

Phase 1 of Major Sales Update: Email Sequences & Extra Field Sections

This is the first in a series of updates that will be added to the Sales Extension. Our primary focus is to enhance and add value to this extension, making it an invaluable tool for Salespeople, Marketers, Management and Executives alike. Within these updates, we will be adding new features and integrations and improving existing ones, all with the purpose of providing businesses with key features they need to be connected, collaborative, and more efficient. This first update includes a highly requested *new* feature, Email Sequences.

Key



New Feature



Change to Existing Feature



Setup Instructions

★ Email Sequences

An Email Sequence is a series of timed templated emails that are sent to targeted Contacts. They can be used for selling, lead nurturing, onboarding, and more. Ultimately, the goal is to improve engagement with your leads and customers to build better relationships, increase customer satisfaction and sales. Email Sequences is available with either the Sales or Complete User Roles.

Step	Subject	Send Delay	Pause Conditions
1	It's been a while	0	Contact response to email
2	Try us again for less with this special promo code!	5	Contact clicks on a link
3	Book demo now and see all of the new and exciting additions	7	Contact has scheduled an appointment
4	Fill out our survey and win great prizes!	3	Contact clicks on a link
5	We'll miss you and will be here when you need us.	14	

How Email Sequences Work

Setting up an effective sequence requires proper planning, with every email working in unison towards a singular call-to-action which you want the Contact to complete. Email sequences are made up of several email 'steps', which can be scheduled with time delays and can be stopped when a key action is taken by the recipient.

Subsequent emails are sent after a specified number of days identified as 'Send Delay'.

Send Delay

Day(s)

Pause Conditions

Contact response to email

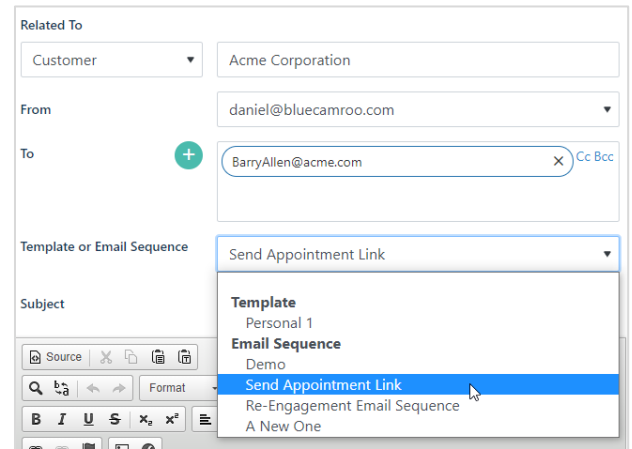
Contact clicks on a link

Contact has scheduled an appointment

To opt-in a Contact, once an email sequence has been created, simply send an email from BlueCamroo and select the desired Sequence from the drop-down selection (pictured right). The email will be sent at a random time within selected parameters.

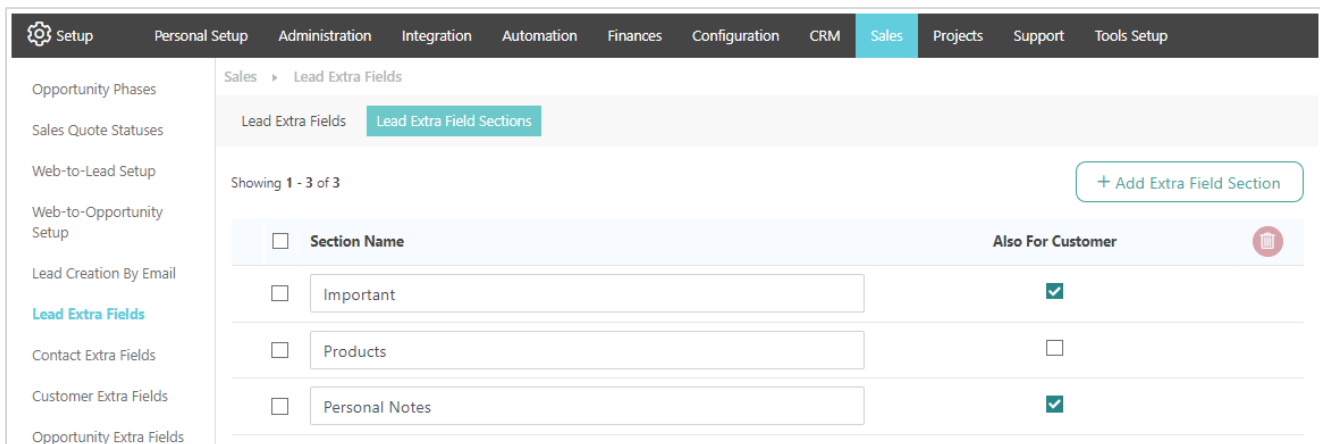
An email sequence will continue sending until the final email 'step' is sent, or a specified pause condition has been met, such as the Contact responding to an email, clicking on a link created via clickthrough links, or scheduling an appointment.

You can also view important metrics to analyze how well an Email Sequence is performing, letting you determine whether you need to make any adjustments to make it more effective.



★ Extra Field Sections

Extra Fields are an integral part of BlueCamroo, they are a key customization feature allowing businesses to tailor BlueCamroo to their unique needs and making it easy to track important information about Leads, Customers, Suppliers, Contacts, Opportunities, Sales Orders, Projects, and Cases which aren't in BlueCamroo by default. Until now, all Extra Fields were added into the Details section of a record, but with the new Extra Field Sections, System Administrators can create unlimited sections to organize the location of the Extra Fields within the form.



Extra Field Sections can be added for each record category from the Extra Field Section tab (pictured above). They are available to all User Roles, except CRM Free.

We hope you will enjoy BlueCamroo 8.3.1, if you have any questions about this release, or if you have any suggestions or comments, please send an email to support@bluecamroo.com. We'll be glad to help!

The BlueCamroo Team