

# Know your CRM better.

Explore the CRM modules:

- Leads

- Contacts

- Account

- Oppurtunity

Learn how to manage the modules.

- Create

- Export

- Import

Learn about Worflows and campaigns

# Main Features.

As we take you through the Modules while exploring the features that make the CRM easy to use.

- [Shortcuts](#) for easy access to the modules features
- [Basic and advanced](#) search options
- [Export](#) selected records
- [Sort](#) columns by clicking on the header

## Leads Module

Leads are early contacts in the sales process. After they have been evaluated and assessed, you can convert them into contacts, opportunities, and accounts.

You can associate a lead with any type of campaign to track the effectiveness of the campaign in generating opportunities for your organization.

The screenshot shows the 'Leads: Home' page. On the left is a 'Shortcuts' sidebar with 'Import' highlighted. The main area has 'Basic Search' and 'Advanced Search' tabs. Below are input fields for 'First Name', 'Last Name', 'Lead Source' (with a dropdown menu), and 'Haircolor'. There are 'Search' and 'Clear' buttons, and a 'Saved Searches' dropdown. Below the search area is a 'Lead List' table with columns: Name, Status, Account Name, Email, Office Phone, and User. The table contains two rows: 'John Smith' (Converted) and 'Billy Bunter' (Paused). Annotations with red arrows point to the 'Import' button, the 'Lead Source' dropdown, the 'Export' button, and the 'Create Target List' button.

**Leads: Home** Print ? Help

Basic Search | Advanced Search

First Name  Last Name  Only my items

Lead Source  Haircolor

Search  | Saved Searches

**Lead List**

Select	Delete	Export	Create Target List	Merge Duplicates	Selected: 0				
	Name	Status	Account Name	Email	Office Phone	User			
<input type="checkbox"/>	John Smith	Converted	ABC Inc,		123-123-1234	admin			
<input type="checkbox"/>	Billy Bunter	Paused	Billy Bunter	test@test.com		admin			

## Create a new Lead

You can create Leads from shortcuts left panel, you can also import them from a comma delimited, tab delimited, or custom delimited file.

**Shortcuts**

- Create Lead
- Create From vCard
- Leads
- Import

**Click on create Lead**

**New Lead**

First Name:

Last Name: \*

Office Phone:

Email:

Assigned to: \*  
admin

**Shortcuts**

- Create Lead
- Create From vCard
- Leads
- Import

**New Lead**

First Name:

Last Name: \*  
**Enter Last name**

Office Phone:

Email:

Assigned to: \*  
admin

**Click Save**

## Create Lead from vCard

**Shortcuts**

- Create Lead
- Create From vCard
- Leads
- Import

**Click to create a Lead from a vCard**

**Leads Import vCard**

Automatically create a new lead by importing a vCard from your file system.

**Import a vcf file**

**Browse for the file in your system**

## Import Leads

Another way of adding Leads is importing them from a data source. Let us discuss the Import feature function step by step. When you import Leads, you can select the default value for the Lead Source, such as Direct Mail, Trade Show, and so on from the drop-down list in the Default Value column.

### Import Step 1: Select the Source

[Print](#) [? Help](#)

What is the data source?

- Salesforce.com
- Comma Delimited File
- Tab Delimited File
- Custom Delimited File

Select the data source

Click Next to proceed

Next >

### Import Step 2: Upload Export File

[Print](#) [? Help](#)

Many applications will allow you to export data into a **Comma Delimited text file (.csv)**. Generally most applications follow these general steps:

1. Launch the application and open the data file
2. Select the **Save As...** or **Export...** menu option
3. Save the file in a **CSV** or **Comma Separated Values** format

Browse for the file

Select file:

C:\Documents and Settings\user\Desktop\Employees.csv

Browse...

Has Header:

Click Next

Next >

< Back

Map the system fields with the corresponding fields from the file imported. Once the fields have been mapped, click on **'Import Now'** at the bottom.

### Import Step 3: Confirm Fields and Import

Select fields from drop down to correspond to fields imported

\* Indicate

In the list below, select the fields in your import file that should be imported into each field in the system. When you are finished, click

Database Field	Header Row	Row 1
Account ID	id	1
Account Name	user_name	admin
First Name	first_name	Jerry
Last Name *	last_name	Akers
Description	description	
Date Created	date_entered	07/22/2008 01:51
- Do not map this field -	date_modified	02/04/2009 04:34
Contact ID	modified_user_id	1

### Import Results

[Print](#) [? Help](#)

Success:

- 1 Successfully Imported
- 0 Records skipped because the id's either existed or were longer than 36 characters
- 0 Records skipped because they were missing one or more required fields

More options

Undo Last Import  
Import More Finished

Import results

### Last Imported Leads

Name	Status	Account Name	Email	Office Phone	User
<a href="#">Jerry Akers</a>	New	admin			admin

\* NOTE: the procedure to Import files is same for Contacts and Accounts.

## Advanced Search

## Leads: Home

[Print](#) [Help](#)

Basic Search **Advanced Search**

First Name  Any Address  Any Phone   
Last Name  City  Any Email   
Account Name  State  Postal Code   
Do Not Call  Country

Lead Source   
Cold Call  
Existing Customer  
Self Generated  
Employee

Status   
Assigned  
In Process  
Converted  
Recycled

Assigned to   
demo  
LisaVega  
nathansmith  
pankaj@msn.com

Loyalty Ladder   
Prospect  
Shopper  
Customer  
Member  
Advocate

[Saved Search & Layout](#)

**Various Search criterion**

**Always clear the search result to refresh the page**

Search  | Saved Searches

## Create a Target List from Leads

### Lead List

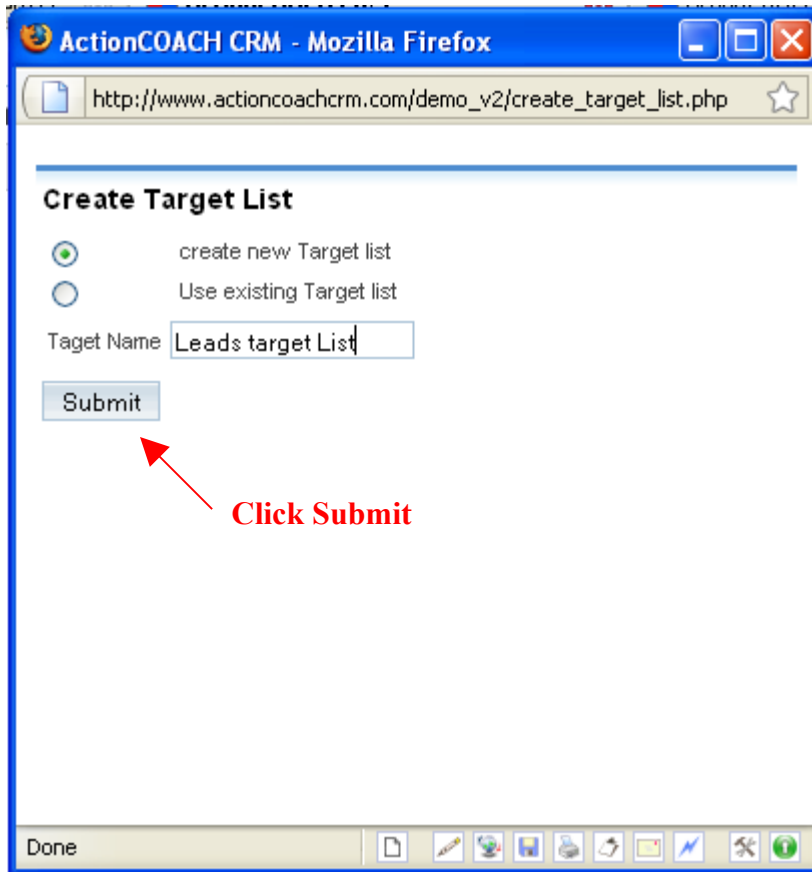
Select     Selected: 7 (1 - 19 of 19)

<input type="checkbox"/>	Name	Status	Account Name	Email	Office Phone	User
<input checked="" type="checkbox"/>	<a href="#">John Smith</a>	Converted	ABC Inc,		123-123-1234	admin
<input checked="" type="checkbox"/>	<a href="#">Billy Bunter</a>	Paused	Billy Bunter	<a href="mailto:test@test.com">test@test.com</a>		admin
<input checked="" type="checkbox"/>	<a href="#">Tom Jones</a>	New		<a href="mailto:tom@tom.com">tom@tom.com</a>		admin
<input checked="" type="checkbox"/>	<a href="#">Nate Smith</a>	New				admin
<input checked="" type="checkbox"/>	<a href="#">Bob Jones</a>	New		<a href="mailto:bob@bobjones.com">bob@bobjones.com</a>	123-123-1234	admin
<input checked="" type="checkbox"/>	<a href="#">Akers</a>	Paused				admin
<input type="checkbox"/>	<a href="#">Pankaj Kumar</a>	New	Test4			admin
<input type="checkbox"/>	<a href="#">AmanpreetS Singh</a>	New		<a href="mailto:monica.datta@sourcefuse.com">monica.datta@sourcefuse.com</a>		admin
<input type="checkbox"/>	<a href="#">Monica Datta</a>	Step2				admin
<input checked="" type="checkbox"/>	<a href="#">Mr. Juan Pablo</a>	New		<a href="mailto:jpreves@actioncoach.com.mx">jpreves@actioncoach.com.mx</a>		admin

**Select the Leads**

**Click to move selected Leads to Target List**

Give the Target List a name and click on Submit.



Similarly you can select the desired Leads and Export them to a .csv file

## Mass Update

- manage more than one account
- select the desired records/leads
- choose the desired function for the selected records/leads
- the changes will reflect in the Leads list

## Mass Update

Update

Assigned User:

Do Not Call:

Converted:

Lead Source:

Status:

Reports To:

Loyalty Ladder:

## Contacts Module

Use the Contacts module to create and manage contacts for your organization.

A contact is any individual who is a valid sales lead; that is, a lead who has been evaluated and assessed for a possible sales opportunity. You can associate a contact with any record such as an account, opportunity, or campaign. Associating a contact with a campaign enables you to track the effectiveness of the campaign in generating opportunities for your organization.

The screenshot shows the 'Contacts: Home' page. On the left is a 'Shortcuts' sidebar with options like 'Create Contact', 'Enter Business Card', and 'Import'. Below it is a 'New Contact' form with fields for First Name, Last Name, Office Phone, Email, and Assigned to. The main area has search tabs for 'Basic Search' and 'Advanced Search', with a red arrow pointing to 'Advanced Search' labeled 'Search Options'. Below the search fields are buttons for 'Search', 'Clear', and 'Saved Searches'. A red arrow points to the 'Saved Searches' dropdown labeled 'Create a Target List of selected Contacts'. Below that is a 'Contact List' table with columns for Name, Title, Account Name, Email, Office Phone, and User. The table contains several contact entries. A red arrow points to the 'Export' button above the table. Another red arrow points to the 'Create Target List' button above the table. A red arrow points to the 'Save' button in the 'New Contact' form, labeled 'Create or import new contacts'.

**Shortcuts**

- Create Contact
- Enter Business Card
- Create From vCard
- Contacts
- Import

**New Contact**

First Name:

Last Name:

Office Phone:

Email:

Assigned to:

**Contacts: Home** [Print](#) [Help](#)

**Basic Search** | **Advanced Search** ← Search Options

First Name  Last Name  Account Name

Only my items

Export the selected Contacts to a csv file ?

Search  | Saved Searches  ← Create a Target List of selected Contacts

**Contact List**

Select     Selected: 0 (1 - 20 of 30)

<input type="checkbox"/>	Name	Title	Account Name	Email	Office Phone	User
<input type="checkbox"/>	Joe Young		Billy Bunter	<a href="mailto:jyoung@eversafeva.com">jyoung@eversafeva.com</a>		admin
<input type="checkbox"/>	Rob Withers			<a href="mailto:RobertWithers@vafb.com">RobertWithers@vafb.com</a>	(601) 981-7422	admin
<input type="checkbox"/>	Steuart Thomas				(540) 895-1517	admin
<input type="checkbox"/>	Prof. Mad The		Right Attitude		12345	admin
<input type="checkbox"/>	Sur. To					admin
<input type="checkbox"/>	Sur. To					admin
<input type="checkbox"/>	CRW Support			<a href="mailto:support@chainreactionweb.com">support@chainreactionweb.com</a>		admin
<input type="checkbox"/>	CRW support			<a href="mailto:cresupport@chainreactionweb.com">cresupport@chainreactionweb.com</a>		admin
<input type="checkbox"/>	Lang Smith			<a href="mailto:lang.smith@firstcitizens.com">lang.smith@firstcitizens.com</a>	(540) 897-1302	admin
<input type="checkbox"/>	John Smith					admin
<input type="checkbox"/>	Mr. AmanpreetSF Singh			<a href="mailto:amanpreet.singh@sourcforce.com">amanpreet.singh@sourcforce.com</a>		admin
<input type="checkbox"/>	Mr. AmanpreetGmail Singh			<a href="mailto:amanpreets@gmail.com">amanpreets@gmail.com</a>		admin

Create or import new contacts

**NOTE:** The functions in a Contacts module are similar to those in a Leads module; the difference is in the search criterion/fields.

# Accounts Module

The Accounts can be associated with other records such as Contact or an opportunity. Accounts are records/leads that have been converted to leads in the system through a workflow. The features are the same as in the other modules.

The screenshot shows the 'Accounts: Home' page. On the left is a sidebar with 'Shortcuts' (Create Account, Accounts, Import) and a 'New Account' form. The main area has a search bar with 'Basic Search' and 'Advanced Search' tabs. Below the search bar is a 'Create from shortcut panel' section with 'Search' and 'Clear' buttons. At the bottom is an 'Account List' table with columns for Account Name, City, Phone, and User. Annotations with red arrows point to 'Advanced Search', 'Import', 'Create from shortcut panel', and 'Export'.

**Search options**

**Create from shortcut panel**

**Export selected records to a .csv file**

Account Name	City	Phone	User
Test4			admin
test1			admin
Right Attitude		12345	admin
Billy Bunter			admin

NOTE: The functions in a Contacts module are similar to those in a Leads module; the difference is in the search criterion/fields.

# Opportunity Module

The opportunity contains the records of an Account who can generate revenue for your organization. Each opportunity is related to an account and multiple opportunities can be related to the same account.

**Shortcuts**

- Create Opportunity
- Opportunities
- Import

**Create Opportunity**

Opportunity Name: \*  
 Account Name: \*  
 Expected Close Date: \*  
 Sales Stage: \*  
 Amount: \*  
 Assigned to: \*

**Opportunities: Home**

Basic Search | Advanced Search

Opportunity Name:  Type: Existing Business, New Business, Action Coaching/Mentor, Action Seminars, Action Books,DVD,Gam

Account Name:

Only my items

Search | Clear | Saved Searches: -None-

**Opportunity List**

Select | Delete | Export | Merge Duplicates | Selected: 0

	Name	Account Name	Sales Stage	Amount
<input type="checkbox"/>	test	Right Attitude	Value Proposition	\$23,000.00
<input type="checkbox"/>	Testing4	Test4	Prospecting	\$500.00
<input type="checkbox"/>	Akers			\$200.00

NOTE: The functions in a Contacts module are similar to those in a Leads module; the difference is in the search criterion/fields.

## Workflow Module

The workflow manager is a custom built module *exclusively* for the ActionCOACH CRM users. A workflow is a tool that allows you to:

- Re-create your Business processes inside the CRM program, by breaking them into logical steps
- The steps can further be broken into logical Tasks
- Allows you to track certain activities within the organization.
- Allows you re-assign the sequence of the steps/tasks.

***Let us discuss this with the help of an example.***

If your business is to manufacture automobiles then the workflow process for assembling the car could be like:

### **Workflow: How to assemble a Car.**

Step1. Apply body to car frame.

Step2. Install car interior.

Step3. Paint the car.

Step4. Install the wheel and tires.

Step5. Test drive finished car.

Each of the steps involves a series of steps to be completed, some of which can be skipped based on the situation. In the example we have used let us understand the Tasks for Step1

### **Step 1: Apply body to car frame.**

Task 1. Obtain correct car body and move to assembly line.

Task 2. Gently lower car body on top of the car frame.

Task 3. Secure car body to car frame.

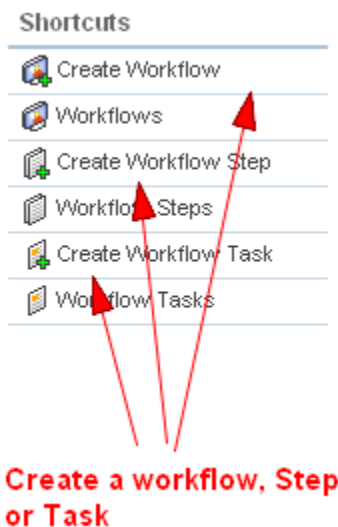
In order for Step 1 to complete the tasks need to be performed in sequence.

### **How to Create a Workflow?**

Creating a workflow helps you determine:

- Determine who the workflow is intended for Leads, contacts or account.
- Determine the users who can access the Workflow

**Creating a Workflow** is simple, click on the create workflow option on the left panel.



## WorkflowManager: How to assemble a Car

The screenshot shows the WorkflowManager interface. At the top, there are 'Save', 'Cancel', and a help icon. Below this, the 'Workflow Name' is set to 'How to assemble a Car' and 'Workflow Status' is set to 'Active'. The 'Workflow Object' is set to 'Lead'. The 'Workflow Description' field contains the text: 'This workflow defines the steps that need to be followed to assemble a Car.' Below the description, there is a checkbox labeled 'Available for all' which is checked. Underneath, a list of users is shown: Jerry Akers, Administrator, Lisa Vega, Pankaj Kumar, and Nate Smith. Red arrows point to the 'Workflow Name' field with the label 'Name the workflow', to the 'Workflow Description' field with the label 'Object associated with the workflow', and to the user list with the label 'Users in the CRM are listed'.

Choose who the workflow is available to, by holding control or check the box as shown above for all users.

Workflow Object: workflow can be intended for either a Contact, Account, lead or opportunity.

## Create a workflow Step

### Workflow Manager Steps:

The screenshot shows the Workflow Manager Steps interface. At the top, there are 'Save', 'Cancel', and a help icon. Below this, the 'Name' is set to 'Apply Body to car frame' and there is an 'Allow Skip?' checkbox which is unchecked. A red arrow points to the 'Allow Skip?' checkbox with the label 'Skip option'. The 'Description' field is empty.

We have an option to skip this step by clicking the check box. In our case this step cannot be skipped so we did not choose it.

## Workflow Steps

Step Name	Step Order	
<a href="#">Apply body to car frame.</a>	1	<a href="#">rem</a>
<a href="#">Install car interior.</a>	2	<a href="#">rem</a>
<a href="#">Paint the car.</a>	3	<a href="#">rem</a>
<a href="#">Install the wheels and tyres.</a>	4	<a href="#">rem</a>
<a href="#">Test Drive finished Car.</a>	5	<a href="#">rem</a>

Select, Create or re-order steps

Remove any existing step

## Create a workflow Task

### Workflow Manager Task:

[? Help](#)

Save Cancel

Choose to create Lead, Account or contact

\* Indicates required field

Task Name: \*  On Completion:

Allow Skip:  Skip option

Task Description:

## Workflow Tasks

Task Name	Task Order	
<a href="#">Secure car body to car frame.</a>	1	<a href="#">rem</a>
<a href="#">Obtain correct car body and move to assembly lin</a>	1	<a href="#">rem</a>
<a href="#">Gently lower car body on top of the car frame.</a>	1	<a href="#">rem</a>

Select, create or re-order tasks

Remove any task

## Execute a Workflow for a Lead

Let us execute the Workflow: "How to Assemble a Car" for the Lead 'Akers'

## WorkflowManager: How to assemble a Car

[Print](#) [Help](#)

[Edit](#) [Delete](#) [?](#) **Workflow selected**

[View Change Log](#) [Return to List](#) [Resume](#)

Workflow Name	How to assemble a Car	Workflow Status:	Active
Workflow Object:	Lead	Global Access	<input checked="" type="checkbox"/>
Workflow Description	This workflow defines the steps that need to be followed to assemble a Car.		

[All](#) [Sales](#) [Marketing](#) [Other](#)

**Leads** **Chosen Lead** **Start workflow for chosen Lead**

[Create](#) (1 - 10 of 25) [Start](#)

Name	Referred By	Lead Source	Office Phone	Email
<a href="#">Akers</a>				

1) From the list of Leads Click **Start** besides the desired Lead

### Active Workflows: Akers

[Edit](#) [Delete](#)

[View Change Log](#)

Name:	Akers	Assigned to:	admin
Workflow Process:	How to assemble a Car		
Description:			

**Steps in a Workflow**

**How to assemble a Car**

- Apply body to car frame.
- Apply Body to car frame
- Install car interior.
- Paint the car.
- Install the wheels and tyres.
- Test Drive finished Car.

[Terminate](#) [Pause](#)

**Apply body to car frame.**

[Complete](#)

**Select to end the workflow**

**Select to continue later**

**Click to indicate step is over**

2) Click on **Complete** for each step once it is over.

Pause : *If you wish to continue later. The status 'Paused' will appear besides the Lead*

Terminate: *If the Workflow is terminated then all the associated steps and tasks for the Lead also get deleted.*

Edit	Delete		
<b>View Change Log</b>			
Name:	Akers	Assigned to:	admin
Workflow Process:	How to assemble a Car		
Description:			

**Completed Steps**

**How to assemble a Car**

- Apply body to car frame.
- Apply Body to car frame
- Install car interior.
- Paint the car.
- Install the wheels and tyres.
- Test Drive finished Car.

**Terminate** **Pause**

**Paint the car.**

**Step Back** **Complete**

**Option to Step back**

## Active Workflows: Akers

[Edit](#) [Delete](#)

<u>View Change Log</u>			
Name:	Akers	Assigned to:	admin
Workflow Process:	How to assemble a Car		
Description:			

<b>How to assemble a Car</b>	
Apply body to car frame.	<input checked="" type="checkbox"/>
Apply Body to car frame	<input checked="" type="checkbox"/>
Install car interior.	<input checked="" type="checkbox"/>
Paint the car.	<input checked="" type="checkbox"/>
Install the wheels and tyres.	<input checked="" type="checkbox"/>
Test Drive finished Car.	<input checked="" type="checkbox"/>

Thanks we are finished with all steps .

**All steps are complete**

If you now view Active Workflows (below) you will find 2 entries listed for Akers

The 1<sup>st</sup> workflow "Sample SF workflow" is a previous workflow that was run for Akers and left at Step 2

The 2<sup>nd</sup> workflow "How to assemble a Car" was run by us to completion.

A lead can have more than one workflow running for them.

Basic Search | Advanced Search | Saved Search & Layout

Name:  Only my items:

Search | Clear | Saved Searches: —None—

**Active Workflows List**

Select  | Delete | Export | Merge Duplicates | Selected: 0 | (1 - 20 of 26)

<input type="checkbox"/>	Workflow Name	Process Status	Workflow Process	Last Modified	User	<input type="button" value="v"/>
<input type="checkbox"/>	<a href="#">Akers</a>	Step2	Sample SF workflow	2009-02-06 08:35am	admin	<input type="button" value="v"/>
<input type="checkbox"/>	<a href="#">Akers</a>	Completed	How to assemble a Car	2009-03-05 01:19am	admin	<input type="button" value="v"/>

**Workflow on Step 2**

**Completed workflow**

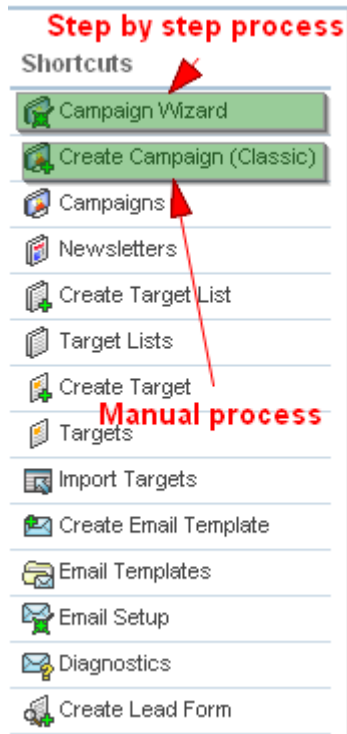
## Campaigns

The campaign module allows you to track and manage mass marketing campaigns for e-mail and newsletters.

### Campaigns

- allows you to send mass marketing emails/newsletters to Leads, contacts, perspective clients and accounts
- allows you to choose recipients from the Leads, Contacts and Clients
- gives you the option to suppress/block mails from being sent out, based on id, email address or domain
- on completion you can review the results that tell you who received the mail, recipients who checked the mails, the number of click thrus on the Tracker URL's
- allows you to add Tracker URL s for recipients to click on to either register or un register
- a user once un registered does not receive future communication and the corresponding information for the user gets updated.

### Create a Campaign



Let us now walk you through running a campaign wizard for an e-mail campaign using the Campaign Wizard.

1) Click on **Campaign Wizard**.

### Campaign Wizard

[Print](#) [Help](#)

Campaign Type	<p><b>Campaign Type</b> Select the type of Campaign you would like to create.</p> <p><input type="radio"/> Newsletter</p> <p><input checked="" type="radio"/> <b>Email Campaign</b></p> <p><input type="radio"/> Non-email based Campaign</p>
---------------	---

Click Start

Start

2) After filling in the mandatory fields Click **Next**

**Campaign:**

**Cancel** **Next** Click next

[Campaign Header](#)  
[Budget](#)  
[Trackers](#)  
[Target Lists](#)  
[Marketing](#)  
[Send Email](#)  
[Summary](#)

**Campaign Header**  
Fill out the required fields to help identify the campaign.

Name: \*  Assigned to:

Status: \*

Start Date:   (yyyy-mm-dd) Type:

End Date: \*   (yyyy-mm-dd) Choose start and end date

Description:

3) Fill in the Budget details if relevant. Click **Next**

**Campaign:**

**Back** **Cancel** **Next** Click next

[Campaign Header](#)  
[Budget](#)  
[Trackers](#)  
[Target Lists](#)  
[Marketing](#)  
[Send Email](#)  
[Summary](#)

**Campaign Budget**  
Enter the budget to calculate the ROI.

Budget:  Actual Cost:

Expected Revenue:  Expected Cost:

Currency:  Impressions:

Objective:

4) Create a Tracker URL, the opt-out link needs to be selected in order to make the URL to un-register from a mailing list. Click **Next** once the URL are made.

**Campaign:**

[Print](#) [Help](#)

Back Cancel Next

[Campaign Header](#)  
[Budget](#)  
[Trackers](#)  
Target Lists  
Marketing  
Send Email  
Summary

### Campaign Tracker URLs

**Select to create an unsubscribe link**

Define a tracker URL here to use with this campaign. You must enter both the name and the URL to create the tracker.

Tracker Name:   Opt-out Link?

Tracker URL:

**Click to create tracker**

Opt-out Link:	Tracker Name:	Tracker URL:
<input type="checkbox"/>	<input type="text" value="Actioncoach"/>	<input type="text" value="www.actioncoachcrm.com"/> <a href="#">rem</a>

5) You may create a Target list from here or select from an existing list. Click Select to get the existing list of Target Lists

### Target Lists

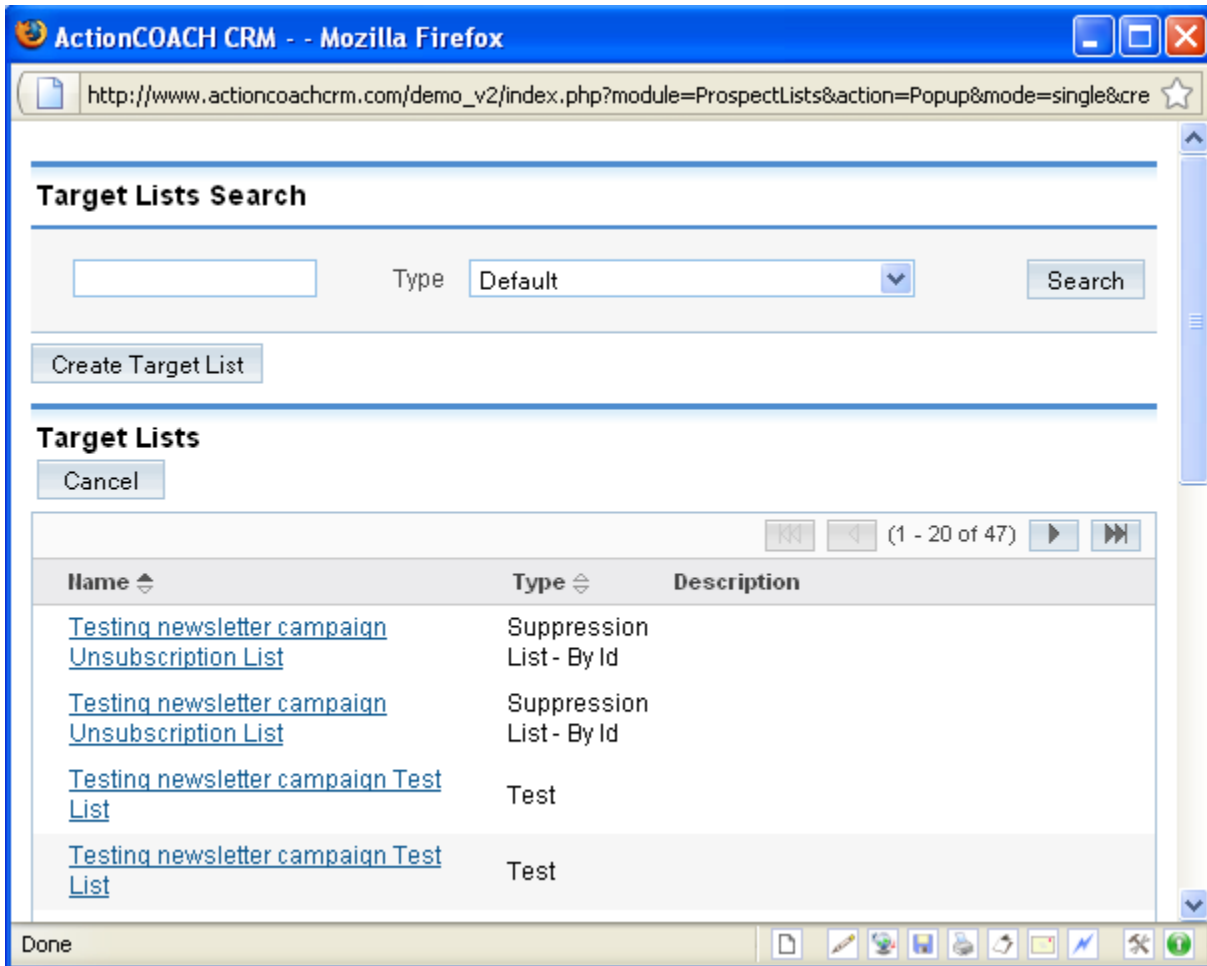
Select or create a target list for use with your campaign. This list will be used while sending emails with your marketing messages.

Use existing Target List  **Select an existing list**

Or create a new one using the form below:

Target List Name:  Target List Type:

6) Make your choice from the List



7) Click Save and Continue to proceed

## Campaign:

[Print](#) [Help](#)

Back Cancel **Save and Continue** Finish

[Campaign Header](#)  
[Budget](#)  
[Trackers](#)  
[Target Lists](#)  
Marketing  
Send Email  
Summary

### Target Lists

Select or create a target list for use with your campaign. This list will be used while sending emails with your marketing messages.

Use existing Target List

Or create a new one using the form below:

Target List Name  Target List Type

**List selected**

Target List Name	Target List Type
New List	Default <input type="button" value="rem"/>

**Click once a list is selected**

8) Marketing email has all the information about the email you are sending. Fill in the mandatory fields. From the Mail Account choose the Active mail account to handle the campaign. Click **Next**

## Campaign: Test Email Campaign

[Print](#) [Help](#)

Back Cancel **Next**

[Campaign Header](#)  
[Budget](#)  
[Trackers](#)  
[Subscriptions](#)  
[Marketing](#)  
Send Email  
Summary

### Marketing Email

Fill out the form below to create an email instance for your newsletter. This will allow you to specify the information regarding when and how your newsletter should be distributed.

Name \*  Status: \*

Use Mail Account: \*  Start Date & Time: \*

From Name: \*  "From" Address \*

"Reply-to" Name: \*  "Reply-to" Address: \*

Send This Message To: \*  All Target Lists in the Campaign. Email Template: \*


**Select from existing mail accounts**

**Choose an existing template or create one**

9) Click Finish

## Campaign: Test Email Campaign

 [Print](#)

Back Cancel **Finish** 

[Campaign Header](#) **Send Email**

[Budget](#)

[Trackers](#)

[Subscriptions](#)

[Marketing](#)

[Send Email](#)

Summary

This is the last step in the process. Select whether you wish to send out a test email, schedule your newsletter for distribution, or save the changes and proceed to the summary page.

Finish

Send Marketing Email As Test

Schedule Email

10) Click View Status to view the details of the Campaign

[Campaign Header](#)

[Budget](#)

[Trackers](#)

[Target Lists](#)

[Marketing](#)

[Send Email](#)

[Summary](#)

**Campaign Summary**

[Edit Campaign](#) [View Status](#) [View ROI](#)

Name: Test Email Campaign

Assigned to: admin

Status: Active

Start Date: 2009-03-04

End Date: 2009-03-05

Description: Campaign to send out mass marketing emails.

Objective: Set a budget if there is any associated with the Campaign.

**View status** 

11) Click on Send emails to run the emails through

## Campaigns

[Print](#) [? Help](#)

<a href="#">Edit</a>	<a href="#">Duplicate</a>	<a href="#">Delete</a>	<a href="#">Send Test</a>	<a href="#">Send Emails</a>	<a href="#">Mail Merge</a>	<a href="#">View Change Log</a>	<a href="#">Launch Wizard</a>	<a href="#">View Status</a>	<a href="#">View ROI</a>
<a href="#">Return to List</a>								(8 of 8)	
Name:	Test Email Campaign			Assigned to:	admin				
Status:	Active			<b>Click to send e-mails</b>					
Start Date:	2009-03-04			Date Modified:	2009-03-04 02:48pm by admin				
End Date:	2009-03-05			Date Entered:	2009-03-04 02:48pm by admin				
Type:	Email			Frequency:					
Budget: (USD \$):				Actual Cost: (USD \$):					
Expected Revenue: (USD \$):				Expected Cost: (USD \$):					
Impressions:	0								
Objective:	Set a budget if there is any associated with the Campaign.								
Description:	Campaign to send out mass marketing emails.								

12) Select the marketing email and click on send. You can send more than one marketing email .

### Campaign: Send Emails

Please select the campaign messages that you would like to schedule for distribution on the specified start date and time:

<a href="#">Send</a>	<a href="#">Cancel</a>	<b>Select marketing email and click on Send</b>	
		(1 - 1 of 1)	
<input type="checkbox"/>	Name	Targeted Lists	
<input checked="" type="checkbox"/>	Test email	New List	
		(1 - 1 of 1)	

13) Click View details to get detailed information about the Campaign.

### Campaigns: Test Email Campaign

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<a href="#">Delete Test Entries</a>	<a href="#">Launch Wizard</a>	<a href="#">View Details</a>	<a href="#">View ROI</a>	
<b>View Change Log</b>				
Name:	Test Email Campaign		Assigned to:	admin
Status:	Active		<b>View the details</b>	
Start Date:	2009-03-04		Last Modified:	2009-03-04 02:48pm by admin
End Date:	2009-03-05		Date Created:	2009-03-04 02:48pm by admin

## Campaigns: Test Email Campaign

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Delete Test Entries

Launch Wizard

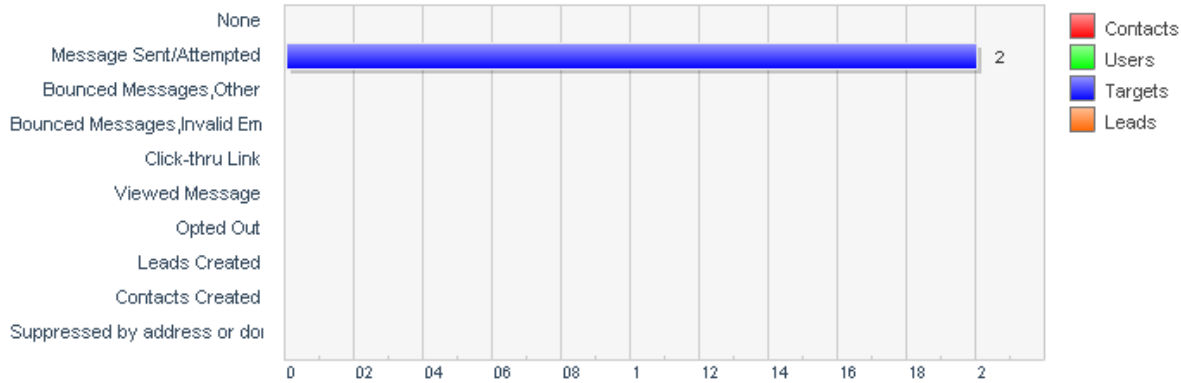
View Details

View ROI

### View Change Log

Name:	Test Email Campaign	Assigned to:	admin
Status:	Active		
Start Date:	2009-03-04	Last Modified:	2009-03-04 02:48pm by admin
End Date:	2009-03-05	Date Created:	2009-03-04 02:48pm by admin
Type:	Email		
Budget: (USD \$)		Actual Cost: (USD \$)	
Expected Revenue: (USD \$)		Expected Cost: (USD \$)	
Objective:	Set a budget if there is any associated with the Campaign.		
Description:	Campaign to send out mass marketing emails.		

### Campaign Response by Recipient Activity



Rollover a bar to view details.

⤴ **Message Sent/Attempted**

Add To Target List						(1 - 2 of 2)
Recipient Name	Recipient Email	Activity Type	Activity Date	Related	Hits	
corbin	ryan@google.com	Message Sent/Attempted	2009-03-04 03:13pm	<a href="#">Test Email Campaign: test subject</a>		
Datta	monica.datta@sourcefuse.com	Message Sent/Attempted	2009-03-04 03:13pm	<a href="#">Test Email Campaign: test subject</a>		

⤴ **Viewed Message**

Add To Target List						(0 - 0 of 0)
Recipient Name	Recipient Email	Activity Type	Activity Date	Related	Hits	

⤴ **Click-thru Link**

Add To Target List						(0 - 0 of 0)
Recipient Name	Recipient Email	Activity Type	Activity Date	Related	Hits	

⤴ **Leads Created**

Add To Target List						(0 - 0 of 0)
Recipient Name	Recipient Email	Activity Type	Activity Date	Related	Hits	

⤴ **Contacts Created**

Add To Target List						(0 - 0 of 0)
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***\*To learn more you can look for online documentation and video tutorials on our support site at <http://support.actioncoachcrm.com>***