

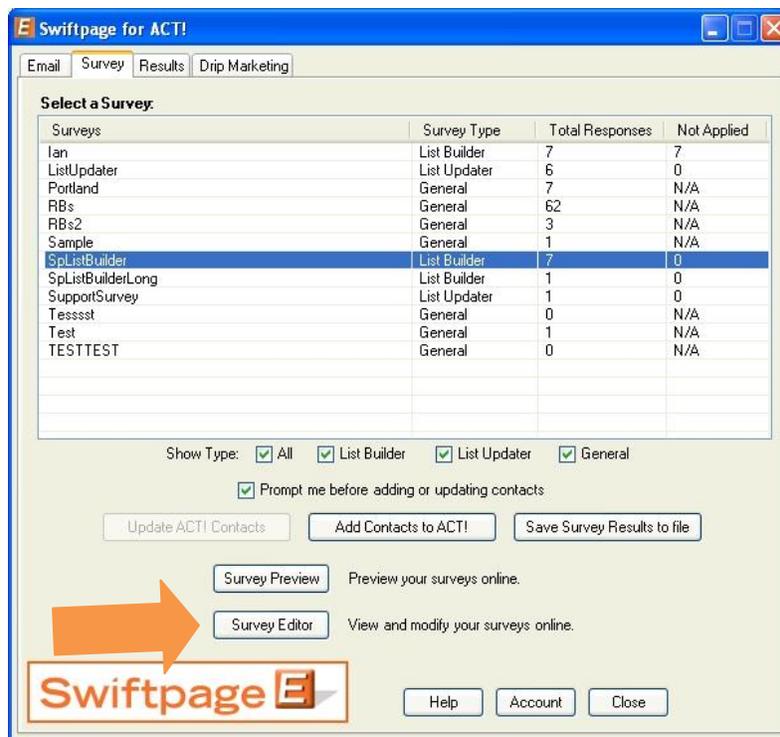


Quick Start Guide To:

Creating and Using the List Builder Survey

A List Builder survey is used to gather new contacts that will be added to your ACT! database. A List Updater survey is used to update information that already exists in your ACT! database. Follow these steps to create a List Builder survey:

1. From ACT!, click on the E, then click on the Surveys tab and then click on the Survey Editor button:



2. Create a survey in Swiftpage, asking for basic contact information and any other information you wish to gather from your contact (would you like to subscribe to our newsletter, what is your favorite color, what is your annual household income, etc.). If you wish, you can also use and edit one of the existing List Builder surveys that Swiftpage automatically provides (called SpListBuilder and SpListBuilderLong).
3. When you are finished with your survey, click on the Survey Result Options button (at the top of the screen). There, select the checkbox next to ACT! Database Update, then click on the List Builder radio button and click Submit.
4. The next screen to open will ask you to map fields from your List Builder survey questions with fields in your ACT! database. Match up questions with the fields as appropriate (you can also simply have the answers written to the Notes or History tab in

ACT! if you do not have an appropriate ACT! field for each question). When you are finished mapping the fields, click Submit.

Survey Result Options

Current Survey: SpListBuilder

In addition to ACT fields, questions can be mapped to the following special processing values:

- **** None **** The question will not be imported to ACT.
- **** History **** The question will be placed in an ACT history record.
- **** Note **** The question will be placed in an ACT note record.

<u>Database Fields</u>	<u>Survey Questions</u>
First Name	First Name
Last Name	Last Name
E-mail	Email Address
Company	Company Name
Phone	Phone Number

Finalize the Survey Result Options

5. Click on the Survey Management button, and then link to the List Builder survey from your web site using the hyperlink given on the Survey Management page.
6. Your List Builder survey is now connected to your web site, which is driving people to the survey to gather new contact information.
7. After you have launched the List Builder survey, click on the Swiftpage window in ACT! and select the Survey tab. In the list of surveys, you will see your List Builder survey, and the number of people who have filled out the survey (under Total) as well as the number of records yet to be applied to the ACT! database (under Not Applied). So, for instance, a day after you connect your web site to your List Builder survey, you might have three Total contacts who have filled out the survey and therefore three Not Applied.
8. Click on the Add Contacts to ACT! button and a window will open verifying that you want to add the new contacts into your ACT! database. Check the mapping of fields and then you have a choice of options:

Field Name	Value
First Name	Joey
Last Name	Tester
E-mail	jtester@swiftpage.com
Phone	877-228-8377
Company	Swiftpage
History: Time Stamp	Contact filled out survey: 3/15/2010 12:47

Retain Contact(s) as Not Applied

- Add New Contact: this will add the current new contact to your ACT! database (this option allows you to review each new contact as you add them to the ACT! database).
- Add this contact and all others: this will add all of the Not Applied contacts to your ACT! database (this allows you to add contacts without reviewing them individually).
- Ignore contact: this option prevents the contact from being added to your ACT! database.
- Ignore this contact and all others: this option prevents all of the Not Applied contacts from being added to your ACT! database.

In this step, you also have the option to check the “Retain contact(s) as Not Applied” box. If you do this, you can Add (or Ignore) the contact(s) and they will still appear as Not Applied. This is particularly useful if you are adding contacts to more than one ACT! database.

9. After you have selected one of the options named above, you are finished! The List Builder survey has successfully added contacts to your ACT! database. Simply repeat the process of adding new Not Applied contacts as more people fill out your List Builder survey and watch your ACT! database grow.