Swiftpage

Quick Start Guide To:

Adding a Fax Stage to Your Drip Marketing Campaign Sequence

This quick start guide will explain how to create a Fax Stage for your Drip Marketing Campaign Sequence.

Please note: the Fax Stage is only available with Gold or Platinum Drip Marketing service levels.

1. In the Campaign Sequence Edit screen, click on the icon for Faxes.
2. Fill in the fields:
   a. Name: give the Fax Stage a name.
   b. Comments: any comments you want to add would go here.
   c. Email to: enter the email address of the third-party vendor to whom your contact list for the faxes should be sent. Select the check box if you would like to include contacts' postal addresses in the contact list.
   d. Fax Mail Merge Letter: enter the name of the fax you would like to send (you will have given the fax template to your fax vendor in advance).
   e. Personal message: enter the message you would like to appear on the fax.
   f. Special instructions to Fax company: any instructions you would like to send to your fax vendor would go here.
   g. Fax on: choose the date and the time you wish to send the contact list to your fax vendor.
   h. Contacts: select which contacts you would like to generate the Fax contact list from, and (if desired) filter based on previous Campaign Stages, or filter based on criteria from your database.
   i. Options: check the box here if you wish to receive a reminder to sync your database prior to the Fax contact list being generated.
   j. Email notification: if you wish to receive a notification about the Fax Stage before or after the Fax contact list is generated, select the appropriate options and check the box here.
3. Now you are ready to add the Fax Stage to your Campaign Sequence: Click the Add Stage button, and the Fax Stage will be added to your Drip Marketing Campaign Sequence. You're all done with that Stage!