



Quick Start Guide To:

Importing Leads from the Lead Builder

This Quick Start Guide will walk you through the steps of Importing Leads using the Swiftpage Lead Builder.

- 1. Select the Leads button from the Swiftpage Connect portal.



- 2. At the top of the page, Click List. You will receive a message when your Leads (Data Bridge) import is available. Select Yes to start the import lead process.

The screenshot shows the Swiftpage List Manager interface. A modal dialog box is open in the center with the title "Data Bridge import available." and the text "You have a file available for import from the Data Bridge. Would you like to go to the import screen now?". The dialog has "Yes" and "No" buttons. Below the dialog, the interface shows a "Manage Contacts" section with a "Current Filter" box containing "Group Name: 'All'", "Rule: All Contacts", and "Contacts: 1". There are also filter options for "Filter by Group" (set to "All") and "Use All Contacts with a Field Value" (with "Email Address" and "Contains" selected). A table of contacts is visible at the bottom, with columns for First Name, Last Name, Email Address, Title, Company, and Date Added. The first row shows "1 AsSP33111 AsSP33111 aschaef@swiftpage.com AsSP33111 11/09/2011".

- Under the Import List Tab, you'll want to select the option to import From a Contacts file on the Data Bridge. You will see your named Lead list under the dropdown menu. Click Submit.

The screenshot shows the 'Swiftpage List Manager' interface. At the top, there are navigation buttons: Home, Contacts, Groups, List, Send Email Blast, Update Drip Marketing, and Lead Builder. Below this is a sub-menu with 'Import List' selected, along with 'Import Survey', 'Export List', 'Field Maps', and 'List Options'. The main content area has two radio buttons: 'Use My List' (selected) and 'Use Sample List'. The title 'Import List' is centered. There are two main options: 'From a CSV file' with a text input field and a 'Browse...' button (note: 'File may not be larger than 1.5MB'), and 'From a Contacts file on the Data Bridge' (selected) with a dropdown menu showing 'Food in Englewood, CO, Uploaded Nov 9, 2011 at 12:59:12P' and a 'Remove file from Data Bridge' button. At the bottom are 'Submit' and 'Cancel' buttons.

- The system will then check the list for duplicates. You can choose to ignore the message, replace the previous contact with the new information, or to skip importing that contact. (**Note:** The system detects duplicates based on name and you may therefore wish to compare other information, such as the company field, before making your selection.)
- You will then have the option to group your contacts as a new group in the List Manager, add them to a pre-existing group, replace a previous group with the new contacts, or to add them to the List Manager without grouping them. After you have made your selection, click on Submit. The Leads List has now been uploaded to your List Manager.

Import Options

Your List has been imported successfully.

Step 1: Groups can be used to Send Email or Update Drip Marketing. Choose a Group option below:

Create a Group with this name:

Add to an existing Group:

Replace an existing Group:

Do not Group my Import

Step 2: An optional Tag can be added for each of your imported contacts. The tag will be added to the selected field.

Enter a Tag (optional): Add to Field:

Current Filter: ?

Group Name: "Food in Englewood, CO"
 Rule: The contacts that are in the group (???)
 Contacts: 9
[Advanced Filter Actions >>](#)

Select a Filter

Filter by Group: Food in Englewood, CO ▾

Use All Contacts with a Field Value:

Email Address ▾ Contains ▾

 Goto Page:

<input type="checkbox"/>	First Name	Last Name	Email Address	Title	Company	Date Added
<input type="checkbox"/>	Edit 2	Eddy	Reyes	Prin	BEST ELECTRONIC SORTING TECHNOLOGY USA INC	11/09/2011
<input type="checkbox"/>	Edit 3	Blair	Brady	Owner	BDB Enterprises	11/09/2011
<input type="checkbox"/>	Edit 4	Paul	Berghmans	Prin	BEST ELECTRONIC SORTING TECHNOLOGY USA INC	11/09/2011
<input type="checkbox"/>	Edit 5	Bert	Van Der Auwera	Verantw Marketing And Sales Spectron	BEST ELECTRONIC SORTING TECHNOLOGY USA INC	11/09/2011
<input type="checkbox"/>	Edit 6	Taula	Montoya	Acct Mgr	BEST ELECTRONIC SORTING TECHNOLOGY USA INC	11/09/2011
<input type="checkbox"/>	Edit 7	Marc	Ryman	Prin	BEST ELECTRONIC SORTING TECHNOLOGY USA INC	11/09/2011
<input type="checkbox"/>	Edit 8	Mark	Hill	Mgr	BEST ELECTRONIC SORTING TECHNOLOGY USA INC	11/09/2011
<input type="checkbox"/>	Edit 9	Rick	Spiegel	Pres	Rocky Mountain Gourmet Tea, Inc	11/09/2011
<input type="checkbox"/>	Edit 10	Johan	Peeters	V Pres	BEST ELECTRONIC SORTING TECHNOLOGY USA INC	11/09/2011

Show: Main Fields All Fields (Page 1 of 1) Rows per page: