



Quick Start Guide To:

Using Logic-Based Filtering with your ACT! Database

Please note: Logic-based filtering of contacts between Drip Marketing Stages is only available at the Gold and Platinum service levels.

The following instructions will help you set up a logic-based filter with your ACT! database:

1. In the Drip Marketing Campaign Sequence Edit screen, select a Stage to create a filter for. Then go to the Contacts section.
2. Here you can filter using contacts from all of your previous Email Stages that match one of the following email responses: “Opened, No Clicks,” “Clicked a link,” or “Unopened.”
3. Or, you can select to filter from one individual Email Stage that will have already taken place, and match a specific response.
4. To filter using your actual database you will want to check the last box that says “Also filter Contacts by matching Database field criteria.”
5. The dropdown box will display all of your personal ACT! database fields from the last time you accessed Swiftpage from your ACT! database. **Please note:** if any changes have recently been made to your ACT! database fields, you will need to close out of the Swiftpage Drip Marketing window, go back to your database and log back into Drip Marketing for the changes to take effect.
6. Once you have selected your ACT! database field you can choose the filtering parameters and the value you want to filter. These filtering options can play a large role in your Stage sequencing and your targeted efforts. For example, if you wanted to use a Call Center Stage you might want to only call those contacts in your database whose Email field is blank, and hope to obtain those email addresses through your call center efforts.
7. When everything looks good with the filter settings, click on the Add Stage button and you are done. Congratulations! You’ve successfully used logic-based filtering with your ACT! database.