

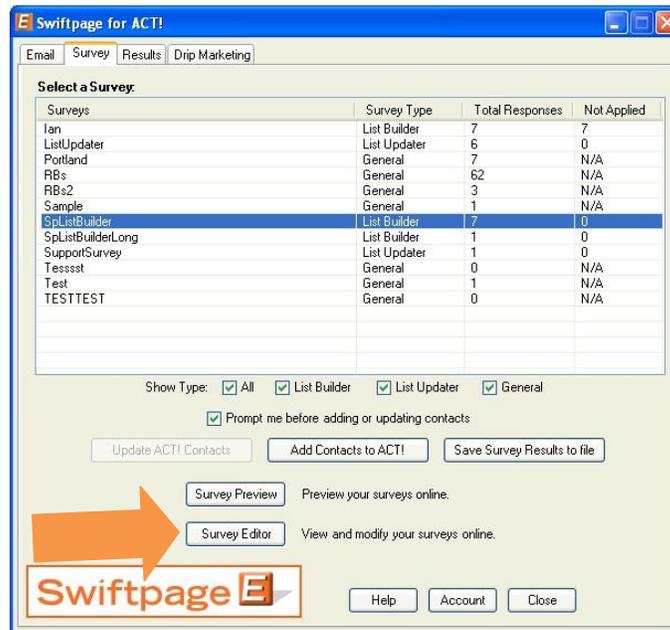


## Quick Start Guide To:

### Creating and Using the List Updater Survey

A List Updater survey is used to update contact information in your ACT! database. Follow these steps to create a List Updater 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. If the purpose of the survey is simply to have people sign up for a newsletter, for instance, you don't need to ask for information like Company, Phone Number, etc. However, if you are asking people to update their contact information in general, you should ask for those basic contact details. Essentially, ask for whatever new information you want added to or updated in your existing ACT! contact records.
3. **Important note: if you are linking to the List Updater survey from an email you send out through Swiftpage, there are no required fields. However, if you link to the List Updater survey from outside of Swiftpage (i.e. through your own web site), you must ask for the contact's Email Address—that is the field that will be used to match up survey respondents with ACT! contacts.**
4. When you are finished with your survey, click on the Survey Result Options button (this should be at the top of the online survey editor section). There, select the checkbox next to ACT! Database Update, then click the List Updater radio button and click Submit.
5. The next screen to open will ask you to map fields from your List Updater survey questions with fields in your ACT! database:

## Survey Result Options

Current Survey: ListUpdater

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.

Database Fields	Survey Questions
First Name	First Name
Last Name	Last Name
E-mail	Email Address
Company	Company Name
Phone	Phone Number
Spouse	What is your spouse's name?
**** History ****	How do you feel?

Finalize the Survey Result Options

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.

6. Your survey is finished! At this point, you can either send a Swiftpage email to your contacts, linking to the List Updater survey or you can link to the List Updater survey from your web site (see Important Note above).
7. Your List Updater survey is now active and people can begin filling it out.
8. After you have launched the List Updater survey, click on the Swiftpage window in ACT! and select the Survey tab. In the list of surveys, you will see your List Updater 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 Updater survey, you might have three Total contacts who have filled out the survey and therefore three Not Applied.
9. Click on the Update ACT! Contacts button and a window will open verifying that you want to update the contact information in your ACT! database. Check the mapping of fields and then you have a choice of options:

Swiftpage for ACT!

Select Fields to update for: Ian Doescher

Field Name	New Value	Existing ACT! Value
<input checked="" type="checkbox"/> First Name	Ian	Ian
<input checked="" type="checkbox"/> Last Name	Doescher	Doescher
<input checked="" type="checkbox"/> Email Address	idoescher@swiftpage.com	idoescher@swiftpage.com
<input checked="" type="checkbox"/> Company Name	Swiftpage	Swiftpage
<input checked="" type="checkbox"/> Phone Number	877-228-8377	877-228-8377
<input checked="" type="checkbox"/> What is your spouse...	Jennifer	
<input checked="" type="checkbox"/> History: How do you...	Great!	N/A
<input checked="" type="checkbox"/> History: Time Stamp	Contact filled out survey: 3/15/...	N/A

Retain Contact(s) as Not Applied

- Update all fields: this will update all existing ACT! database fields for that contact (shown in the right-hand column, under Existing ACT! Value) with the new information (shown in the middle column, under New Value).
- Update Selected Fields Only: you can use the checkboxes next to the fields you want to update to select some and not others. Then, select the Update Selected Fields Only button to change only those particular fields for that contact in ACT!.
- Ignore contact: this option prevents the contact information from being updated in your ACT! database.
- Ignore this contact and all others: this option prevents all of the Not Applied contacts from having their ACT! database information updated.

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

10. After you have selected one of the options named above, you are finished! The List Updater survey has successfully updated contact information in your ACT! database. Simply repeat the process of updating new Not Applied contacts as more people fill out your List Updater survey.