

**Sage SalesLogix E-marketing for SalesLogix Lan 7.5.2+**  
**TECHNICAL SPECIFICATIONS**  
**Plug-in version 7.5.2.15**

**\*note\* this plug-in requires SalesLogix lan client version 7.5.2 or higher**

**General Stats:**

Been tested to fully work with SalesLogix 7.5.2

SalesLogix tables modified: **None**

SalesLogix tables written to: 1 (History)

Tables added: 4 (SpeHistory, SpeLeadHistory, SpeSurveyResponses, SpeSurveys, SpeSend)

Forms added: 17 (under the *System, Contact and/or Lead* family)

Scripts added: 1

Menu items: 1

Toolbar items: 1

**Tables created by E-Marketing plug-in**

1. SpeHistory/SpeLeadHistory (Fields: 20, Size in bytes: 1397 bytes)
  - a. Association: Contact (by ContactID) or Lead (by LeadID)
  - b. Type: One-to-many
  - c. Rules:
    - i. Only written if the User selects the *Update History* action after sending emails or stage results from a Drip Marketing campaign
    - ii. Email Score information is also stored in this table
  - d. Fields:

Field Name	Type	Length	Description
ContactID or LeadID	String	12	Entity whom this record belongs
CreateDate	Date/Time	8	Date record was created
CreateUser	String	12	SalesLogix user logged in at creation time
ModifyDate	Date/Time	8	Last written date/time for this record
ModifyUser	String	12	SalesLogix user logged in when created
SpeAction	String	32	Filter criteria type for Swiftpage Call list
SpeAssignedUserID	String	12	ID of Call list item assignment
SpeAssignedUserName	String	255	Call list item assignment
SpeBatchID	String	14	Email batch sent that entity was included
SpeClicks	Short Int	2	Nbr. of times entity clicked a link in email
SpeHistoryID	String	12	Internal database ID for this record
SpeOpens	Short Int	2	Nbr. of times entity opened email
SpeQueryTag	String	64	Entered name (tag) given to email batch
SpeScore	Short Int	2	Tabulation of opens and clicks
SpeStatus	String	24	Swiftpage
SpeSubject	String	255	Subject line of the email batch sent
SpeTemplate	String	255	Template used in email batch sent
SpeEmailSender	String	128	Send As Swiftpage UserID
SpeDripCampaignName	String	128	Drip campaign, if created from stage results
SpeDripCampaignStage	String	32	Name of stage data is applicable to
SpeDripCampaignStageType	String	128	Type of Drip marketing campaign stage

2. SpeSurveys (fields: 59, size in bytes: 13069)
  - a. Association: None
  - b. Type: n/a
  - c. Rules:
    - i. A SpeSurvey row is added per unique survey imported
  - d. Fields:

Field Name	Type	Length	Description
CreateDate	Date/Time	8	Date record was created
CreateUser	String	12	SalesLogix user logged in at creation time
LastResponseDate	Date/Time	8	Last date/time this survey had a response
ModifyDate	Date/Time	8	Last written date/time for this record
ModifyUser	String	12	SalesLogix user logged in at last written date
NumQuestions	Short Int	2	Number of questions in this survey
NumResponses	Short Int	2	Number of responses recorded for this survey
Question1-Question50	String	255	Survey questions (up to 50 stored)
SpeSurveyID	String	12	Internal database ID for this record
SurveyName	String	255	Name given to survey at creation time

3. SpeSurveyResponses (fields: 58, size in bytes: 12834)
  - a. Association: Contact (by ContactID)
  - b. Type: One-to-many
  - c. Rules:
    - i. Created/Updated per Contact that participated in a Swiftpage survey, if the response date is *newer* than the SpeSurvey tables last modified date.
  - d. Fields:

Field Name	Type	Length	Description
Answer1 – Answer50	String	255	Answers for questions to related survey
ContactID	String	12	Contact whom responded to related survey
CreateDate	Date/Time	8	Date record was created
CreateUser	String	12	SalesLogix user logged in at creation time
ModifyDate	Date/Time	8	Last written date/time for this record
ModifyUser	String	12	SalesLogix user logged in at last written date
ResponseDate	Date/Time	8	When the response was recorded
SpeSurveyResponsesID	String	12	Internal database ID for this record
SpeSurveyID	String	12	Reference to the related survey

4. SpeSend (fields: 12, size in bytes: 749)
  - a. Association: None
  - b. Type: n/a
  - c. Rules:
    - i. Created per Email batch sent using the Swiftpage plug-in
  - d. Fields:

Field Name	Type	Length	Description
CampaignID	String	12	ID of SalesLogix campaign, if one
CampaignStage	String	64	Name of SLX stage targets were from
ContactTargets	String	1	Targets were all contacts (true/false)
CreateDate	Date/Time	8	Date record was created
CreateUser	String	12	SalesLogix user logged in at creation time
IsSendAs	String	1	Email blast was sent of behalf-of another user
ModifyDate	Date/Time	8	Last written date/time for this record
ModifyUser	String	12	SalesLogix user logged in at last written date
NumSubmitted	Long Int	4	Number of emails in batch
Scheduled	String	1	True, if this email batch was scheduled
SpeBatchID	String	32	ID for the email batch
SpeQueryTag	String	64	Tag assigned to this email blast by sender
SpeSendID	String	12	Internal database ID for this record
SpeSubject	String	255	Subject of emails in email blast
SpeTemplate	String	255	Template used in email blast

#### **Tables used by E-marketing plug-in**

1. History (size in bytes:1831 bytes)
  - a. Association: None
  - b. Type: n/a
  - c. All fields (except UserDefs, ActivityBasedOn, & Ticketed are used)
  - d. Rules:
    - i. Created per email target per email blast, only if the User selects the *Create SalesLogix History* option

#### **Global Joins**

1. Joined SpeHistory to Campaign table via SpeQueryTag=Campaign Name
2. Joined SpeHistory to CampaignTarget table via ContactID=EntityID
3. Joined SpeSurveyResponses to Contact table via ContactID

### **Forms Added by E-marketing plug-in**

1. SpEmarketingForm – Allows user to send email, manage email results, manage Drip Marketing campaigns, manage Surveys and create Call Lists
2. SpEmarketingLoadingForm – Just a progress bar window shown during initialization
3. SpEmarketingAccountForm – Show general account information and set options
4. SpEmarketingTagsForm – Manage email blast tags
5. SpEmarketingSendForm – Verify send data and show send progress
6. SpEmarketingScheduleForm – Allows user to set date/time for sending email blast
7. SpEmarketingSendAsForm – Set email blast sender and date/time of send
8. SpEmarketingSendAsSummaryForm – Displays which Users will send to which email addresses
9. SpEmarketingSendAsErrorForm – Displays any Send As user errors
10. SpEmarketingValidateAddrForm – Displays first 30 email addresses for email blast
11. SpEmarketingSurveyResultsForm – Show a survey response and gives options to create/update Contacts or Leads
12. SpEmarketingAssignUserForm – Used by Call List to choose a SalesLogix user
13. SpEmarketingDripSyncForm – Displays pre-Drip sync results and performs sync
14. SpEmarketingDripResultsForm – Facilitates creating history from Drip stages
15. SpEmarketingCreateGroupForm – Facilitates choosing a group type and name
16. E-marketing History – A view that shows all SpeHistory records per Contact
17. E-marketing History – A view that shows all SpeLeadHistory records per Lead

### **Scripts Added by Swiftpage**

1. SpEmarketingStartupScript– This script initializes tables and data, verifies accounts and user which are needed for E-marketing plug-in

### **Menu items**

- Write→SalesLogix E-marketing...

### **Standard Toolbars items**

- 'E-marketing' Icon – Invokes the main E-marketing form ('SpEmarketingForm')