

Campaigns

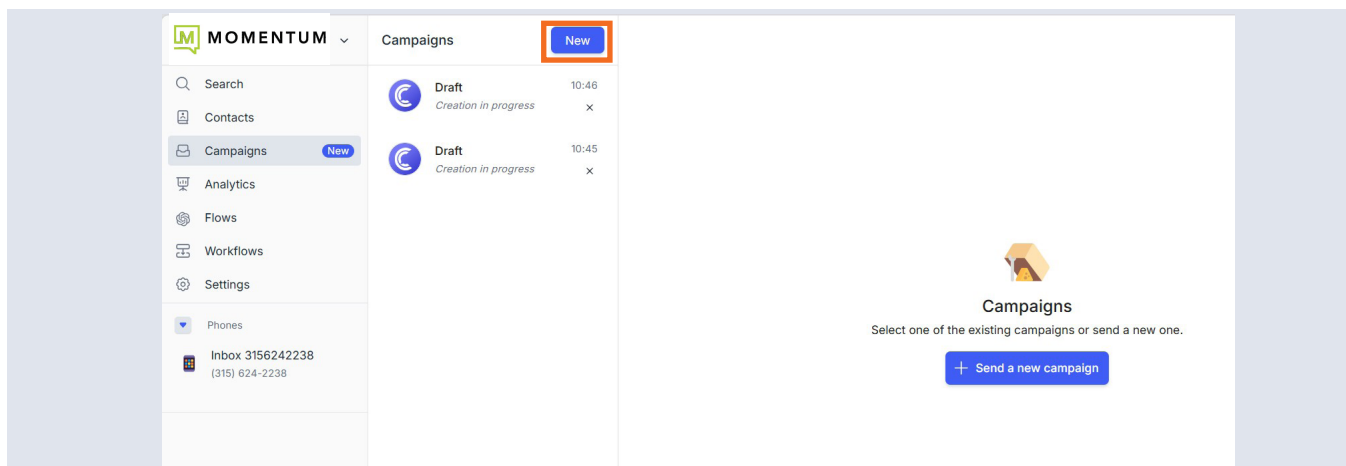
INTRODUCTION

Clerk Chat makes sending SMS messages to multiple contacts as a Campaign easy. SMS marketing campaigns are useful for allowing licensed users to send personalized, hyper-targeted SMS messages to contacts that meet all carrier requirements. The *Campaigns* tools simplify the process with easy to follow workflows. To use Clerk Chat and its Campaigns tools, your organization must have provided you with an **Ultimate** License and the credentials to get started.

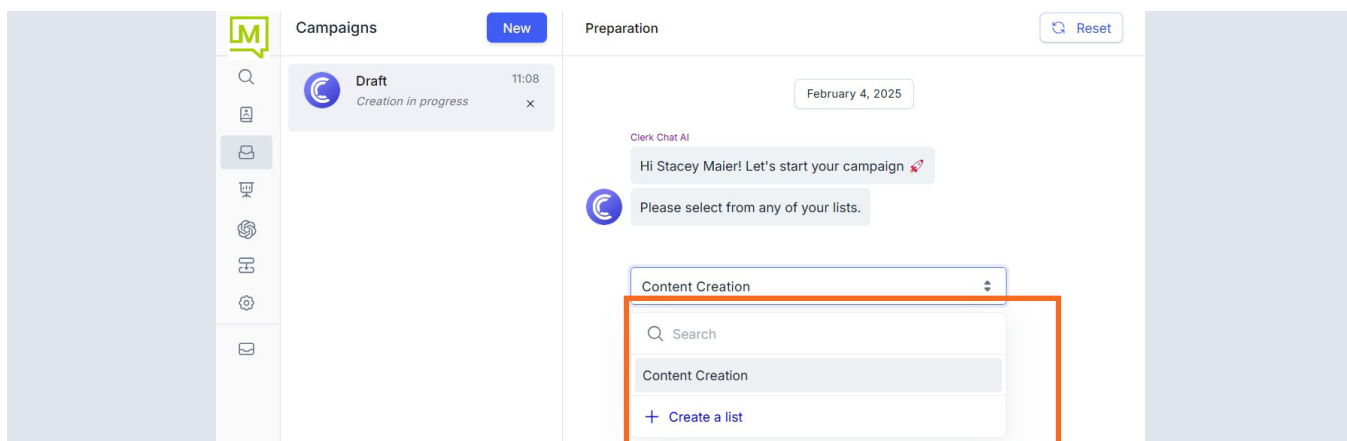
GETTING STARTED WITH CLERK CHAT FOR CAMPAIGNS

To use any of Clerk Chat's features including Campaigns, you will need to access the Clerk Chat app. You can open your web browser and go to: <https://clerk.chat/> to log in with the credentials provided to you - Or better yet, find and add the Clerk Chat SMS App for your telephony / collaboration tool (Teams, WebEx, etc.) and open it to get started. *This guide offers examples when using the Clerk Chat website online.*

- + Select Campaigns on the left and then select **New**.
- + Enter your email address when prompted. *You will be emailed a one-time verification code to input.*

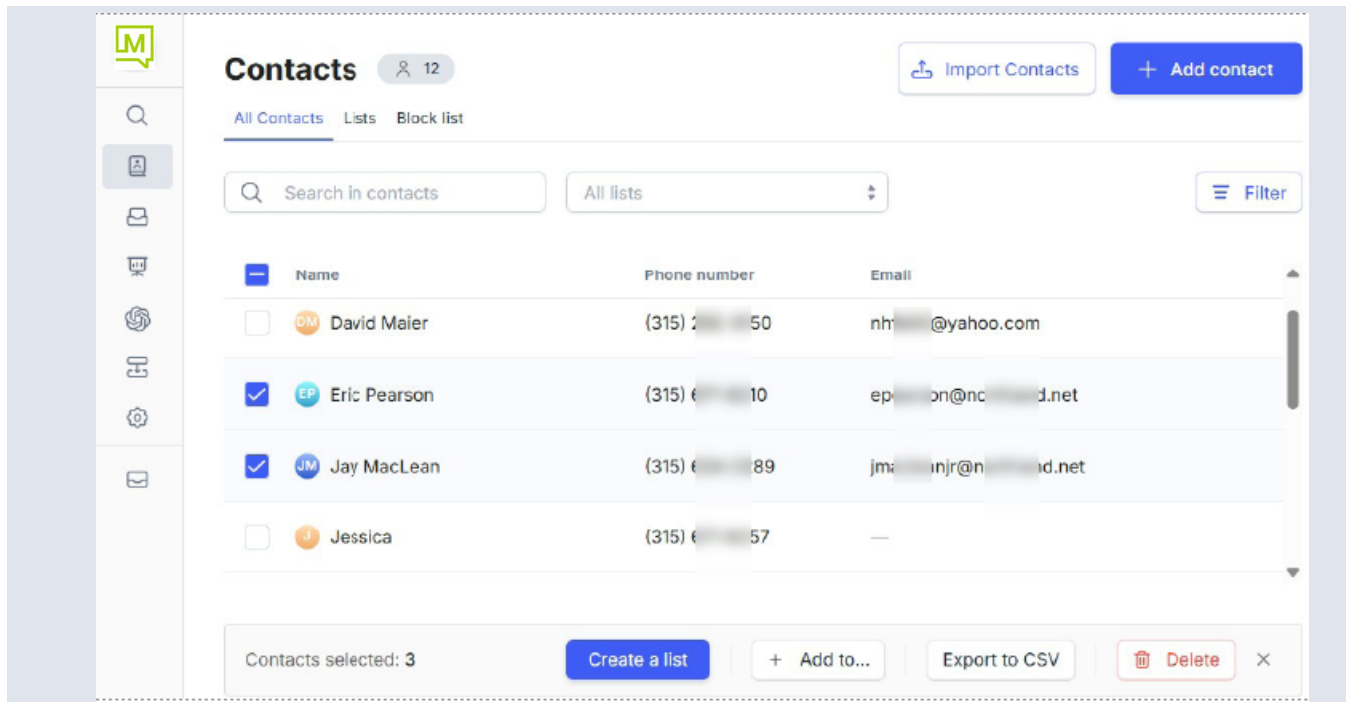


CREATE A CAMPAIGN



Follow the Preparation workflow instructions:

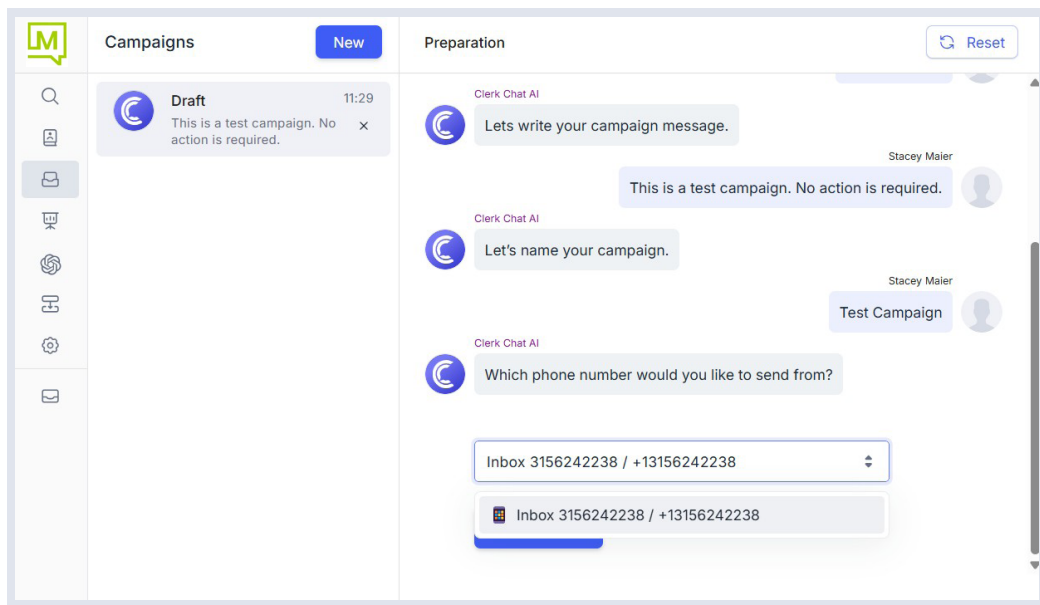
- + Choose your list from the drop down or create a new contact list if starting from scratch.



- + When you choose **Create a list**, you have the option to use the **Import Contacts** or the **+ Add Contact** tools to input new SMS contacts.
- + Select names from the list of contacts to choose them for your list.
- + Select **Create a list**.

The 'Create a list' form has a title 'Create a list' with an exclamation mark icon. Below it, a message says 'You are going to create a new list with 3 contacts. Provide a list name to save.' There is a text input field for 'List name'. Below that, there are radio buttons for 'List access': 'Team' and 'Private'. The 'Private' option is selected. At the bottom, there are two buttons: 'Back' and 'Create'.

- + Give the list a name in the field provided.
- + Choose whether the list can be seen by others in your organization (Team) or only by you (Private).
- + Select **Create** to build the list.



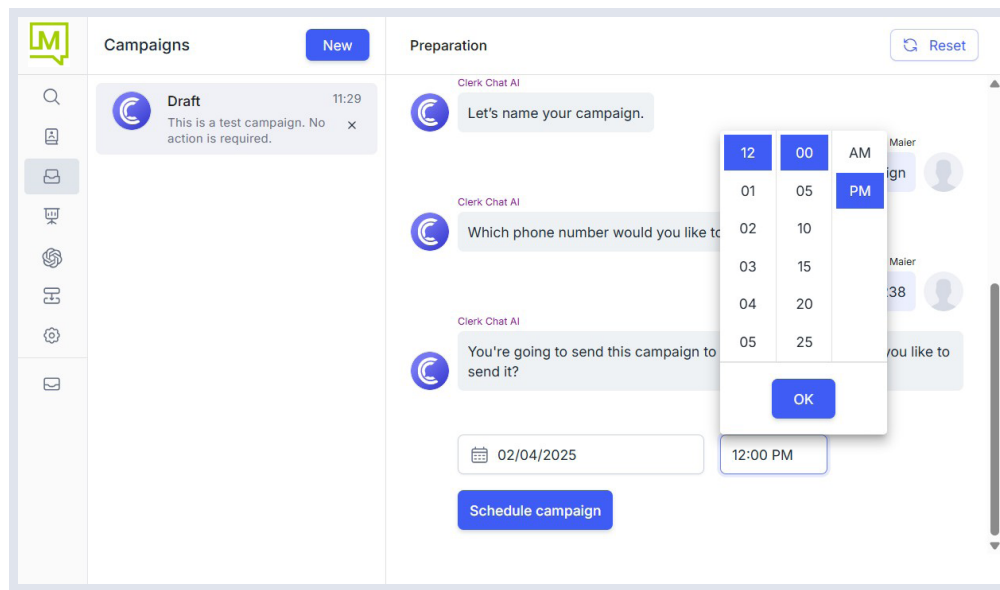
+ Choose a phone number from the list, if provided. You may have access to more than one SMS enabled number depending on how your organization's administrator has you configured for telephony and for Clerk Chat.

+ Select **Continue**.

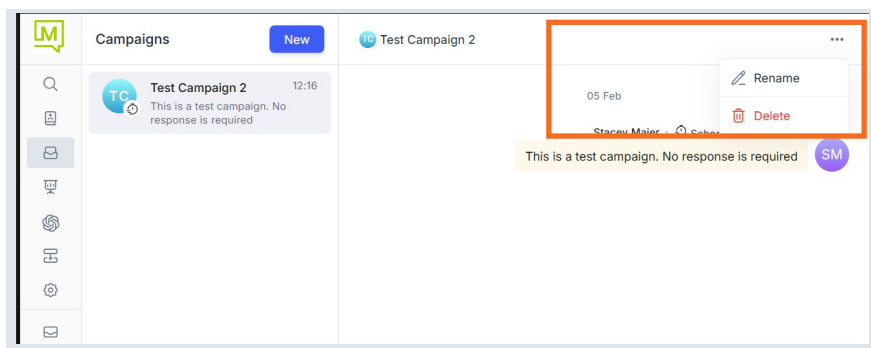
+ Select **Send now** to send the message to your Campaign list immediately

or...

+ Choose the date and time to send the campaign to this list and select **Schedule campaign**.



DELETE A SCHEDULED CAMPAIGN



+ To Delete a scheduled campaign, select the ellipses (...) next to it.

+ Select **Delete**.