



## Quick Start Guide To:

### **Adding a Transfer Stage to Your Drip Marketing Campaign Sequence**

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

**Please note: the Transfer Stage is only available with the Platinum Drip Marketing service level.**

1. In the Campaign Sequence Edit screen, click on the icon for Transfer.
2. Fill in the fields:
  - a. Name: give the Transfer Stage a name.
  - b. Comments: any comments you want to add would go here.
  - c. Transfer contacts on: choose the date and the time you wish to transfer the contacts to a different Drip Marketing Campaign Sequence.
  - d. Transfer to campaign sequence: choose the Drip Marketing Campaign Sequence you would like to transfer your contacts to. Select the check box if you would like to, at the same time, remove your contacts from the Campaign Sequence you are currently working on.
  - e. Contacts: select which contacts you would like to transfer to a different Campaign Sequence, and (if desired) filter based on previous Campaign Stages, or filter based on criteria from your database.
  - f. Options: check the box here if you wish to receive a reminder to sync your database prior to transferring the contacts.
  - g. Email notification: if you wish to receive a notification about the Transfer Stage before or after the contacts are transferred, select the appropriate options and check the box here.
3. Now you are ready to add the Transfer Stage to your Campaign Sequence: Click the Add Stage button, and the Transfer Stage will be added to your Drip Marketing Campaign Sequence. You're all done with that Stage!