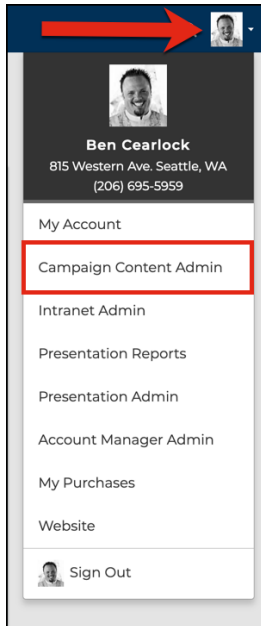


Create a Campaign

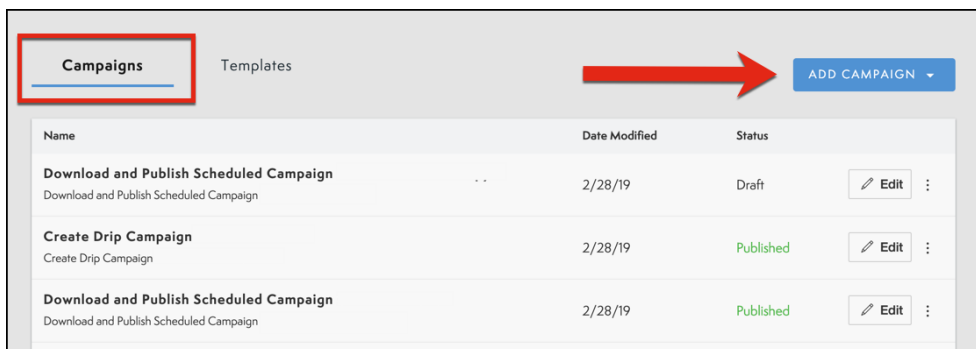
Using Campaigns for your agents is a great way to keep in touch with their people! However, we will need to create those campaigns for them to use! Here we will learn how to take the email templates we have created and put them into a campaign for agents to use!

Create a Campaign

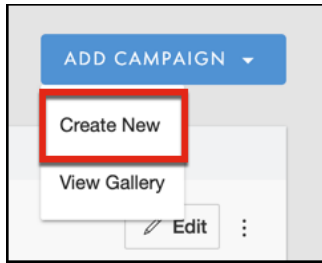
1. From your Engage Dashboard, select your agent drop-down in the top right corner.



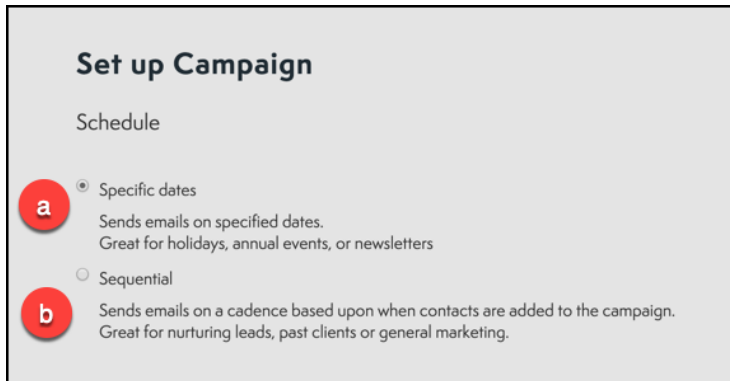
2. From the Campaigns menu select **Add Campaign**.



3. From the drop-down menu, select **Create New**.

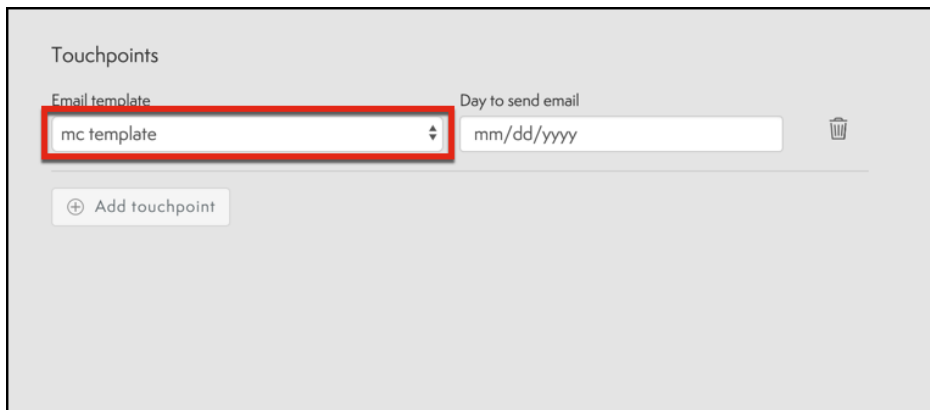


4. Now we can create our template! First, we have to select the timing method.



- a. Specific Date: You can assign specific dates such as holidays or company events. (I.E. July 4th or Dec 25th)
- b. Sequential: This will let you put a cadence on when the emails are sent. (I.E. Day 5 or Day 12)

5. Now we need to put our templates in our campaign. Select **Add Touchpoint** and select a template from the drop down.



6. Next, assign the date you would like this email to be sent out.

Touchpoints

Email template: mc template

Day to send email: mm/dd/yyyy

+ Add touchpoint

7. Once you have added your templates into your Campaign, select **Next: Preview**.

Set up Campaign

Schedule

Specific dates
Sends emails on specified dates.
Great for holidays, annual events, or newsletters

Sequential
Sends emails on a cadence based upon when contacts are added to the campaign.
Great for nurturing leads, past clients or general marketing.

Touchpoints

Email template: 4th of July [E-card] Day to send email: 03/14/2019

30 Day Follow Up - Seller 03/30/2019

60 Day Follow Up - Seller 05/31/2019

+ Add touchpoint

Next: Preview

Cancel

8. Now we give this Campaign a title and description, so our agents know what kind of campaign they are going to run!

Review

Title: [a]

Description: Describe the purpose of the campaign [b]

Campaign schedule [Edit](#)

- 4th of July [E-card] Mar 14, 2019 Preview
- 30 Day Follow Up - Seller Mar 30, 2019 Preview
- 60 Day Follow Up - Seller May 31, 2019 Preview

Publish to agents

Save as draft

9. When you have created your campaign, select the **Publish to agents** button. This will send your campaign onto the campaign's dashboard!

Review

Title

New Template

Description

This is a great new template!

Publish to agents

Save as draft

Campaign schedule [Edit](#)

● **4th of July (E-card)**
Mar 14, 2019

Preview

● **30 Day Follow Up - Seller**
Mar 30, 2019

Preview

● **60 Day Follow Up - Seller**
May 31, 2019

Preview