

## Assigning Campaigns to a Lead/Contact

The Smart Campaigns in your Keyes Connect (kvCORE) Platform are one of the many tools to use for nurturing your leads/contacts. There are many premade campaigns for you to choose from.

Go to “Marketing” and select “Smart Campaigns” from the drop down menu. Here you will see the Campaigns added to your Library.

There are several ways to assign a campaign to a Lead/Contact, the first step is to make sure the campaign you choose is active (toggle campaign on).

Campaign Name	Campaign Description	Starts When	Designed For	Channels	Touches	Always Run	Status	Scope
Default New Lead - Seller	System default for seller leads whose status is New Lead.	Status IS New Lead	Seller	Change Status, Create Call, Email, Text	15	No	<input checked="" type="checkbox"/>	Company
Default New Lead - Buyer	System default for buyer leads whose status is New Lead.	Status IS New Lead, Source IS NOT eleadnetwork, Source IS NOT condo.com	Buyer	Change Status, Create Call, Email, Task, Text	42	No	<input type="checkbox"/>	Company
Default Homeowner - Sphere	System default for leads whose status is Sphere.	Status IS Sphere	Seller, Buyer	Create Call, Email, Task, Text	18	No	<input checked="" type="checkbox"/>	Company
Default Closed	System default for contacts whose status is Closed.	Status IS Closed	All	Change Status, Create Call, Email, Text	8	No	<input type="checkbox"/>	Company
Default Active Renter	System default for renters whose status is Active.	Status IS Active Lead	Renter	Task	29	No	<input type="checkbox"/>	Company

### Option #1

- Go to “Smart CRM” and Select the contact (s) you want to assign the campaign to.
- Click on “More Actions” > Scroll to Add Campaigns > Select from drop down menu
- Click “Add Campaign”

Smart CRM

What's This? Create Pond Add Contact

Filters Search name or address Mass Email Mass Text Video Message

More Actions

- Add Task(s)
- Add Hashtag(s)
- Change Status
- Transfer Contact(s)
- Share Contact(s)
- Archive Contact(s)
- Assign Lender
- Add Campaign**
- Delete Contact(s)
- Export Contacts

Add Campaign

Contacts: 1 contact selected.

Campaigns:

- COLE Seller Series
- Condo Retarget
- Default New Lead - Buyer**

Add Campaign Cancel

## Assigning Campaigns to a Lead/Contact

### Option #2

- Go to Lead/Contact details page, navigate to the right-hand column
- Click "+ADD" > Select from drop down menu > Add Campaign

The screenshot shows the 'Lead/Contact' details page. On the right-hand side, there is an 'Active Campaigns' section with a '+ Add' button. A red arrow points from this button to a dropdown menu that lists several campaigns: 'COLE Seller Series', 'Condo Retarget', 'Default New Lead - Buyer', and 'Default Prospect - Homeowner'. Below the dropdown menu, there is another '+ Add' button and a 'Cancel' button, both highlighted with a red box.

### Option #3

- When adding a manual contact
- In the Options section
- Select the Campaign
- Click Add Contact

The screenshot shows the 'Add Contact' dialog box. In the 'Options' section, there is a 'Smart Campaign' dropdown menu. The dropdown menu is open, showing the same campaign options as in Option #2: 'COLE Seller Series', 'Condo Retarget', 'Default New Lead - Buyer', and 'Default Prospect - Homeowner'. A red arrow points to the 'Default Prospect - Homeowner' option. Below the dropdown menu, there is an 'Add Contact' button and a 'Cancel' button, both highlighted with a red box.

The screenshot shows the 'Campaign Settings' dialog box. The settings are: Applies To: Buyer, Starts When: Source IS openhouse, Created By: System, Always Run: No, Scope: Company. A red bracket highlights the 'Always Run: No' setting.

**Note:** Each Campaign has a trigger or settings that will automatically add a Campaign to a Lead/Contact when all the items are met.