



## 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.

The screenshot shows the EBSuite Marketing Automation interface. At the top, there is a navigation bar with tabs for Main, Lead, Organization, Contact, Template (highlighted), Audience, Campaign, Tool, Calendar, Task, and Admin. Below the navigation bar, there is a search bar and a table of templates. The table has columns for #, Name, Type, Description, Subject, Doc Type, Status, and Product. The first row in the table is for a template named '1756: Feature Blast'.

#	Name	Type	Description	Subject	Doc Type	Status	Product
1756	Feature Blast		Track Service Level Mgmt activity in your EBSuite		HTML	Draft	


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.

**Campaign > Create New**

 **Blast Campaign**

A **Blast Campaign** is a campaign that you can configure one or multiple *Schedules* to contact your audiences. The schedules, once defined, use **Absolute** dates, and do not repeat themselves after completion.

Examples:  
- Simple: Send an email to my audiences today.  
- Newsletter: Send March newsletter on 03/01, send April newsletter on 04/01, May newsletter on 05/01, ...


 **Drip Campaign**

A **Drip Campaign** is a campaign *Process* that you can define, to email your audiences with a desired pace. The schedule of a Drip campaign uses **Relative** dates, starting from the day when an Audience was attached to the campaign.

In the life-cycle of a Drip campaign, different audiences can be attached to the campaign on different dates, and the different steps gets processed over and over again as new audiences are attached.

And make sure you select the Drip Campaign.

Then follow the Wizard...

 Drip Campaign

**New Campaign Wizard**    1 Definition    2 Select Template    3 Schedules

\*Campaign:

Priority:

Status:     \*Owner:

Description:

Goal:

Goal Detail:

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

The screenshot shows the 'Select Template' step of the 'New Campaign Wizard'. The progress bar indicates three steps: 1 Definition, 2 Select Template (highlighted), and 3 Schedules. Under the 'Selected Templates' section, three templates are listed: 'DripB - 1', 'DripB - 2', and 'DripB - 3', each with a checked checkbox. A 'Submit' button is located below the list, with a red arrow pointing to it. Below this is the 'Browse & Search for Templates' section, which includes a dropdown menu set to 'Browse through all templates', a 'New Template' link, a 'Refresh' link, and filters for 'Common' (1, 2, 5), 'Contact' (1, 8), 'Opportunity' (1, 2), 'Lead' (1), and 'Organization' (1, 2). Several template thumbnails are visible at the bottom.

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:

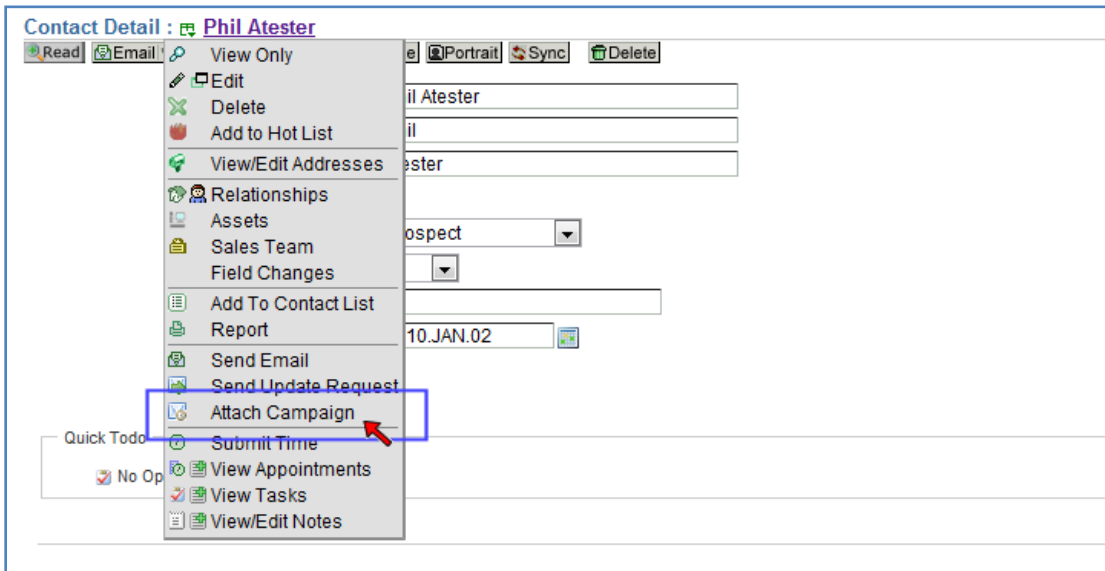
The screenshot shows the 'Schedules' step of the 'New Campaign Wizard'. The progress bar indicates three steps: 1 Definition, 2 Select Template, and 3 Schedules (highlighted). The campaign name is 'Getting Started with Drip Campaign'. A description states: 'A campaign can consist one or more Step(s) / Schedule(s). In each Step / Schedule we send out one email, using a template you picked in the previous screen.' The '# Steps:' dropdown is set to '3'. Below this, there are two explanatory lines: 'In a Blast Campaign we use absolute dates ( on MM/DD/YYYY, send ...(target) using ...(template) ).' and 'In a Drip Campaign we use relative dates ( on Day N, send ...(target) using ...(template) ).'. The 'Dates:' section is highlighted with a blue box and contains three rows: 'On Day 1 Use Email Template : DripB - 1', 'On Day 3 Use Email Template : DripB - 2', and 'On Day 7 Use Email Template : DripB - 3'. A 'Submit' button is located at the bottom.

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.



Contact Detail : **Phil Atester**

Read | Email | View Only | Portrait | Sync | Delete

- Edit
- Delete
- Add to Hot List
- View/Edit Addresses
- Relationships
- Assets
- Sales Team
- Field Changes
- Add To Contact List
- Report
- Send Email
- Send Update Request
- Attach Campaign**
- Submit Time
- View Appointments
- View Tasks
- View/Edit Notes

Quick Todo: No Op

Phil Atester

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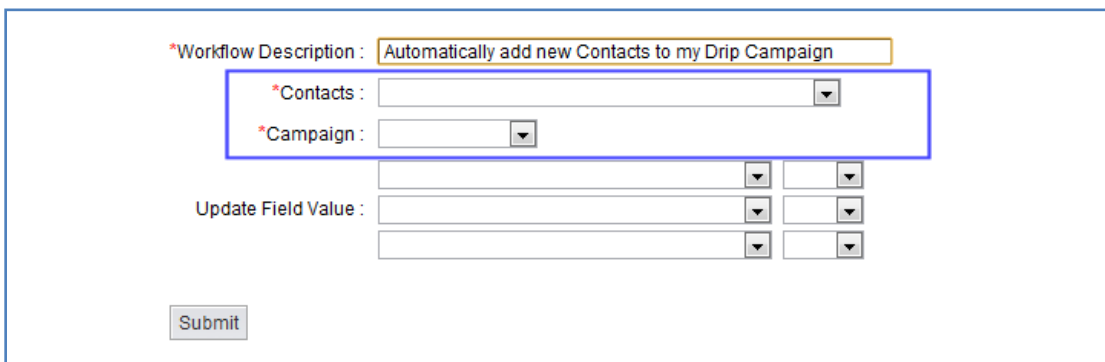
10.JAN.02

## 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].



\*Workflow Description : Automatically add new Contacts to my Drip Campaign

\*Contacts : [Dropdown]

\*Campaign : [Dropdown]

Update Field Value : [Dropdown] [Dropdown]

[Dropdown] [Dropdown]

[Dropdown] [Dropdown]

Submit

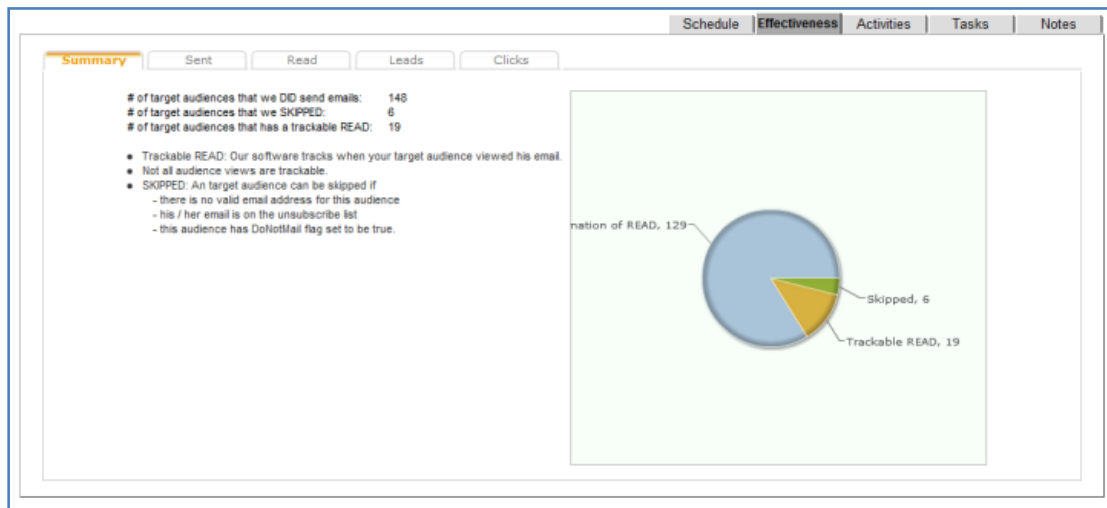
In this step,

- 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](mailto:support@ebsuite.com) if you have any questions regarding the topic discussed in this guide.