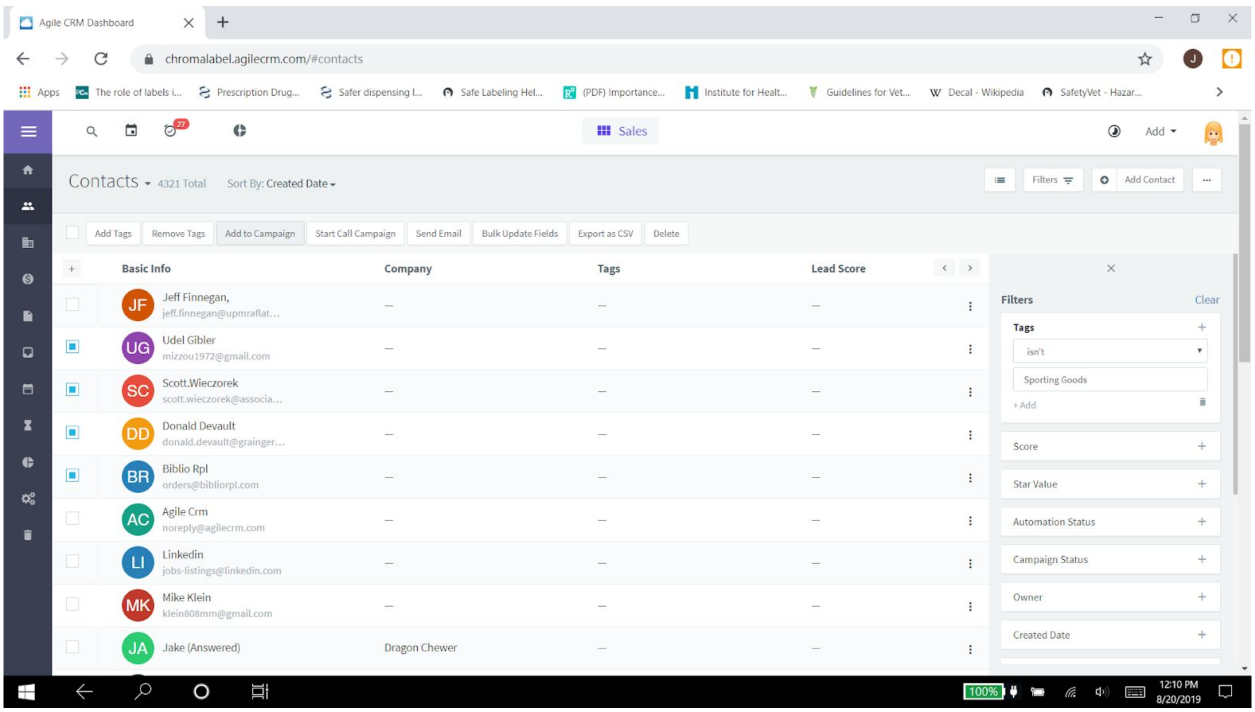
Adding And Removing From Campaigns

Leads can be added to campaigns manually in two ways:

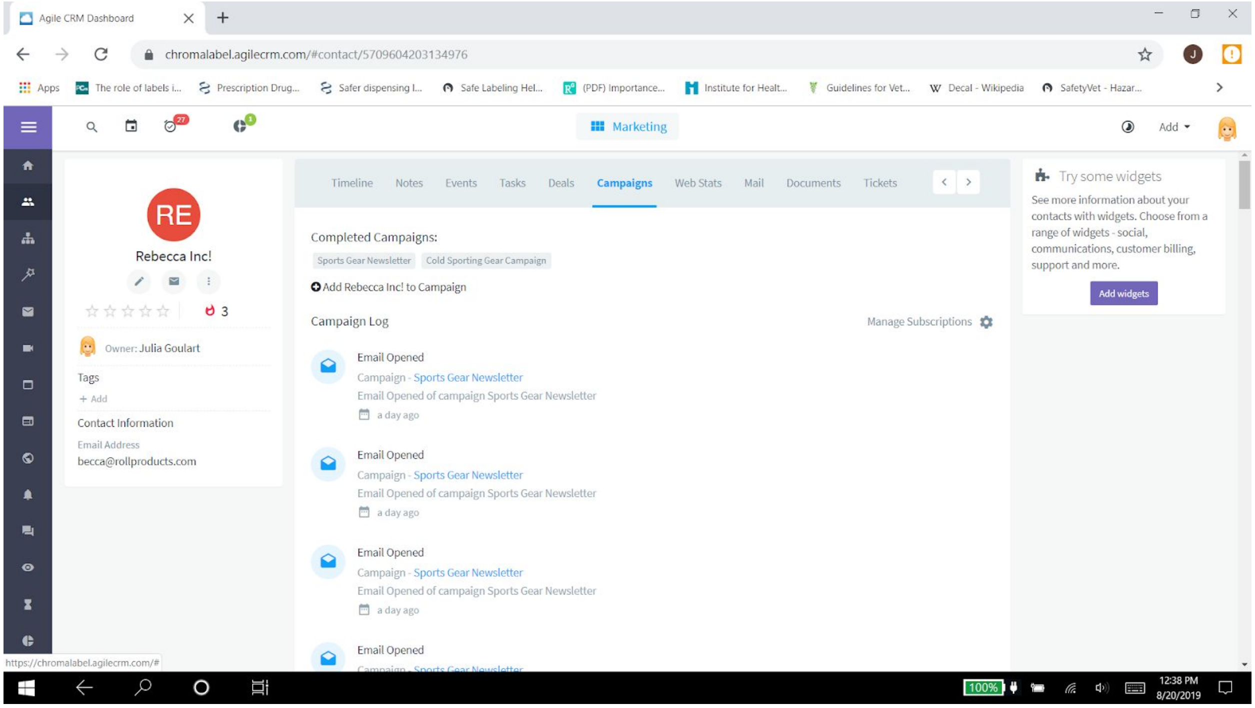
1) Bulk Action:

- On Agile, go to >Sales>>contacts (or companies), and check the boxes next to the names you would like to add to a campaign.
- Click Add To Campaign and complete the prescribed actions.

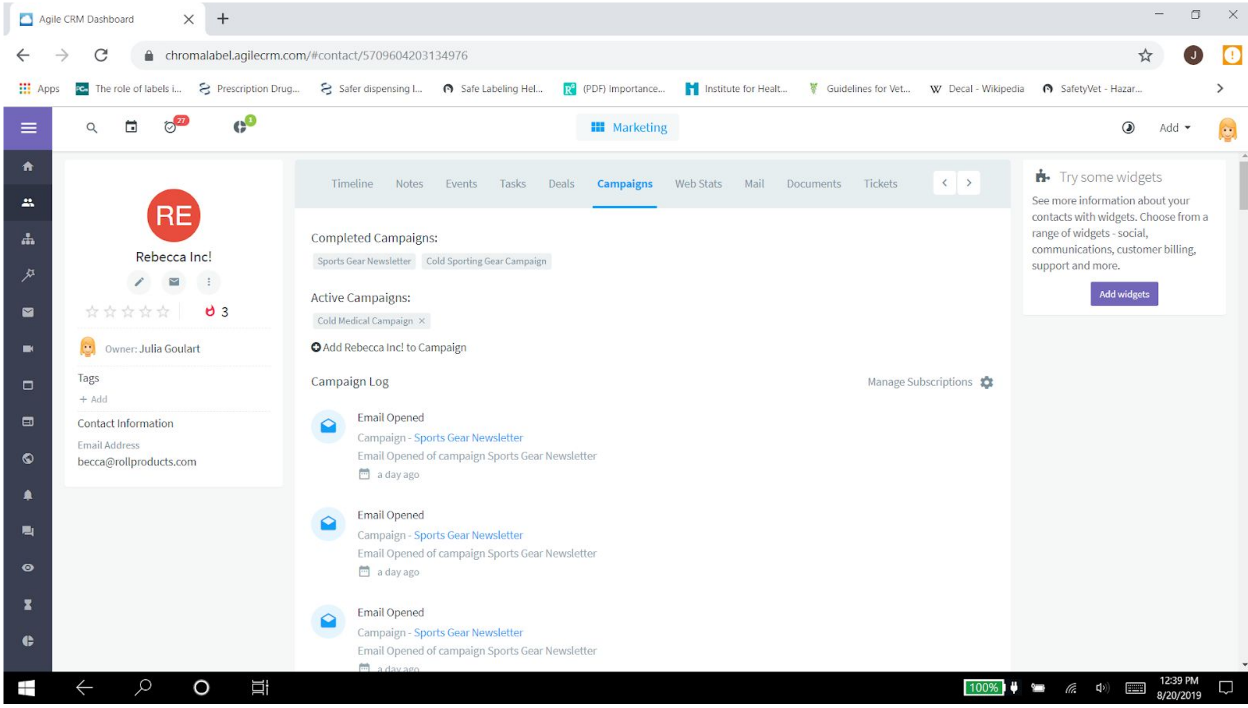


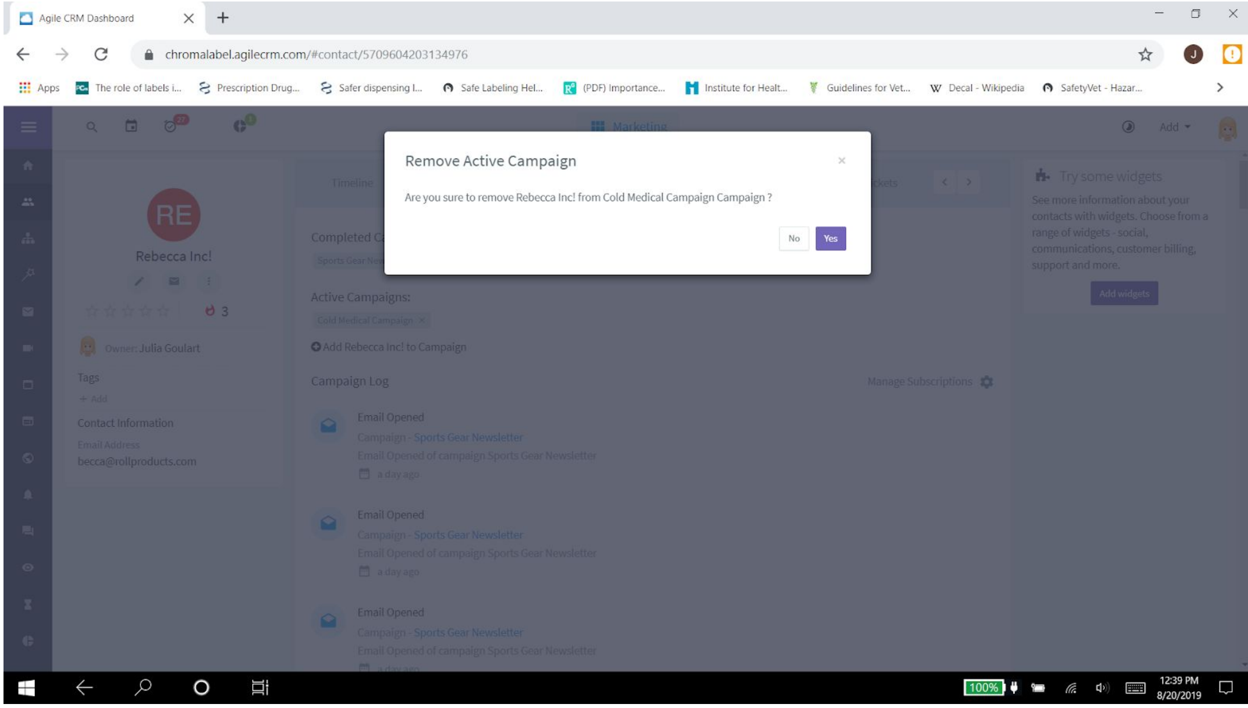
2) Individual Action

- Go to the profile page of a contact
- Go to the campaign tab on their profile
- Select add to campaign, and choose the campaign.



- ❖ Removing from Campaigns
- Go to the customer profile page
- Click the x next to each active campaign you would like to remove




Agile CRM Dashboard
chromalabel.agilecrm.com/#contact/5709604203134976
Remove Active Campaign
Are you sure to remove Rebecca Inc! from Cold Medical Campaign Campaign ?
No
Yes
Rebecca Inc!
Active Campaigns:
Add Rebecca Inc! to Campaign
Campaign Log
Email Opened
Owner: Julia Goulart
Contact Information
becca@rollproducts.com
12:39 PM
8/20/2019