



Sage E-marketing for Sage CRM

Quick Start Guide To:

Drip Marketing – Call List Wave

This Quick Start Guide provides instructions for how to create and work with the Drip Marketing Call List Wave within Sage E-marketing for Sage CRM.

Drip Marketing is an automated sequence of emails to your contact database. You set it up to automatically execute when you want different Waves to reach your recipients.

To create the Drip Marketing Call List Wave in Sage E-marketing for Sage CRM:

1. Click on the Marketing button on the left-hand side of the Sage CRM screen.
2. Click on the E-marketing tab.
3. You'll see any E-marketing campaigns on this screen. Click the New Drip Marketing Campaign button on the right to get started with creating the campaign.

The screenshot shows the Sage CRM E-marketing interface. The left-hand side has a 'Main Menu' with 'Marketing' selected. The central area displays a table of campaigns. The table has the following data:

Campaign Name	Owner	Type	Status	Start	End	Actual Cost (\$)
send_1	System Administrator	Standard	Pending	10/24/2011		0.00

On the right side, there are several buttons: 'New E-marketing Campaign', 'New Drip Marketing Campaign', 'Edit E-mail Templates', and 'Help'. An arrow points to the 'New Drip Marketing Campaign' button.

4. Select the correct campaign that you desire to add a Call List Wave > Select the previous Wave.

5. To add a New Wave for the Call List Wave, click New Wave Activity

The screenshot shows the 'E-marketing Wave Summary' page. At the top, there is a summary for 'Wave: Test' with the following details: Wave Name: Test, Start: 10/27/2011, End: (blank), Status: Pending, Wave Budget: \$ 0.00, and Actual Cost: \$ 0.00. Below this is a table titled '1 Wave Activity Found, Page 1 of 1'. The table has columns for Status, Wave Activity Name, Type, Start, End, and Actual Cost (\$). The first row shows a checkbox, the name 'Test', a blue lightning bolt icon, 'Today', and '0.00'. At the bottom left, there is a 'New Wave Activity' button with a green plus icon, which is highlighted by an orange arrow.

6. Wave Activity Details: This page is where you'll set up the Call List Wave. You'll want to give the Wave Activity a name, select the Type as Drip Marketing Call List, and select other desired information. Click Save.

The screenshot shows the 'Wave Activity' details page. The 'Wave Activity Name' is 'Test 2'. The 'Status' is 'Pending'. The 'Type' is 'Drip Marketing Call List', which is highlighted by an orange arrow. The 'Start' date is '10/29/2011' and the 'End' date is (blank). The 'Activity Budget' and 'Actual Cost' are both '\$'. Below this are sections for 'Outbound Call Details' (Team: Default, Introduction, Contact Introduction, Users: Amy2 Web@2, System Administrator, --None--), 'Default Communication Details' (Priority: Normal, Subject: Test, Communication Details), and 'Drip Campaign Stage' (Wave Items, Communication Team: Users Channel, Territory: Default Territory). A 'Send on:' field is at the bottom. On the right side, there are buttons for 'Save', 'Preview Recipients', 'Cancel', and 'Help'.

7. The new Call List Wave for this Drip Marketing Campaign is has now been completed.