



Quick Start Guide To:

Adding a Call Center Stage to Your Drip Marketing Campaign Sequence

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

Please note: the Call Center Stage is only available with Gold or Platinum Drip Marketing service levels.

1. In the Campaign Sequence Edit screen, click on the icon for Call Center.
2. Fill in the fields:
 - a. Name: give the Call Center Stage a name.
 - b. Comments: any comments you want to add would go here.
 - c. Email to: enter the email address of the third-party call center to whom your contact list should be sent. Select the check box if you would like to include contacts' postal addresses in the contact list.
 - d. Call Center Script: enter the name of the script you would like to send (you will have given the call script to your call center in advance).
 - e. Personal message: enter any message you would like to add to the script.
 - f. Special instructions: any instructions you would like to send to your call center would go here.
 - g. Results Form: allows you to include a Swiftpage survey for the Call Center to fill out. Survey results will end up directly back in your Swiftpage account.
 - h. When to call: choose the date and the time you wish to send the contact list to your call center.
 - i. Contacts: select which contacts you would like to generate the call center contact list from, and (if desired) filter based on previous Campaign Stages, or filter based on criteria from your database.
 - j. Options: check the box here if you wish to receive a reminder to sync your database prior to the call center contact list being generated.

- k. Email notification: if you wish to receive a notification about the Call Center Stage before or after the call center contact list is generated, select the appropriate options and check the box here.
3. Now you are ready to add the Call Center Stage to your Campaign Sequence: Click the Add Stage button, and the Call Center Stage will be added to your Drip Marketing Campaign Sequence. You're all done with that Stage!