Document Follow Up 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 Document Follow Up campaign that you can download for free from the Infusionsoft Marketplace.

This campaign is designed to streamline the creation and delivery of a specific document. An employee can request the document's creation via our mobile applications or directly inside Infusionsoft. This creates a task to create and send the document. There is an automated follow up email one day after the document task is marked as complete.

1. Download the Document Follow Up campaign from the Marketplace

2. Setup the Campaign Field

   This campaign references the specific document in the creation task as well as the follow up email. In this part, you tell the campaign the name or type of document being created and sent.

   1. In the upper left of the page, click on the Campaign drop-down and then click on Merge Fields.
   2. Click the pencil icon next to the Document Name to edit the merge field value.
   3. Insert the name or type of document (e.g. "1099 Form") and click the Save icon.
   4. Click on Close in the lower right corner of this menu.

3.

4. Assign the Follow-up Task

   The next step is to choose who gets the document create & send task when a request comes in.

   1. Double click on the Task to Create & Send Document sequence.

2. Double click on the Create & Send Document task.
3. Select a user from the Assign to (backup) drop-down.
4. In the Notify these users section, select the same user so they can receive an email notification when a new lead comes in.
5. In the upper right of the page, click Draft to change the task to the Ready status.
6. Click on Back to Sequence in the upper left of the page.
7. In the upper right of the page, click Draft to mark the sequence itself as Ready!
8. Click Back to Campaign in the upper left of the page.

5.

6. Publish the Campaign

   All items on this campaign by now should look light green/greyed out (like the ADMIN - Request Document 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.

7.

8. Begin Requesting Document Creation

   Your workflow is ready to go! Now you just have to start requesting documents.

   - To request document creation on-the-go from any Infusionsoft mobile application: Apply the 'Functional -> Request Document' tag to someone's contact record
   - To request document creation when using Infusionsoft in a full web browser: Apply the 'ADMIN - Request Document' Note template to someone's contact record