Easy Follow Up Campaign

This article provides instructions for launching the Easy Follow Up campaign that you can download for free from the Infusionsoft Marketplace.

1. Download the Easy Follow Up campaign from the Marketplace

2. Assign the Follow Up Task

   By default the follow up task will be assigned to the user that owns the contact record. However, a backup user needs to be chosen in case there isn't an assigned owner.

   1. Double click on the Task to Follow Up sequence.
   2. Double click on the Task to Follow Up task.
   3. Select a user from the Assign to (backup) drop-down.
   4. In the upper right of the page, click Draft to change the task to the Ready status.
   5. Click on Back to Sequence in the upper left of the page.
   6. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   7. Click Back to Campaign in the upper left of the page.

3. Publish the Campaign

   All items on this campaign by now should look light green/greyed out (like the ADMIN - Schedule Follow Up goal). This means we can safely Publish.

   1. Click the blue Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

4. Start Scheduling Follow Up Tasks

   Your campaign is ready to go! The next time you need to schedule a follow up for a contact in your database...

   - If they are a new contact - Submit the "ADMIN - Schedule Follow Up" internal form according to this tutorial .
   - If they are an existing contact - Submit the "ADMIN - Schedule Follow Up" internal form according to this tutorial .