Swiftpage E

Quick Start Guide To:

Adding a Call List Stage to Your Drip Marketing Campaign Sequence

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

1. In the Campaign Sequence Edit screen, click on the icon for Call List.
2. Fill in the fields:
    a. Name: give the Call List Stage a name.
    b. Comments: any comments you want to add would go here.
    c. Create on: choose the date and the time you wish to create the Call List.
    d. Contacts: select which contacts you would like to generate the Call List from, and specify either all contacts from all previous Stages or contacts from one particular Stage. Note: stage specific contact filters are only available with Gold or Platinum Drip Marketing service levels. With Silver Drip Marketing service level, the only option is to create a Call List from all previous email stages who opened or clicked.
    e. Options: check the box here if you wish to receive a reminder to sync your database prior to the Call List being generated. Note: this option is only available with Gold or Platinum Drip Marketing service levels.
    f. Email notification: if you wish to receive a notification about the Call List before or after it is generated, select the appropriate options and check the box here.
3. Now you are ready to add the Call List Stage to your Campaign Sequence: Click the Add Stage button, and the Call List Stage will be added to your Drip Marketing Campaign Sequence. You're all done with that Stage!