Frequently Asked Question Campaign

Please Note! We recommend using the online Strategy Guide to source your campaigns. The Strategy Guide is kept up-to-date with the latest campaigns. This campaign may contain legacy content (e.g, legacy emails, legacy landing pages, etc...)

This article provides instructions for launching the Frequently Asked Question Automation campaign that you can download for free from the Infusionsoft Marketplace.

This campaign sends a pre-authored email answering a frequently asked question (FAQ) when triggered by an Infusionsoft user.

Step-by-Step Instructions

1. Download the Frequently Asked Question Automation campaign from the Marketplace

2. Update Campaign Objects to Specify FAQ Topic

   The campaign installs with "Topic A" in the names of the different elements. To keep things meaningful and organized, you need to edit the elements so they reflect the real-world topic being discussed in the automated email.

   1. In the lower left corner of the FAQ - Topic A goal, double click the orange note symbol
   2. Replace "Topic A" in the Goal Name with the actual topic and click Save (e.g. If this is an FAQ email about pricing, the Goal Name can be "FAQ - Pricing")
   3. Double click the Note Template goal itself that you just renamed; do NOT click the orange note symbol again.
   4. Replace "Topic A" in the Title with the actual topic (e.g. If this is an FAQ email about pricing, the Title for this note can be "Sent FAQ - Pricing")
   5. In the upper right of the page, click Draft to mark the Note Template goal as Ready; in the upper left of the page click Back to Campaign
   6. Double click into the FAQ - Topic A sequence
   7. In the upper left of the page, using the Sequence dropdown, select Rename
   8. Replace "Topic A" in the Sequence Name with the actual topic and click Save (e.g. If this is an FAQ email about pricing, the Sequence Name can be "FAQ - Pricing")

3. Edit Email Template to Reflect FAQ Answer

   The FAQ email design and layout are pre-defined upon install. All you have to do is rename the email object and add in the specific answer to the email.

   1. Double click the FAQ - Topic A email
   2. In the upper left of the page, using the Email dropdown, select Rename
   3. Replace "Topic A" in the Email Name with the actual topic and click Save (e.g. If this is an FAQ email about pricing, the Email Name can be "FAQ - Pricing")
   4. Edit the email content to answer the frequently asked question
   5. In the upper right of the page, click Draft to mark the email as Ready; in the upper left of the page click Back to Sequence
   6. In the upper right of the page, click Draft to mark the sequence as Ready; in the upper left of the page click Back to Campaign

4. Publish the CAMPAIGN

   All items on this campaign should be light green-greyed out (like the FAQ - Topic goal) which means we can safely Publish the campaign so it can be used.

   1. Click the Publish button in the upper right.
   2. Click the Publish button at the bottom of this list to publish the campaign.

5. Begin Triggering FAQs And Save Time

   Your FAQ email is ready to go! Now, the next time a Contact asks that specific question, you just need to apply the Note Template to their Contact Record and the email will send automatically. For a tutorial on how to apply Note Templates to a Contact click here.