W-9 Collection Campaign 🔗

This article provides instructions for launching the W-9 Collection campaign that you can download for free from the Infusionsoft Marketplace.

This campaign delivers the W-9 form and allows you to easily record when you receive it. The campaign can be triggered automatically from another campaign or you can manually start it using the Note Template .

1. Download the W-9 Collection campaign from the Marketplace

2. Publish the Campaign

   This campaign is 100% ready to launch, no setup required.

   1. Click the blue 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.

3. Launch the Campaign

   To automatically trigger this campaign:

   1. Navigate to another campaign you want to use with this tax doc collection.
   2. Open the sequence of the campaign where you want to request a W-9.
   3. At the appropriate point in the sequence, add a Tag step that applies the Functional -> Start W-9 Collection tag.
   4. Re-publish that campaign so the next time a contact reaches that point in the sequence, the tag will automatically start them in this document workflow.

4. To manually trigger this campaign for an individual prospect:

   1. Apply the ADMIN - Request W-9 Note Template to someone's contact record

5. To manually trigger this campaign for a group of contacts:

1. Do a contact search to find the segment of your database that needs a W-9 on file.
2. When you have the segment you want, from the Actions drop-down in the upper left of the search results, select Apply/Remove Tag.
3. Apply the Functional -> Start W-9 Collection tag.
4. Process the action.

6. To log when a W-9 has been received:

   1. Apply the ADMIN - W-9 Received Note Template to someone's contact record.