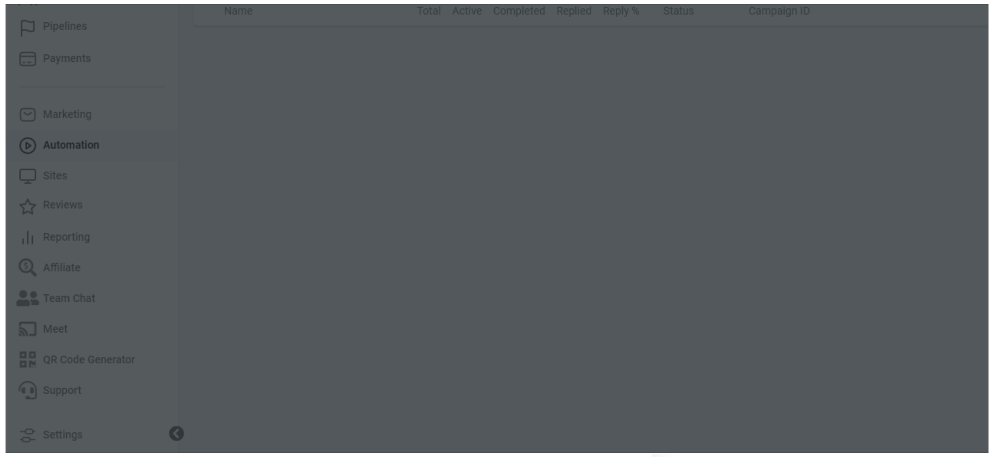
Step 1: Create a Campaign

- Navigate to Campaigns
- Click **+ Create Campaign**



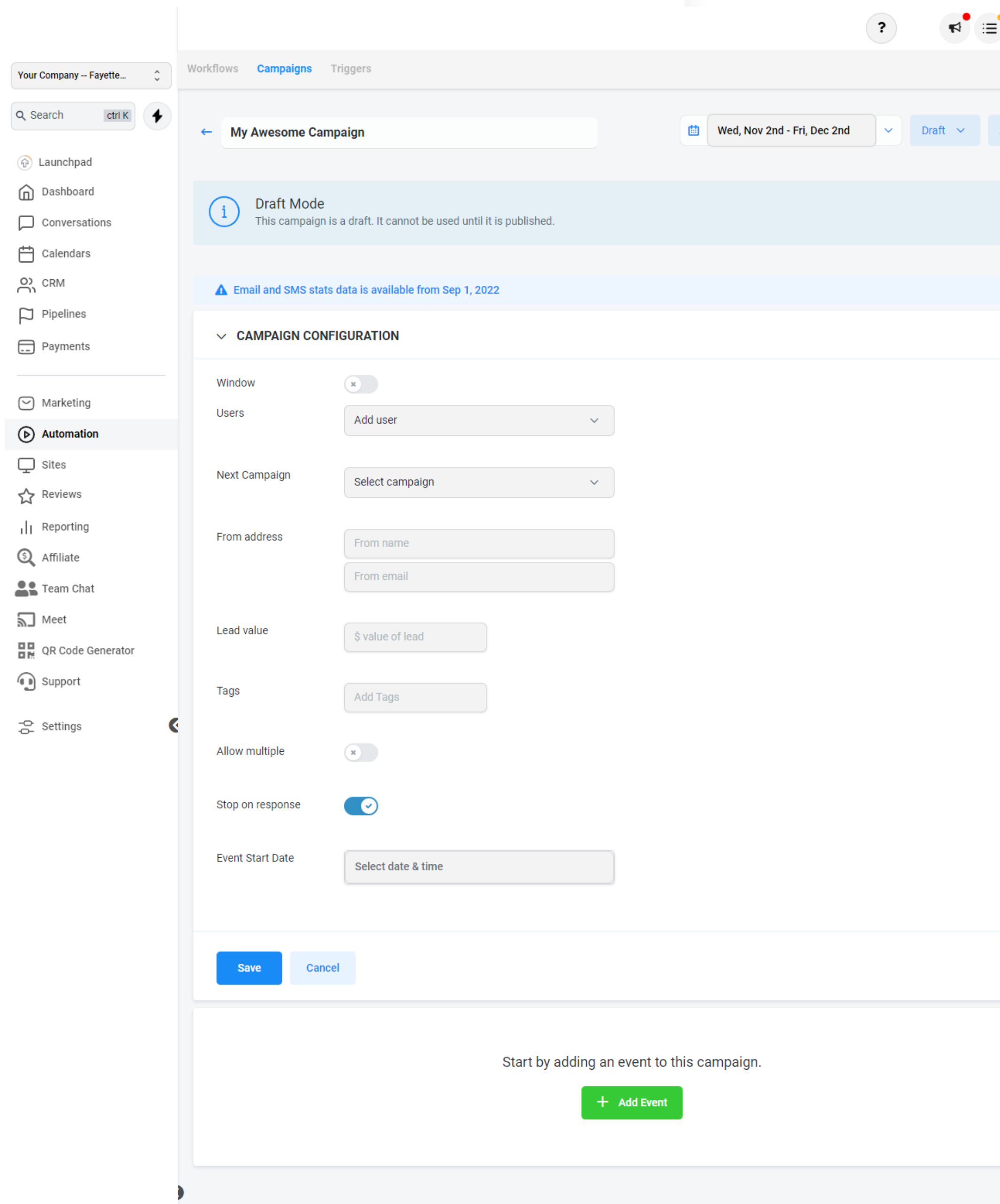
- Type in a Campaign Name.





- Choose a folder where the campaign will be added from the dropdown.
  - ***NOTE***: You may also edit an existing campaign instead of creating a new one.

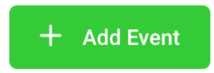
Step 2: Set up the Campaign Configuration



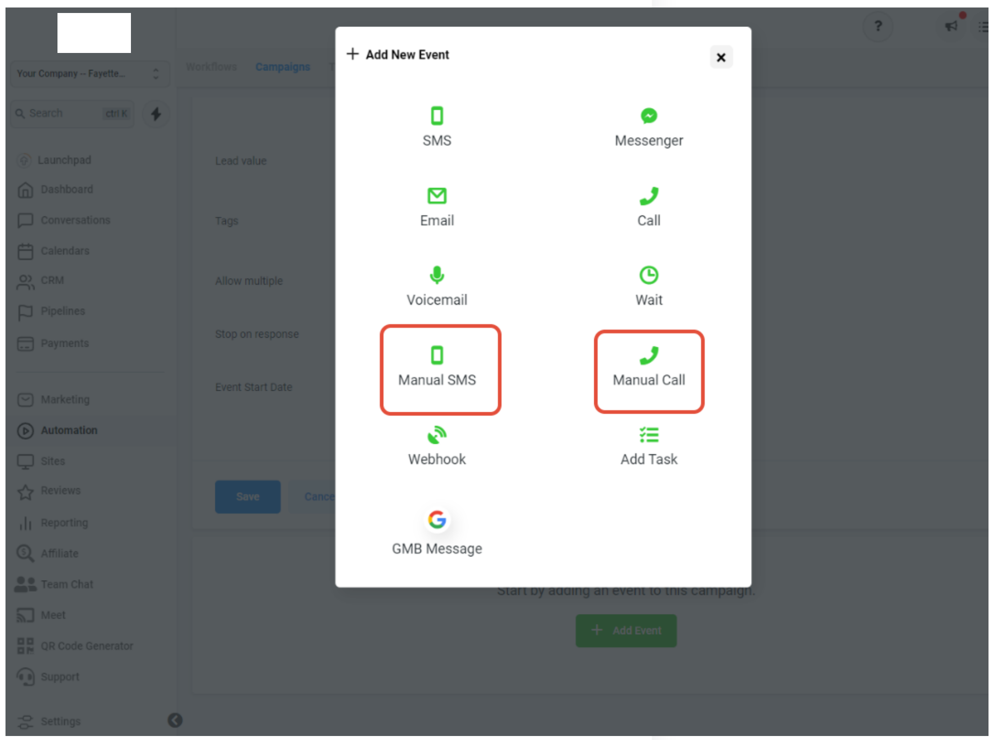
- Select Campaign Configuration to add information such as:
  - Window - Configure when the Campaign runs
  - Users - Assign users to the campaign
  - Next campaign - The campaign that is next in the pipeline
  - From address - Shows from address
  - Lead Value - $ value of lead
  - Tags - Tags assigned to the campaign
  - Multiple Allow - Allows campaign visitors to visit the same or next campaign in the pipelir multiple times.
  - Stop on Response - Stops all subsequent events in the case a lead responds to the cam
  - Event Start Date - Choose when the campaign begins
- **Save** to confirm your changes**.**

Step 3: Add an Event

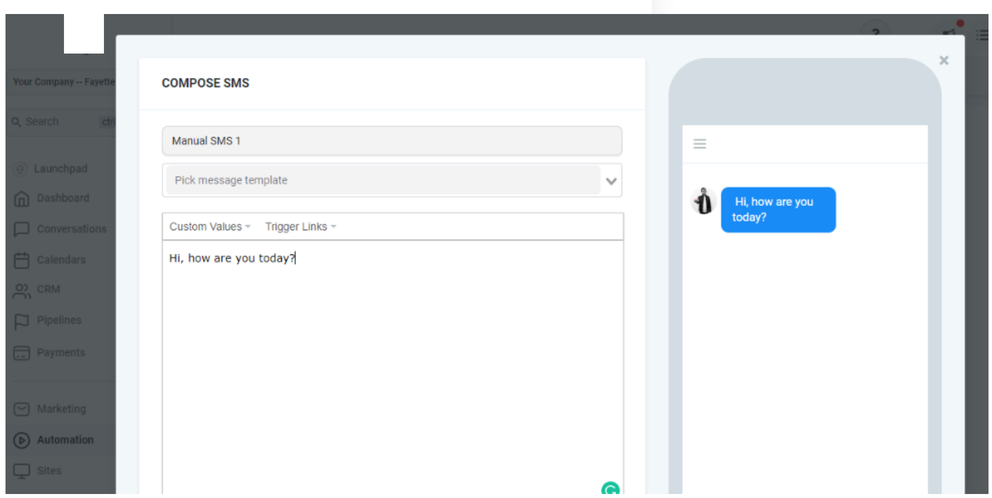
- Click on **+ Add Event**

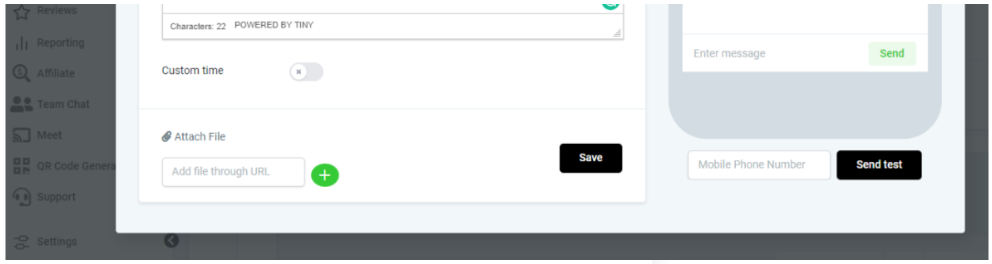


- Click on **Manual SMS** or **Manual Call** for an event.



- For a **Manual SMS:**





- Type SMS name
- Select template if needed
- Custom Values - Select values from the drop-down to be added to your SMS message
- Trigger Links - Provide links to triggers created in your account
- In the text box, you may type out the SMS you want to be sent out
- Custom Time - Toggle **Custom time** to on if you'd like the SMS to be sent out at a specif and time
- Attach file - Files such as logos can be added here
- Add File Through URL - Add link here

- You can test your message by entering a number and clicking on **Send Test.**
- Click **Save** once you have the desired manual SMS

- For a **Manual Call:**
- This Adds manual call as a task for selected users after the user is added to the campaign
- The task is marked as complete after the task is executed.
- Save any changes you make to the campaign, and switch it from **Draft** to **Published** mode in for it to run.

Step 4: Accessing and Completing the Tasks/Manual Actions.

- Once Contacts are added to the campaign(s) with manual SMS or call events, the tasks will b generated and formed into a queue you can access in the system.
- Navigate to **CRM** >**Manual Actions**.
- Here you will see a list of your pending tasks/actions.
  - They can be sorted by **Campaign** or **Assignee** (if you have multiple users). Once execu tasks can be marked complete.