Start sending emails to new Leads / Contacts

This is a Quick Guide to the Drip Campaign setup in the *Marketing Module*.

1. We will be using the Drip Campaign

If you want your new leads / contacts to start receiving your emails as soon as they signs up, then Drip Campaign is the one to use. For a detailed explanation of what is a drip campaign, and the difference of *Drip* vs. *Blast* campaigns, please click here.

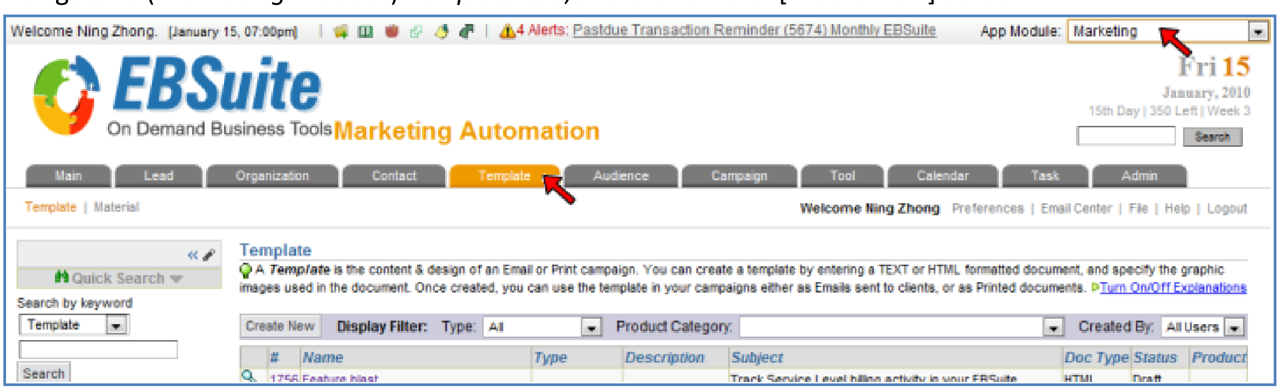
2. Capturing Leads / Contacts

Use EBSuite *Form Builder* to build a web form, put it on your website, and start capturing visitors as new Leads / Contacts in your database. For a video demonstration of Form Builder, please click here.

Please notice the part that how you can embed a 'hidden field' in the form, to feed the new Lead / Contact with a campaign source value. We will be using that later.

3. Define a couple of Campaign Email Templates

Navigate to (*Marketing Module*) *Template* tab, and click on the [Create New] button.

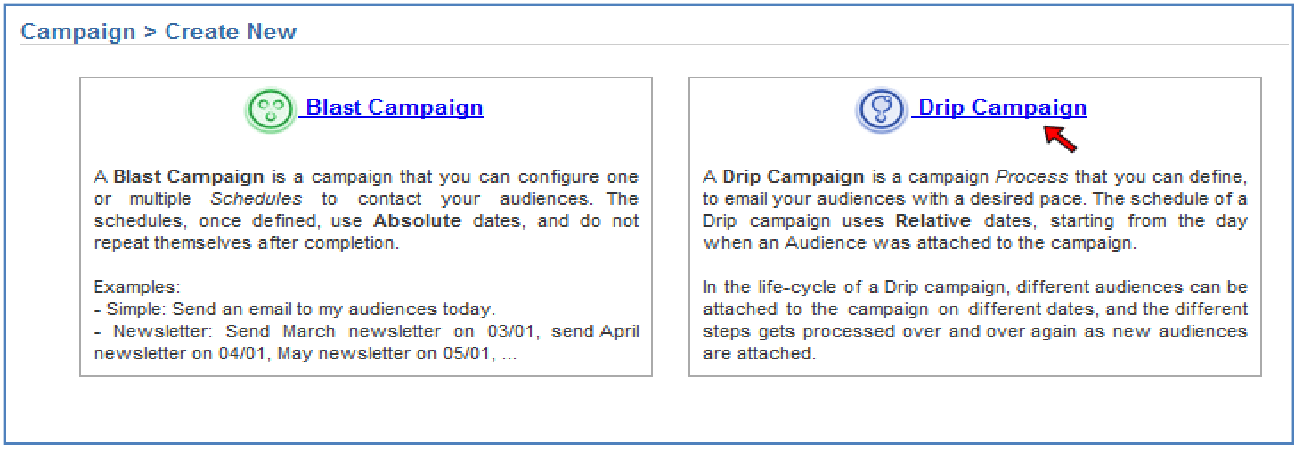


Template is the email content that you are sending. If you want to send your new Lead / Contact a series of emails, you should create each one as a separate template.

The detail instruction of how to define campaign templates is not within the scope of this quick guide. For more information, you can check on here, and here.

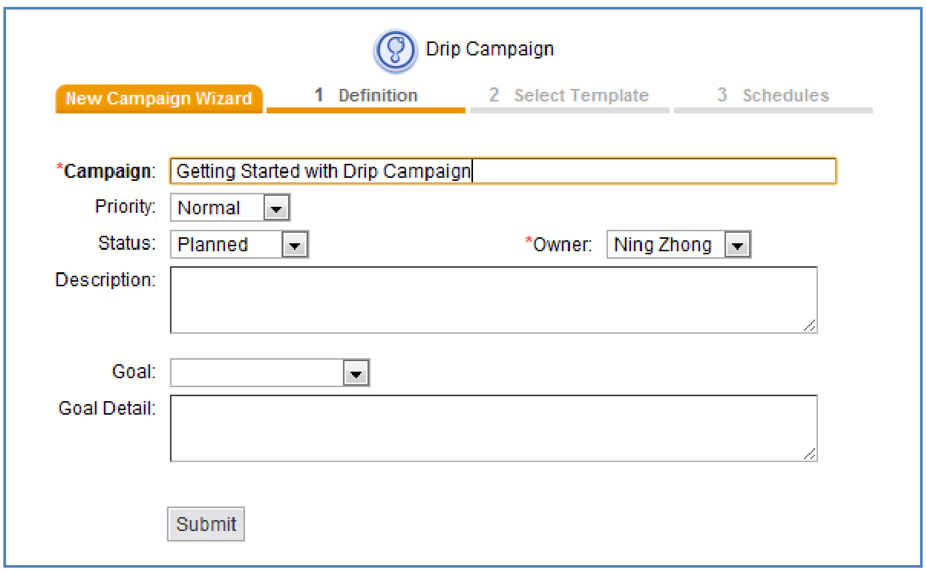
4. Define a Drip Campaign

Navigate to (*Marketing Module*) *Campaign* tab, and click on the [Create New] button.

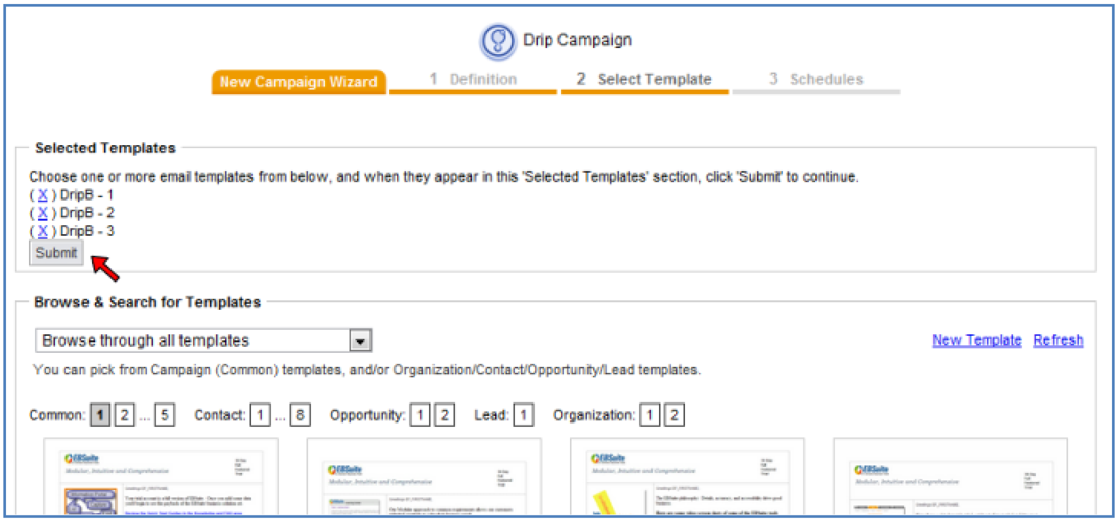


And make sure you select the Drip Campaign.

Then follow the Wizard…

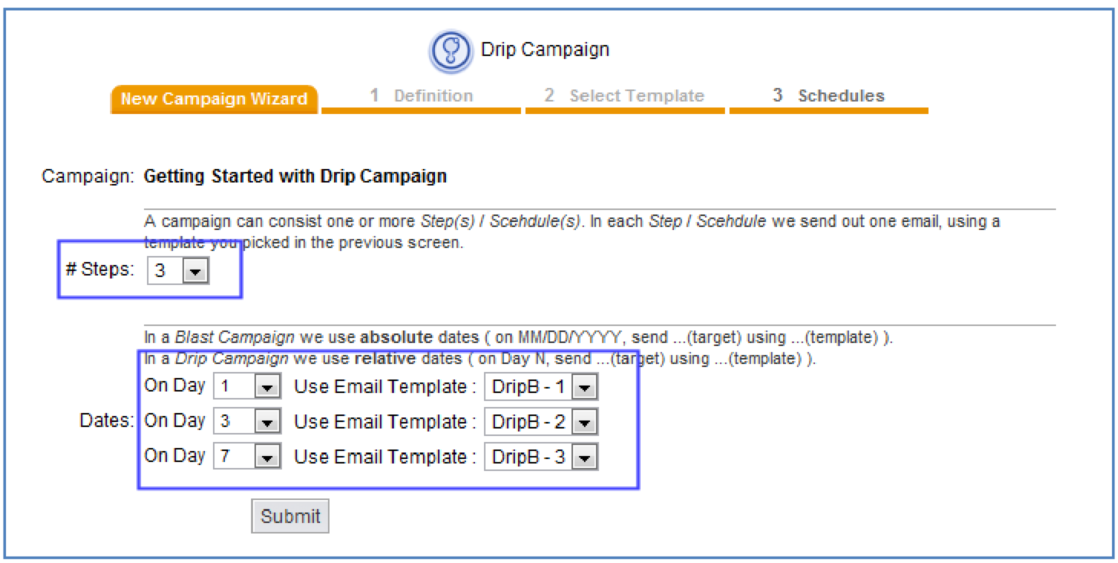


And select the template(s) you just created in the last step…



After you selected all the templates, click on the [Submit] button in the [Selected Templates] section.

In the last step, Schedules, we specify on Day 1, send Email 1. On Day 3, send Email 2. On Day 7, send Email 3:

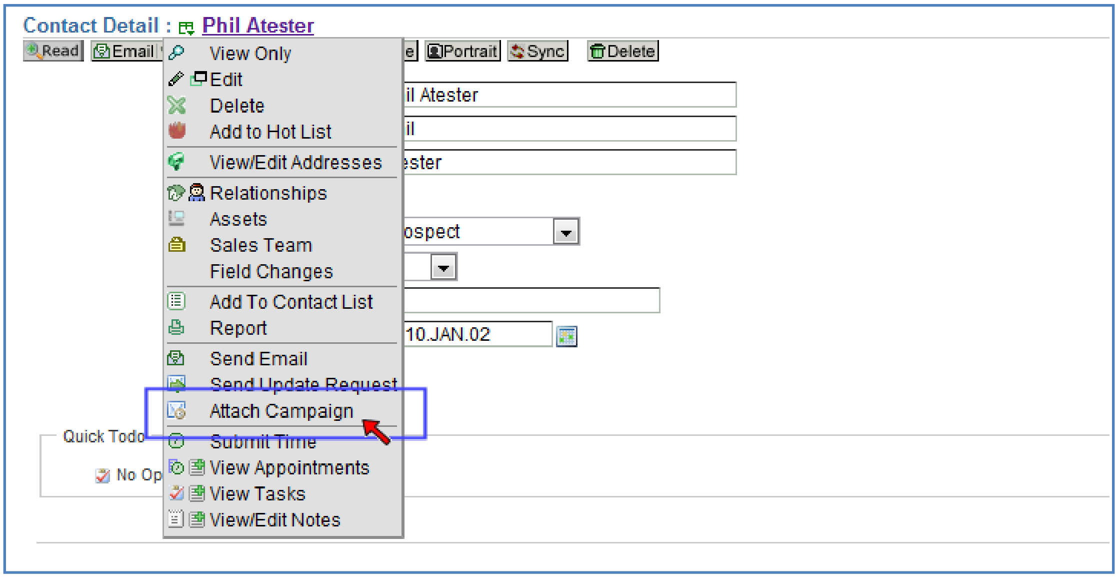


And we have just created a 3 step Drip Campaign!

5. Adding Leads / Contacts to the Campaign

There are two ways to add a Contact / Lead to a Drip Campaign:

1) **Manually Add**.

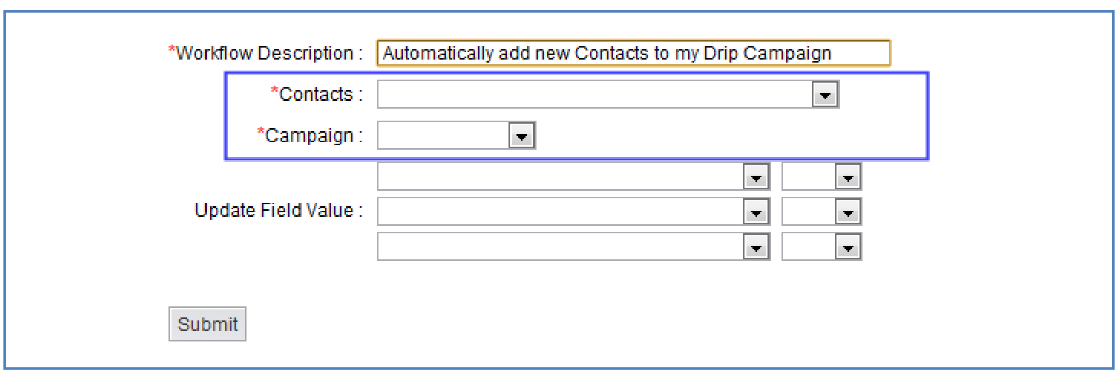


2) **Configure a workflow that automatically adds new Contacts / Leads**.

If you capture many new leads / contacts a day, manually adding them to the drip campaign can be very tedious. (Even though we do have the search + multiple manual add feature).

A much more effective way, would be to add them automatically via a workflow engine:

- Navigate to (*Marketing Module*) Account -> Setup -> Background Workflow Engine
- Choose either Scheduled **Campaigns – Contacts**, or **Scheduled Campaigns – Lead**.
- Click on [Create New].



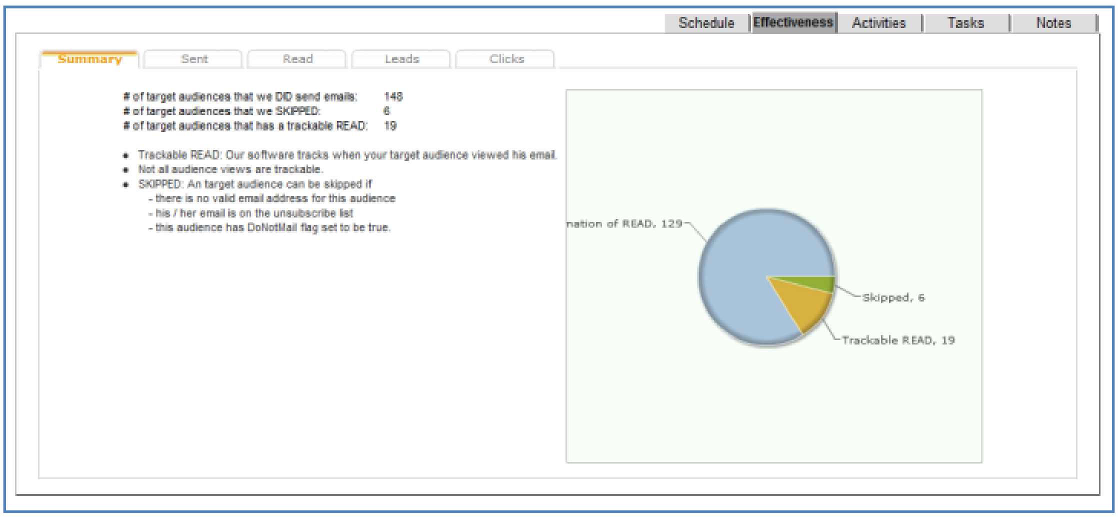
In this step,

- you can give the workflow description any value.
- Be sure to choose the campaign we just created in the campaign dropdown.

- For the Contacts dropdown, we need to tell the system what contacts do we want to add to this campaign. Actually here we skipped a step: we need to define a ‘Saved Search’, for all contacts whose campaign (form builder) source equals to a certain value. (refer to [this video](#)). For defining a Saved Search, please see [this video](#).
- Once you choose the *Saved Search* in the Contacts dropdown, and the *Campaign* in the Campaign dropdown, and submit, our engine will start to automatically add new contacts (or leads) that satisfy the Saved Search criteria, to the drip campaign. 365 days a year. (366 in a Leap Year).

6. Checking Results.

We are actually all done. To check results, navigate to the campaign we just created, click on the [Effectiveness] subtab. Both the Summary, Sent, Read, should all give you valuable information about the delivery of your campaign emails. Who were sent emails, who viewed them, etc.



Contact us at support@ebsuite.com if you have any questions regarding the topic discussed in this guide.