

Lead value:

Tags:

Allow multiple: ☐

Stop on response: ☒

Event Start Date:

Start by adding an event to this campaign.

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

### Step 1: Create a Campaign

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

Workflows **Campaigns** Triggers

Your Company - Fayette...

Search

Launchpad

Dashboard

Conversations

Calendars

CRM

Pipelines

Payments

Marketing

**Automation**

Sites

Reviews

Reporting

Affiliate

Team Chat

Meet

QR Code Generator

Support

Customer Acquisition

My Campaigns

Get More Customers

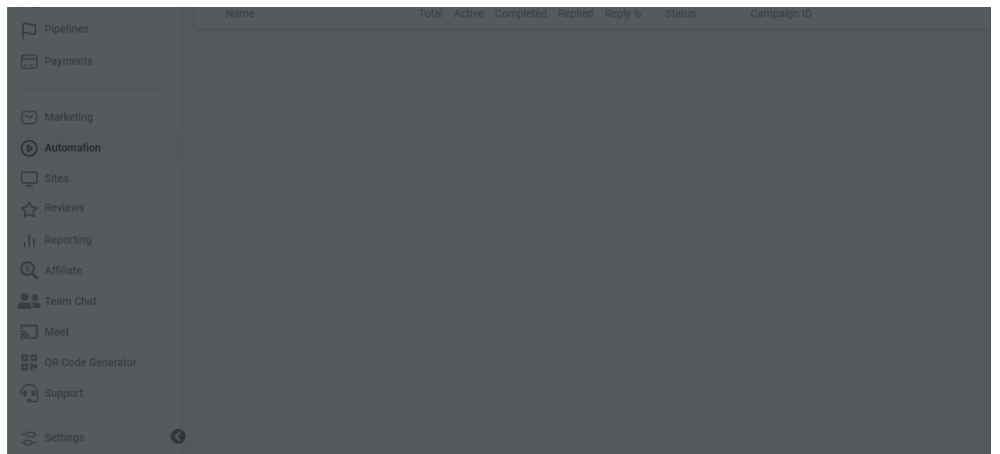
Customer acquisition campaigns help you to produce more "hot" sales leads who are ready to engage.

Name	Total	Active	Completed	Replied	Reply %	Status	Campaign ID

- Type in a Campaign Name.

Create Campaign

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

 The screenshot shows a web application interface for configuring a campaign. On the left is a sidebar with a search bar and a list of menu items: Launchpad, Dashboard, Conversations, Calendars, CRM, Pipelines, Payments, Marketing, Automation (highlighted), Sites, Reviews, Reporting, Affiliate, Team Chat, Meet, QR Code Generator, Support, and Settings. The main content area is titled 'My Awesome Campaign' and includes a date range 'Wed, Nov 2nd - Fri, Dec 2nd' and a 'Draft' status. A 'Draft Mode' warning states: 'This campaign is a draft. It cannot be used until it is published.' Below this is a blue banner: 'Email and SMS stats data is available from Sep 1, 2022'. The 'CAMPAIGN CONFIGURATION' section contains several settings: 'Window' (toggle), 'Users' (dropdown with 'Add user'), 'Next Campaign' (dropdown with 'Select campaign'), 'From address' (fields for 'From name' and 'From email'), 'Lead value' (field with '\$ value of lead'), 'Tags' (field with 'Add Tags'), 'Allow multiple' (toggle), 'Stop on response' (toggle, currently on), and 'Event Start Date' (field with 'Select date & time'). At the bottom of the configuration section are 'Save' and 'Cancel' buttons. Below the configuration section is a message: 'Start by adding an event to this campaign.' with a green '+ Add Event' button.

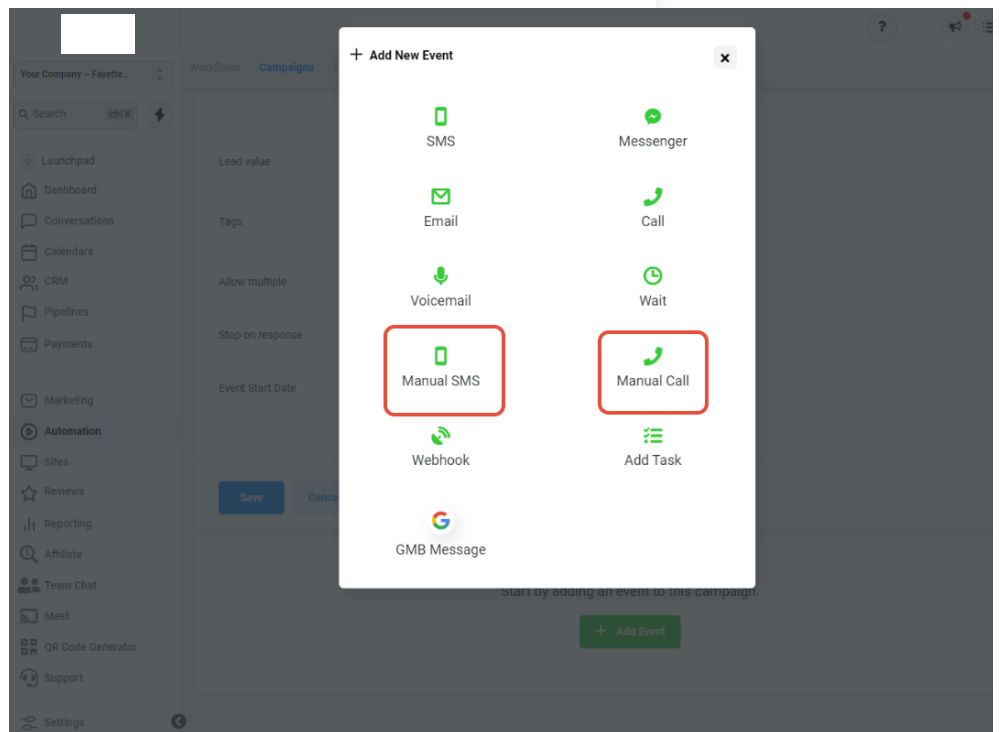
- Select Campaign Configuration to add information such as:
  - Window - Configure when the Campaign runs
  - Users - Assign users to the campaign
  - Next campaign - The campaign that is next in the pipeline
  - From address - Shows from address
  - Lead Value - \$ value of lead
  - Tags - Tags assigned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

### Step 3: Add an Event

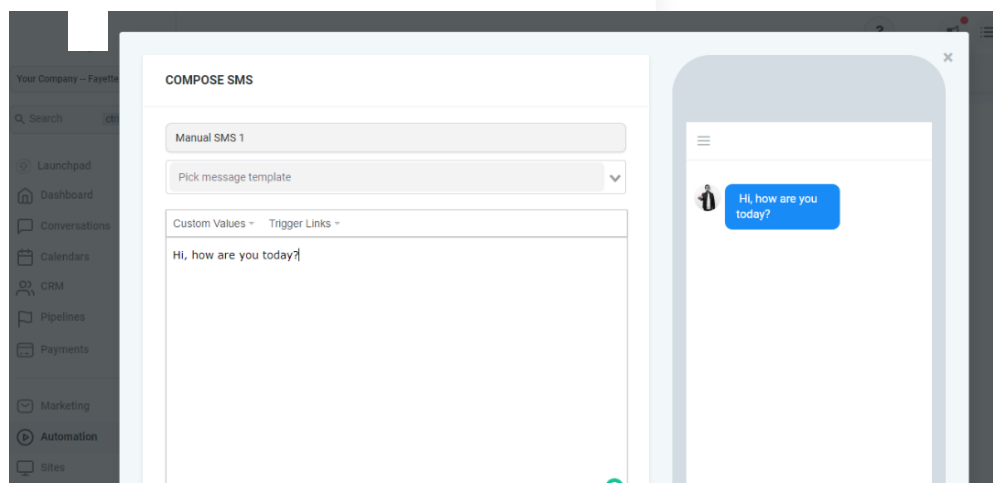
- Click on **+ Add Event**



- 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 specific 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 be 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 executed tasks can be marked complete.

Manual Actions				
		Select Campaign / Workflow		Select Assignee
Contacts	Campaign / Workflow	Date Added	Assigned To	Type
 Demo Contact	Manual Action Demo Campaign	Jul 06 2021, 12:03 pm	 Demo User	Call





