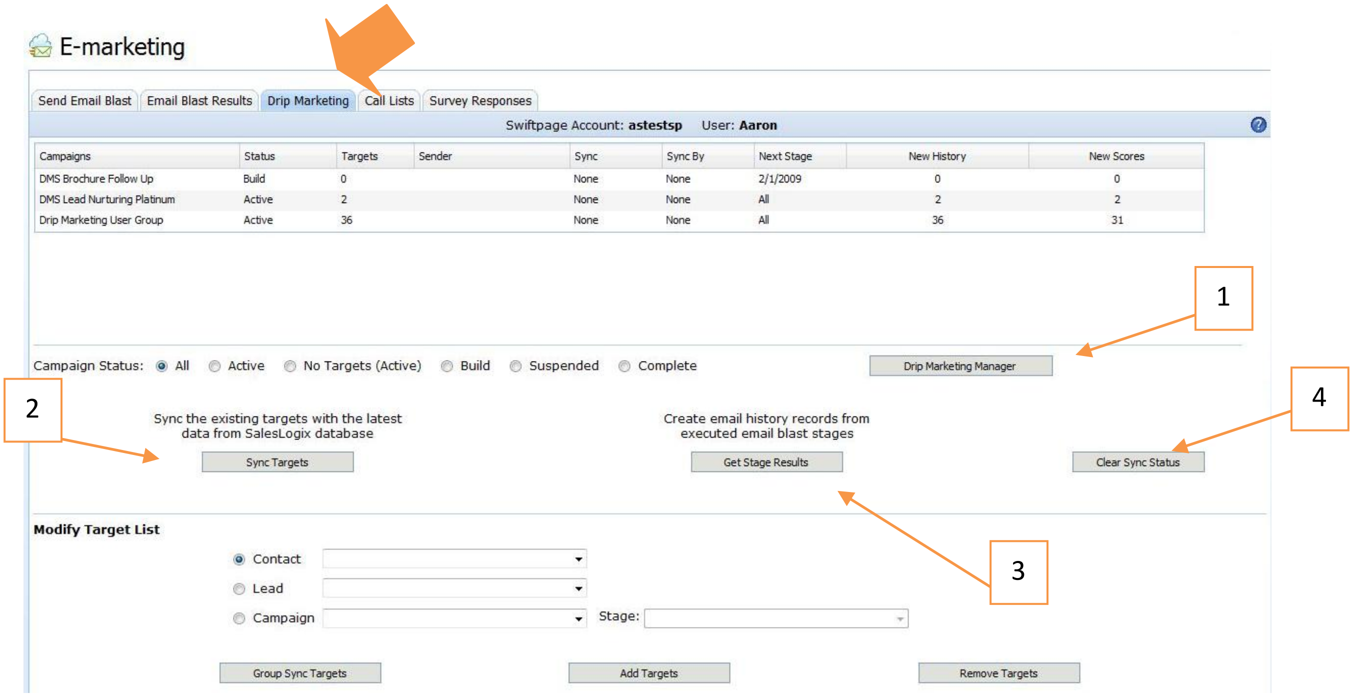
Sage SalesLogix E-marketing Quick Start Guide to:

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:

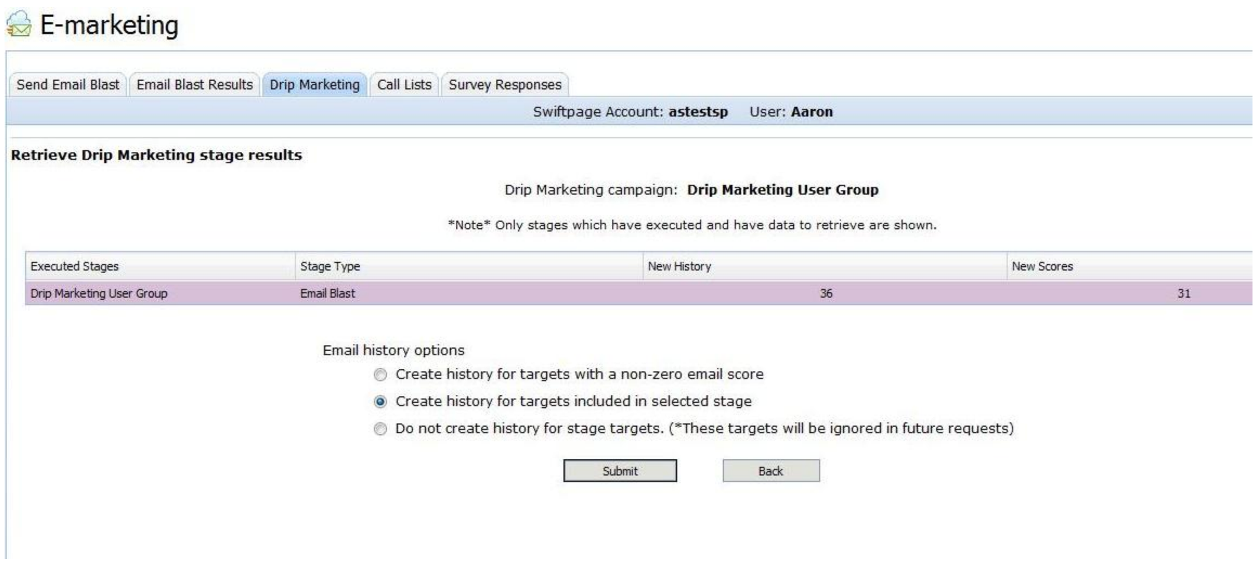


Your Drip Marketing Campaigns will appear on this screen and you can use the radio buttons to determine which Campaigns are shown. The information displayed for each Campaign includes status (Active, No Targets (Active), Build, Suspended or Complete), the number of targets in the Campaign, whose behalf 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.

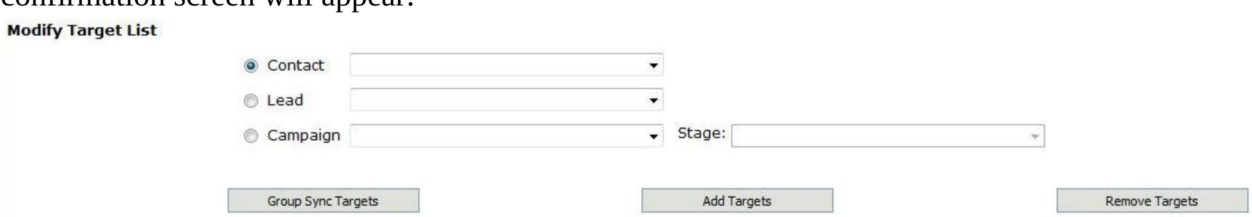
2. Sync Targets: click this button to sync your SalesLogix contacts with your existing Drip Marketing contacts. Performing this function ensures that your Drip Marketing Campaign always has the most current contact information from your SalesLogix database.

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:

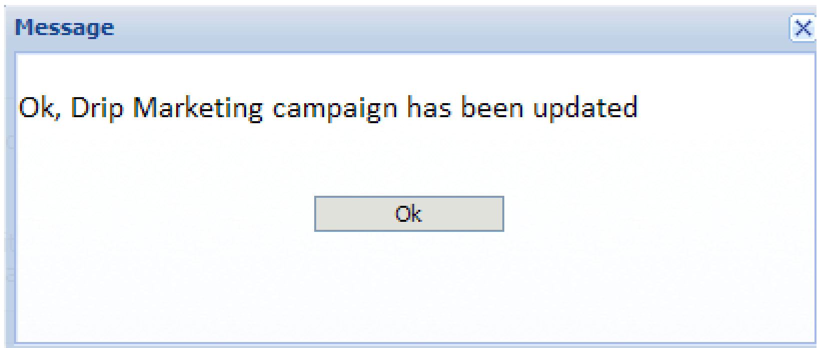


4. Clear Sync Status: if the Sync or Sync By column for your Drip Marketing Campaign indicates that a sync needs to be performed, you can clear that sync by clicking the Clear Sync Status button.

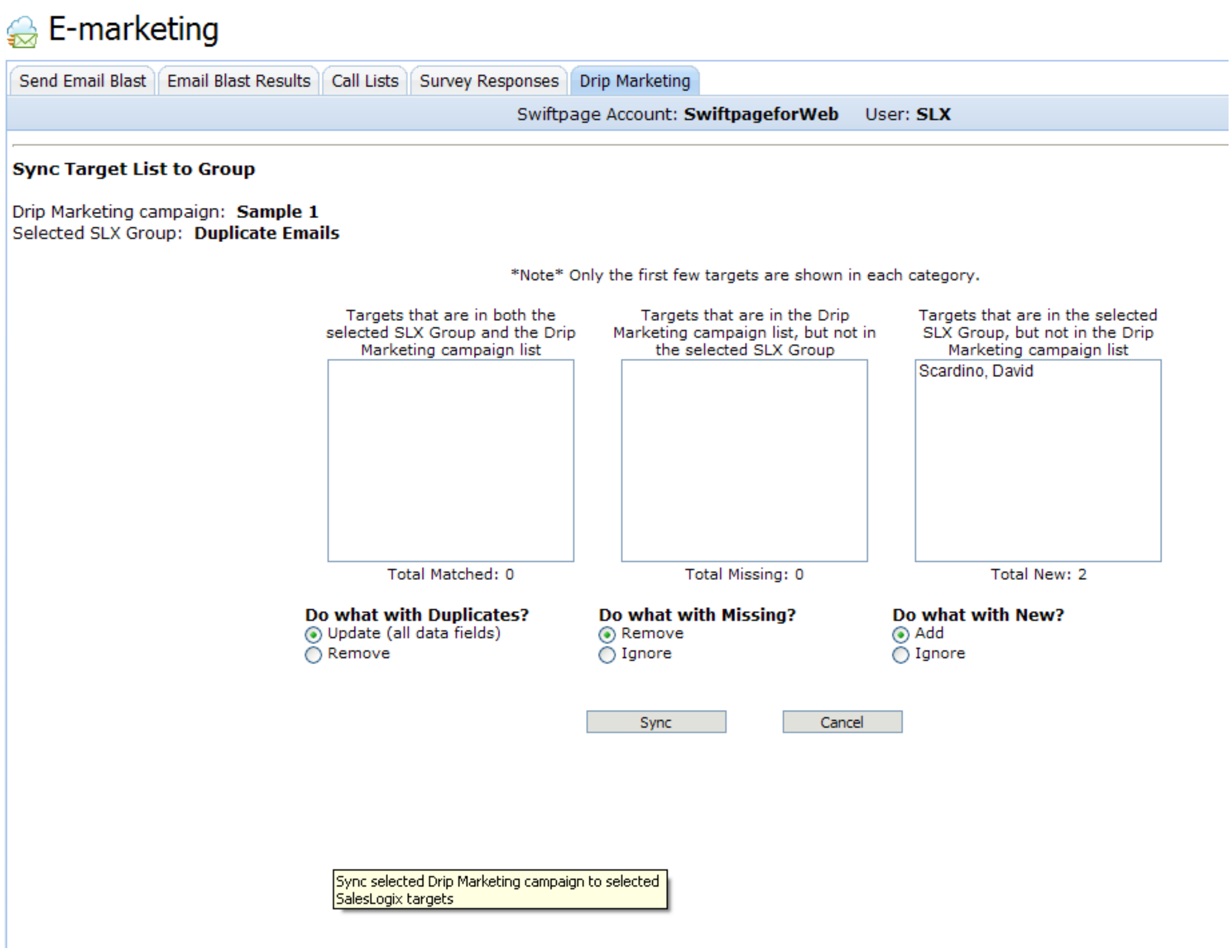
In the "Modify Target List" section, choose the contacts you want to add to or remove from your Drip Marketing Campaign (the options for contacts are similar to the options when sending an email through Swiftpage for SalesLogix: contacts, leads, campaigns). Select the contacts you want to add or remove,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



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:



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.