STEP-BY-STEP CAMPAIGN INSTRUCTIONS

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<u>What is a Campaign?</u>

- A Campaign is a series of emails that you prepare ahead of time to be sent as your set unravels.
- You can have unlimited Campaigns with unlimited messages each.

What are some Campaign types you might have?

- New consultant training
- Customer follow-up
- Recruit info follow-up
- Booth follow-up

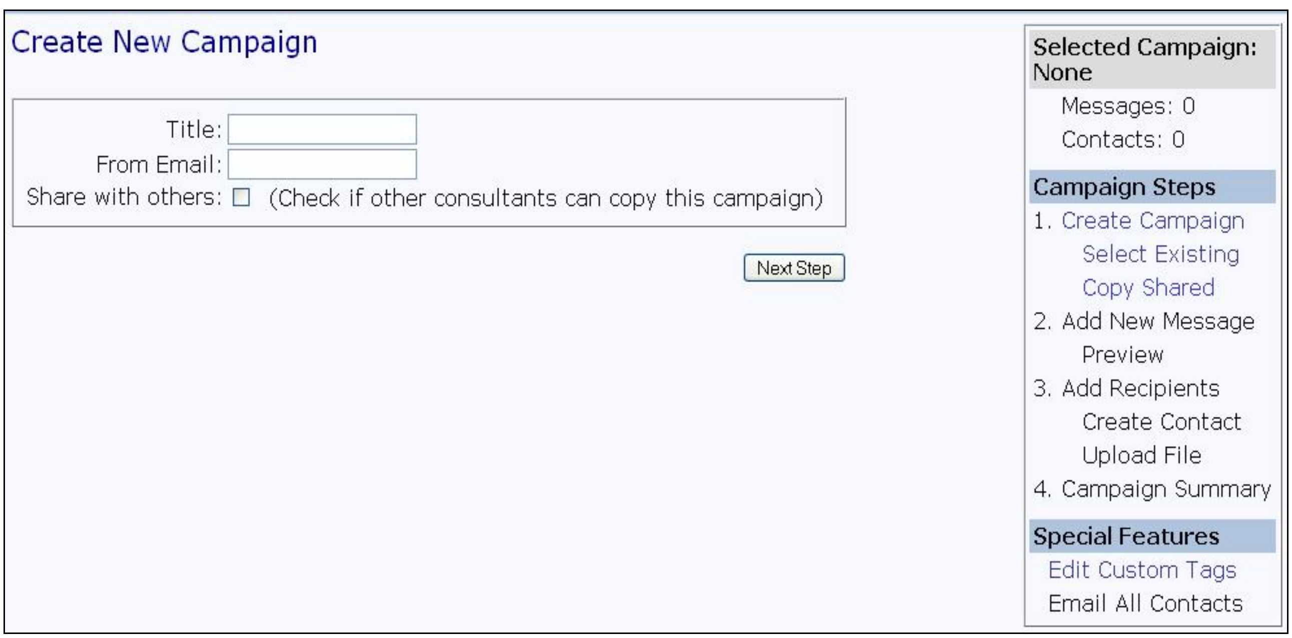
<u>CREATE A NEW CAMPAIGN</u>

1. **Title**: (The name you want the Campaign to be listed under. It can be anything but just make sure it will be recognizable to the people you are sending to.)

2. **From Email**: (This will be email you want all the responses to go to if a consultant replies back to the campaign)

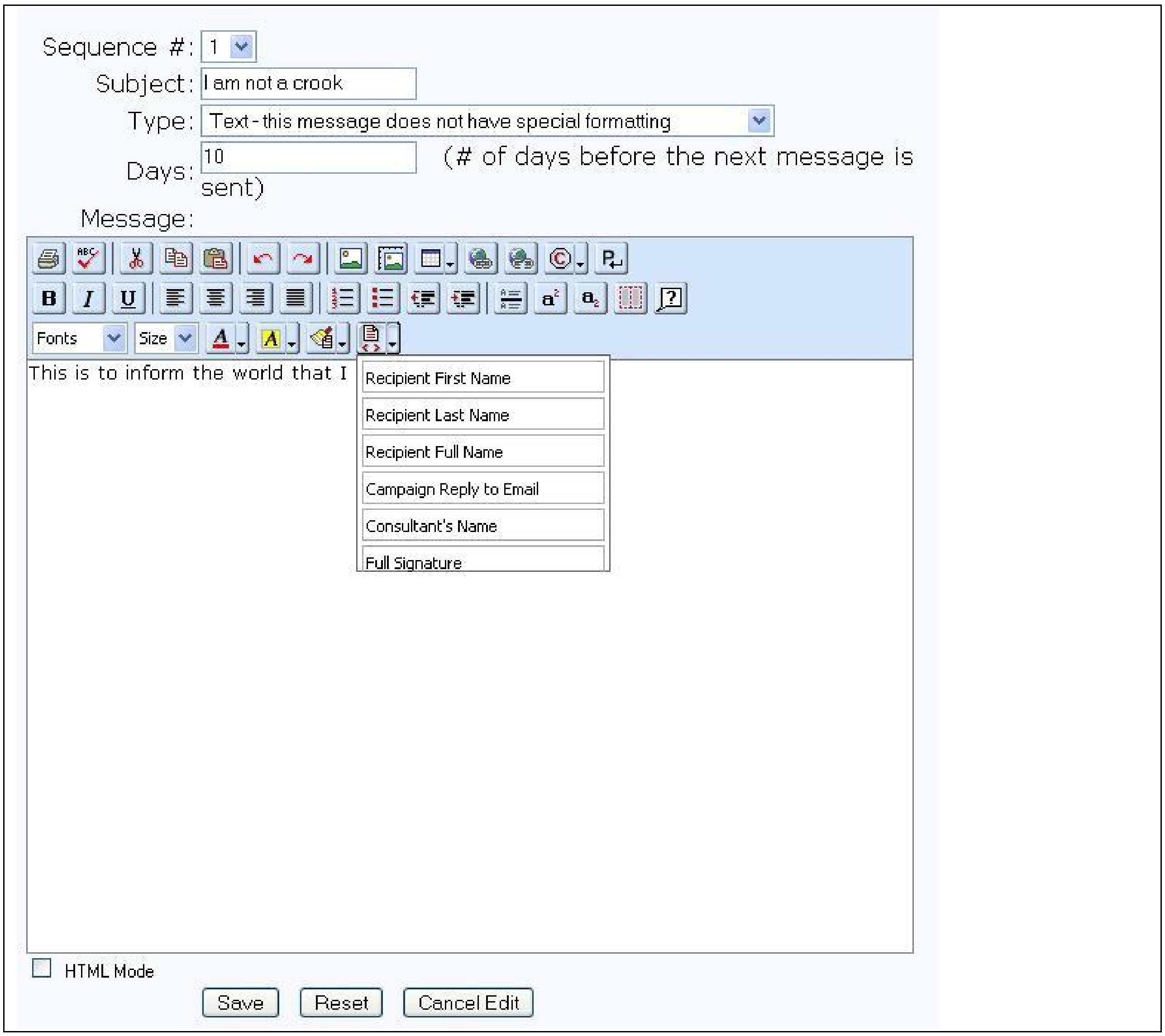
3. **Share with others**: (By checking this you will allow other consultants the access to use this for their campaigns or to be viewed for helpful resources)

4. On this page you will also have the ability to select an existing campaign that you have created already or to select a shared copy of another campaign created by another consultant. These options are listed on the left hand side under Campaign Steps. By selecting an existing campaign, you will have the ability to edit the title name, email address, add new messages to the campaign or add new contacts to the campaign. By selecting a shared copy, you will have the ability to add an already existing campaign created by someone else to one of your campaigns.



CREATE A MESSAGE

1. **Subjec**t: (Same as what the subject line would read on any email)
2. **Type**: (2 choices. HTML or Plain Text. In most cases you will choose plain text unless you want to format the message with HTML tags)
3. **Days**: (This is created so that when a campaign has multiple messages, you can decide how many days apart you want them to be sent out)
4. **Message**: (The body of the email that will be sent.)
5. **Custom Tags**: On the third row, at the end of the tool bar, there will be an icon with a down arrow, the custom tag option. This will allow you to personalize every message that is on the campaign list. You can personalize by First, Last, First and Last, Reply email, Consultant's Name and use a Full Signature.
6. NOTE: The last 2 tags (Consultants Name and Full Signature) will have to be created from the Edit Custom Tags link on the right.



After you have finished with the Message, then click on save.

YOU CAN ADD MEMBERS 3 DIFFERENT WAYS:

1. **Contact Type**: (This will list all of your contacts from your OPOL contact manager depending on what folder you stored the contacts in.)
2. **Create Contact**: (Under the Campaign Steps you can click on Create Contact and add a member individually.)
3. **Upload File**: (Under the Campaign Steps you can click on Upload File and load other email addresses from a .csv file)
4. *Note: To add a member you must put a check mark next to their email address. After you have checked all members that you want then click on Add Checked

CAMPAIGN SUMMARY PAGE.

Here you can double check to make sure everything is correct and make any changes to the campaign. You can move messages up and down in the sequence or delete them. You will see all contacts receiving the emails and what message they will receive next.

Campaign Summary

Messages in this Campaign

Sequence	Title	Days Until Next Sent	Type	Move	Move		
1	Thanks for your recent Usborne Books order!	20	Text	Up	Down	Edit	Delete
2	I hope you are enjoying your Usborne Books!	35	Text	Up	Down	Edit	Delete
3	New Usborne Titles	90	Text	Up	Down	Edit	Delete
4	Latest and Greatest of Usborne Books	95	Text	Up	Down	Edit	Delete

Contacts associated with this campaign

Activate Finished Contacts

First Name	Last Name	Email Address	Step	Send Date	