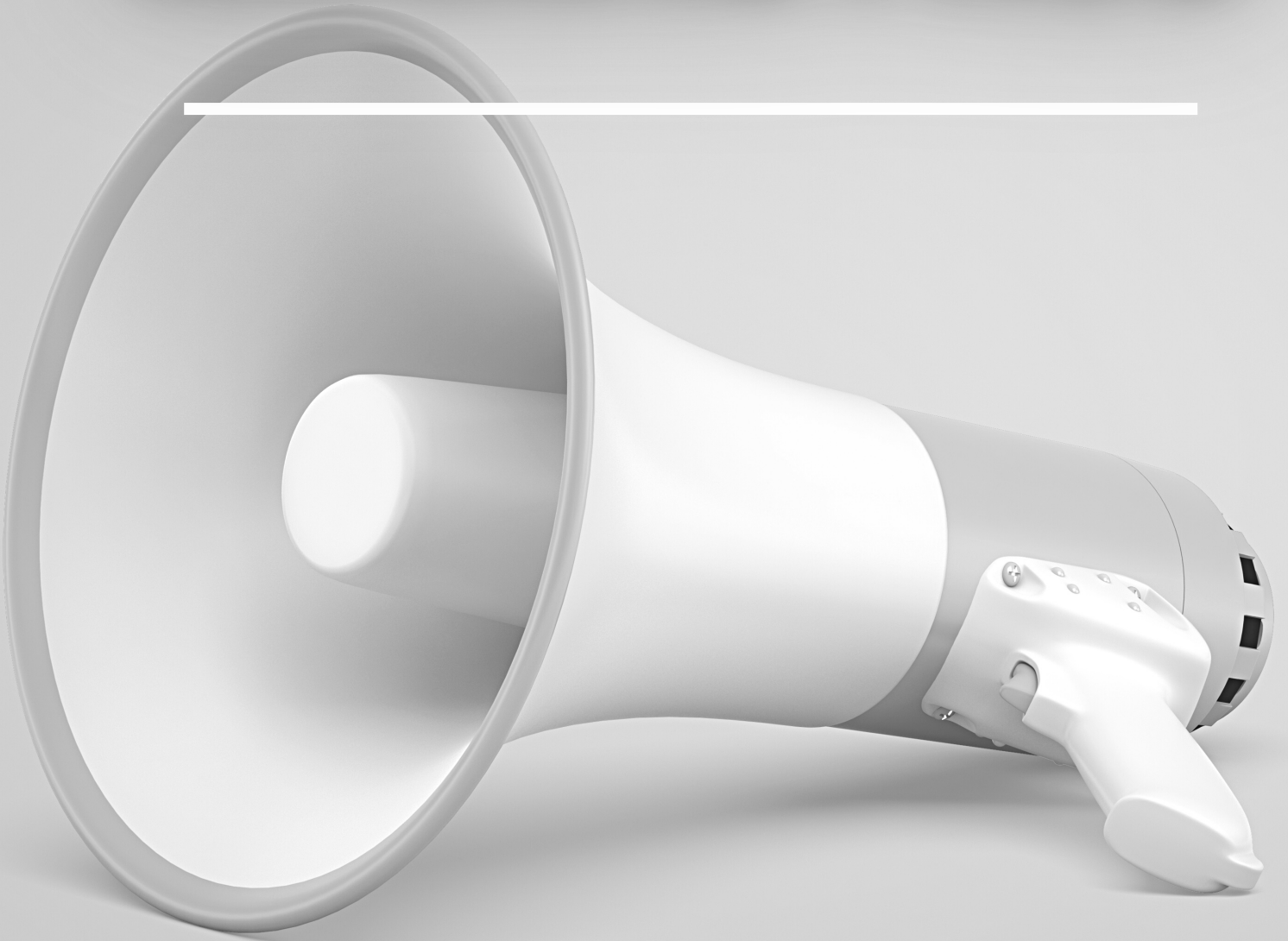


MARKETING



BUSINESS MODEL SOFTWARE

Good Looking

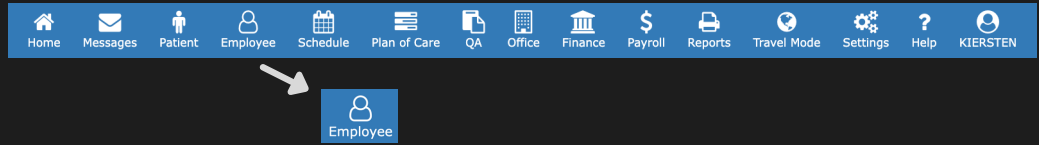


Create a Campaign

1

Go to 'Employee' Tab

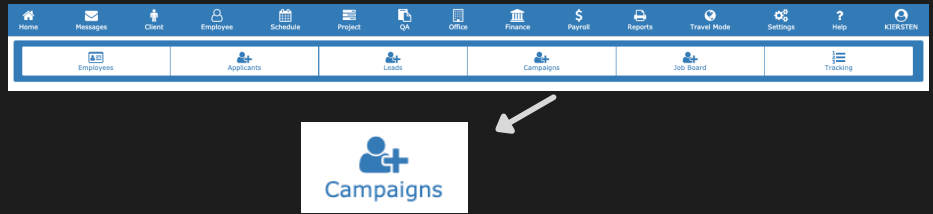
- On your home page, click the 'Employee' tab at the top tool bar



2

Go to Campaigns Section

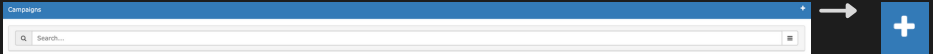
- Click "Campaigns" in the sub-menu bar.



3

Add a New Campaign

- Click the '+' icon on the far right to the search bar.
- A form will open up.



4

Complete the Form

- Fill out the required fields with the Campaign information.
- Don't forget to click 'Save' on the bottom right of the form.

 A screenshot of the 'Add New Campaign' form. The form contains several sections:

- Name:** A text input field.
- Office:** A search dropdown.
- Status Attribute Defaults:** A search dropdown.
- Job Title:** A search dropdown.
- Campaign Email Account:** A dropdown menu with a 'Create New' button.
- Assign to:** Radio buttons for 'Employee' and 'Team'.
- Campaign Type:** A dropdown menu.
- Form:** A section with a 'Template' dropdown and a 'Preview Template' button.
- Title:** A text input field.
- Subtitle:** A text input field.
- Paragraph before form:** A rich text editor with a toolbar.
- Paragraph after form:** A rich text editor with a toolbar.
- Form Fields:** A section with a 'Drop Down' dropdown and a 'Check Application' button. Below are checkboxes for: Home, Title, Email, Message, Last, Job Title, Phone, Resume Upload, First, Company, Address, and Other Upload.
- On Campaign Submission:** A section with 'Send to Website' and 'Show Message' buttons.
- After campaign Submission:** A section with 'SEND EMAIL', 'SCHEDULE EVENT', and 'SEND INTERNAL MESSAGE' buttons, each with a '+' icon.

 At the bottom right of the form, there is a blue 'Save' button, which is highlighted by an arrow.



Integrations: Domain

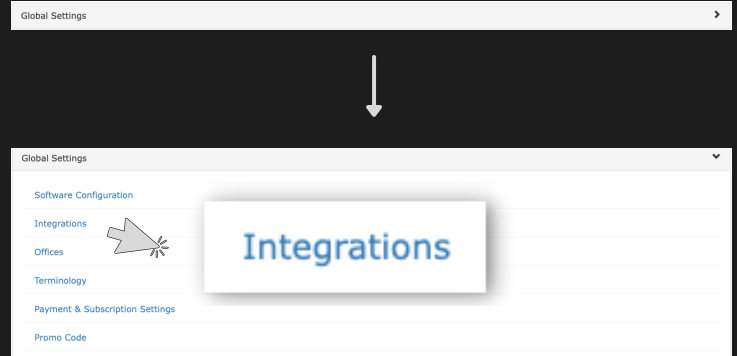
1 Go to 'Settings' Tab

- On your home page, click the 'Settings' tab at the top tool bar.



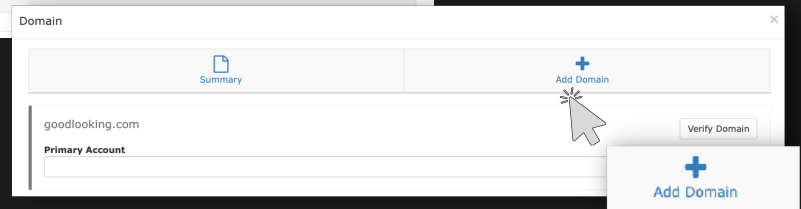
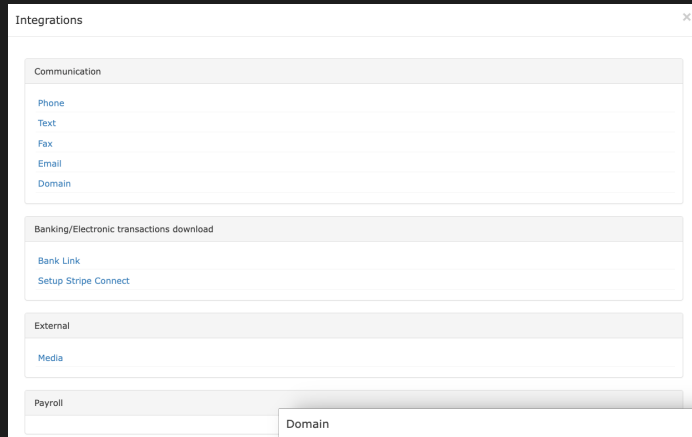
2 Global Settings → Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



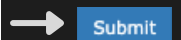
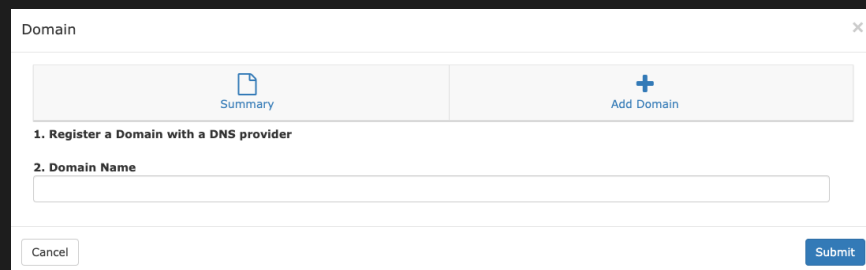
3 Click on 'Domain'

- When the Integrations page open, click on the 'Domain' option under Communication.
- A Domain page will open up. Click on 'Add Domain'.



4 Complete the Form

- Fill out the required fields with the domain information.
- Don't forget to click 'Submit' on the bottom right of the form.

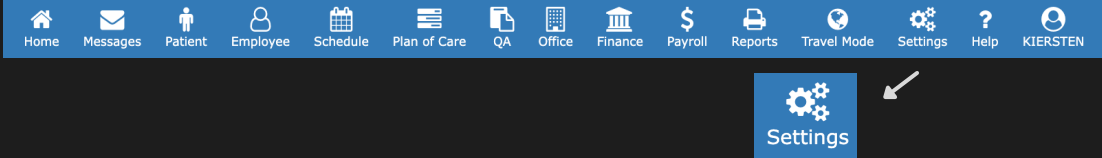


Integrations: Claims Clearinghouse



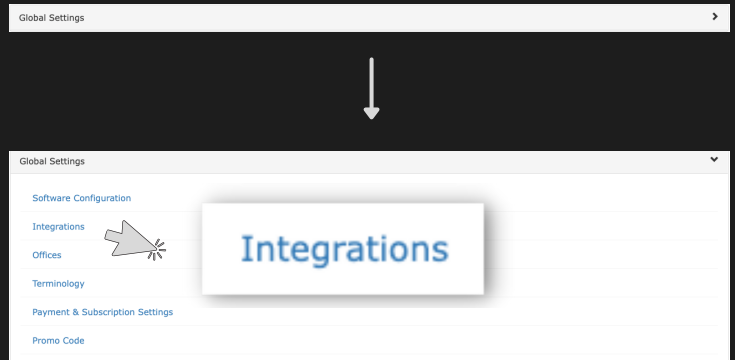
1 Go to 'Settings' Tab

- On your home page, click the 'Settings' tab at the top tool bar.



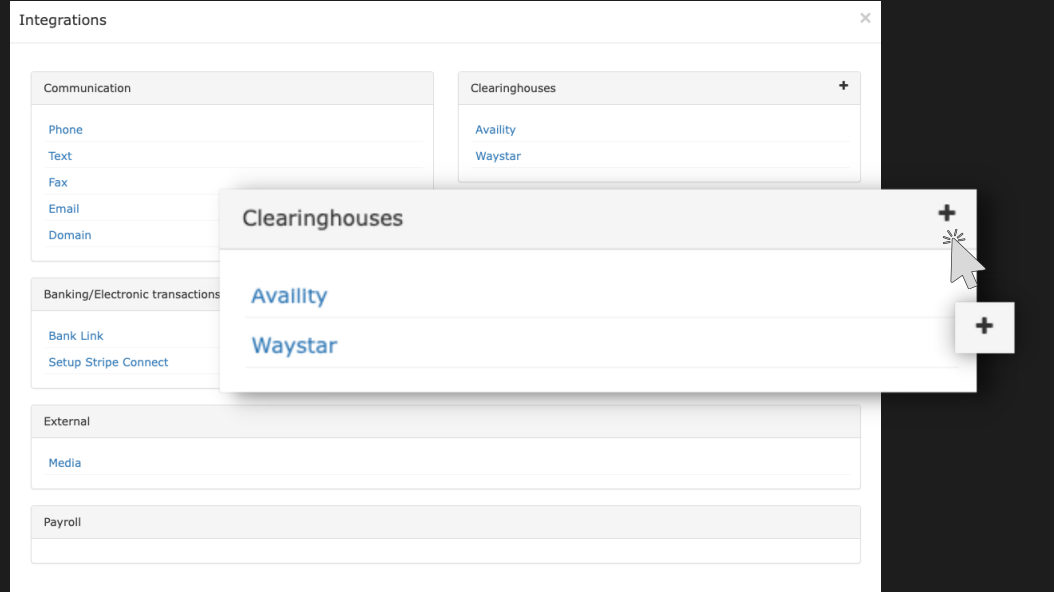
2 Global Settings → Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



3 Add a Clearinghouse

- When the Integrations page opens, click on the '+' to the right of Clearinghouses.
- A form will open.



4 Complete the Form

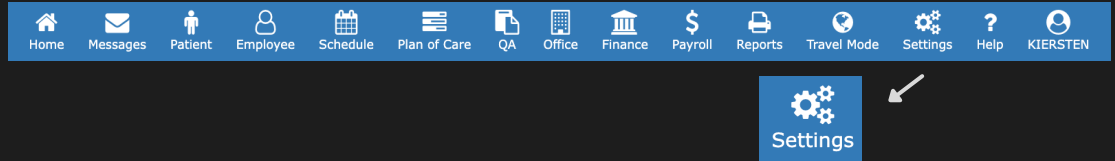
- Fill out the required fields with the Submitter and Electronic Claims information.
- Don't forget to click 'Submit' on the bottom right of the form.

Integrations: Email



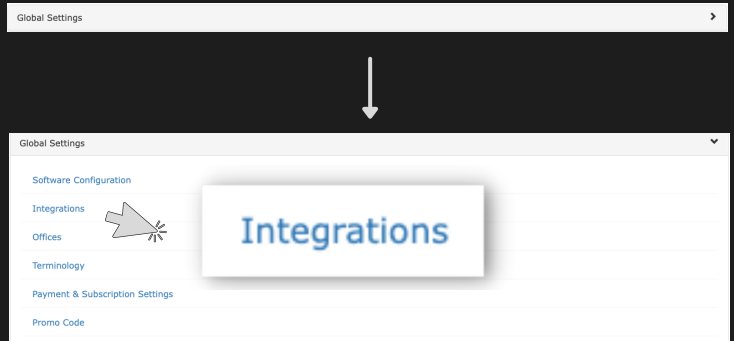
1 Go to 'Settings' Tab

- On your home page, click the 'Settings' tab at the top tool bar.



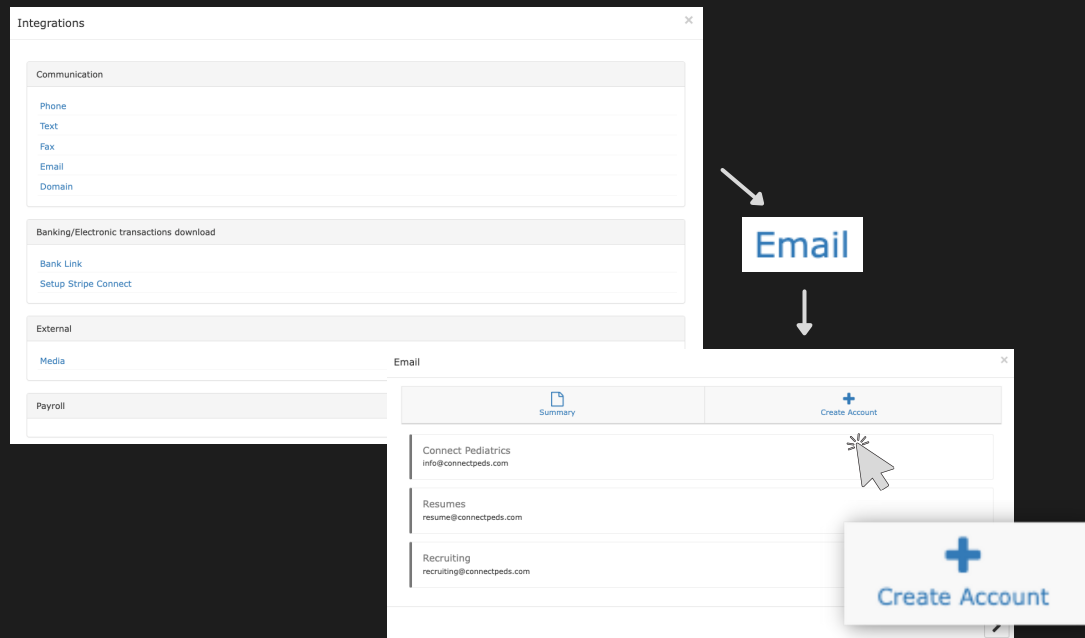
2 Global Settings —> Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



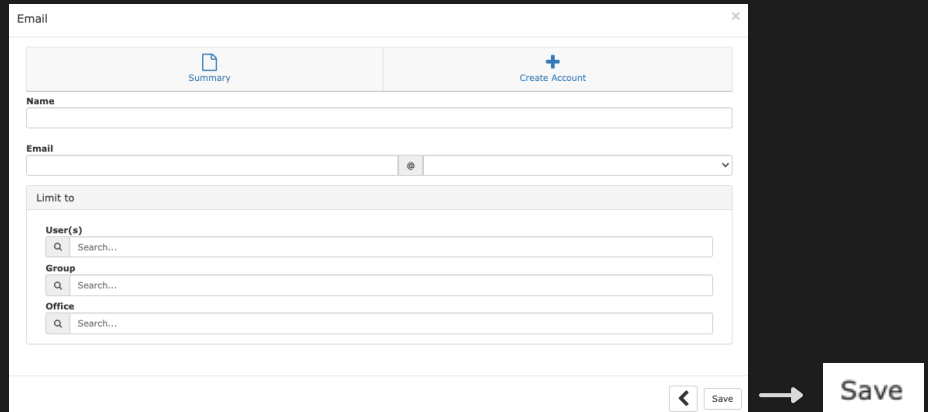
3 Click on 'Email'

- When the Integrations page open, click on the 'Email' option under Communication.
- An 'Email' page will open up with a summary of the existing emails linked.
- To add an account, click 'Create Account'.



4 Complete the Form

- Fill out the required fields with the email information and Limits settings.
- Don't forget to click 'Save' on the bottom right of the form.

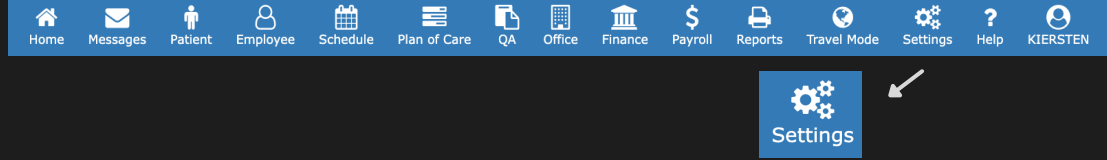




Integrations: Fax

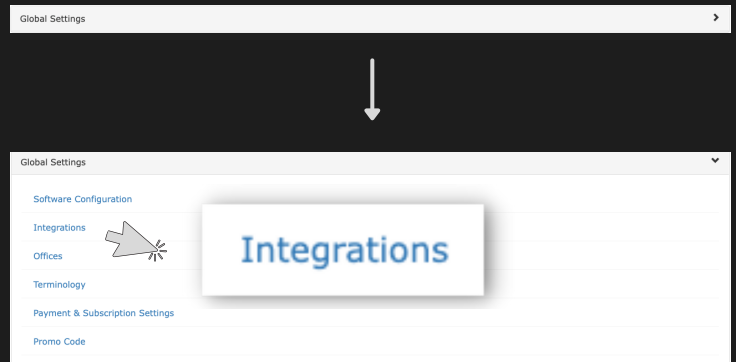
1 Go to 'Settings' Tab

- On your home page, click the 'Settings' tab at the top tool bar.



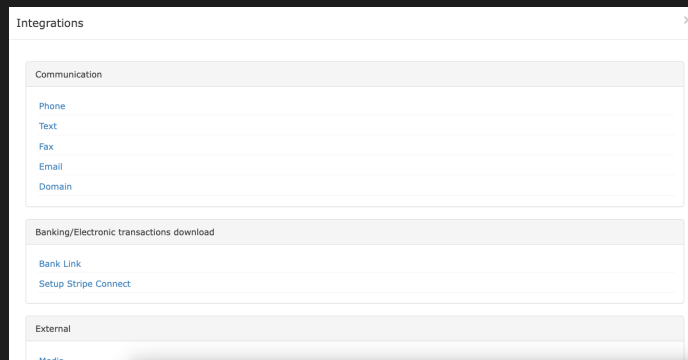
2 Global Settings —> Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.



3 Click on 'Fax'

- When the Integrations page open, click on the 'Fax' option under Communication.
- A 'Fax Accounts' page will open up. Click 'Add Fax Account' on the far right above 'Office(s)'



4 Complete the Form

- Fill out the required fields with the Fax information and input the Limits settings.
- Don't forget to click 'Submit' on the bottom right of the form.

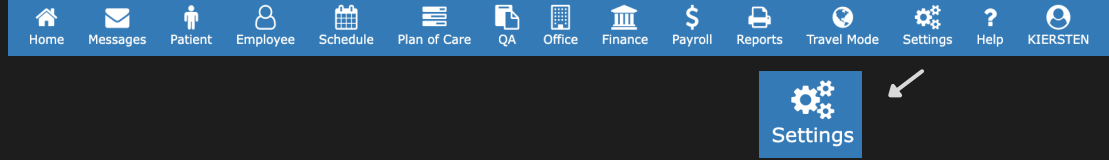


Submit

Integrate Phones

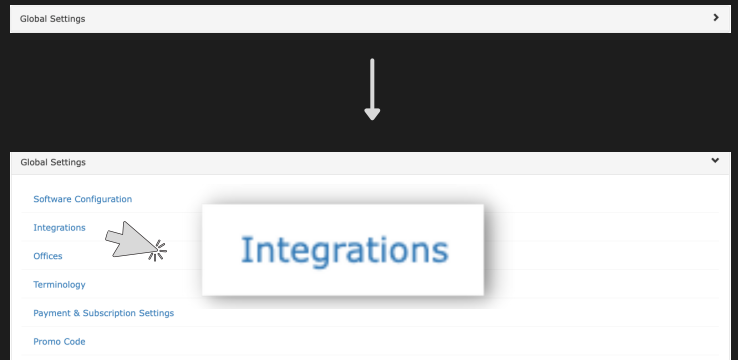
1 Go to 'Settings' Tab

- On your home page, click the 'Settings' tab at the top tool bar.



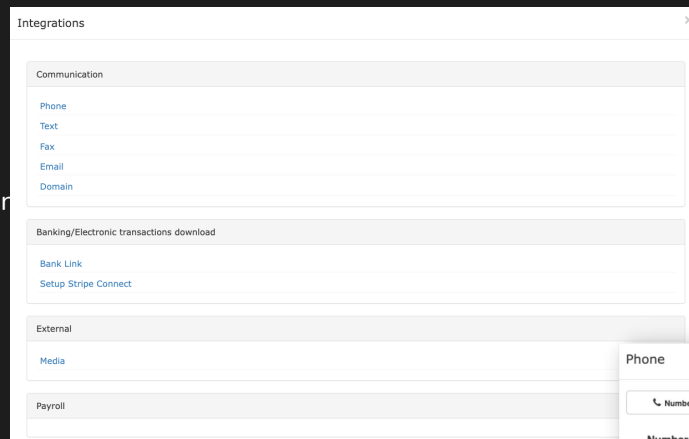
2 Global Settings → Integrations

- Click "Global Settings" in the list so a drop down opens.
- Click the 'Integrations' option.

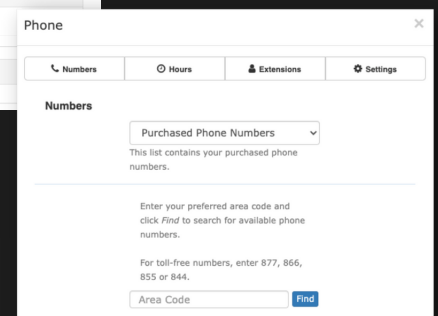


3 Click on 'Phone'

- When the Integrations page open, click on the 'Phone' option under Communication.
- A 'Phone' page will open up.



Phone



4 Complete the Form

- Fill out the required fields with the lead's information.
- Don't forget to click 'Save' on the bottom right of the form.