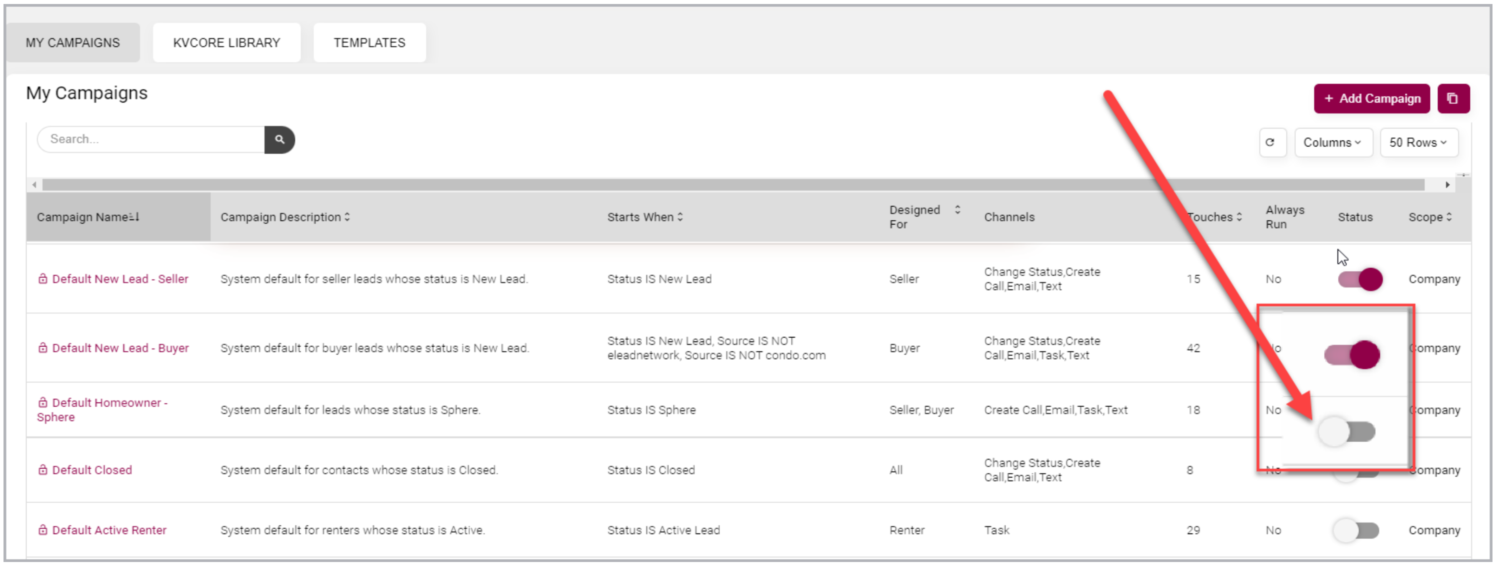
The Keyes Company PLATINUM PROPERTIES ILLUSTRATED PROPERTIES

Assigning Campaigns to a Lead/Contact

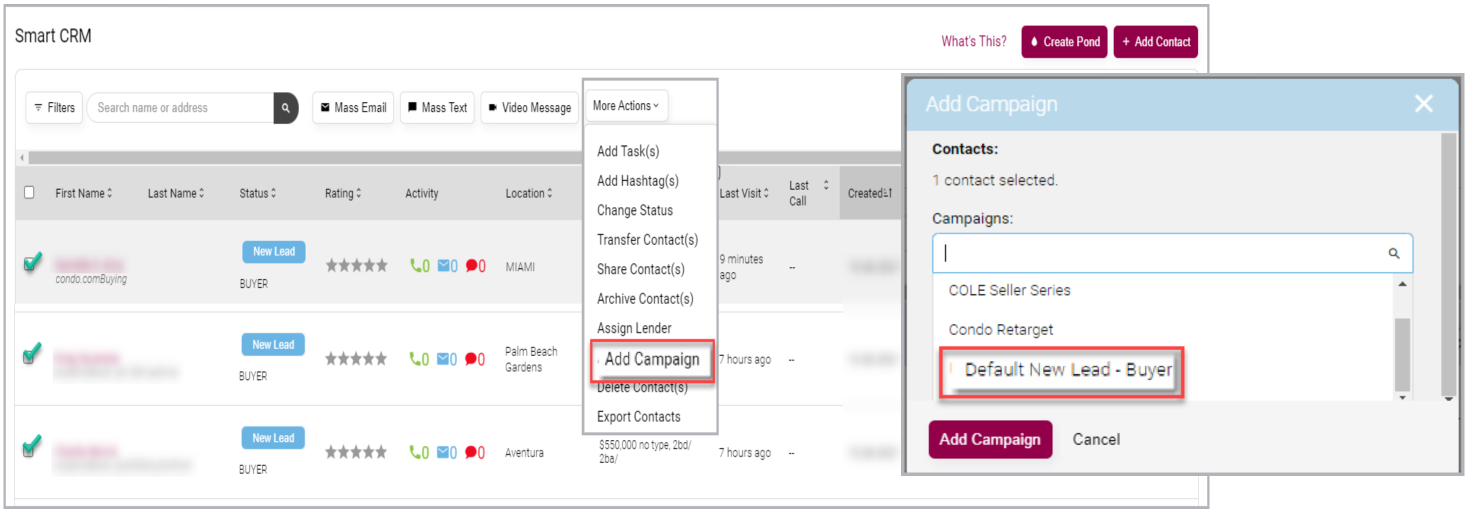
The Smart Campaigns in your Keyes Connect (*kvCORE*) Platform are one of the many tools to use for nurturing your leads/contacts. There are many premade campaigns for you to choose from.
Go to "Marketing" and select "Smart Campaigns" from the drop down menu. Here you will see the Campaigns added to your 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).



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"*



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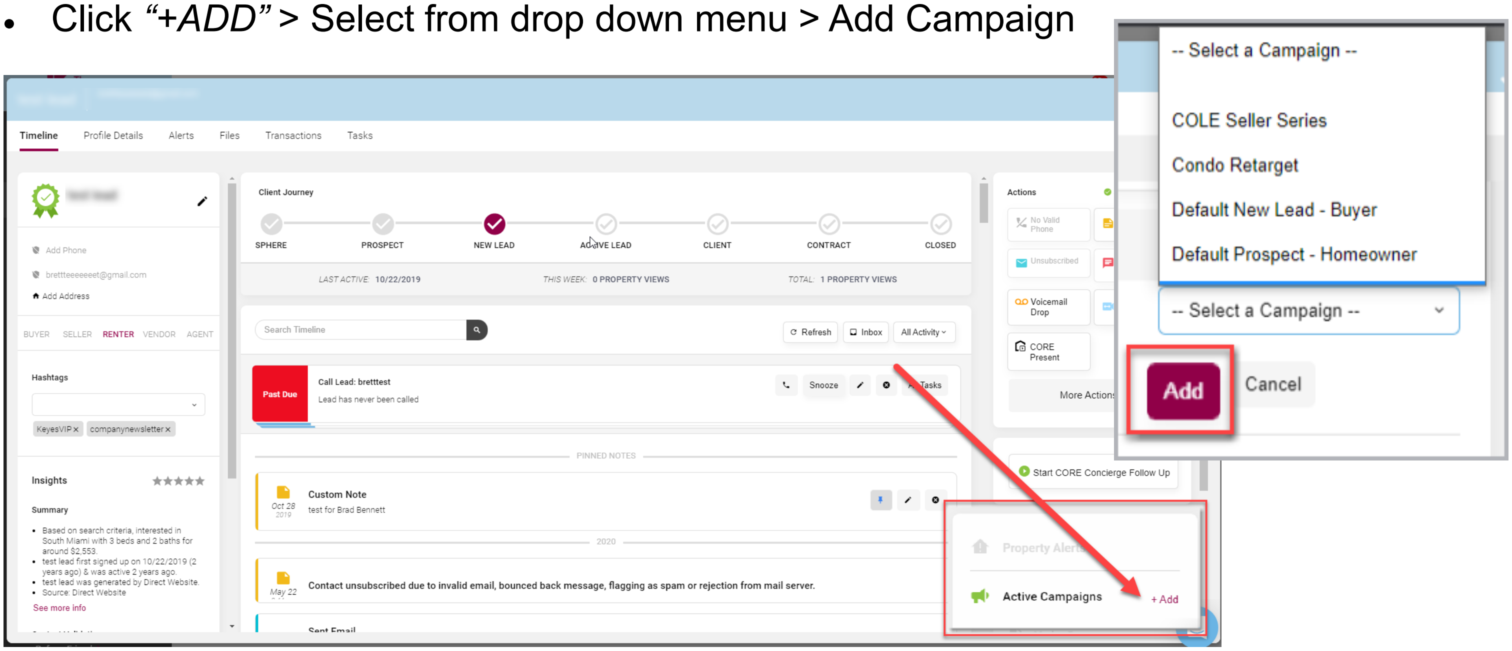
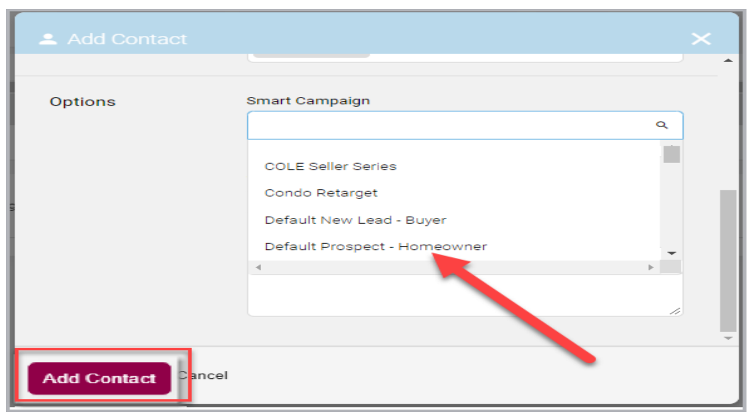
Option #2

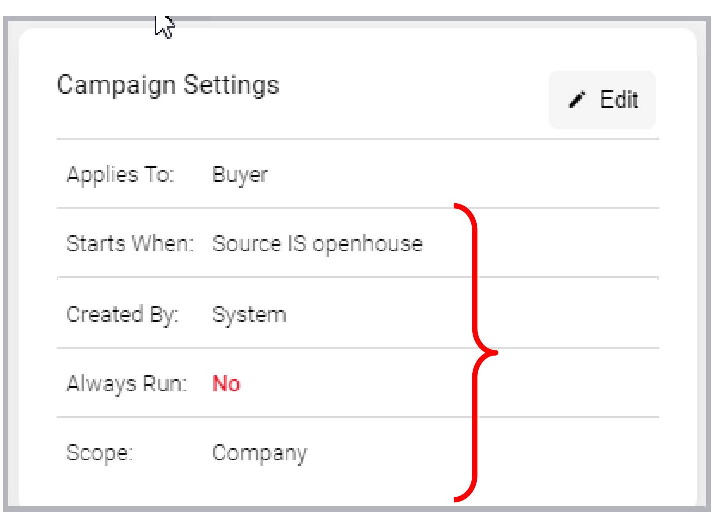
- Go to Lead/Contact details page, navigate to the right-hand column
- Click *"+ADD"* > Select from drop down menu > Add Campaign



Option #3

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





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