



Sage SalesLogix E-marketing Quick Start Guide to:

Accessing Drip Marketing

This Quick Start Guide takes you through the steps of accessing your Drip Marketing Campaigns in Sage SalesLogix Web Client and managing your contacts in those Campaigns.

Click on the E-marketing button on the left hand side in SalesLogix and then click on the Drip Marketing tab at the top. The following screen will appear:

E-marketing

Send Email Blast | Email Blast Results | **Drip Marketing** | Call Lists | Survey Responses

Swiftpage Account: **astestsp** User: **Aaron**

| Campaigns | Status | Targets | Sender | Sync | Sync By | Next Stage | New History | New Scores |
|-----------------------------|--------|---------|--------|------|---------|------------|-------------|------------|
| DMS Brochure Follow Up | Build | 0 | | None | None | 2/1/2009 | 0 | 0 |
| DMS Lead Nurturing Platinum | Active | 2 | | None | None | All | 2 | 2 |
| Drip Marketing User Group | Active | 36 | | None | None | All | 36 | 31 |

Campaign Status: All Active No Targets (Active) Build Suspended Complete

1 Drip Marketing Manager

2 Sync the existing targets with the latest data from SalesLogix database
Sync Targets

Create email history records from executed email blast stages
3 Get Stage Results

4 Clear Sync Status

Modify Target List

Contact Lead Campaign

Stage:

Group Sync Targets Add Targets Remove Targets

Your Drip Marketing Campaigns will appear on this screen and you can use the radio buttons to determine which Campaigns are shown. The information displayed for each Campaign includes status (Active, No Targets (Active), Build, Suspended or Complete), the number of targets in the Campaign, whose behalf the Campaign is being sent on (if not the original user), and information about syncing, next stages, new history and new scores. From here, you can perform several functions:

1. Drip Marketing Manager: will take you to the online Drip Marketing Campaign Manager, where you can view and edit your Campaigns.
2. Sync Targets: click this button to sync your SalesLogix contacts with your existing Drip Marketing contacts. Performing this function ensures that your Drip Marketing Campaign always has the most current contact information from your SalesLogix database.
3. Get Stage Results: if the New History or New Scores column for your Drip Marketing Campaign indicates that there is information to be written back to your SalesLogix database, click the Get Stage Results button to write the information back to SalesLogix. A screen will appear with options for writing Email History:

 E-marketing

Send Email Blast | Email Blast Results | **Drip Marketing** | Call Lists | Survey Responses

Swiftpage Account: **astestsp** User: **Aaron**

Retrieve Drip Marketing stage results

Drip Marketing campaign: **Drip Marketing User Group**

Note Only stages which have executed and have data to retrieve are shown.

| Executed Stages | Stage Type | New History | New Scores |
|---------------------------|-------------|-------------|------------|
| Drip Marketing User Group | Email Blast | 36 | 31 |

Email history options

Create history for targets with a non-zero email score
 Create history for targets included in selected stage
 Do not create history for stage targets. (*These targets will be ignored in future requests)

Submit Back

4. Clear Sync Status: if the Sync or Sync By column for your Drip Marketing Campaign indicates that a sync needs to be performed, you can clear that sync by clicking the Clear Sync Status button.

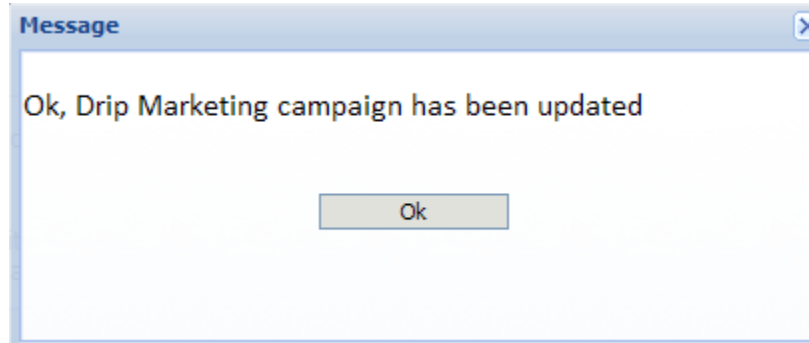
In the “Modify Target List” section, choose the contacts you want to add to or remove from your Drip Marketing Campaign (the options for contacts are similar to the options when sending an email through Swiftpage for SalesLogix: contacts, leads, campaigns). Select the contacts you want to add or remove, then click the appropriate button (Add Targets or Remove Targets). A confirmation screen will appear:

Modify Target List

Contact
 Lead
 Campaign Stage:

Group Sync Targets Add Targets Remove Targets

Select the contacts you want to add or remove, then click the appropriate button (Add Targets or Remove Targets). A confirmation screen will appear:



Group Sync Targets: click this button to sync an entire SalesLogix group to your Drip Marketing contact list. When you click this button, the following screen will appear:

E-marketing

Send Email Blast | Email Blast Results | Call Lists | Survey Responses | **Drip Marketing**

Swiftpage Account: **SwiftpageforWeb** User: **SLX**

Sync Target List to Group

Drip Marketing campaign: **Sample 1**
Selected SLX Group: **Duplicate Emails**

**Note* Only the first few targets are shown in each category.*

| Targets that are in both the selected SLX Group and the Drip Marketing campaign list | Targets that are in the Drip Marketing campaign list, but not in the selected SLX Group | Targets that are in the selected SLX Group, but not in the Drip Marketing campaign list |
|--|---|---|
| <div style="border: 1px solid gray; height: 100px;"></div> | <div style="border: 1px solid gray; height: 100px;"></div> | Scardino, David |
| Total Matched: 0 | Total Missing: 0 | Total New: 2 |

Do what with Duplicates?
 Update (all data fields)
 Remove

Do what with Missing?
 Remove
 Ignore

Do what with New?
 Add
 Ignore

Sync selected Drip Marketing campaign to selected SalesLogix targets

This screen shows you which contacts from the SalesLogix group match up with your Drip Marketing contact list, which are missing from your SalesLogix database and which are new to be imported to the Drip Marketing contact list. You can choose to Update or Remove all contacts that match, Remove or Ignore any missing contacts, or Add or Ignore any new contacts. Then click the Sync button.