Creating Multistep Email Campaigns
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 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 to-dos.

The default is a To-do. To change it to another option, click the Activity Type box with To-do 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 user’s task list when checked and someone clicks on a link.
To set up a call

With the activity type as 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.