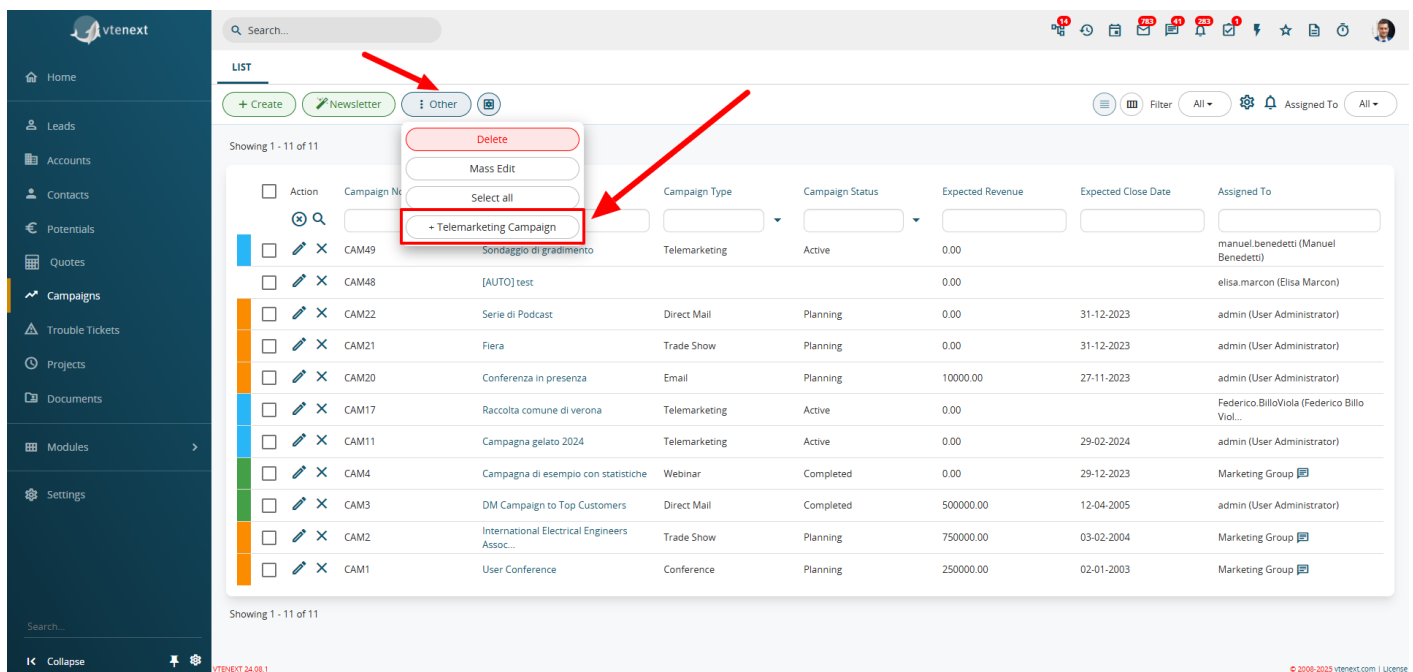


Advanced Telemarketing Module Configuration

The creation and use of the module are easy to manage by following these steps:

1. Creating a New Telemarketing Campaign

To create a new Telemarketing campaign, go to the **Campaigns** section and then select **More > +Telemarketing Campaign**.

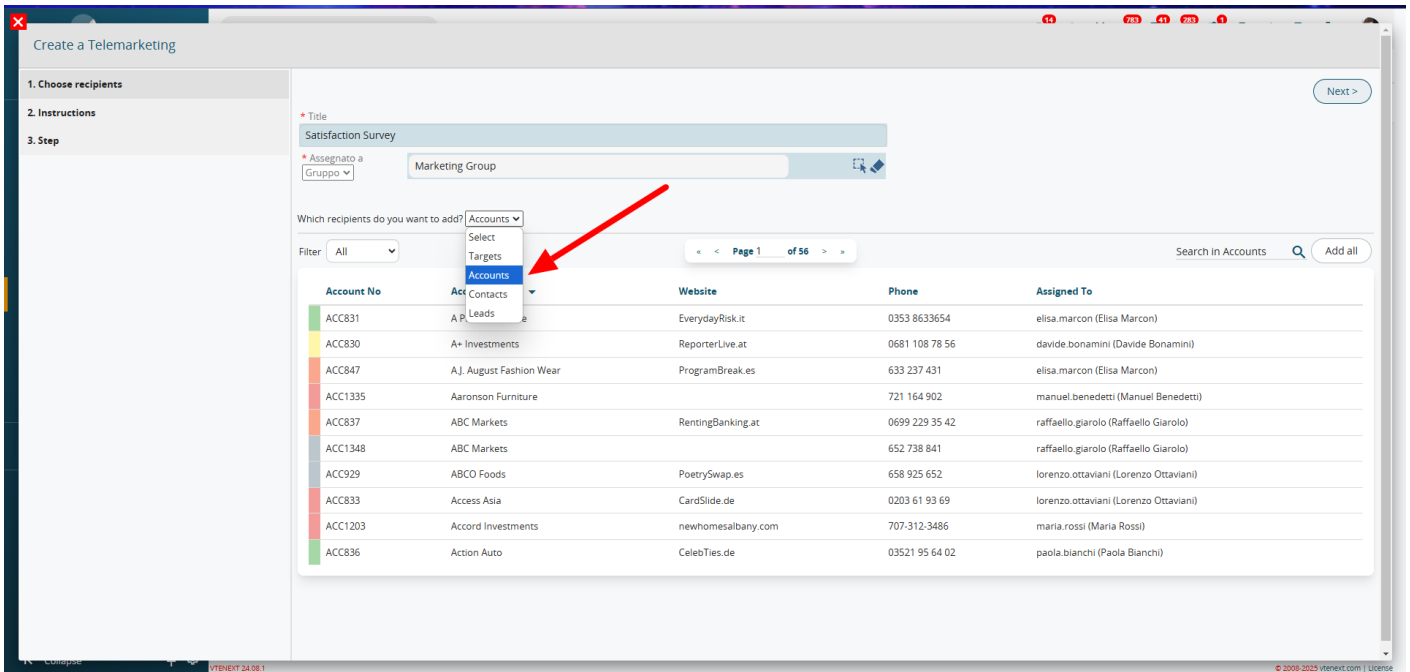


The screenshot displays the vteneXt interface. On the left is a dark blue sidebar with navigation options: Home, Leads, Accounts, Contacts, Potentials, Quotes, Campaigns (highlighted), Trouble Tickets, Projects, Documents, Modules, and Settings. The main area shows a 'LIST' view of campaigns. At the top of the list, there are buttons for '+ Create', 'Newsletter', and 'Other'. A red arrow points to the 'Other' button, which has opened a dropdown menu. In this menu, the option '+ Telemarketing Campaign' is highlighted with a red box and a red arrow. Below the menu is a table of campaigns with columns: Action, Campaign No., Campaign Name, Campaign Type, Campaign Status, Expected Revenue, Expected Close Date, and Assigned To. The table contains 11 rows of campaign data.

Action	Campaign No.	Campaign Name	Campaign Type	Campaign Status	Expected Revenue	Expected Close Date	Assigned To
<input type="checkbox"/>	CAM49	Sondaggio di gradimento	Telemarketing	Active	0.00		manuel.benedetti (Manuel Benedetti)
<input type="checkbox"/>	CAM48	[AUTO] test			0.00		elisa.marcon (Elisa Marcon)
<input type="checkbox"/>	CAM22	Serie di Podcast	Direct Mail	Planning	0.00	31-12-2023	admin (User Administrator)
<input type="checkbox"/>	CAM21	Fiera	Trade Show	Planning	0.00	31-12-2023	admin (User Administrator)
<input type="checkbox"/>	CAM20	Conferenza in presenza	Email	Planning	10000.00	27-11-2023	admin (User Administrator)
<input type="checkbox"/>	CAM17	Raccolta comune di verona	Telemarketing	Active	0.00		Federico.BilloViola (Federico Billo Viola)
<input type="checkbox"/>	CAM11	Campagna gelato 2024	Telemarketing	Active	0.00	29-02-2024	admin (User Administrator)
<input type="checkbox"/>	CAM4	Campagna di esempio con statistiche	Webinar	Completed	0.00	29-12-2023	Marketing Group
<input type="checkbox"/>	CAM3	DM Campaign to Top Customers	Direct Mail	Completed	500000.00	12-04-2005	admin (User Administrator)
<input type="checkbox"/>	CAM2	International Electrical Engineers Assoc...	Trade Show	Planning	750000.00	03-02-2004	Marketing Group
<input type="checkbox"/>	CAM1	User Conference	Conference	Planning	250000.00	02-01-2003	Marketing Group

A window will open where you can enter all the relevant details for the new campaign.

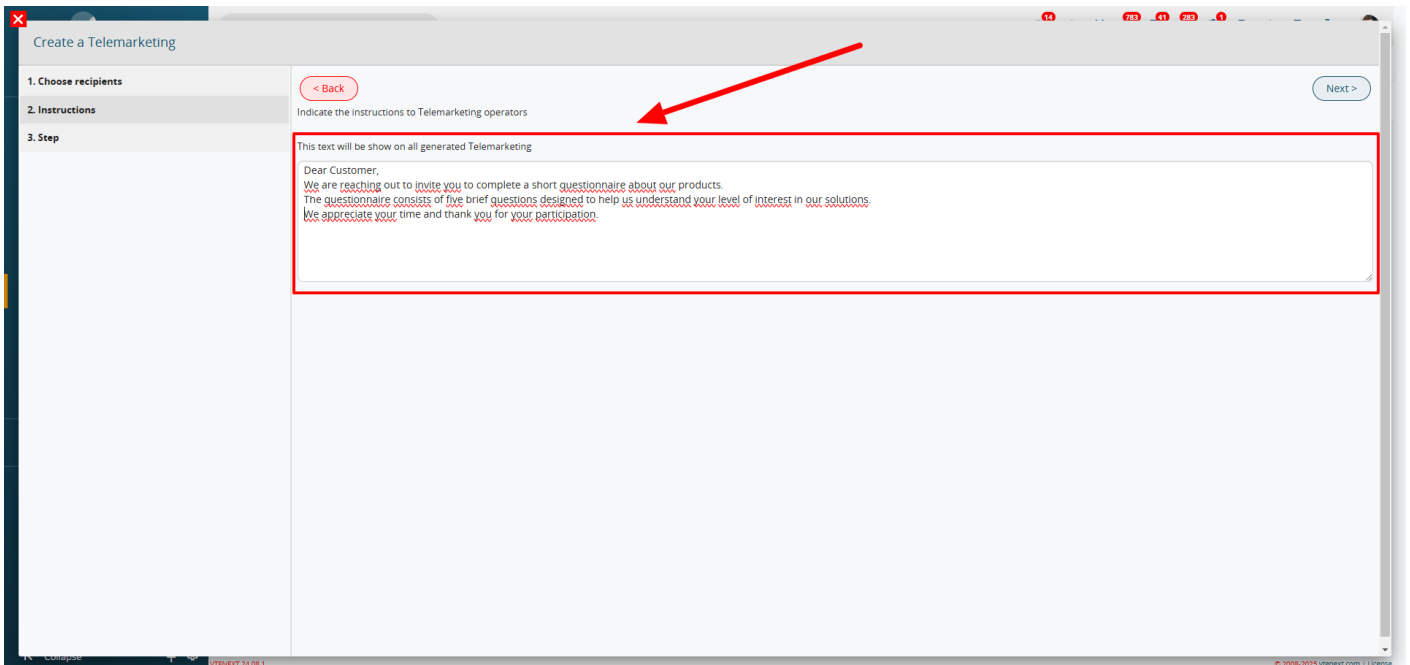
1.1 Selecting Recipients



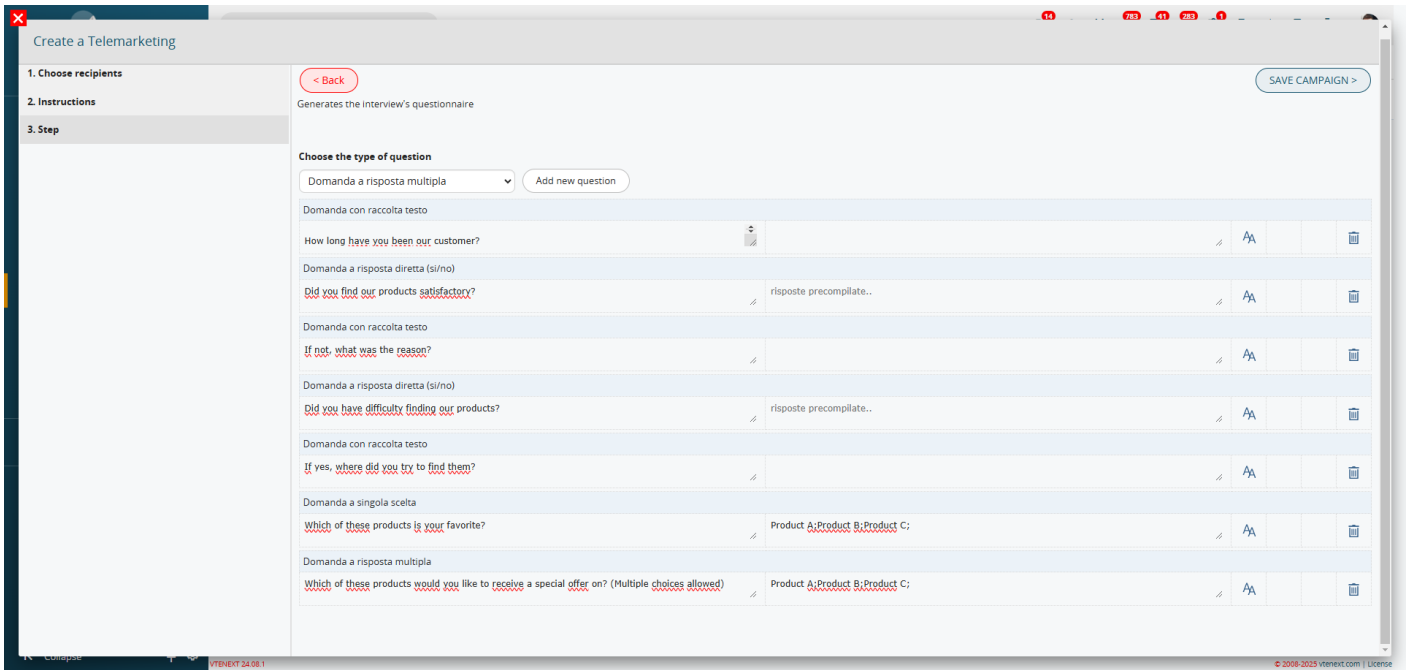
In the first section, set the **name** and **recipients** of the campaign (Targets, Companies, Contacts, Leads). Based on the selected entity, choose the desired records using filters or the search box if needed.

1.2 Instructions

In this section, you can enter a text that will be visible in all telemarketing activities created from this campaign. This helps guide the conversation with the customer.



1.3 Steps



The final step allows you to generate the **questionnaire** to use during the customer call. You can also define the type of questions (multiple choice, boolean, text entry, etc.).

Revision #4

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