



Sage E-marketing for Sage CRM

Quick Start Guide To:

Drip Marketing – Email Wave

This Quick Start Guide provides instructions for how to create and work with the Drip Marketing Email 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 Email 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 'Marketing' button in the left-hand navigation menu is highlighted with an orange arrow. The 'E-marketing' tab is selected in the top navigation bar, also highlighted with an orange arrow. The main content area shows a table with one campaign found, 'send_1', owned by 'System Administrator', with a status of 'Pending' and a start date of '10/24/2011'. On the right side, the 'New Drip Marketing Campaign' button is highlighted with an orange arrow. The interface includes a 'Main Menu' on the left, a 'Status' dropdown, and various filter and action buttons.

4. Campaign Details: Within this page, you'll want to give the campaign a name, select the type of campaign (Duration, Calendar, Anchor), dates, contacts, etc. Click Continue.

New Drip Marketing Campaign, Step 1 of 3

Campaign Name: <input type="text" value="Example"/>		Type: <input type="text" value="Duration"/>	Ends on: <input type="text" value="12/31/2011"/>	Actual Cost: \$
Group: <input type="text" value="Import from Dummy List With Bounces.csv"/>	Get E-mail Address From: <input type="text" value="Person - Business E-mail: Pers_EmailAddress"/>	Campaign Budget: \$		

5. Wave Details: Within this page, you'll want to give the wave a name and other desired information. Click Continue.

New Drip Marketing Campaign, Step 2 of 3

Wave

Wave Name:

Status: Pending

Start:

Wave Budget: \$

End:

Actual Cost: \$

Continue

Previous

Cancel

Help

6. Wave Activity Details: This page is where you'll set up the Email Blast. You'll want to give the wave activity a name, select a template, enter an email subject line, select the contacts that will be added to the Wave, and other desired information. Click Save.

Wave Activity

Wave Activity Name:

Details:

Status: Pending

Start:

Activity Budget: \$

Type: Drip Marketing E-mail

End:

Actual Cost: \$

Save

Previous

Preview Recipients

Cancel

Help

Drip Campaign E-mail

Subject:

Template: [View/Edit Template](#)

- Sample - Event Invitation Gala (Global - Advanced)
- Sample - Letterhead 1 (Global - Advanced)
- Sample - Newsletter 1 (Global - Advanced)
- Sample - Newsletter 2 (Global - Advanced)
- Sample - Product Education 1 (Global - Advanced)
- Sample - Product Education 2 (Global - Advanced)
- Sample - Product Launch (Global - Advanced)

Personal Message:

Drip Campaign Stage

Send on: 1 days after contact is added to Campaign

Send To:

All Contacts in Drip Marketing List

Contacts from previous E-mail stages, matching Response

From Stage:

7. This is an overview page of the Campaign that you have just created:

E-marketing Campaign Summary | E-marketing Campaign Analysis | Communications | Shared Documents | Report | ...

This is the E-marketing Campaign Summary screen.

- To access the Wave Item Summary details or to add a new Wave Activity, select any Wave hyperlink.
- To access the Wave Activity Summary details and view any E-marketing results, select a Wave Activity hyperlink

Campaign: Example

Campaign Name: Example

Status: Suspended

Group: Import from Dummy List With Bounces.csv

Type: Duration

Ends on: 12/31/2011

Get E-mail Address From: Pers_EmailAddress

Campaign Budget: \$ 0.00

Actual Cost: \$ 0.00

Change

Delete

Continue

Launch Drip Marketing Campaign

Clone Campaign

Hide Wave Activities

Show Analysis

Help

Waves

[Test](#)

Wave Activities

[Test](#)

8. You'll now see your new Drip Marketing Campaign listed under your E-marketing campaigns:

Sage CRM E-marketing

Recent Campaign List E-marketing Mass E-mail Status ...

Main Menu

Administration

- Find
- New
- My CRM
- Team CRM
- Reports
- Marketing
- Log Off

This is the E-marketing work area. From here you can create and manage E-marketing and Drip Marketing campaigns.

- Use the new buttons to start creating a new E-marketing or Drip Marketing campaign.
- Select one of the hyperlinks from the list to drill down on an individual Campaign and review the Waves and Wave Activities that are part of it.

2 Campaigns Found, Page 1 of 1

Campaign Name	Owner	Type	Status	Start	End	Actual Cost (\$)
Example	System Administrator	Drip (Duration)	Suspended	Today	12/31/2011	0.00
send_1	System Administrator	Standard	Pending	10/24/2011		0.00

Status: --All--

Owner: --All--

Start: Between [] And []

Filter

- New E-marketing Campaign
- New Drip Marketing Campaign
- Edit E-mail Templates
- Help