

SalesNexus Online CRM and Email Marketing User Manual

Select An Existing Campaign:

sort: Recently Used Alphabetically My Campaigns Only

Name of template (1 emails(s), last used: 1/3/2013 10:10:43 AM)(active)
chad_december (1 emails(s), last used: 12/28/2012 5:01:49 PM)(active)
Aggies Beat Alabama (1 emails(s), last used: 12/28/2012 5:01:21 PM)(active)
11272012_testing_1 (1 emails(s), last used: 12/21/2012 6:59:28 AM)(active)
non_tracking_email_campaign (1 emails(s), last used: 12/21/2012 6:37:41 AM)(active)
Private Attachment Email Campaign (1 emails(s), last used: 12/21/2012 6:33:55 AM)(active)
R3 Testing Adjusted Link (Single) (1 emails(s), last used: 12/21/2012 6:08:30 AM)(active)
11282012_email_engine_only (1 emails(s), last used: 11/28/2012 10:04:40 AM)(active)
11272012_testing_2 (1 emails(s), last used: 11/27/2012 1:54:02 PM)(active)
Over 2 MB Attachment (1 emails(s))(active)
chad_test_clicks (1 emails(s))(active)
Apostrophe work flow test (1 emails(s))(active)
BOUNCE TESTING (1 emails(s))(active)
R3 Testing Round 2 (1 emails(s))(active)

[More Campaigns...](#)

Delete The Selected Campaign:

This will remove all completed and uncompleted activities and history, including sent emails.
Sales opportunities and opportunity history will not be removed.

Delete

Retire The Selected Campaign:

Retiring a campaign prevents more items from being scheduled to it, but it will still be available in reports, dashboards, and Existing Campaigns.

Retire

Once you have selected the campaign you want, you can either Delete it or Retire it.

NOTE: Delete will remove all open and all closed items for this campaign. It will remove all history of any kind associated with this campaign. There is no Undo so be sure that is what you want to do before hitting Delete. If you want to remove only open items please contact Chat.

Retire- will block anyone else from being scheduled for this campaign but does not remove the history.

Stop!

You can now stop any emails from being sent that are in the que. Simply click the Campaign name and click Delete.

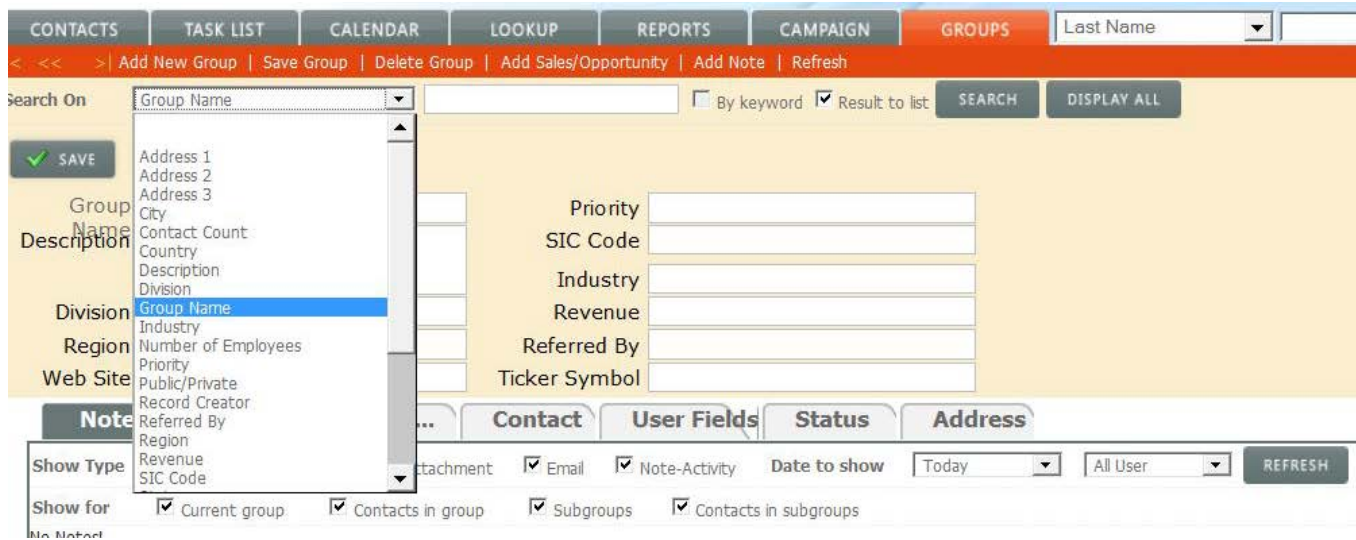
NOTE: This will remove all Pending emails for this campaign for all clients so if you do not want to remove all pending emails, please contact Chat to have the specific one removed.

Groups Tab



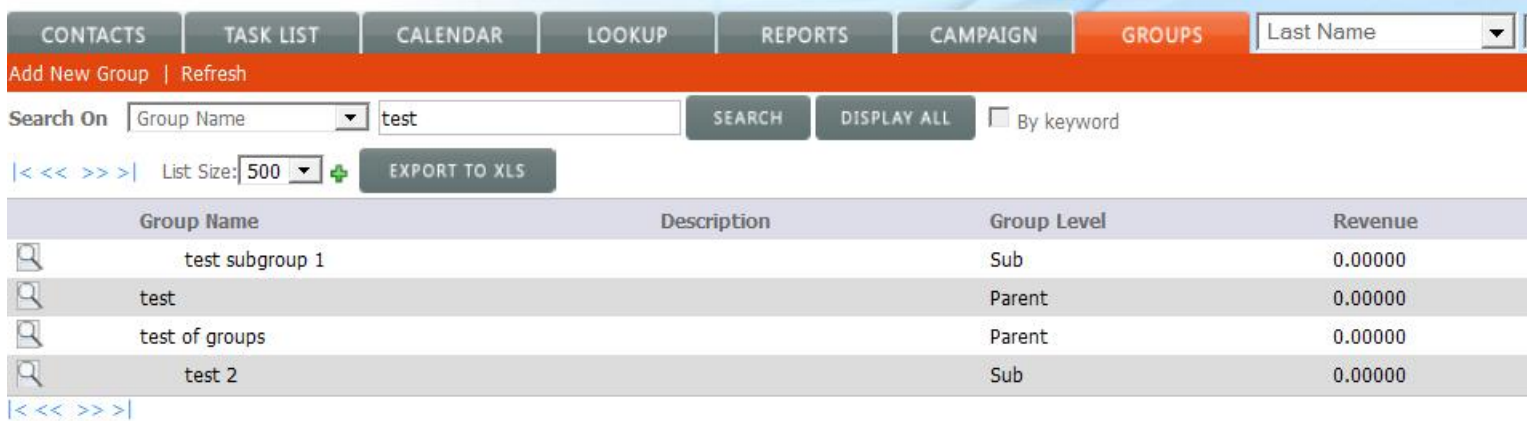
To look up a group, Go to the group tab in the top row., Click Display All to see all your Groups

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For the line starting with Search On, you can pick any field in the group to search for groups with that information. Default is Group Name

You can change the fields you view in the list of groups by clicking on the **green** plus to the far Right



Once you have a group selected, open it by clicking on the magnifying glass on the far left.

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- Clicking on the center Notes tab will show you all notes on all contact records associated with this group.
- Clicking on the center Activities tab will show you all activities on all contact records associated with this group.
- Clicking on the center Sales/ tab will show you all Sales Opportunities on all contact records associated with this group.
- Clicking on the center Contact tab will show you all contact records associated with this group. To go to a contact in the group, click on the magnifying glass.

Name	Company	Email	Phone	Mobile
boo banton	The Company of the Week	test@hopajet.com		
boo banton	The Company of the Week	test@hopajet.com		
Boscoe Allen	Company ABC	boscoe@test.com		
Boscoe Banton	The Company of the Week	boscoe@test.com		
Boscoe Banton	The Company of the Week	boscoe@test.com		
Jennifer Ward	The Company of the Week			
Jim Smith	The Company of the Week			
John Miller	The Company of the Week			
John Sales	The Company of the Week			
John Smith	The Company of the Week			

To see the groups a given contact belongs to, go to the Groups tab in the center of the contact record.



Group Membership Information

	Group Name	Description	Contact Count
<input type="checkbox"/>	test		6229
<input type="checkbox"/>	tX and Banton		22

Dashboard Tab

You have the ability to set up dashboards to allow you to see data that matters to you.

Click on the **Dashboard** tab, click Create New Dashboard

It will take you to a layout to pick your tables and fields.

My Dashboards

 ▲ ▼ + ✖

Create/Edit

Select the table & field in which you are most interested:

Table:

Field:

Cleared Filter:

Select the date range in which you are interested:

Range:

Field:

User Filter:

Only Display:

Name/Title:

Here is a sample dashboard we use

New Leads This Week

Table: Contact
 Field: Lead Source
 Date Range: This Week
 User(s): All

Lead Source	Count
LeadFerret	561
Web Search	46
Additional User	13
Cold Call	2
Referral	1
ProspectDB	1