How to Create a Multistep Campaign

How to create a multistep campaign

Once you have all your templates created, then you can put them in a drip campaign.

Start by going to the Campaign tab. Click on Manage Workflows.

This opens a new window. Click Go to start a new campaign.

Your next screen gives you the choice of making it a Start date campaign or a due date campaign. Start date means emails start the date you want them to an run till they are all out. Due date means they will all end by a given date. Normally Due date is used for events.

Click Next

This screen is where you start adding tasks to the campaign; Tasks can be emails, calls, meetings or todos.
How to Create a Multistep Campaign
SalesNexus Online CRM and Email Marketing

Step 2: Add Activities
A workflow can have a start date or a due date.

If the workflow has a start date, then campaign activities will be scheduled after the start date. If the workflow has a due date, then campaign activities will be scheduled before the due date.

This workflow has a *Start date* ☑ *Due date*
Click Add to add an activity to the campaign.
Click link to edit an activity in the campaign.
Click Next when you have specified all of the activities in the campaign.

<table>
<thead>
<tr>
<th>Type</th>
<th>After Start Date</th>
<th>Schedule For</th>
<th>Duration</th>
<th>Regarding</th>
<th>Priority</th>
<th>Letters</th>
<th>Subjects</th>
<th>Library</th>
</tr>
</thead>
</table>

The default is a Todo. To change it to another option, click the Activity Type box with Todo in the dropdown.

Change it to an Email and the fields change

For emails:
1. Check the box Auto Send – this will allow your emails to go out without you logging into the database.
2. Select Template – This is the email template you want to use.
3. Subject line – This is the Regarding line of your emails.
4. Schedule Activity – How many days after the start date will this go out.
5. Enable Tracking – This creates the Campaign report.
6. Open and click notification – put tasks in the users task list when checked and someone clicks on a link.
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To set up a call

1. You can set the regarding line on this task.
2. Schedule Activity is how many days from the start date.
3. Ring Alarm - Sets the alarm within your database before the task is to happen.

Click OK after you set up each task

To create the next task click Add again

Your Campaign should now look like this
When you have all the tasks created, emails and calls, you are done so click Next.

Now name your workflow and check the box that says Create Campaign with this Work flow

Click Finish and your campaign is ready.