



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 Client and managing your contacts in those Campaigns.

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

Sage SalesLogix E-marketing

Messages: No new messages

Send Emails | Drip Marketing | Email Results | Surveys | Call Lists

Select a Campaign to reveal options...

Drip Campaigns	Status	Targets	Send As	Sync	Sync By	Next Stage	New History	New Scores
Null User	Active	91000		None		3/18/2010	0	0
TEST	Complete	1058	Aaron	None			10	0
test for admin drip	Complete	36	Aaron	None			36	1
Test No Contacts	Complete	0	Aaron	None			0	0
Test3	Build	6	Aaron	None			5	0

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

View Manage

Sync targets in Drip Campaign Get Stage Results Clear Sync Status

Modify Drip Campaign targets

Contacts: Latest Contacts (Everyone) Leads: 100k Campaigns: Dell Optiplex Special

Group Sync Targets Add Targets Remove Targets

-Account- Help Close

1. All of your Drip Marketing Campaigns will appear at the top of the screen, along with their Status, the number of targets they include, the Sage SalesLogix on whose behalf emails in the Campaign are sent, the presence of any Sync Stage or Sync By date, the Next Stage to come, the number of New History records to be written, and the number of New Scores to be written.
2. Choose which Drip Marketing Campaigns are shown by selecting one of the option buttons to filter the view if desired.
3. The View button opens a web page showing the highlighted Drip Marketing Campaign.
4. The Manage button opens web page showing the Drip Marketing Campaign Manager screen, where you can create and edit your Drip Marketing Campaigns.
5. Click Sync Targets in Drip campaign to sync the targets in your Drip Marketing Campaign with your Sage SalesLogix database. This updates your Drip Marketing targets with the most current Sage SalesLogix database information. When you select it, you will see a confirmation screen. Click Yes and the targets of your Drip Marketing Campaign will be updated.
6. Click Get Stage Results to import the results of your Drip Marketing Campaigns into your Sage SalesLogix database. There will be a number in the New History or New Scores at the top of the Drip Marketing window if a particular Campaign has results to import into Sage SalesLogix. When you click this button, the following screen will appear:

Drip Marketing stage results [X]

Select a Stage from: test for admin drip

Execute Stage Name	Stage Type	New History	New Scores
test for admin drip	Email Blast	36	1

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

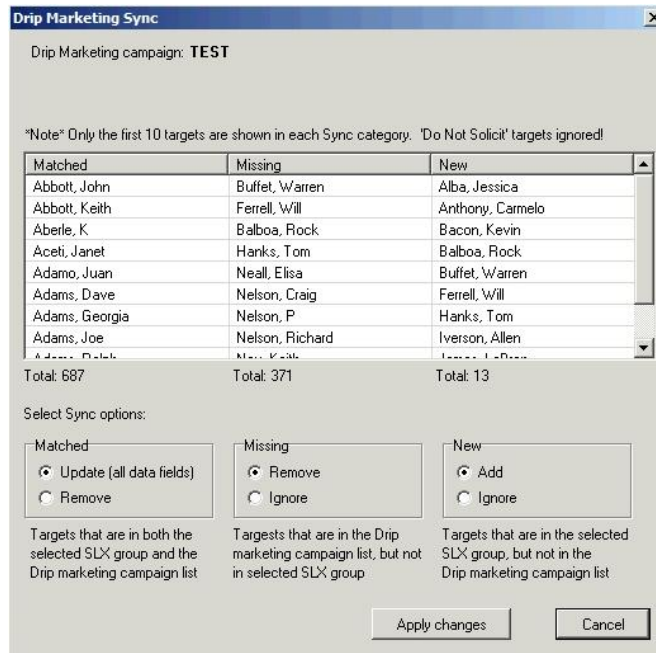
Create email history records for the targets who were part of the selected stage based on selected retrieval options.

Create history for targets with a Non-zero email score (Email was opened, bounced, failed, etc)
 Create history for targets included in the stage (passed the stage filters)
 Do Not create history records for these targets. (These targets will be ignored in future requests)

Submit [Cancel]

Choose the option button you want, depending on the type of history records you wish to create for the targets shown. When you have made your select, click Submit, and your Stage results are written to your Sage SalesLogix database.

7. Clear Sync Status: if you have set a Stage in your Drip Marketing Campaign to require a sync prior to the Stage's execution, you can clear the needed Sync by highlighting the Campaign and clicking Clear Sync Status. Once you do this, the "Sync By" date will disappear.
8. In the Modify Drip Campaign targets section, you can select targets based on Contact groups, Lead groups, or Campaigns. Use the option buttons and drop-down lists to select the targets you wish to add or remove to/from your Drip Marketing Campaign. At that point, you have the option to perform the functions listed in 9-11 below.
9. Group Sync Targets: if you are using a specific Sage SalesLogix group as the target group for a Drip Marketing Campaign, the Group Sync Targets button allows you to keep your Drip Campaign contact list current. Select your Group using the option buttons in the "Modify Drip Campaign targets" section of the Drip Marketing tab. Then click Group Sync Targets, and a screen will appear confirming the sync with the selected Sage SalesLogix group:



This window shows you how many contacts in the Sage SalesLogix group matched with Drip Marketing contacts, how many are missing, and how many are new. Select the option buttons you desire—update or remove matching targets, remove or ignore missing targets, and add or ignore new targets. When you have selected the options you want, click Apply Changes and you will receive a confirmation screen telling you how many targets were updated, removed, added or ignored, as well as the new total number of targets in the Drip Marketing Campaign. (**Note:** groups larger than 3,000 will have to be synced by using the Add and Remove Targets functions.)

10. **Add Targets:** this button is used to add targets to Drip Marketing Campaigns (the targets selected in the Modify Drip Campaign targets section). When you select your targets and click Add Targets, a screen will appear confirming the targets to be added to your Drip Marketing Campaign. Click Yes and the targets are added.
11. **Remove Targets:** this button is used to remove targets from Drip Marketing Campaigns (the targets selected in the Modify Drip Campaign targets section). When you select your targets and click Remove Targets, a screen will appear confirming the targets to be removed from your Drip Marketing Campaign. Click Yes and the targets are removed.
12. **The Account button** allows you to adjust certain options on your Sage SalesLogix E-Marketing account.