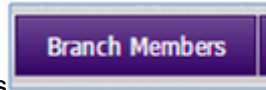


# How to use the WARMS Campaign Feature

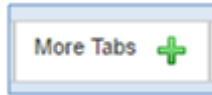
Modified on: Mon, 15 Oct, 2018 at 1:29 PM

## To search for members within a campaign:

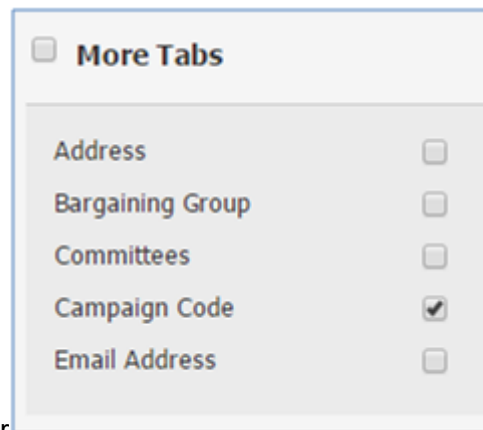
1. Select Branch members



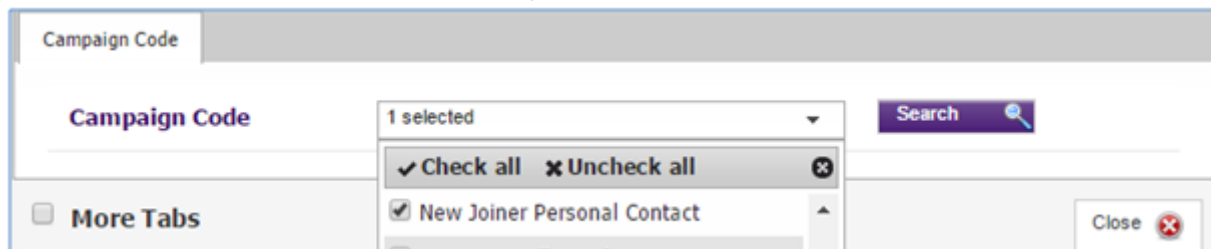
2. Select More Tabs



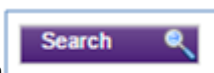
3. Tick Campaign code, you will see an additional tab appear



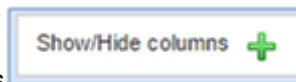
4. From the drop down list select the campaign



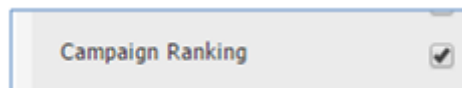
5. Select Search



6. Select Show/Hide columns



7. Select Campaign Ranking



8. Sort the list by Campaign Ranking select column header



9. Work through the list of members in campaign ranking order starting with the lowest group first.



## 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




3. Select the Add contact icon for the row of the required campaign

Campaign Code	Campaign Name	Add Contact
25	Proactive calling June 16	
51	New Joiner Personal Contact	

4. Enter the date member was contacted

5. Record the contact response from the drop down list - **the options will vary depending on the campaign**

### New Campaign Contact

**Date Member Contacted**  

**Contact Response** -- Please select --

**Contact Outcome**

**Notes**

-- Please select --

Call back requested

Failed - Member not available to take the call at this time

Failed - No Valid phone number held on file for the member

Failed - no answer

Failed - phone number unobtainable

Failed - wrong phone number


Historical Personal Contact Made

Historical Phone Contact Made

Member does not wish to be contacted


Personal Contact Made

Successful phone contact made



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

### New Campaign Contact

**Date Member Contacted**  

**Contact Response** -- Please select --

**Contact Outcome** -- Please select --

**Notes**

-- Please select --



Cannot remember what the member wanted

Member has membership pack - no further info req


Member has not received any information

Member would like additional material

Member would like material on activism

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 

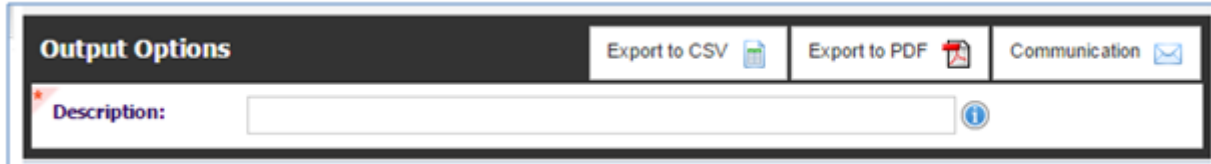
### To extract a list of Members within the Campaign

1. To extract a list of members select the required fields for the report within Show/Hide columns



Output Options 

2. Select Output Options

3. Enter the description for the extract



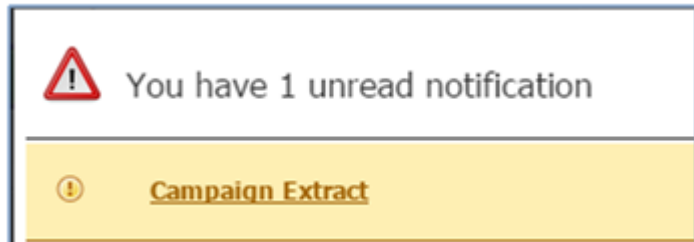
The screenshot shows the 'Output Options' form. At the top, there are three buttons: 'Export to CSV' with a document icon, 'Export to PDF' with a document icon, and 'Communication' with an envelope icon. Below these buttons is a 'Description:' label followed by a text input field and a blue information icon.

Export to CSV 

4. Press

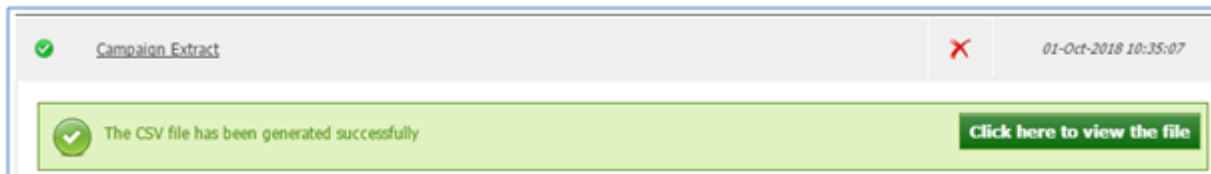
Notifications **1**

5. Once the file has generated you will receive a notification



6. Click the red box to access the notifications

7. Select the Name of the extract file to download the file



**Please note - Once a member has been updated with a response they will no longer be displayed in the list the next time the search is run.**