



Quick Start Guide to:

Accessing Reports and Using Surveys in Swiftpage for SalesLogix

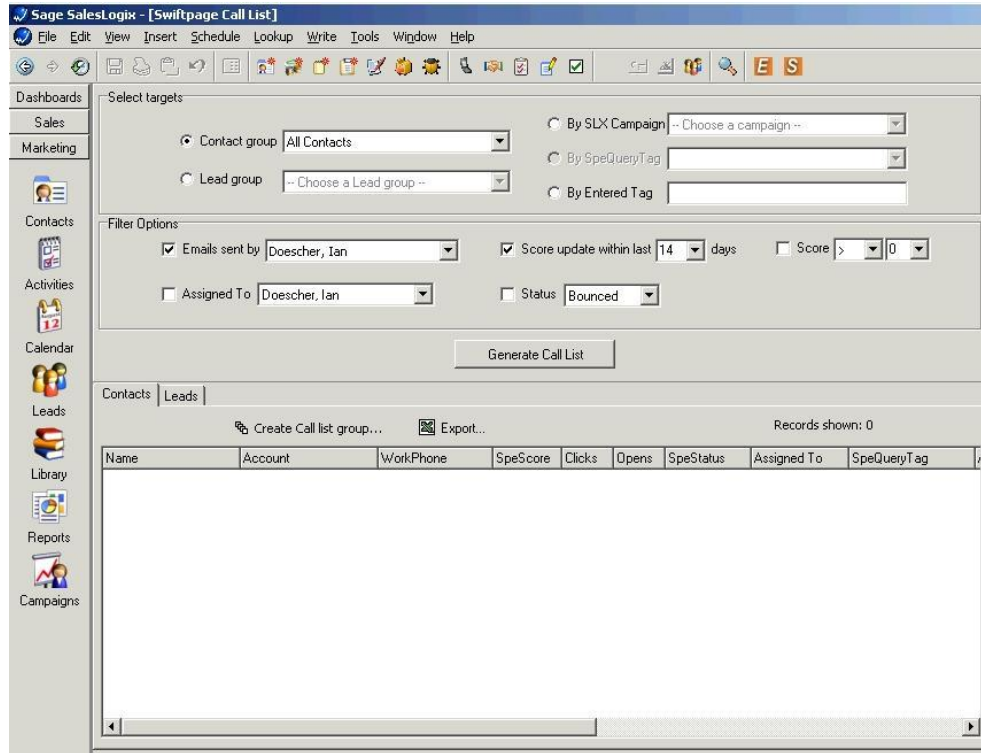
This Quick Start Guide takes you through accessing and retrieving your reports and scores in Swiftpage for SalesLogix, and accessing and retrieving survey results. Click on the Swiftpage S icon in SalesLogix. The following screen will appear:



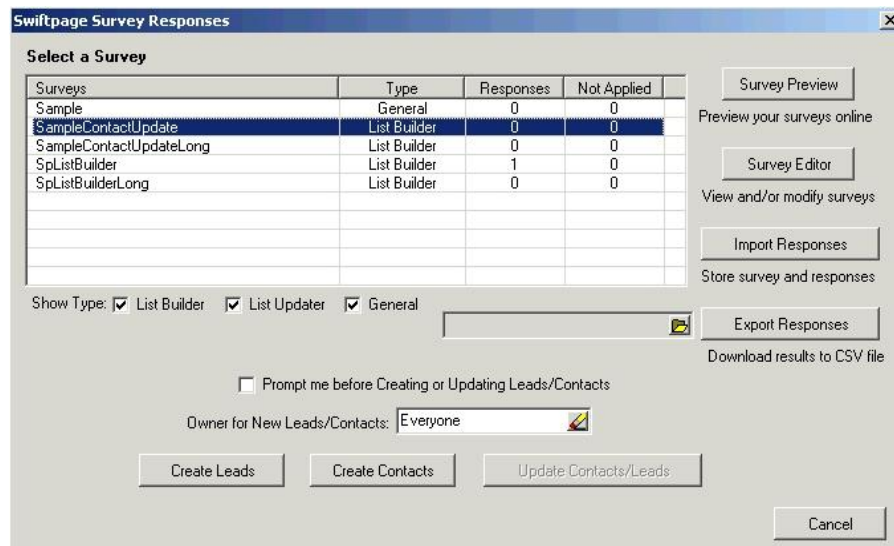
From here, you can perform several functions:

1. Online Reports: click here to be taken online to view the reports of your email blasts.
2. Get All Scores: click here to retrieve scores for all of your email blasts—including information about opens, clicks, bounces, opt-outs, etc.—and write them back into the history records for each of your contacts. **Note:** scores take 24 hours from the time of your email blast to become available for writing to SalesLogix.
3. Choose Scores: if, instead of retrieving all scores, you want to retrieve scores for only certain email blasts, choosing this option allows you to pick the email blasts for which you want to retrieve scores.

- Swiftpage Call List: clicking on this button will open a screen within SalesLogix (see below) that allows you to choose from contacts, leads, campaigns or query tags, and then create a Call List based on those contacts. Select your contacts and then click the “Generate Call List” button. Your Call List will then display in the window below, and you can then create a group from that list or export it in Excel format.



- How To: Swiftpage Call List: click here to be taken to Swiftpage’s online help section for Call Lists.
- Get Surveys and/or Responses: when you click this button, a screen appear like this:



Click the Survey Preview or Survey Editor button to be taken online to view or edit your surveys. Click Import Responses to check for new survey responses, and click Export Responses to receive the surveys in Excel format. If you have List Builder or List Updater surveys, you will see how many responses have been made to those surveys and how many still need to be applied to your SalesLogix database. Click Create Leads to apply those surveys as new leads, or Create Contacts to apply those surveys as new contacts. You will receive a confirmation screen telling you how many contacts were updated, ignored or added.

7. View Survey Responses: here you can choose a survey and date range to view survey responses for those criteria.
8. How To: Swiftpage Surveys: click here to be taken to Swiftpage's online help section for surveys.
9. Manage Tags: when you click this button, you are able to view, rename and delete your existing query tags (and any public query tags) for your SalesLogix Campaigns. The screen will look like this:

Tag	Owner
Newsletter - January	Vostrejs, Christa

You can also add a new tag by typing the tag name in the box provided and clicking Add. When you are finished managing your tags, just click Cancel.