



## Quick Start Guide To:

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

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

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

1. In the Campaign Sequence Edit screen, click on the icon for Letters.
2. Fill in the fields:
  - a. Name: give the Letter 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 vendor to whom your contact list for the letters should be sent.
  - d. Mail Merge Letter: enter the name of the letter you would like to send (you will have given the letter template to your letter vendor in advance).
  - e. Personal message: enter the message you would like to appear on the letters.
  - f. Special instructions to printer: any instructions you would like to send to your letter vendor would go here.
  - g. Send on: choose the date and the time you wish to send the contact list to your letter vendor.
  - h. Contacts: select which contacts you would like to generate the Letter contact list from, and (if desired) filter based on previous Campaign Stages, or filter based on criteria from your database.
  - i. Options: check the box here if you wish to receive a reminder to sync your database prior to the Letter contact list being generated.
  - j. Email notification: if you wish to receive a notification about the Letter Stage before or after the Letter contact list is generated, select the appropriate options and check the box here.
3. Now you are ready to add the Letter Stage to your Campaign Sequence: Click the Add Stage button, and the Letter Stage will be added to your Drip Marketing Campaign Sequence. You're all done with that Stage!