

SuiteCRM Email Drip Campaign

(Premium)

User Guide

Email Drip Campaign

Outright

User Guide:-

1. Go to admin panel and create new Drip Outbound Settings.

	ND EMAIL SETTING 🗸		CREATE - Q	<u>ُ</u>		ND EMAIL SETTING 🖵		CREA	~
Note: To send record assign CREATE	ment notifications, an SMTP server must be configu	red in <u>Email Settings</u>		•	Note: To send record assign	ment notifications, an SMTP server n	nust be configured in <u>Email Settines</u> SETTING		
BASIC Email Address:* From Name:*		Password:* Status:	Active		From Name 🔶	Email Address $\widehat{>}$	SMTP Success Message \Leftrightarrow Email Successfully configured!!! Email Successfully configured!!!	SMTP Server Address $\widehat{\Theta}$ untpgmail.com untpgmail.com	SMTP Server Port(25/465/587 (1 - 2 of 2) 567 (1 - 2 of 2) (1 - 2 of 2)
Assigned to:	admin			l	Security Groups: Mass	s Assign ASSIGN	REMOVE Group:	None	BACK TO TOP
SMTP CONFIGURATION									
SMTP Server Address: SMTP Server Protocol(SSL/TLS):	smtp.gmail.com tis	SMTP Server Port(25/465/587):	587						
SAVE	VIEW CHANGE LOG								

2. Second option is to click on drip manager and create new settings.

≡ DRIP MANAGER 🗸		≡ drip manager 🗸	
Note: To and record assignment notifications, an SMTP server must be configured in Enail Sections. DRIP MANAGER You currently have no records saves		Toda: To and record assignment notifications, at SATTP server must be configured in [mall Settings. CREATE SAVE CANCEL EASIC	-
© Rupercharged by SuiteCRM © Powered By SugarCRM © Server response time: 0.03 seconds.	BACK TO TOP A	Name:* Test Enall Drip Campaigns Module List:* Cutom Module Select Module Field: status Field Value:* New Automated Drip: X Choose Email Sender: admin Description: X	

3. After saving Drip manger you need to create controller.

	•			Î ≡	DRIP MANAGER	-		CREATE - Q A
TEST EMAIL	DRIP CAMPAIGNS					DRIP CAMPAIGNS 😭		
BASIC	•			Ľ	UNDIC NETIONS			
Name:	Test Email Drip Campaigns				Name:	Test Email Drip Campaigns		
Module List:	Custom Module				Module List:	Custom Module		
Select Module Field:	status				Select Module Field:	status		
Field Value:	New				Field Value:	New		
Automated Drip:		Remove Old Drip:			Automated Drip:		Remove Old Drip:	
Description:					Description:			
LBL_DETAILVIEW_PANEL1			-	Ľ	LBL_DETAILVIEW_PANEL1			-
					Choose Email	admin		
SAVE CANCEL	FULL FORM		_		Date Created:	01/17/2022 07:51	Created By:	admin
					Date Modified:	01/17/2022 07:51	Modified By	admin
BASIC			-				Name:	
Name:*	Set Drip Controller			١.				
After Days:	0			H	DRIP CONTROLLER	Tamelata 🚔 Arthity Tur	na ⇔ Aftar Dan	— ue ⊕ Schedule Time ⊕
Schedule Time:	00 am				Create 👻	- Antipater - Activity () p		K < (1-1of 1) > >
Template.:*	Email Template for Lead				+ Create Drip Controller	Email Template for Lead Email	0	Go to 99.999 to activate Win
	R ×			1.				

4. Create a record in Custom Module and enter the same status as we mentioned in drip settings.

	CREATE - Q @ @	🚊 сизтом мори			
Note: To send record assignment notifications, an SMTP server must be configured in <u>Email Settings</u> .		Note: To send record assignment	ent notifications, an SMTP server must be configured	in <u>Email Settings</u>	
CUSTOM MODULE		TEST EMAIL	DRIP 🕁		
		Contact Informatio	n ACTIONS 🔻		
You currently have no records saved. CREATE or Import one now.		Name:	Test Email Drip 📲	Office Phone:	
Security Groups: Mass Assign ASSIGN REMOVE Group:None 💌		Title:		Mobile Phone:	
© Super-bared by Suite/DM © Bruered By Super/DM @ Samer recorded time: 0.03 canonde		Department:		Home Phone:	
a sopercharged by some chining a none to by sogar chining the response chines who security.	DACK TO TOP -			Other Phone:	
		Date Created:	01/17/2022 08:05 by admin	Fax:	
		Date Modified:	01/17/2022 08:05 by admin	Do Not Call:	
		Assigned to:	admin		
		Email Address(es):	sharma.mohit@outrightcrm.com (Primary)		
		Primary Address:		Alternate Address:	
		Description:		status:	New
		CONSENT			-

5. After saving the record a drip will automatically assign to the record. Right now status is "in Queue".

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TEST EMA	IL DRIP CAMPAIGN	S 🕁										
BASIC ACTI	DNS 👻		< (1 of 1) >	Note: T	To send record assign	nment notifications, an SN	ITP server must be confi;	gured in <u>Email Settings</u> .				
Name:	Test Email Drip Campaigns			DRI	P DASH	BOARD						
Module List:	Custom Module				Name \varTheta	Template Name \ominus	Drip Manager \ominus	Scheduled Time ⊖	Sent On Time 🖯	Drip Controller \ominus	Status 🔶	Impressions \ominus
Select Module Field:	status			0	BULK ACTION						_	
Field Value:	New				0_Test Email Drip_Email Template for	Email Template for Lead	Test Email Drip Campaigns	01/17/2022 00:00		Set Drip Controller	in_queue	0
Automated Drip		Remove Old Drip:		0.	BULK ACTION							
Description:				-								
				© Superchar	rged by SuiteCRM	C Powered By SugarCRM	M @ Server respon	se time: 0.10 seconds.			BAC	ск то тор 🔺
LBL_DETAILVIEW_PA	NEL1		-									
Choose Email Sender:	admin											
Date Created:	01/17/2022 07:51	Created By: admin										
Date Modified:	01/17/2022 07:51	Modified By admin Name:										
DRIP CONTROLLE	R		-									
Name 🕀	Template. 🕀 Activity Type	⊖ After Days ⊖ Schedu	le Time 🕀									
Create 🔻			(1-1of1) > >							Activate V Go to Setting	Vindows is to activate W	
+ Set Drip Controller	Email Template for Lead Email	0 00 am	Edit 🗸									

6. Drip status changed to sent and we also got the email. If user click on the unsubscribe, he/she will not get email.



7. Once a user unsubscribed, the status will also change in the Drip Dashboard.

≡ DRIP DASHBOARD -		= 附 Gr	mail	Q Search all conversa	₩ ••	0 🕸 🎟	•
Note: To used record assignment wolfloations, an SMTP server must be configured in <u>Email Settions</u> .		 + • 	I 0 ■ (no subject)	□ 0 ≪ ₽	DI	1 of 9,927	
DRIP DASHBOARD Name & Template Name & Drip Manager & Scheduled Time & Sent On Time &	Drip Controller 🗢 Status 😁 In		Mohit Sharma «st to me • Hello	arma.mohit@outrightcrm.com>	3:00 PM (10 minutes ago) 🔥	€ I Ø
Compared and the second s	Set Drip Controller User Unsubscribed 2		Test Email Thanks for	Drip signing up and showing interest in o	our extensio.		• •
			We observ We want to experience	ed you added this plugin in CART, b o make sure that all your questions a when using this plugin from Outrigh	wit have yet to close the ire answered and you w it Store.	deal. ill get a flawless	
C Supercharged by SuiteCRM C Powered by SugarCRM O Server response time: 0.11 seconds.	BACK TO TOP A		We also ha	ave a offer only for you. You will get a Hurry up with this	a FLAT 20% off for this offer!	extension.	
			If you have We love to	queries regarding the "SuiteCRM T hear from you!	heme Style Builder" the	n please discuss with u	15.
	-	8	Take Care,	stay safe, have a nice day!!	o nup you .).		
		E S C	Thank You	Unsub	soribe here Ac Go	tivate Windows to Settings to activate	e Windows.
Email Drip Campaign						Outrig	ght

8. If subscribed for the email again then status will changed to "Resubscribed" in the Dashboard.

E DRIP DASHBO	ARD 🗸				CREATE -	Q (A) (A)
Note: To send record assign	nment notifications, an St 1 B O A R D	ITP server must be conf	igured in <u>Email Settings</u>			
Name 🔶	Template Name 🔶	Drip Manager	Scheduled Time	Sent On Time	Drip Controller	Status 🗢 Impres
0_Test Email Drip_Email Template for Lead	Email Template for Lead	Test Email Drip Campaigns	01/17/2022 00:00	01/17/2022 09:30	Set Drip Controller	Resubscribed 2
© Supercharged by SuiteCRM	© Powered By SugarCR!	M Q Server respo	nse time: 0.11 seconds.			ВАСК ТО ТОР 🔺

9. You can see all drip settings in drip manager. In drip activity logs, you can see recipient activity. Also, admin will get email

	CREATE 👻	\$	📄 📃 DRIP ACTIVITY LOGS 🗸			CRI	eate • 0, @@
			DRIP ACTIVITY LOG	S			
DRIP MANAGER			Name 🔶	Recipient IP 🔶 🛛	Date Created 🗢	Drip Name 🕀	Drip Activity Date $~~\ominus$
Name $ \ominus $ Module List $ \ominus $ Select Module Field	⊖ Field Value ⇔ Choose Email	Sender \varTheta	O- BULK ACTION + Y				< (1 - 2 of 2)
		-1o(1)	Email Viewd for Email : sharma.mohit@outrightcrm.com	66.249.84.28 01	1/17/2022 09:40	9b8b36f4-215a-9d8f-4bc3- 61e528dacd78	01/17/2022 09:40
Test Email Drip Campaigns Custom Module status_c	New admin		Email Viewd for Email : sharma.mohit@outrightcrm.com	66.249.84.24 01	1/17/2022 09:40	9b8b56f4-215a-9d8f-4bc3- 61e528dacd78	01/17/2022 09:40
	K < (1-	1 of 1)					< <1 - 2 of 2)
ę.	SuiteCRM <sharma.mohit@ to do_not_reply Hi, Drip Controller sent an email</sharma.mohit@ 	outrightcrm.com> for the followings	records		_		
	SNo Name	Modules D)rip Name	Sent Date/Time			
	1 Email Drip	Custom Module	_Email Drip_User Case Update	2022-01-14 11:40:10			
	2 Email Drip For Regular User	Custom 0 Module C)_Email Drip for Regular User_User Case Update	2022-01-14 11:43:10			