Contact Me Bubble Up

This article provides instructions for launching the Contact Me Bubble Up campaign that you can download for free from the Infusionsoft Marketplace.

This campaign contains a simple re-usable workflow that lets a contact easily request a personal follow up.

1. Download the Contact Me Bubble Up campaign from the Marketplace

2. Assign the Follow-up Task

   The only setup step is to choose who gets the follow-up task when someone bubbles up from an email.

   1. Double click on the Task to Contact sequence.
   2. Double click on the Contact Bubble Up task.
   3. Select a user from the Assign to (backup) drop-down.
   4. In the Notify these users section, select the same user so they can receive an email notification whenever someone bubbles up.
   5. In the upper right of the page, click Draft to change the task to the Ready status.
   6. Click on Back to Sequence in the upper left of the page.
   7. In the upper right of the page, click Draft to mark the sequence itself as Ready!
   8. Click Back to Campaign in the upper left of the page.

3. Publish the CAMPAIGN

   All items on this campaign by now should look light green/greyed out (just like the Functional -> Contact Me Bubble Up goal). This means we can safely Publish the campaign so it can be used.

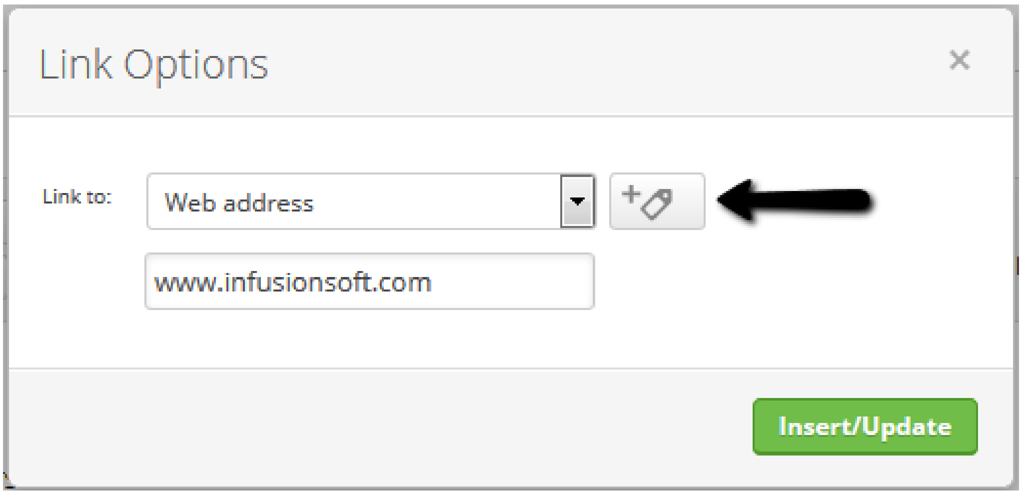
   1. Click the green Publish button in the upper right; this will display a list of all items to be published.
   2. Click the green Publish button at the bottom of this list to publish the campaign.

4. BEGIN ADDING BUBBLE UP FUNCTIONALITY TO YOUR CAMPAIGNS AND BROADCASTS

   You can easily add a link in any email that applies the functional tag.

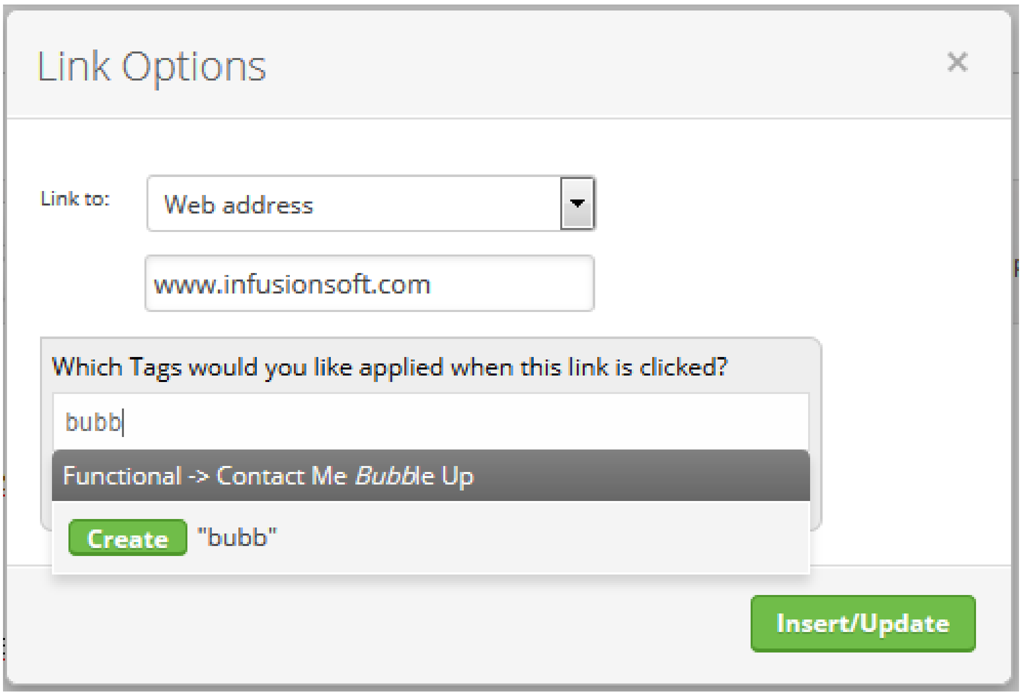
To apply this tag from a Campaign Email:

1. When configuring a link in a Campaign Email, click the Auto-Tag button

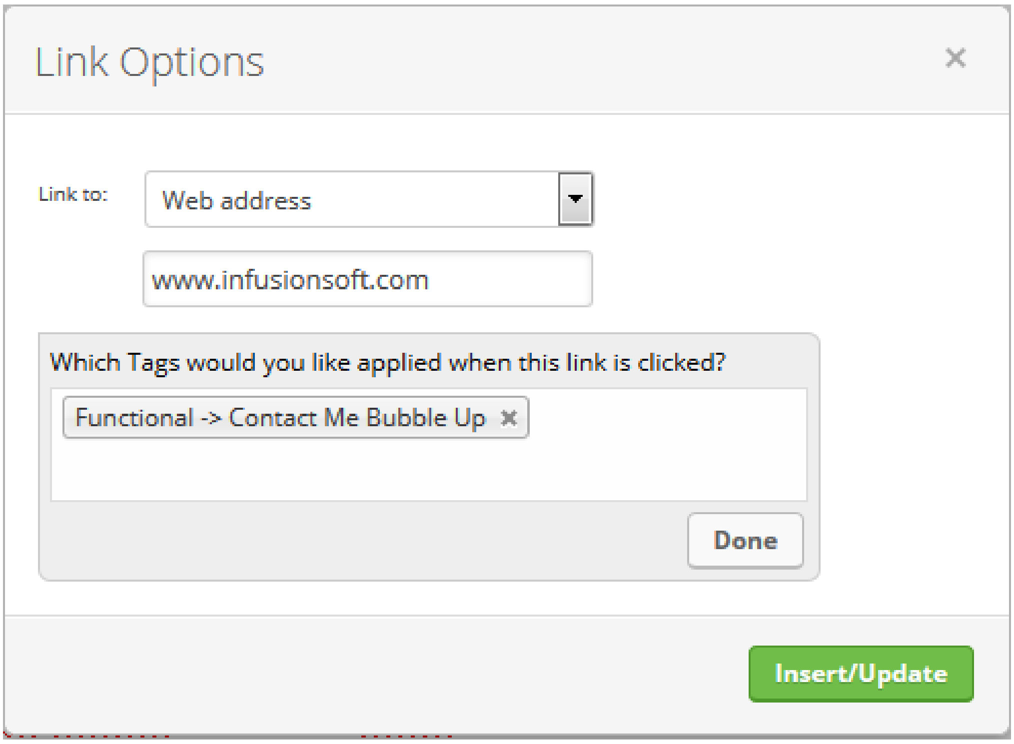


2. Begin typing the name of the tag

3. When the tag appears as an option, click on it



4. Click Insert/Update


Link Options
Link to:
Web address
www.infusionsoft.com
Which Tags would you like applied when this link is clicked?
Functional -> Contact Me Bubble Up
Done
Insert/Update