

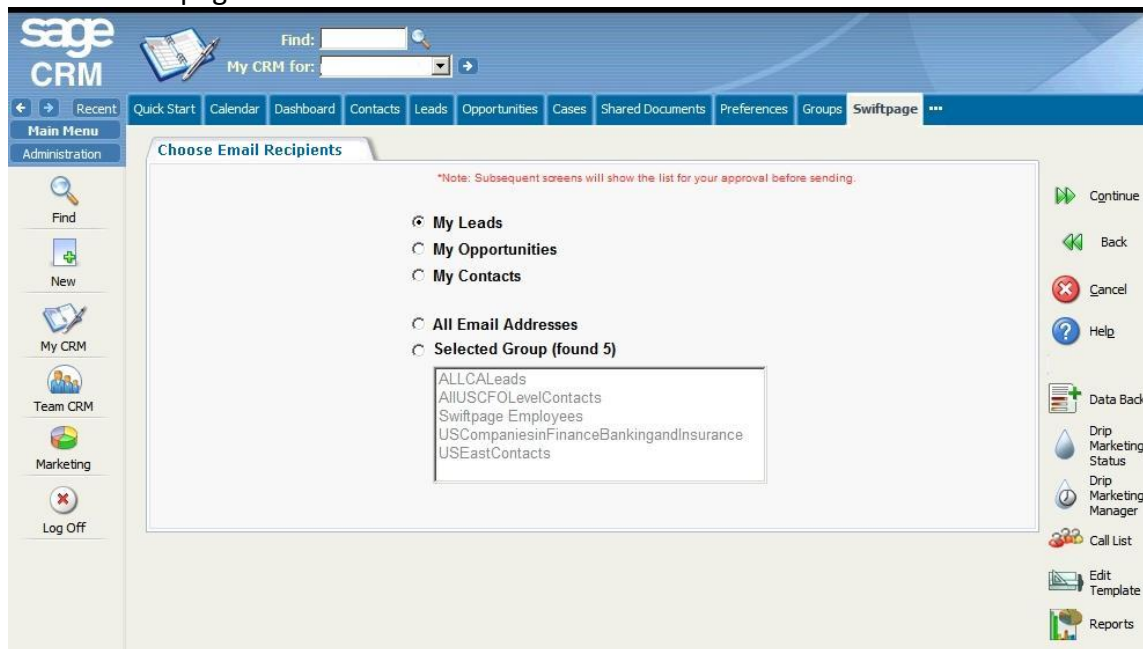
Quick Start Guide To:

Accessing and Using Drip Marketing in Swiftpage for Sage CRM

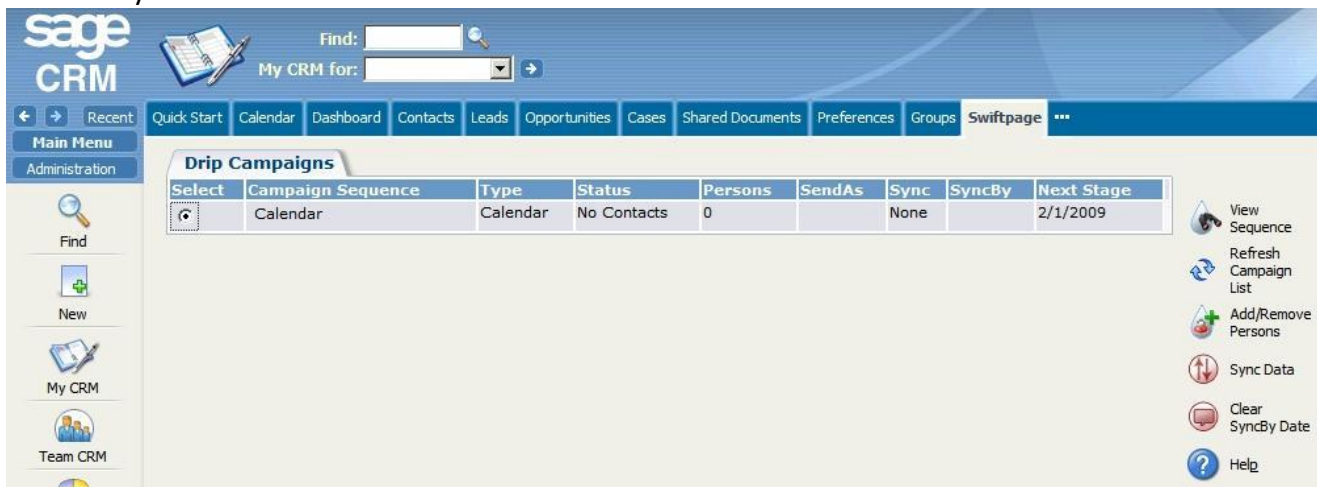
This Quick Start Guide provides instructions for accessing and using Drip Marketing within Swiftpage for Sage CRM.

To access Drip Marketing in Swiftpage for Sage CRM:

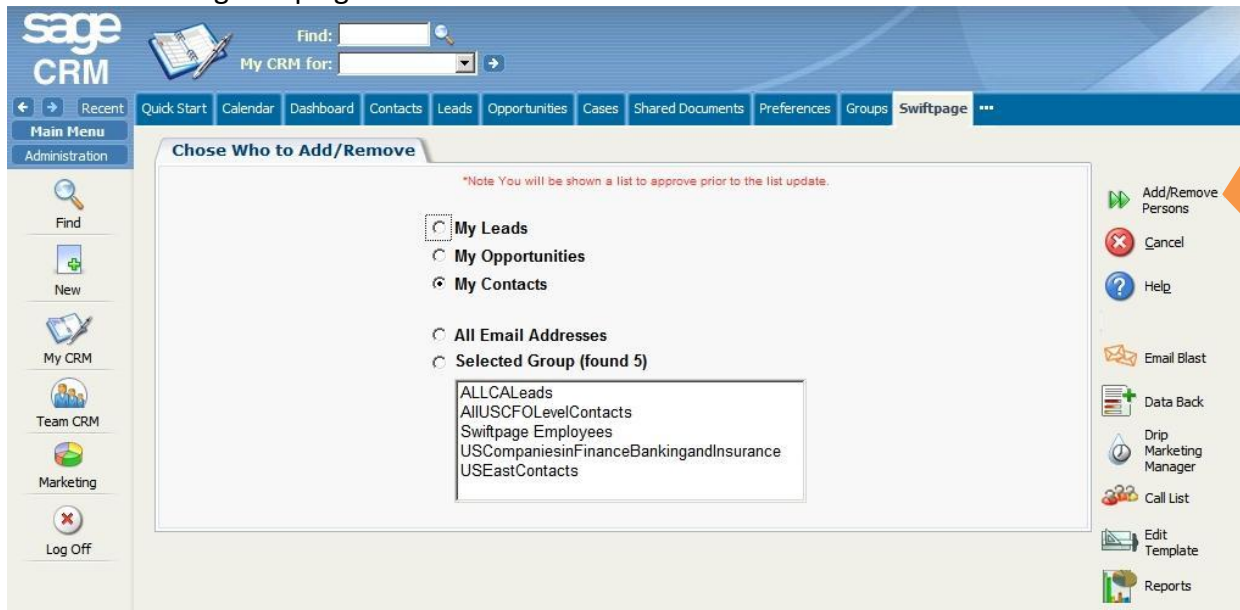
1. Click on the My CRM button on the left-hand side of the Sage CRM screen.
2. Click on the Swiftpage tab.



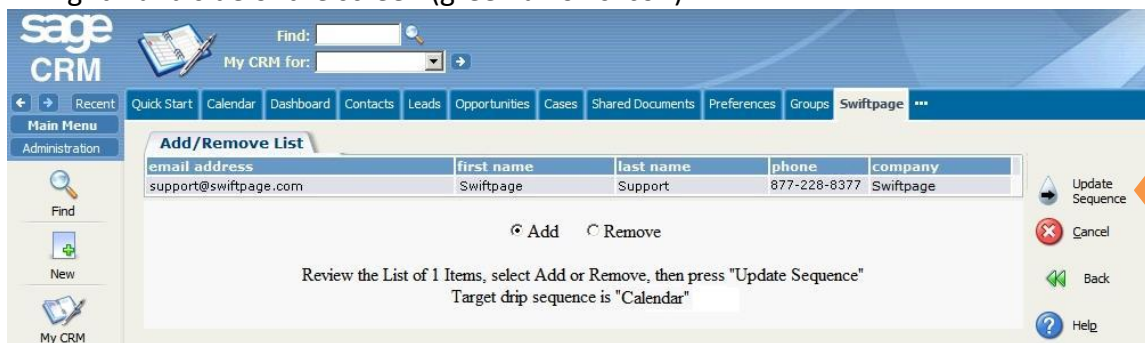
3. You have two options here: clicking on the Drip Marketing Manager button will take you to the Drip Marketing Campaign Manager online, where you can create Campaigns (see our Drip Marketing help section for help on the Campaign Manager). Or, you can click on the Drip Marketing Status button to see further information on your Drip Marketing Campaigns within Sage CRM. The Drip Marketing Status button allows you to add contacts to and remove contacts from your Drip Marketing Campaigns.
4. When you click on the Drip Marketing Status button, you will see a series of buttons on the right-hand side of your screen:



- View Sequence: click here to return to the initial Drip Marketing Status screen.
- Refresh Campaign List: this button refreshes your list of Campaigns, in case newly added Campaigns are not yet displayed.
- Add/Remove Persons: click here to add contacts to or remove contacts from your Drip Marketing Campaign.

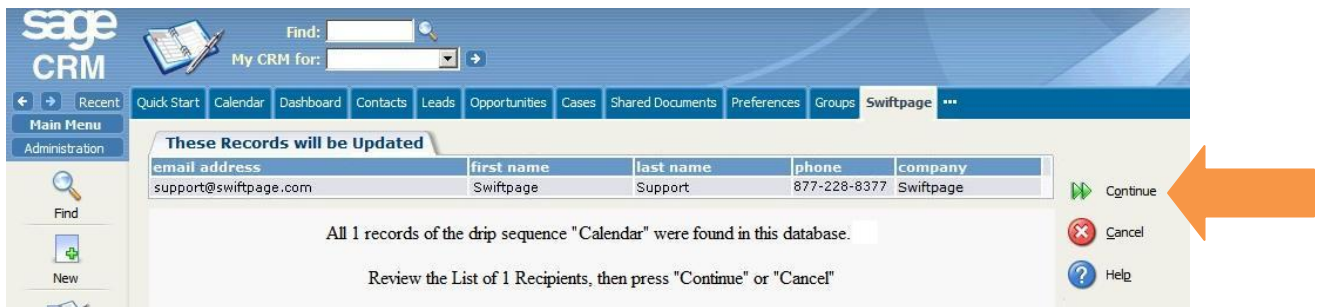


You are given the choice of My Leads, My Opportunities, My Contacts, All Email Addresses or a Selected Group. Choose your option, then click on the Add/Remove Persons button on the right-hand side of the screen (green arrows icon).



You will see a confirmation screen showing the contacts to be added or removed. Review the list, then select the appropriate radio button at the bottom (either “Add” or “Remove”). Then, click on the Update Sequence button on the right-hand side (Drip icon with arrow). You will receive a confirmation screen stating the number of contacts now in your Drip Marketing Campaign. You have now successfully added contacts to or remove contacts from your Drip Marketing Campaign. Click on the Drip Marketing Status button, and then the Refresh Campaign List button and your new contact total will be shown.

- Sync Data: use this button to sync your Sage CRM contacts with your Drip Marketing contacts. When you click the Sync Data button, you will see a message saying that Sage CRM is retrieving contacts from Swiftpage and that the process may take a moment. Then all records from the Drip Campaign found in your Sage CRM database will be shown—these are the contacts whose information will be updated (the Drip contact information will be updated with what is currently in Sage CRM).



Click the Continue button on the right-hand side to move forward with the Sync (or press Cancel if you do not wish to Sync). After clicking Continue, you will receive a confirmation screen saying that your contacts have been updated, and prompting you to click on the Refresh List button on the right-hand side of the screen. Click there and you will be back to the Drip Marketing Status list.

- Clear SyncBy Date: if you have a "Sync By" date as part of an Alert Stage in your Drip Marketing Campaign Sequence, pressing this button will allow you to remove it. Click on it and you will receive a confirmation screen saying that the Sync By date has been cleared. You can then click on Refresh List to be taken back to the Drip Marketing Status screen.
 - Help: this button will launch Swiftpage's online help to guide you through Drip Marketing in Swiftpage for Sage CRM.
 - **Note:** Other buttons, including Email Blast, Data Back, Drip Marketing Manager, Call List, Edit Template and Reports serve the functions they do from the normal Swiftpage for Sage CRM main menu. Visit our Swiftpage for Sage CRM support area to learn more about the functions of these buttons.
5. You should now know how to review Drip Marketing Campaigns in Swiftpage for Sage CRM, add contacts to or remove contacts from Drip Marketing Campaigns, and perform other functions like Syncing Data or Clearing a "Sync By" Stage.