



Quick Start Guide to:

The Sync Contacts Button in Swiftpage for ACT!

The “Sync Contacts” button on the Swiftpage Drip Marketing screen gives you three options: Sync Data Only, Add or Remove Contacts, or Sync to Group:

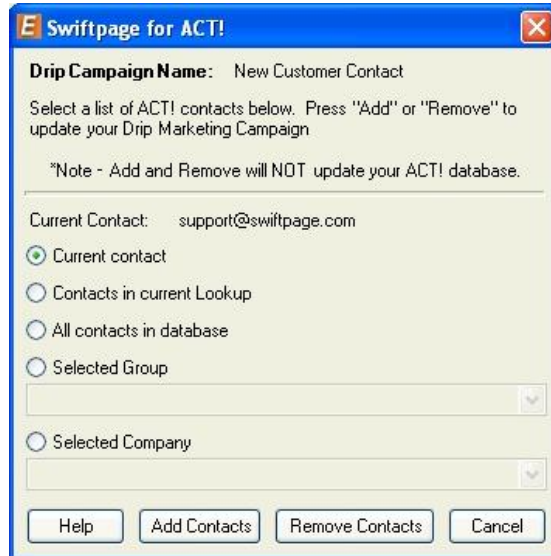


This quick-start guide provides a description of each of those options and step-by-step instructions for utilizing them.

1. **Sync Data Only:** This option syncs both mail merge data and optional data fields. Mail merge data refers to any mail merge fields located in the email templates used in that particular Drip Campaign. Data fields refer to any field being used for a “Database Compare” (which can be set in each Stage). **Note:** this option will be unavailable (i.e. grayed out) if you do not yet have any contacts in your Drip Marketing Campaign. Follow these steps to use the Sync Data Only option:
 - a. In the list of Drip Marketing Campaigns on the Drip Marketing tab, highlight the Campaign you wish to change.
 - b. Click on the Sync Contacts button on the Drip Marketing tab.
 - c. Select the radio button for Sync Data Only and click Next.
 - d. A confirmation screen will appear that says: “Warning: Contacts previously added from this ACT! database to the Drip Marketing Campaign will have their data replaced with the current ACT! database values. Do you wish to continue?” Click Yes. **Don’t worry:** if you have a duration-type Drip Marketing Campaign, syncing your data will not start a contact over in the Campaign sequence.
 - e. The system will sync your ACT! contacts with your Drip marketing contacts and then a dialogue box will appear that says “Sync complete.” Click OK and you are finished.

2. **Add or Remove Contacts** – this option allows you to add contacts to or remove contacts from your Drip Marketing Campaign. Follow these steps to use the Add or Remove Contacts option:

- In the list of Drip Marketing Campaigns on the Drip Marketing tab, highlight the Campaign you wish to change.
- Click on the Sync Contacts button on the Drip Marketing tab.
- Select the radio button for Add or Remove Contacts and click Next. You will see this screen:

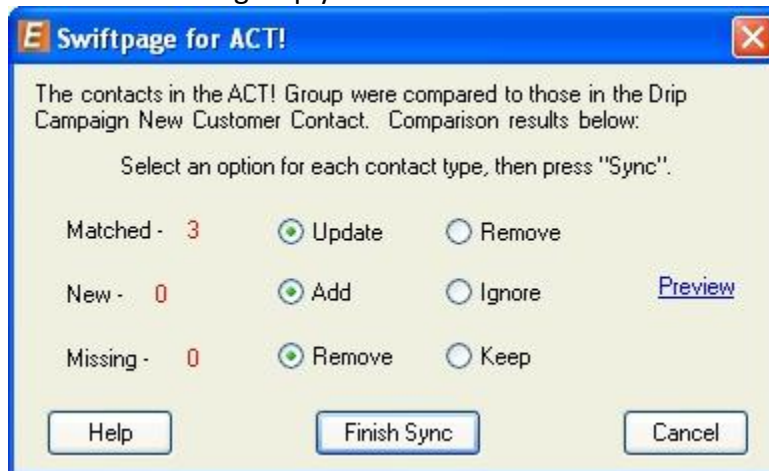


- Select the contacts you wish to add to or remove from your Drip Marketing Campaign. You may add/remove your “Current Contact”, “Contacts in current Lookup”, “All contacts in database,” “Selected Group” or “Selected Company.”
 - Next, select the appropriate button depending on what you want to do, either Add Contacts or Remove Contacts.
 - A confirmation window will appear, asking if you really want to add or remove the selected contact(s) to or from the selected Drip Marketing Campaign. Click Yes.
 - A confirmation window will appear, explaining how many contacts were added or removed, and what the new total number of contacts is for that Campaign. Click OK.
3. **Sync to Group** – this option syncs the contacts in your Drip Marketing Campaign with the contacts in any ACT! group you select. Follow these steps to use the Sync to Group option:
- In the list of Drip Marketing Campaigns on the Drip Marketing tab, highlight the Campaign you wish to change.
 - Click on the Sync Contacts button on the Drip Marketing tab.

- c. Select the radio button for Sync to Group and click Next. The following screen appears:



- d. Select your group from the drop-down list of groups and click Next.
e. A window will come up with a comparison of your existing Drip Marketing contacts to the ACT! group you have selected:



For contacts that match, you can either choose to Update the contacts (with the information in ACT!) or Remove those contacts. For contacts that are new (i.e. they are in the ACT! group but not yet in the Drip Marketing Campaign), you can choose either to Add them to the Drip Marketing Campaign or Ignore them. For contacts that are missing (i.e. they are in the Drip Marketing Campaign but no longer in your ACT! database), you can choose either to Remove those contacts or Keep them in the Drip Marketing Campaign. Once you have selected the options you need, click on Finish Sync.

- f. A confirmation screen will appear, telling you how many contacts were added, updated or removed, and the total number of contacts now in the Drip Marketing Campaign. Click OK to complete the Sync to Group function.