Swiftpage E

How to Use Swiftpage for ACT! by Sage

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Basics of the Swiftpage for ACT! by Sage Integration

The Swiftpage for ACT! integration allows you to perform the following important marketing and sales functions:

1. **Email Marketing:** Swiftpage for ACT! by Sage gives you the tools to create beautiful email templates, send directly from your database to your leads, contacts and groups, and track who opened and clicked your messages. You can Send Now or Schedule Send.

2. **Email Tracking:** When you send your email blast with Swiftpage you can track who opened, clicked, bounced, suppressed and more. You can also view graphical and detailed data about your send, and export your send reports to others for further analysis. Results of email blasts are written into ACT!'s history, so your contact's email blast history stays with them.

3. **Surveys and Web Forms:** With Swiftpage's survey tool, you can gather valuable new contacts or become more informed on your contacts with Swiftpage General Surveys. **List Builder and List Updater Surveys** write survey responses directly back into your ACT! database to create or update contacts. Set up an **Autoresponder** email to automatically be sent to your respondents when they complete your surveys. With the Drip Marketing Autoloader you can automatically load contacts into a Drip Marketing Campaign to receive a series of marketing communications.

4. **Call List:** After you send an email blast to your contacts, your recipients open and click on the email message. Meanwhile Swiftpage creates a ranked list of the most interested contacts based on those interactions. You can then filter and assign Call Lists to other members of your team to follow up, and import your Call List into ACT!.

5. **Drip Marketing:** Swiftpage Drip Marketing gives you the ability to create a sequence of messages that are automatically delivered to your ACT! contacts at the right time. Swiftpage Drip Marketing uses intelligent technology to send messages to contacts based on their interactions with previous messages and based on data in your ACT! database environment.

How to Install Swiftpage for ACT! and Set Up Your Account

Follow these instructions to install Swiftpage for ACT! by Sage and set up a new or existing Swiftpage account.

To install Swiftpage for ACT!: (I would make sure that ACT! is closed all the way first)
1. Go to the Swiftpage web site (www.swiftpage.com) and click on "Try Swiftpage Free." Then click on Swiftpage for ACT! by Sage.
2. Select the version you need (there are separate versions for ACT! 6, ACT! 7-8, and ACT! 9-11. **Note:** if you have ACT! version 12, you will use ACT! E-Marketing, a separate Swiftpage service built directly into ACT! 12. Do not download and install Swiftpage into ACT! 12.
3. Click on the appropriate download button based on your version of ACT! and run the installation file.
4. Once the installation is complete, reopen ACT!. You should now see Swiftpage on the toolbar within ACT!.
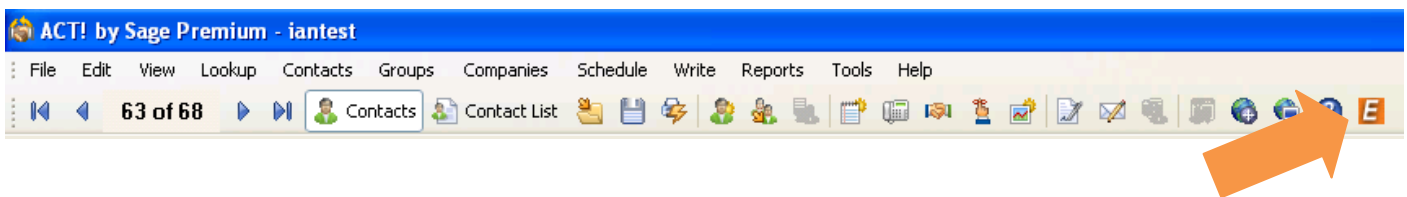
To set up your account in Swiftpage for ACT!:
1. The first time you click on the Swiftpage icon in ACT!, you will be asked if you have a Swiftpage account:

   If you have a Swiftpage account already, click Yes and sign in using those credentials. If not, click No and you will be presented with a page on which you can establish an account. **Note:** you can pick anything you want for your Swiftpage account name and user ID, but those names cannot include spaces or special characters. **Tip:** many people use a company name as the account name, and the user's first name as the user ID.

2. That's it! Your account is set up and you can begin using Swiftpage for ACT!.

The Swiftpage screen in ACT!: Email Functions and Sending Email

When you click on the Swiftpage icon in ACT! (after setting up your account information), the normal Swiftpage window will appear:
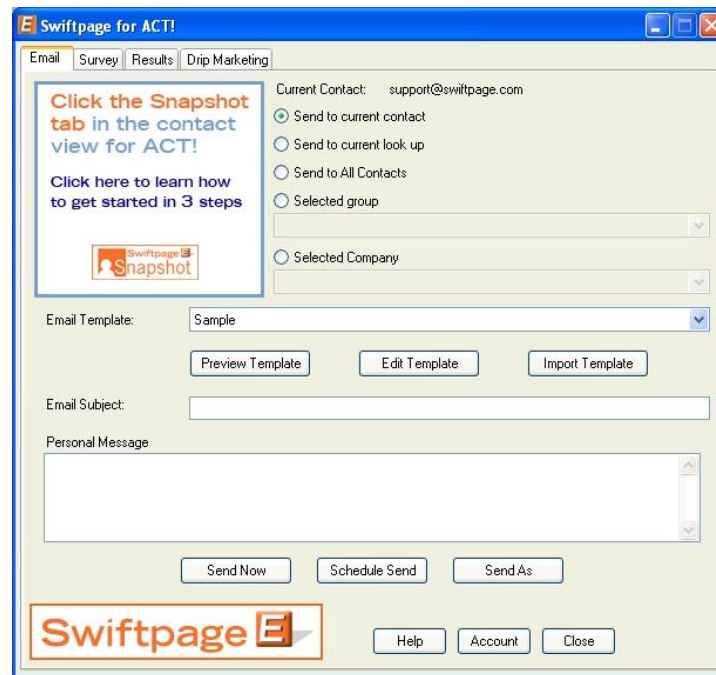
There are four tabs at the top of this page: Email, Survey, Results and Drip Marketing. This section of the Swiftpage for ACT! by Sage Guide offers information on the Email tab. Information on the other three tabs is given in subsequent sections.

Functions of the Email Tab in Swiftpage for ACT!:

- Click on the Preview Template button to view the template selected in the Email Template dropdown menu.
- Click on the Edit Template button to access Swiftpage's online template editor to design your template. (See instructions in a subsequent section on Using the Swiftpage Online Editor)
- Click on the Import Template button to import your own HTML document to send out as an email through Swiftpage.
- The Help button opens Swiftpage's online help for Swiftpage for ACT!.
- The Account button is used for various account functions—see the subsequent section on Swiftpage Account Settings in Swiftpage for ACT!.
- The Close button closes the window.
- Finally, the Email tab in Swiftpage for ACT! is used to send email blasts to your ACT! contacts.

How to send an email in Swiftpage for ACT!:
To send an email, follow these steps:
1. Use the radio buttons to select the contact(s) to whom you wish to send your email: current contact, current look up, all contacts, selected group or selected company.
2. Select your email template from the dropdown menu.

3. Enter your subject line in the Email Subject box.
4. If applicable, enter a message in the Personal Message box.
5. Now, you have three options: Send Now, Scheduled Send and Send As.

Email Option #1: Send Now
If you click the send now button, you will receive a confirmation window reviewing your send, including the number of contacts, the subject line, the template you are sending and so on:

From here, you have several options:
1. If you want to assign the email blast a special name for viewing your online reports, you can enter that into the box. If you do not enter anything there, your subject line will be used as the reporting name. Note: your email recipients will not see your reporting name.
2. For email blasts to 14 or fewer recipients, select the "SwiftNotify" checkbox to receive an email notification each time one of your recipients opens your email.
3. If you wish to receive a copy of your email, select the "Copy to Yourself" checkbox.

When you have set your options, click Yes and your email blast information will be sent to Swiftpage for immediate sending. Information about the send (time, template, and so on) will automatically be written into your contact(s)' ACT! History record and you are finished! (they are sometimes prompted if they want to write the history… might want to mention that)

Email Option #2: Schedule Send

If you click on the Schedule Send option, a screen will open asking you to define when you want to send the email:
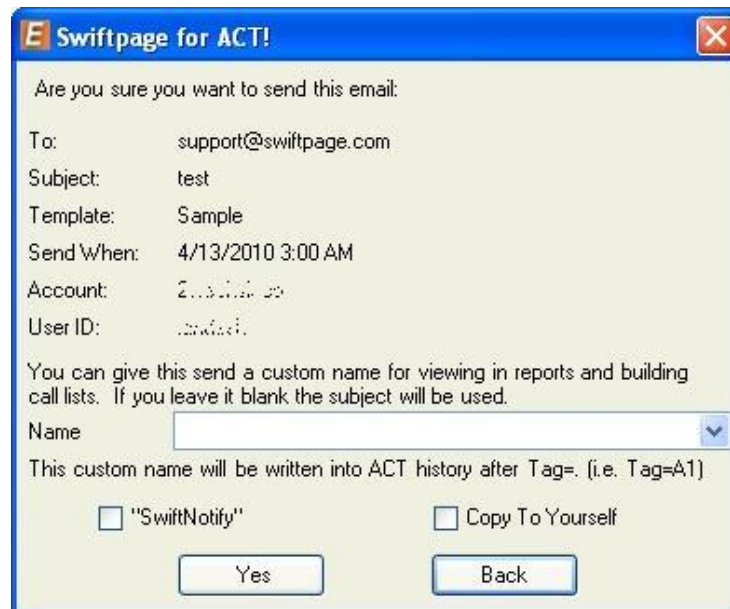
Choose the month using the arrow keys, click on the day you wish to send the email, then select the time from the dropdown menu. When you have selected the date and time you desire, click on Schedule Send. A final confirmation window will appear:
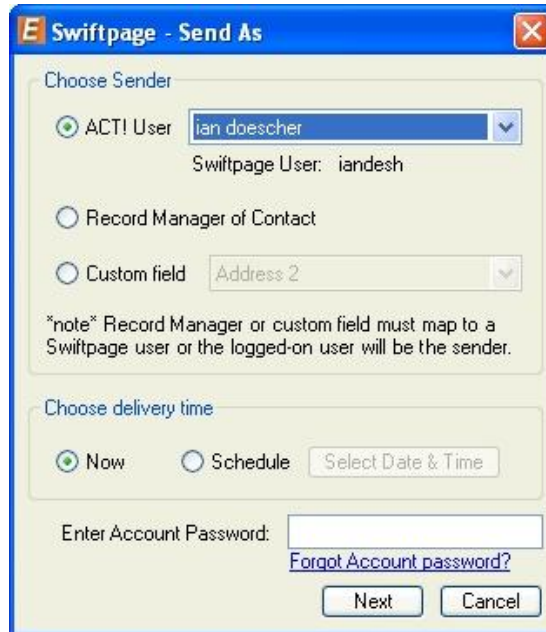
If all of the details look correct, click Yes, and you are finished! Your email will be scheduled and sent out at the date and time you defined. **Note:** at the time of scheduling, your contact list and template are uploaded to the Swiftpage servers. Therefore, if you add or remove contacts to your list after scheduling, or if you change the template after scheduling, those changes will not be reflected in your scheduled send. If you make changes, you will need to cancel your scheduled send and reschedule it for the changes to take effect.

Email Option #3: Send As

Use the Send As option to send emails on behalf of other users on your Swiftpage account. **Note:** the Send As feature is only available with a Team-level account, and any person you want to send on behalf of must also be a user on your Swiftpage account.

To use the Send As function, click on the Send As button from the Email screen in Swiftpage for ACT! after selecting your contacts and template. **Note:** only read-only templates can be sent using the Send As feature. If you need to save your template as a read-only template, click on the Edit Template button, then click on the Template Library tab > Save As Read Only to save the template in Read-Only format.

After you click on Send As, you will have three choices for the sender on whose behalf you are sending:

1. Choose the ACT! user from the dropdown menu on whose behalf you would like to send the email. All ACT! users must be tied to Swiftpage user IDs in order for you to send on their behalf. In other words only ACT! users connected to Swiftpage user IDs will appear in this dropdown list.
2. Choose the "Record Manager of Contact" to send on behalf of the record manager for each ACT! contact to whom you are sending. **Note:** if you send on behalf of the Record Manager, make sure all of your Record Managers are connected to active Swiftpage users on your account. Otherwise, the email will appear to be from the user who is doing the Send As.
3. Choose "Custom Field." If your ACT! database has a custom field tied to particular ACT! user names, you can use that Custom Field setting here in a similar manner to the Record Manager. (For instance, you might have a field in your ACT! database called "Account Executive" that, for each contact, contains the name of one of your ACT! users.) The same rules apply for the Custom Field setting as it does for the Record Manager option: the ACT! user in the custom field must be connected to a Swiftpage user on your account.

After you have selected which user(s) the send as will be sent on behalf of, choose your delivery time: now or scheduled for the future. (See previous section for information on what the scheduled send will look like) Then, enter your account password and click Next. The following screen will appear, summarizing your send:

If the information looks correct, click on Continue and your email will be sent. Then, you are finished!

Final notes about using Send As: when you send on behalf of other users, your user will need to have the send limit on the account allocated to it, not the users on whose behalf you send. (For example, if Jim is sending on behalf of Jane and Sue, Jim's user ID must have the sends allocated to it, not Jane or Sue's.) However, once you send the email, each user will have access to the reports for the emails that were sent under their user ID. So, in the previous example, Jane and Sue will have access to reports showing which emails were sent as their user IDs, but Jim will not have access to such reports.

Template
Library

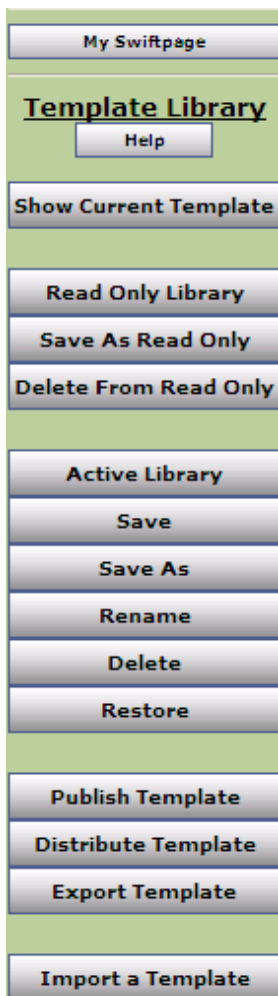Content
Editor

Customize
Template

Using the Swiftpage Online Editor

When you first enter the Swiftpage online editor, you will see three tabs on the left-hand side of the screen: Template Library, Content Editor and Customize Template. **Note:** if you are using Swiftpage's beta editor, you may only see two tabs; Content Editor and Customize Template. The Template Library functions are handled by the Template Manager in the beta editor.

Generally speaking, you will use the Template Library to manage your template as a document—saving , renaming , deleting it and so on. You will primarily use the Content Editor tab when editing your template's images and text. The Customize Template tab is primarily to structure your template, including column widths, colors, adding windows and so on. The following sections explain the functions of each of these three tabs.

Template Library Functions

When you click on the Template Library tab, you will be presented with the buttons shown and described below. **Tip:** to start creating a Swiftpage template, click on the Read Only Library button (see #4, below).

My Swiftpage

Template Library
Help

Show Current Template

Read Only Library

Save As Read Only

Delete From Read Only

Active Library

Save

Save As

Rename

Delete

Restore

Publish Template

Distribute Template

Export Template

Import a Template

1. My Swiftpage: takes you back to the My Swiftpage portal, where you can access Surveys, Reports and more.
2. Help: accesses Swiftpage online help.
3. Show Current Template: displays the most current version of your Swiftpage template. Swiftpage only allows one template to be open at a time, so the "current template" is always the one that is open.
4. Read Only Library: this button accesses the Swiftpage Read Only Library. The Read Only Library consists of templates created by Swiftpage that cannot (in their read-only state) be modified. However, they can each be copied as an Active template so that you can modify them. Begin by visiting Swiftpage's online template gallery to find a template you want to work with. Then, back in the Swiftpage online editor, click on the Template Library tab and click on the Read Only Library button. Choose the template you want from the list of templates and click Submit. Next, click on Show Current Template. Finally, click on the Content Editor tab and click on the Make Editable Copy button. You will be asked to give the template a new name. Type in the name and click Submit, then click on Show Current Template. Now you have a completely editable copy of the template that was found in the Read Only library.
5. Save As Read Only: this function is used to save your Active Templates as read-only, so they cannot be modified. You will need to save templates as Read Only if you are planning to send them using the Send As function (available with the Swiftpage Team service level). Once you save a template as Read Only, a copy of the template is saved in the Read Only library.
6. Delete from Read Only: use this button to delete a template from the Read Only Library. **Note:** you cannot delete Swiftpage's prepopulated templates (with a zzz prefix) from the Read Only library. You may only delete Read Only templates you have created.

7. Active Library: this button accesses your Active Library, which consists of fully editable templates that you have copied from the Read Only Library. Use this button to switch between templates.

8. Save: this button saves your template. Normally, Swiftpage will save your template as you go, but clicking this button before you exit Swiftpage guarantees that your work is saved.

9. Save As: click this button to make a copy of the current template under a new name. If you like the design of one of your templates and want to edit the text—but want to keep the original template as well—use the Save As button to make an exact copy of the template for editing.

10. Rename: use this button to rename the current active template.

11. Delete: this button will give you the option to delete a template from your active library.

12. Restore: when you click this button, you restore the template to the last time it was saved. The point of the last save may be the last time you clicked the Save button on the Template Library tab, or it may be the last time Swiftpage automatically saved the template. (I think it goes back to the last official save) In some cases, using the Restore button can help you recover lost information. In other cases, if you have done more work since the template was last saved, you may lose work by clicking Restore. The Restore button is, generally, therefore only used in the case of broken templates (i.e. templates in which code or other programming has caused the template to function or appear incorrectly).

13. Publish Template: the Publish Template function is used to send a template from one Swiftpage user to another within the same Swiftpage account. Click this button and you will be presented with a list of users on your account. Highlight the user you want to send the template to—or hold down the control key to highlight several—and then click Submit. The template will then be published to the other user(s)'s Read Only Library.

14. Distribute Template: the Distribute Template function is used to send a template from one Swiftpage account to a user in a separate Swiftpage account. To use this function, you must first set up your distribution list. (**Note:** To do this, go to My Swiftpage > Your User Profile > Distribution List, put in the account name and user of anyone you want to receive templates from or send templates to, and then click Submit. In order to receive templates from you, users in other accounts must add you to their Distribution List as well.) When you click on Distribute Template, you will see a list of the accounts and users to whom you can send a template. Highlight the account/user combination you want to send the template to—or hold down the control key to highlight several—and then click Submit. The template will then be published to the other user's Read Only Library on the separate Swiftpage account.

15. Export Template: this button will export your template in .html format and email it to any address you desire. The export function is used primarily for two reasons: to create a file backup of your Swiftpage templates and to create web pages out of your Swiftpage templates.

16. Import a Template: use this button to import templates designed outside of Swiftpage, in HTML editors like Dreamweaver or Frontpage. Once you click this button, you will be asked to browse for your .html file to import. Once the file is imported you will have a chance to review and verify it before it is placed in your Read Only Library. In the Swiftpage Basic Online Editor, you cannot edit imported templates.

Content Editor Functions

When you click on the Content Editor tab, you will be presented with the buttons shown and described below.
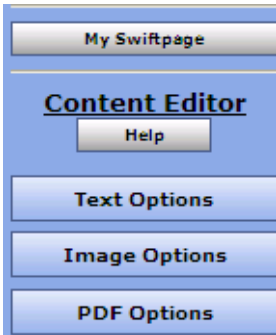
1. My Swiftpage: takes you back to the My Swiftpage portal, where you can access Surveys, Reports and more.

2. Help: accesses Swiftpage online help.

3. Text Options, Image Options and PDF Options: each of these buttons expands a larger menu with more options. Generally speaking, Text Options allows you to add and edit text, Image options allows you to add and edit images, and PDF options allows you to add PDF documents and link them to your template. See below for further details. **Note:** each of these options require that you first select one of the windows in your template by clicking on it. When you scroll over windows in your template, a green border appears around them. When you click on a window to select it, the border turns into a solid blue border.

The Text Options Menu
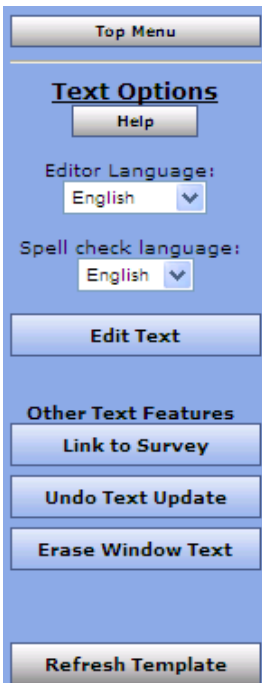
1. Top Menu: returns to the original Content Editor menu.

2. Help: accesses Swiftpage online help.

3. Editor/Spell check language: allows you to select the language for various aspects of the online editor.

4. Edit Text: opens a text editing window that allows you to edit text in the selected window of your template. See below for a complete description of the text editing toolbar.

5. Link to Survey: click this button to link a specific line of text in your window to one of your Swiftpage surveys.

6. Undo Text Update: if you have just edited text in one of your template windows, click this button to undo those edits.

7. Erase Window Text: this button erases all text within the selected window of your template.

8. Refresh Template: click this button to view the most up-to-date version of your Swiftpage template.

The Text Editing Toolbar

When you click the Edit Text button on the Text Options tab, you will see a screen for typing text with the following options. **Note:** always click Submit after typing text to make your changes take effect.
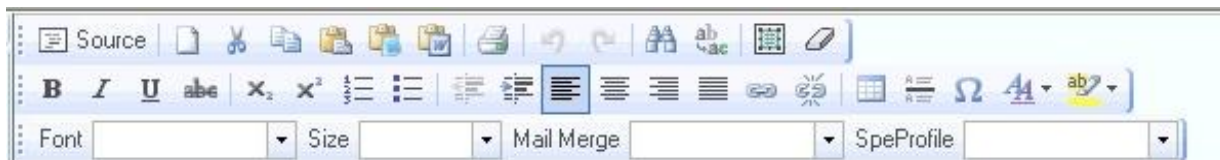
First Row:

1. Source: allows you to edit the HTML source code.
2. Clears text: clears all text
3. Cut text
4. Copy text
5. Paste
6. Paste as plain text
7. Paste from Microsoft Word
8. Print
9. Undo
10. Redo
11. Find
12. Replace
13. Select all
14. Remove format

Second Row:

15. Bold text
16. Italic text
17. Underline text
18. Strikethrough text
19. Subscript
20. Superscript
21. Insert/remove number list
22. Insert/remove bulleted list
23. Decrease indent
24. Increase indent
25. Left alignment
26. Center alignment
27. Right alignment
28. Justified alignment
29. Insert/edit hyperlink
30. Remove hyperlink
31. Insert/edit table
32. Insert horizontal line
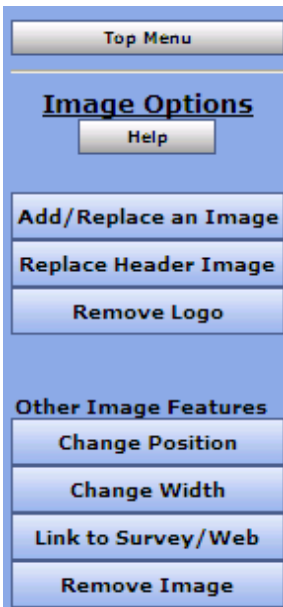33. Insert special character
34. Text color
35. Text background color

Third Row:

36. Text font
37. Text size
38. Mail merge fields for email personalization
39. SpeProfile mail merge fields for personalization

The Image Options Menu

1. Top Menu: returns to the original Content Editor menu.
2. Help: accesses Swiftpage online help.
3. Add/Replace an Image: use this button to insert an image into the selected window of your template or to replace the image currently there. When you click this button, you will be asked to browse for the image to upload. You can then choose where to position the template within the window: Top positions the image in the center at the top, with text below it. Left or Right positions the image next to the text. Bottom positions the image in the center at the bottom of the window, with text above it. **Note:** template windows are limited to one image each.
4. Replace Header Image: the 600-pixel-wide image at the top of most Swiftpage templates is called the Header image. Click this button to replace the header image. You can select to replace the header with your own image that you upload or with an image from the Swiftpage Header Library. All Header images should be 600 pixels wide—wider images will be truncated.
5. Remove Logo: if you are using a Swiftpage template that includes a logo and you have uploaded a logo to the "Your User Profile" section of My Swiftpage, click this button to remove it permanently from the current template. **Note:** removing a logo cannot be undone.
6. Change Position: as mentioned above (number 3), images can be positioned at the Top, Left, Right or Bottom. Click the Change Position button to move the image from one position to another.
7. Change Width: changes the width of the picture (the height of the picture will adjust automatically, so the image does not skew). You will be asked how many pixels wide you want the image to be. (Remember, for reference, that the whole template is 600 pixels wide)
8. Link to Survey/Web: click this button to link the image in the selected window to a web URL.
9. Remove Image: this button will remove the image from the selected window.

The PDF Options Menu

1. Back/Top Menu: both buttons return to the original Content Editor menu.
2. Help: accesses Swiftpage online help.
3. Upload a PDF: click this button to begin the process of adding a PDF and linking it to text or an image within the selected window. You will be asked to browse for your PDF document on your computer. **Note:** PDFs uploaded to Swiftpage cannot be larger than 4MB in file size, and you are limited to one PDF document per window in your template.
4. Link Text to PDF: after uploading your PDF document, click this button to link text from the selected window to your PDF. You will be asked to copy and paste, or retype the text into a window. That text will then be linked to the PDF.
5. Link Image to PDF: after uploading your PDF document, this button will link the image in the selected window to your PDF.

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Customize Template Functions

When you click on the Customize Template tab, you will be presented with the buttons shown and described below.
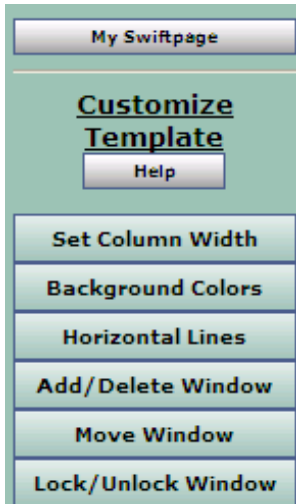
1. My Swiftpage: takes you back to the My Swiftpage portal, where you can access Surveys, Reports and more.

2. Help: accesses Swiftpage online help.

3. Set Column Width: every Swiftpage template is 600 pixels wide, and every Swiftpage template has two columns. (In some Swiftpage templates, the left-hand column is made as wide as possible, making the template appear as a one-column template rather than two.) The Set Column Width button allows you to establish the width of the left-hand column and the right-hand column will adjust automatically. So, for instance, if you set the left column width at 400 pixels, the right column will be about 200 pixels wide (slightly smaller because of the automatic space Swiftpage puts between columns), so you will have a left-hand column that is about double the size of the right. If you set the left column at 300 pixels, the right column will also be about 300 pixels and the columns will appear to be an equal width. You can test different widths to get the look you want.

4. Background Colors: click this button to change the background color of your template, a column of your template, or a single window. When you click the button, you can select a color (or type in an RGB code), select which portion of the email you wish to color (whole template, column or window) and click Submit to apply the color.

5. Horizontal Lines: use this button to insert horizontal lines between windows in your template.

6. Add/Delete Window: this button gives you three options: (1) add a window below the current window, (2) delete the selected window, or (3) duplicate the selected window (duplicate windows appear immediately below the original). **Note:** you cannot delete the topmost window in a column—you have to move it down to do that. (See Move Window, below.)

7. Move Window: this window allows you to move the selected window up or down within its column. You cannot move a window from one column to another.

8. Lock/Unlock Window: use this function to lock a window so no changes can be made to it.

The Swiftpage screen in ACT!: Surveys

The second tab on the main Swiftpage for ACT! screen is the Surveys tab:
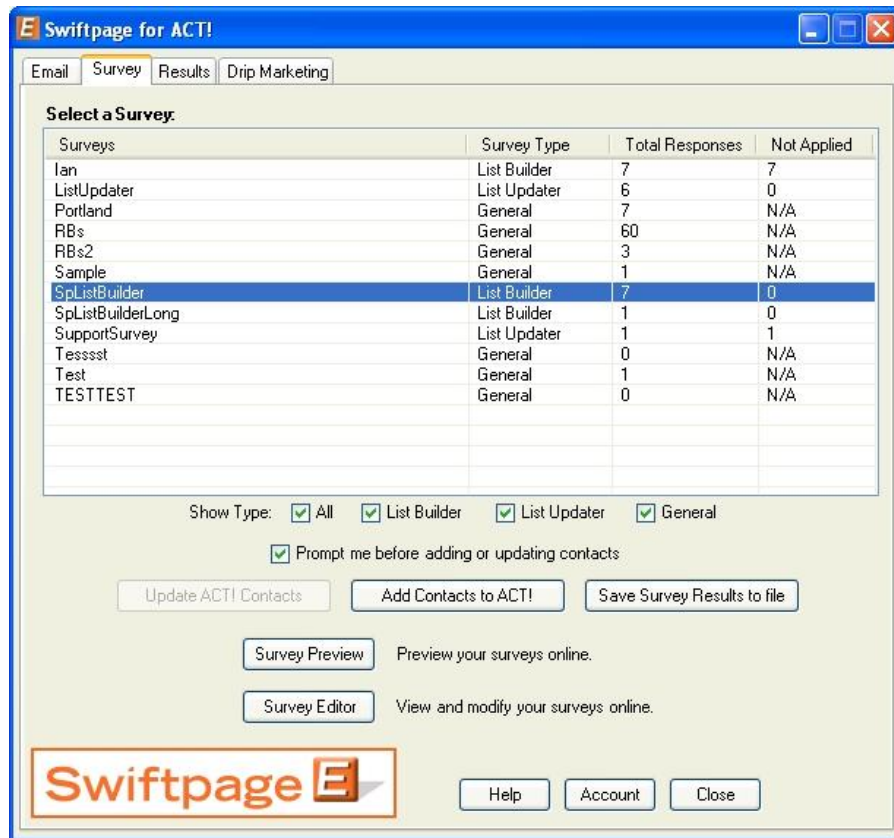
The survey tab lists all of your Swiftpage surveys in the window at the top, along with information on what type of survey it is, how many responses the survey has received and how many of those responses have not yet been applied to your ACT! database. (See the section below on List Builder and List Updater surveys for more information on applying surveys to your database.)

Checkboxes below the survey list allow you to filter which surveys you are seeing. You can also update or add contacts to ACT! (see section below), or save your survey results to an ACT! or Microsoft Excel compatible file. Finally, you can click the Survey Preview button to see how your survey looks online, or click the Survey Editor button to go to the Swiftpage online survey editor.

List Updater and List Builder Surveys

A List Builder survey is a Swiftpage survey that can be used to gather new contacts that will be added to your ACT! database. A List Updater survey is a survey that can be used to update customer information that already exists in your ACT! database. Use the following steps if you would like to create a List Builder or List Updater survey. **Note:** List Builder and List Updater surveys require a Pro-level Swiftpage account.

1. From ACT!, click on the E, then click on the Surveys tab, then click on the Survey Editor button. Create a survey in Swiftpage, asking for basic contact information (List Builder) or whatever information you want to update (List Updater), 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 or List Updater surveys that Swiftpage automatically provides (called SpListBuilder, SpListBuilderLong and ListUpdater).

2. When you are finished with your survey, click on the Survey Result Options button. Select the checkbox next to ACT! Database Update, then click on either the List Builder or List Updater radio button and click Submit.

3. 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.

Database Fields	**Survey Questions**
First Name	First Name
Last Name	Last Name
E-mail	Email Address
Company	Company Name
Phone	Phone Number

Submit | Reset | Cancel | Finalize the Survey Result Options

4. If you are using a List Builder survey, click on the Survey Management button and then link to the List Builder survey from your web site using the URL given on the Survey Management page. If you are using a List Updater survey, send out a Swiftpage email linking to the List Updater survey or link the List Updater survey from your web site (in either case, use the URL given on the Survey Management page). **Important note:** if you are linking to the List Updater survey from an email you send out through Swiftpage, there are no required fields on the survey. However, if you link to the List Updater survey from outside of Swiftpage (e.g. 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. (is this true? I thought that is what the Guid was for)

5. Click on the Add Contacts to ACT! button and a window will open verifying that you want to add the new contacts

6. Your List Builder/Updater survey is now fully functional and will gather new or updated contact information.

7. After you have launched the List Builder or List Updater survey, click on the Swiftpage window in ACT! and select the Survey tab. In the list of surveys, you will see your 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 for List Builder or Update ACT! Contacts for List Updater, and a window will open verifying that you want change contacts into your ACT! database. Check the mapping of fields, and then you have a choice of options:

- 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. **Note:** although the terms shown here relate to List Builder surveys, List Updater surveys are have the same options but use the term "Update" instead of "Add."

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

The Swiftpage screen in ACT!: Results

The third tab on the main Swiftpage for ACT! screen is the Results tab:


The results tab lists any recent Swiftpage email blasts that have new results to write to your ACT! database since you last synced Swiftpage with ACT!. For instance, if a customer has opened an email, or if a customer has opted out of your mailings, those results will show up here as waiting to be written back into ACT!. **Note:** for best Swiftpage for ACT! functionality, you should import your Swiftpage results into ACT! regularly. **Another note:** results are available for importing the following day after sending an email blast, not the day of the send itself.

You can select email blasts one by one using the checkboxes next to each email blast or you can click the "Toggle All" button to select all of them. Then, click the Submit button and Swiftpage will write your results into each applicable ACT! contact's History record. (Writing results may take a minute or two depending on the number of results you have.) **Note:** once you have retrieved results once, there is no way to re-write the results, so make sure to let the process finish completely.

Finally, on this screen you can click the Reports button to be taken to the Swiftpage online reports screen, where you can view graphical reports on email blasts.

The Swiftpage screen in ACT!: Drip Marketing

The fourth and final tab on the main Swiftpage for ACT! screen is the Drip Marketing tab. **Note:** for information on how to create Drip Marketing Campaigns in the Drip Marketing Campaign Manager, please visit the Drip Marketing Support section of Swiftpage's web site (www.swiftpage.com/support).
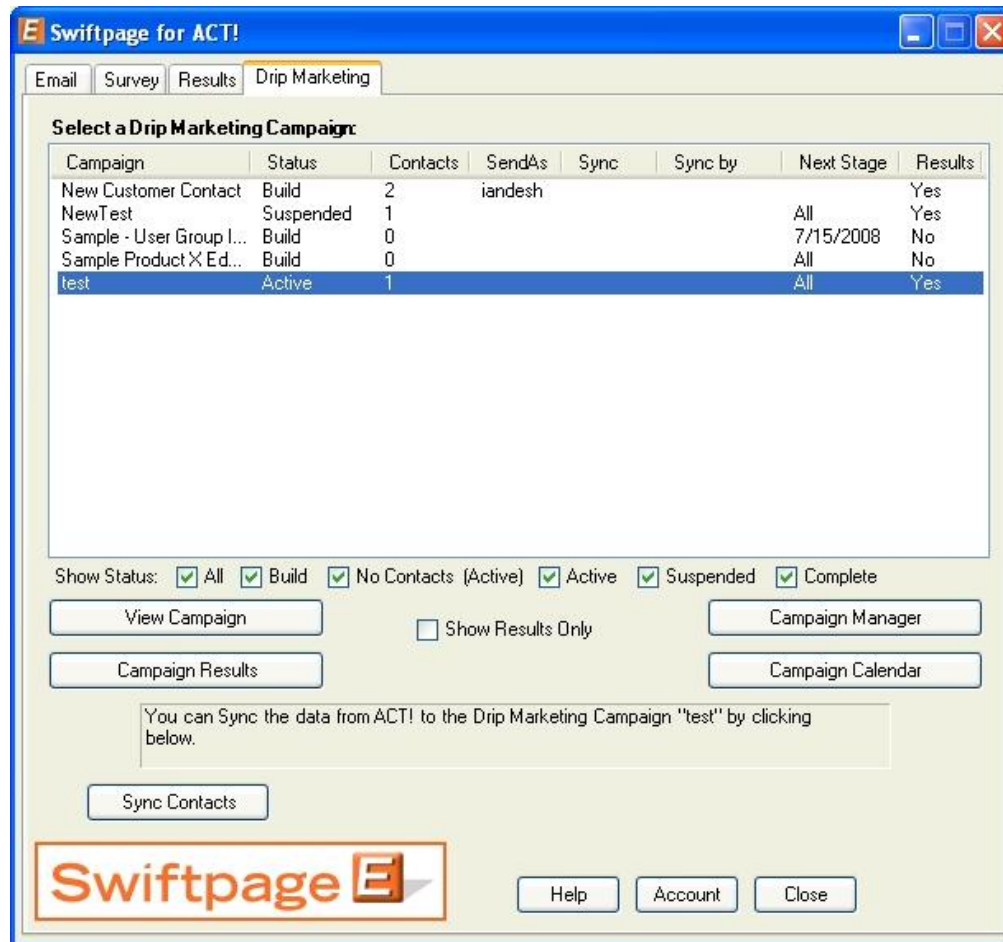
The Drip Marketing tab lists all of your Swiftpage Drip Marketing Campaigns in the window at the top, along with information on what status the Campaign is in, how many contacts it contains and other information. Checkboxes below the Campaign list allow you to filter which Campaigns you are seeing (based on status, number of contacts, and whether or not the Campaign has results).

On this screen, there are five main functions:

1. View Campaign: this button takes you to the Drip Marketing Campaign editor for the selected Drip Marketing Campaign.

2. Campaign Results: use this button to import the results of your Drip Marketing Campaigns into your ACT! database. (This function is the same as the Results function mentioned in the previous section, but is used for Drip Marketing Campaigns as opposed to single Swiftpage email blasts.) When you click this button, the following screen will appear:

Your Campaign with results to write shows up here, as well as the number of new History and new Scores results to write. Select which results you wish to import in the radio buttons at the bottom of the screen and click Submit. A confirmation window will appear, telling you that the results have been successfully imported.

3. Campaign Manager: click this button to be redirected to the Swiftpage online Drip Marketing Campaign Manager, where you can create and edit Drip Marketing Campaigns

4. Campaign Calendar: this button displays a calendar with any upcoming Drip Marketing events scheduled for the Campaign you have highlighted. Click on a calendar date to see the Stage details:

5. Sync Contacts: this button is used to add contacts to Drip Marketing Campaigns or to Sync your Drip Marketing Campaign contacts with your ACT! database. When you click Sync Contacts, you will initially have three choices:

a. Sync Data Only: if you merely wish to sync the current data you have in ACT! with your Drip Marketing Campaign contacts (i.e. update your Drip Marketing contacts with the most current ACT! database information), use this option. When you select it, you will receive a confirmation screen. Click Yes to the confirmation question and you will be notified that the contacts have been updated.

b. Add or Remove Contacts: use this button to add new contacts to your Drip Marketing Campaign or to remove contacts from a Campaign. When you select Add or Remove Contacts, you will see this screen:
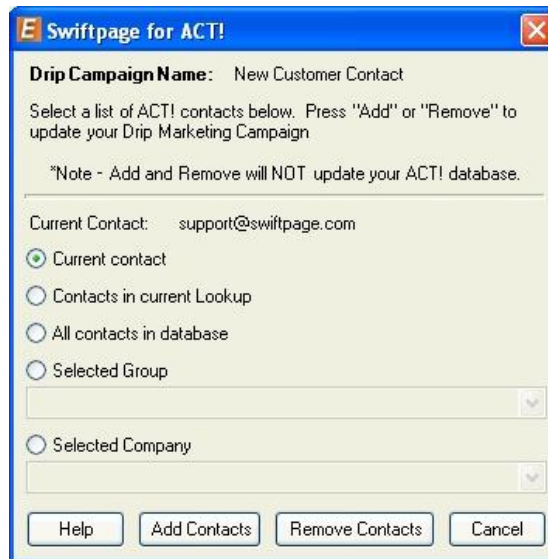

Like a normal email blast send, this screen allows you to add or remove the current contact, the current lookup, all contacts in your ACT! database or a selected group or company. Use the Add Contacts button or Remove Contacts button depending on what you wish to perform. Click Yes on the confirmation screen that appears and you will receive a notification telling you how many contacts are now in your Drip Marketing Campaign.

c. Sync to Group: if you are using a specific ACT! group as the contact group for a Drip Marketing Campaign, the Selected Group option will allow you to keep your Drip Campaign contact list current. When you select the Sync to Group option, the following screen appears:


This screen allows you to choose your ACT! group from a dropdown list (in the example above, the group "Recently Edited Contacts" is selected). Then, click Next and another window appears showing you how many contacts in the ACT! group matched with Drip Marketing contacts, how many are new (and will be added to the Campaign) and how many will be removed from the Drip Campaign because they were no longer in the ACT! group:
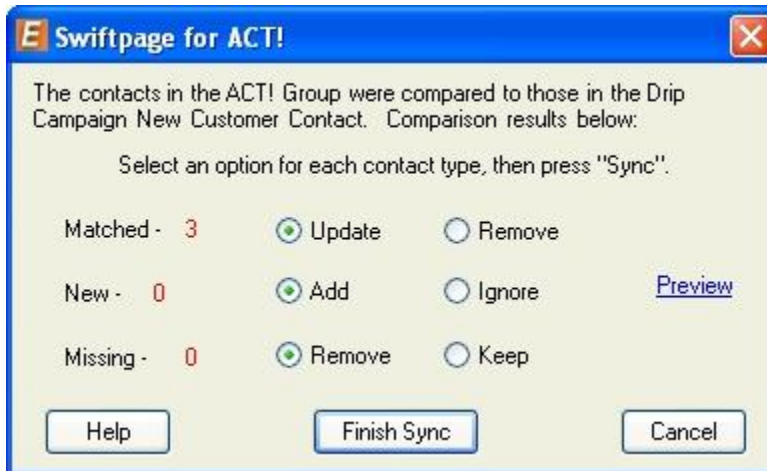
At this point, you have the choice to add the update the matching contacts or remove them, add the new contacts or ignore them, and remove the missing contacts or keep them. When you have selected the option you want, click Finish Sync and you are done!

Snapshot: Accessing Call Lists and Other Send Information in Swiftpage for ACT!

Upon installation of Swiftpage for ACT!, the Snapshot tool is automatically added to the ACT! tabs that appear at the bottom of the ACT! Contacts view.
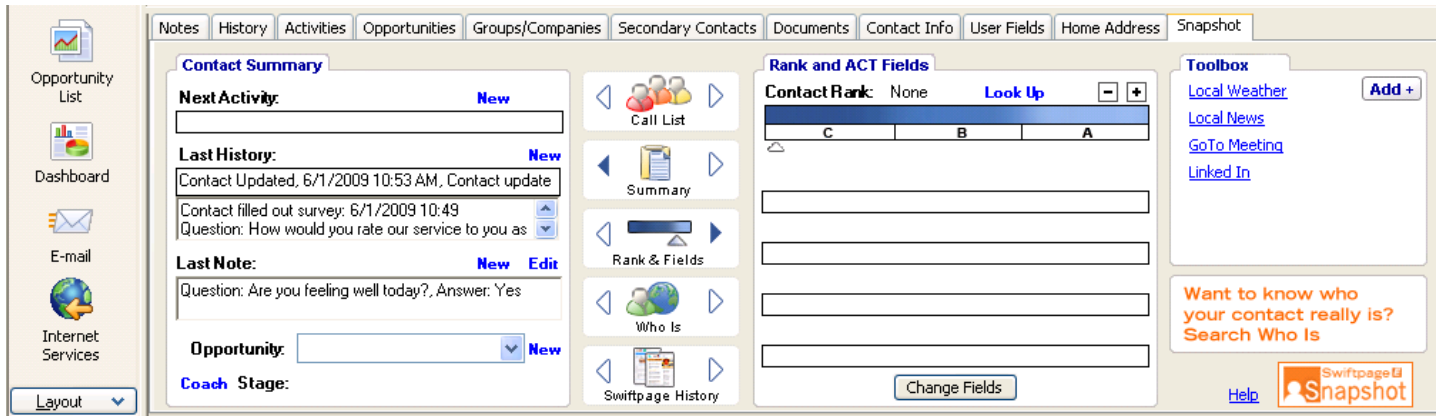
When you click it, there are five primary options: Call List, Summary, Rank & Fields, Who Is and Swiftpage History. This section explains the function of each of these Snapshot tools.

Snapshot: Call List

To access your Call Lists in ACT!, first click on the Snapshot tab in the Contacts view in ACT!. Then, click on the Call List tab and the Call List features will be shown. **Note:** full Call List functionality is only available to customers with a Pro or Team level account.

These are the functions of the Snapshot Call List tool:

- The dropdown list at the top will allow you to switch between any Call List you have created.
- The arrows (showing 1 of 1 in the example above) allow you switch between different contacts in the selected Call List. When you switch between contacts, the contact detail information in ACT! changes correspondingly.

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- The score and ranking (Hot, Warm or Mild) will be shown, along with the contact's name, phone number and how they interacted with the email (i.e. number of sends, opens and clicks).
- The Actions bar allows you to change the Action for that contact. Click on Edit to pull up the Action dialogue box, and then either choose an Action from the list or type in your own. Select the checkboxes if you wish to Save the Action in History or Schedule Activity (these relate to ACT! functions). Then click OK.

- The four buttons at the bottom of the Snapshot Call List tool allow you to do the following functions:
  - Help: receive Help on the Call List window in Snapshot
  - Lookup: create an ACT! lookup based on how your contacts are ranked in the Call List:
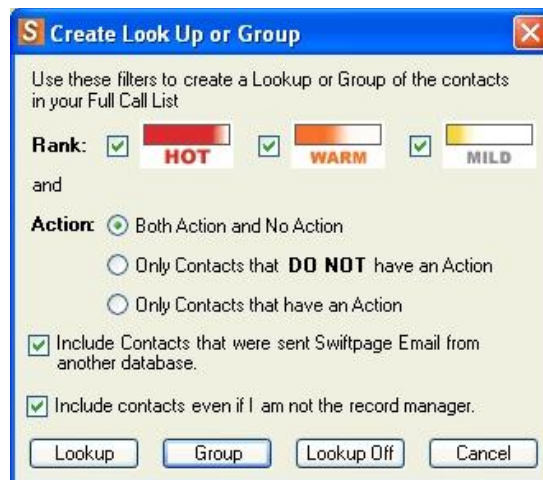
  - Update: update the Call List using the online Call List Dashboard
  - Online Call List: launch the online Call List dashboard to create, edit or update Call Lists

Snapshot: Summary

The Summary tool in Snapshot syncs several ACT! features for a particular contact into one screen. To access the Summary tool, first click on the Snapshot tab in the Contacts view in ACT!. Then, click on the Summary tab, and the Contact Summary and Notes features will be shown:

These are the functions of the Snapshot Summary tool:
- The Next Activity shows you the most recent ACT! Activity for the contact, and allows you to edit that Activity or add a new one.
- The Last History field shows you the most recent ACT! History note for the contact and allows you to add a new History note.
- The Last Note field shows you the most recent Note for the contact, and allows you to edit that Note or add a new one.
- The Opportunity field shows you the most recent ACT! Opportunity for the contact and allows you to create a new one.
- The Stage field shows you the ACT! Stage that the contact is in and allows you to edit the stage.

To create new Activities, History notes, Notes, or Opportunities, or to edit Activities, Notes or Stages, simply click on the blue "New" or "Edit" button next to the corresponding field. (You can also make changes through the corresponding ACT! tabs, which will then be reflected on the Summary window.)

Snapshot: Rank & Fields

The Rank & Fields tool in Snapshot syncs several ACT! features for a particular contact into one view, and also allows you to adjust contacts' rank on the fly, depending on what interactions you have with them. To access the Rank & Fields tool, first click on the Snapshot tab in the Contacts view in ACT!. Then, click on the Rank & Fields tab, and the Contact Rank and Fields features will be shown:

These are the functions of the Snapshot Rank & Fields tool:
- The Contact Rank arrow can be adjusted manually (by clicking and dragging) to adjust a contact's rank. For instance, if a contact scores low on a Call List, you might rank them as a C (low), but if after speaking with them it turns out they are actually very interested, you could slide them up as appropriate. When you are finished, you can click on Lookup to create an ACT! Lookup of contacts by their grade (A, B or C).
- The fields shown below the Rank give you a quick look at some of your contacts' information. Click on the Change Fields button to select which fields are shown—essentially any ACT! contact field can be shown in this window. Click the Lookup button to perform a lookup on that field, or click Edit to change fields.

Snapshot: Who Is

The Who Is tool in Snapshot allows you to perform a number of online searches across multiple search engines, to learn about who your contacts are, what they look like, and who else may be talking about them. You can save images, text and links to have as a future reference. To access the Who Is tool, first click on the Snapshot tab in the Contacts view in ACT!. Then, click on the Who Is tab and the Who Is features will be shown:

Image view: Links view: Text view:

These are the functions of the Snapshot Who Is tool:

- The Image button shows you the image associated with this contact. The Links button shows you any links associated with the contact. The text button shows you any text you may want to insert about the contact.
- To edit the Image, Links or Text, simply click on the blue Edit button. The following window will appear, which allows you to insert text, create links and upload an image related to your contact:
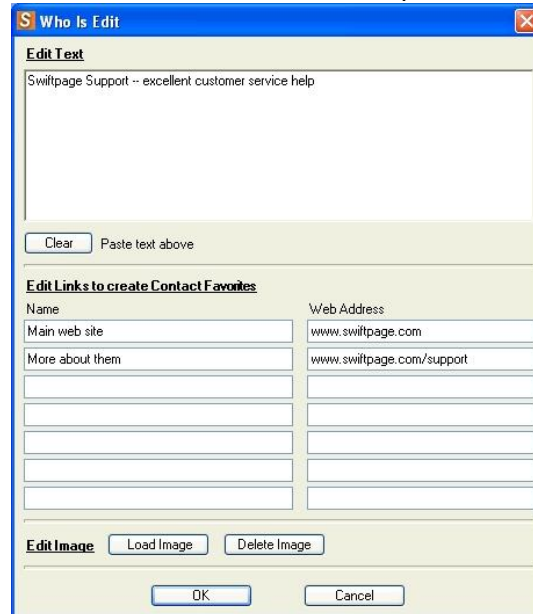
- The Search button allows you to create an Internet search based on your contact's name and/or company details (including address). Clicking on the Search button will display this screen:
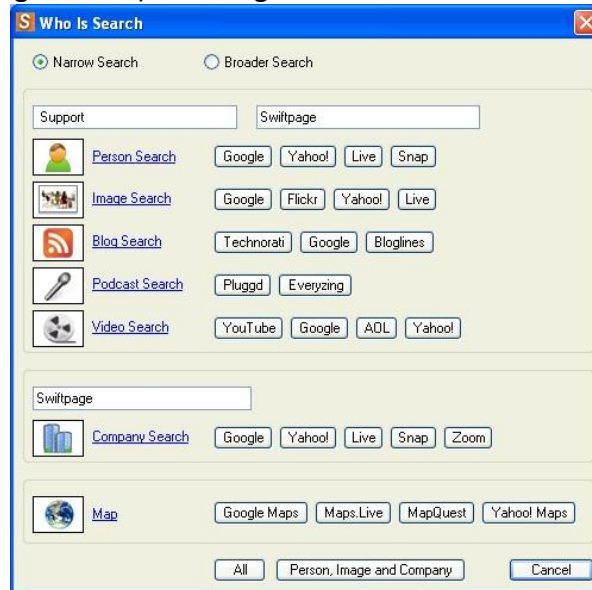
Simply choose the search criteria you want, and a browser window (or windows) will be launched, giving you the information requested. The "Person, Image and Company" button opens three separate browsers, one of which performs a search for the person's name, the second of which searches for an image based on the person's name, and the third of which performs a search based on the company name.
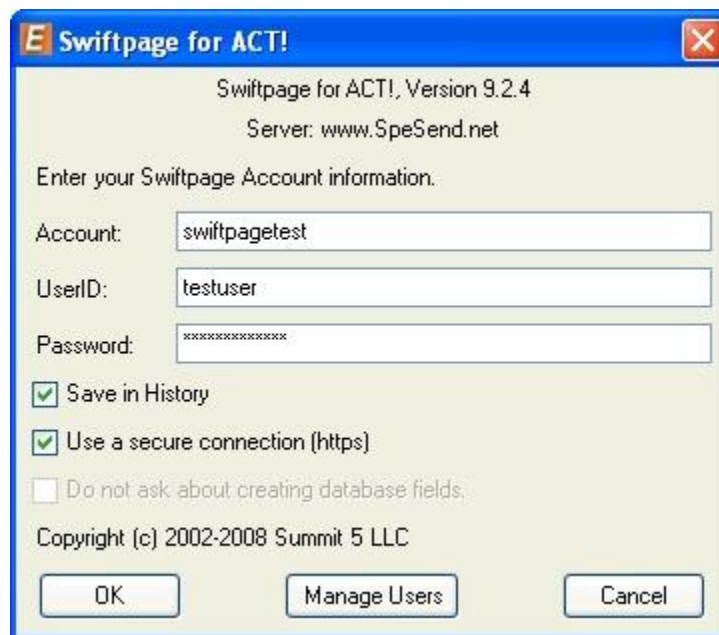
Snapshot: Swiftpage History

The Swiftpage Email History tool in Snapshot gives you a complete breakdown, by contact, of each of your previous email blasts. (Information is available the next day after sending out an email blast.) To access the Swiftpage Email History tool, first click on the Snapshot tab in the Contacts view in ACT!. Then, click on the Swiftpage History tab and the Swiftpage Email History features will be shown:

- The arrows at the top allow you to switch among various email blasts you have sent to this particular contact.
- The Reports button allows you to access your comprehensive email blast reports online.
- The Search button allows you to search the email blast shown (or all blasts) for factors such as Unopens, Bounces, Invalid addresses, Opt-Outs or Duplicates, and to create an ACT! Lookup of these contacts. Follow these instructions to use the Search function:
  - o Click on the Search button.
  - o Select your criteria (for example, "Search this Email Campaign for Unopened")
  - o Click on Copy to Clipboard and click OK.
  - o Open the Lookup dropdown menu in ACT! and click on Keyword Search.
  - o In the "Search For" box, paste the search string by hitting Control+V.
  - o Click on the Find Now button. Your contacts meeting the criteria selected will be shown.
  - o Click on Create Lookup to create an ACT! Lookup based on this list of contacts.
- The Swiftpage Email History button shows details of each Email Blast sent to the selected contact: what time it was submitted, what the subject line was, which Swiftpage template was sent, how many times the contact opened it, clicked on a link in it and what the Result was.
- Click on the View link (or the template thumbnail) to launch your browser and see the email template that was sent.

Swiftpage Account Settings in Swiftpage for ACT!

When you click on the Account button on the Swiftpage window in ACT! (regardless of which tab you are on—Email, Survey, Results or Drip Marketing), you will see the following screen:


The account name, user ID you are currently signed in as will show in the top boxes, along with an encrypted password. There are four functions at this point:

1. Save in History checkbox: if this box is checked, information about Swiftpage email blasts is written to your ACT! contact records automatically when you send an email. The default option when you install Swiftpage for ACT! is for this to be checked. If you uncheck this box, each time you send a Swiftpage email blast you will be asked whether or not you want History records to be written for the send (as opposed to the History records being written automatically).
2. Use a secure connection (https): if this box is checked, Swiftpage will use a secure connection to connect to ACT!. The default option when you install Swiftpage for ACT! is for this to be checked.
3. Do not ask about creating database fields: if you installed Snapshot when you installed Swiftpage for ACT!, this option will be grayed out. If you did **not** install Snapshot when you installed Swiftpage for ACT!, this option will be available. If the box is checked, Swiftpage will never ask you about adding fields to correctly install Snapshot. If the box is unchecked, Swiftpage will prompt you to add the database fields required to use Snapshot.
4. Manage Users button: the first thing to understand regarding the Manage Users function is that only one ACT! user can be associated with any one Swiftpage user ID. In other words, two ACT! users cannot access the same Swiftpage user ID. To connect or disconnect ACT! users and Swiftpage user IDs, follow these steps:
    a. Click on Manage Users.
    b. You will be prompted to put in your account (not user) password. Then click on Connect Existing Users.

c. The following screen will appear. Any connected ACT! users and Swiftpage user IDs already connected will appear on the right hand side, any waiting to be connected will appear on the far left (ACT! user names) and in the middle column (Swiftpage user IDs):
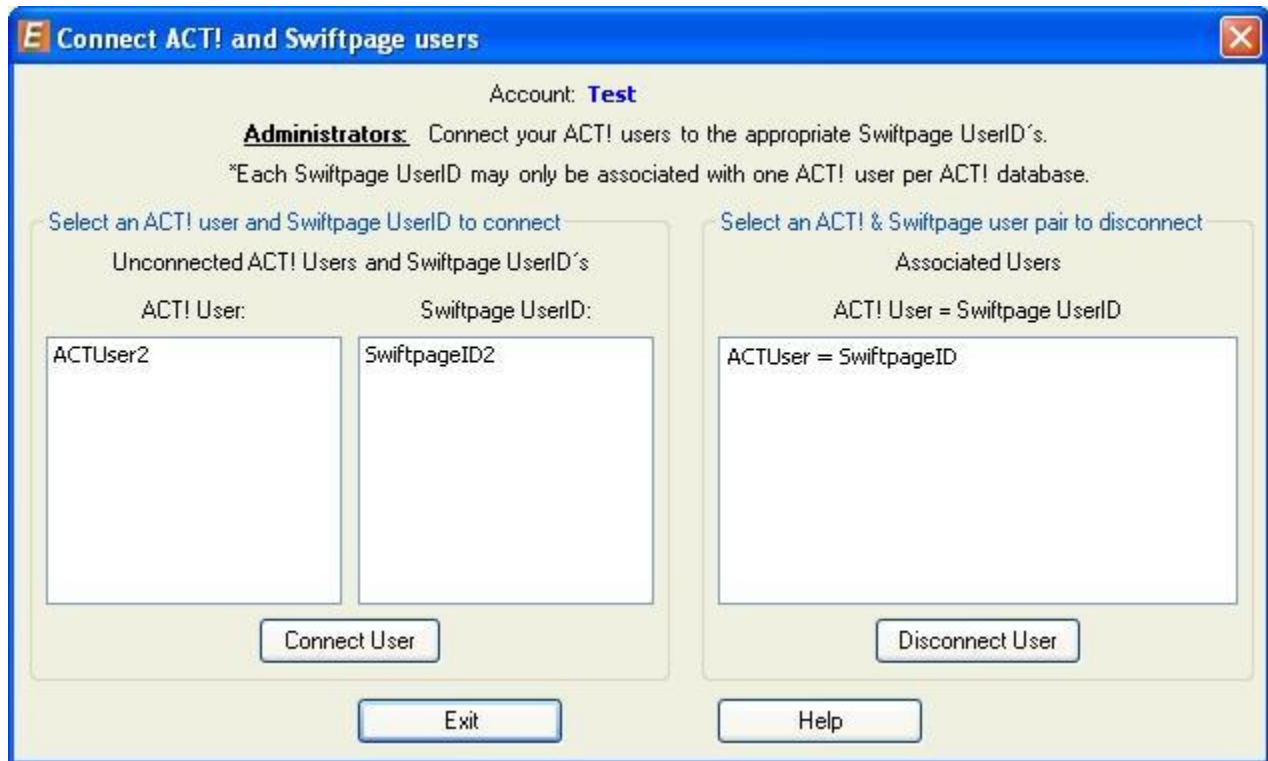
d. If you wish to connect users, highlight the ACT! user you need in the left-hand column, and the Swiftpage user ID you wish to connect it to in the center column, and then click on "Connect User." The combined pair will then move to the right-hand column, where you will now see them connected. To disconnect users, highlight the connected ACT! user name and Swiftpage user ID and click on Disconnect User.The users will return (disconnected) to the left columns.

e. When you are finished, click on Exit then click Cancel on the Manage Users screen.