CAMPAIGNS

Contact Management > Campaigns

PinPoint’s CM Campaigns allows you to organize your accounts/contacts into groups that help you reach your goals faster. Add prospective customers to your campaign with completion goal (i.e. closed sale), or reach out to your current customers with the goal of receiving updates from them in return. Campaigns can be used however you want as a tool to organize your goals.

To add a new campaign, complete the information at the top of the screen (campaign name and start date are required). Goal is typically a percentage of success based on what your end goal is. You can also select an opportunity template, which will be discussed in the next section.

Use the search fields to find a specific campaign, if needed. Add a comment or note to your campaign by clicking the notepad icon. Also, you can add other PinPoint users to the campaign, in addition to emailing all accounts in the campaign directly from PinPoint.