

Guide to Assigning Contacts to Recurring Marketing Campaigns

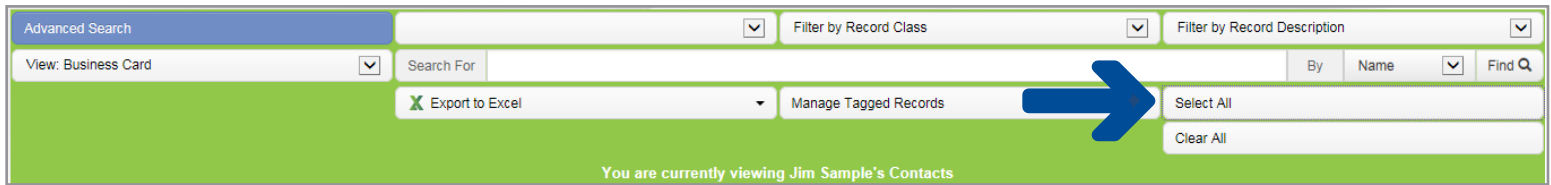
1. Click the **“Contacts”** icon at the top of the page.



2. Filter your contacts by clicking on **“Customers”**.



3. Select all **“Customers”** by clicking **“Select All”**.



4. To assign a recurring campaign to all of the selected customers, click the **“Action”** button in the upper left hand side of the screen.



5. The Action Options window appears.

a. Choose **“Recurring Campaigns”** from the **“Send via:”** drop-down box.



b. Choose the recurring campaign in the **“Template”** drop-down box.



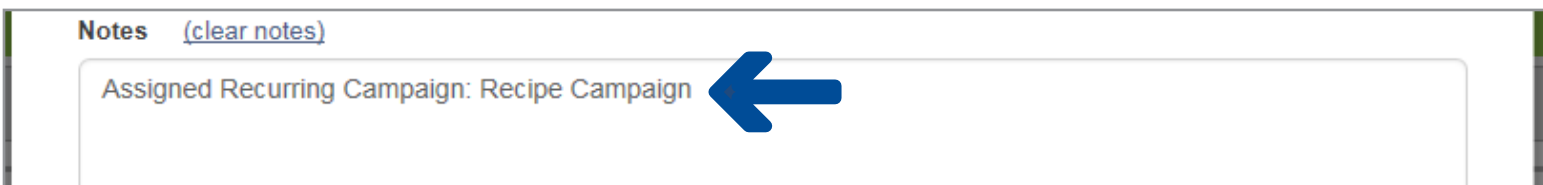
This screenshot shows the campaign configuration interface. It features two dropdown menus: "Send via:" with "Recurring Campaigns" selected, and "Template:" with "Recipe Campaign" selected. A blue arrow points to the "Template:" dropdown. Below the dropdowns is an "Assign" button.

c. Click **“Assign”** to add each contact to the campaign.



This screenshot is identical to the previous one, but with a blue arrow pointing to the "Assign" button.

d. Notes and the date-stamp will automatically be recorded to each customer’s record.



This screenshot shows the "Notes" section of the interface. It includes a link for "(clear notes)" and a text area containing the note "Assigned Recurring Campaign: Recipe Campaign". A blue arrow points to the text area.

e. Set a **“Follow-Up”** reminder (optional) by using the **“Follow-up on”** field shown below.



This screenshot shows the "Followup Options" section. It contains a "Follow-up on:" label and an empty text input field. A blue arrow points to the input field.

f. Click the **“Save”** button at the top of the screen to save the notes in each record’s history tab.



This screenshot shows the bottom of the interface. It features a status bar on the left that reads "199 Tagged Record(s) Selected" and two buttons on the right: "Save" and "Close". A blue arrow points to the "Save" button.