Campaigns

When you add a campaign to a contact you are asking the system to help you stay in contact with them automatically. Different campaigns can be used for different strategies and for different kinds of contacts, so you'll want to be familiar with the kinds of campaigns available to you. These can keep you in touch through a combination of emails and phone calls, and can even include notes for you to complete a separate kind of action (like a hand-written letter).

Some campaigns even generate physical mailings to go to the contact, but as those cost money each time you sign someone up for them this will mostly be limited to the post-closing campaign.

Adding a Campaign

To add a campaign go to a contact's profile. From there, you will see a **Marketing/Activities** tab at

the top, and when you click on that a button will be presented that says **Add New Campaign.**

When you click on that button a few dropdown boxes will be presented. The first is "Campaign" and the options included in there will be the campaigns *you* can sign a contact up for. Some options will have your name on them, and these are either campaigns made by your ERMA team or yourself. The "Loans" section will only have options if the contact has a loan on file. By selecting this the campaign will use loan data when determining things like Co-Branding.

Select the campaign you want to use and click **Submit** to start the contact on that campaign. You will see a list of activities populate below when you do so, and these represent all of the events in that campaign, as well as any other events that you may have done, or are planning to do, for that contact.