

How to use the WARMS Campaign Feature

To search for members within a campaign:

- 1. Select Branch members
- 2. Select More Tabs
- 3. Tick Campaign code, you will see an additional tab appear



From the drop down list select the campaign *"description will vary based on campaign"*





		Search	্
5.	Select Search		

6. This will list all members within the branch in that campaign.

Branch Members List

Campaign Code	1 selected	Search 🔍	
More Tabs			Close 🔞
Address	Ethnic Origin	Service Group	
3argaining Group	Payroll No	Specific Fields	
Committees	Political Fund	Status Date	
Campaign Code	Recruited By	Sub-Category	
mail Address	Recruitment Initiative		
Show/Hic	e columns 🖶 More Tabs 井 Retrie	eve Search 📄 Save Search 📊	Clear Filter 攴
		Ou	tput Options 🕞
now 10 🗸 entries			



Recording Member responses and outcomes

- 1. Select to member number to retrieve the member record
- 2. Expand the Campaign contact made portal by pressing the plus icon

🔚 Campaign Contact Made	e -	
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3. The list of campaigns will vary, Select the Add contact icon for the row of the required campaign in the example below its *"317 – Scottish LG 2022 Pay IA Ballot"*

	📰 Campa	ign Contact Made			0 😑
			Search:		
	Campaign Code	Campaign Name	٥	Add Contact	Contact History
2	113	Social Care Membrs spring 2020		2	
	194	Scottish LG Pay 2021 (194)		S.	
	238	Scottish LG Pay (238)		2	
	317	Scottish LG 2022 Pay IA Ballot		<i>v</i>	
	4 entries				

- 4. Enter the date member was contacted
- 5. Record the contact response from the drop-down list Please note if you select a response (to be followed up) the member will remain in the campaign. If you select a response (drop from the campaign) the member will no longer display in the list of



members to contact.

New Campaign Contact		
^{**} Date Member Contacte	08/06/2022	
* Contact Response	Personal Contact Made (drop from campaign) 🗸	
*Contact Outcome	Please select Call back requested (to be followed up) Failed - no answer (to be followed up)	
Notes	Failed - no answer, no further contact needed (drop from camp Historical Personal Contact Made (drop from campaign) Historical Phone Contact Made (drop from campaign) Invalid phone number (drop from campaign) Member does not wish to be contacted (drop from campaign)	paign)
	No Phone Number on record (drop from campaign) No contact required (drop from campaign) Non-current member (drop from campaign) Personal Contact Made (drop from campaign)	
	94 Successful phone contact made (to be followed up) Successful phone contact made (drop from this campaign) Successful phone contact made (to be followed up)	
	Voice message left, further contact needed (to be followed up) Voice message left, no further contact needed (drop from cam	paign)

6. Select the relevant outcome from the list - *the options will vary depending on the campaign*

Date Member Contacted	08/06/2022
Contact Response	Personal Contact Made (drop from campaign) 🗸
Contact Outcome	Please select 🗸
Notes	 Please select – Ballot paper has been received - confirmed it has been returned Ballot paper has been received - intends to return it Ballot paper has been received refuses to vote/ do not wish to vot Contact made, member aware of ballot and waiting for paper to an Duplicate ballot paper requested - Change of address Left voicemail for member asking them to vote

- 7. Select Submit
- 8. If a member has already had a response and outcome recorded for a campaign and

you try to select add contact the mouse pointer shows a red stop sign $\overline{\mathbb{N}}$

Any queries regarding WARMS please contact <u>warmssupport@unison.co.uk</u>