Campaigns

CM Campaigns allow 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.

Begin by clicking Contact Management in the user menu on the left side of PinPoint, then click Campaigns.

Add Campaign

1. Click the Add Campaign button.
2. Enter the campaign Name and Start Date.
    - Enter any Notes that are needed for the campaign.
3. Click Save when finished.
4. To assign users to the campaign, click the button under the Users column next to the campaign.

Send Email

1. Under the Action column, click the Send Mail button next to the campaign.

Add Notes

1. Under the Action column, click the Notes button next to the campaign.
2. Enter your message, then click Save.