SWIFTPAGE for SALESLOGIX 6.2 and 7.0+
TECHNICAL SPECIFICATIONS for v.3.5.5

General Stats:
Been tested to fully work with SalesLogix 6.2 SP0, SP1, SP2, SP3, SP4, SP5, SP6
Been tested to fully work with SalesLogix 7.0 SP0, SP1, SP2
Been tested to fully work with SalesLogix 7.2 & 7.5 (Windows client only)
SalesLogix tables modified: **None**
SalesLogix tables written to: 1 (History)
Tables added: 4 (SpeHistory, SpeLeadHistory, SpeSurveyResponses, SpeSurveys, SpeSend)
Global joins added: 3
Forms added: 21 (under the *Personal,Contact and/or Lead* family)
Scripts added: 6
Menu items: 1
Toolbar items: 2

Tables created by Swiftpage plug-in

1. SpeHistory/SpeLeadHistory (Fields: 20, Size in bytes: 1397 bytes)
    a. Association: Contact (by ContactID) or Lead (by LeadID)
    b. Type: One-to-many
    c. Rules:
        i. Only written if the User selects the *Update History* action after sending emails from Swiftpage or stage results from Swiftpage Drip campaign
        ii. Swiftpage Score information is also stored in this table
    d. Fields:

Field Name	Type	Length	Description
ContactID or LeadID	String	12	Entity whom this record belongs
CreateDate	Date/Time	8	Date record was created
CreateUser	String	12	SalesLogix user logged in at creation time
ModifyDate	Date/Time	8	Last written date/time for this record
ModifyUser	String	12	SalesLogix user logged in when created
SpeAction	String	32	Filter criteria type for Swiftpage Call list
SpeAssignedUserID	String	12	ID of Swiftpage Call list item assignment
SpeAssignedUserName	String	255	Swiftpage Call list item assignment
SpeBatchID	String	14	Email batch sent that entity was included
SpeClicks	Short Int	2	Nbr. of times entity clicked a link in email
SpeHistoryID	String	12	Internal database ID for this record
SpeOpens	Short Int	2	Nbr. of times entity opened email
SpeQueryTag	String	64	Entered name (tag) given to email batch
SpeScore	Short Int	2	Tabulation of opens and clicks
SpeStatus	String	24	Swiftpage
SpeSubject	String	255	Subject line of the email batch sent
SpeTemplate	String	255	Template used in email batch sent
SpeEmailSender	String	128	Send As Swiftpage UserID
SpeDripCampaignName	String	128	Swiftpage drip campaign, if created from stage results
SpeDripCampaignStage	String	32	Name of stage data is applicable to
SpeDripCampaignStageType	String	128	Type of Swiftpage drip campaign stage

2. SpeSurveys (fields: 59, size in bytes: 13069)
   a. Association: None
   b. Type: n/a
   c. Rules:
      i. A SpeSurvey row is added per unique survey imported
   d. Fields:

Field Name	Type	Length	Description
CreateDate	Date/Time	8	Date record was created
CreateUser	String	12	SalesLogix user logged in at creation time
LastResponseDate	Date/Time	8	Last date/time this survey had a response
ModifyDate	Date/Time	8	Last written date/time for this record
ModifyUser	String	12	SalesLogix user logged in at last written date
NumQuestions	Short Int	2	Number of questions in this survey
NumResponses	Short Int	2	Number of responses recorded for this survey
Question1-Question50	String	255	Survey questions (up to 50 stored)
SpeSurveryID	String	12	Internal database ID for this record
SurveyName	String	255	Name given to survey at creation time

3. SpeSurveyResponses (fields: 58, size in bytes: 12834)
   a. Association: Contact (by ContactID)
   b. Type: One-to-many
   c. Rules:
      i. Created/Updated per Contact that participated in a Swiftpage survey, if the response date is *newer* than the SpeSurvey tables last modified date.
   d. Fields:

Field Name	Type	Length	Description
Answer1 – Answer50	String	255	Answers for questions to related survey
ContactID	String	12	Contact whom responded to related survey
CreateDate	Date/Time	8	Date record was created
CreateUser	String	12	SalesLogix user logged in at creation time
ModifyDate	Date/Time	8	Last written date/time for this record
ModifyUser	String	12	SalesLogix user logged in at last written date
ResponseDate	Date/Time	8	When the response was recorded
SpeSurveryResponsesID	String	12	Internal database ID for this record
SpeSurveyID	String	12	Reference to the related survey

4. SpeSend (fields: 12, size in bytes: 749)
   a. Association: None
   b. Type: n/a
   c. Rules:
      i. Created per Email batch sent using the Swiftpage plug-in
   d. Fields:

Field Name	Type	Length	Description
CampaignID	String	12	ID of SalesLogix campaign, if one
CampaignStage	String	64	Name of SLX stage targets were from
ContactTargets	String	1	Targets were all contacts (true/false)
CreateDate	Date/Time	8	Date record was created
CreateUser	String	12	SalesLogix user logged in at creation time
IsSendAs	String	1	Email blast was sent of behalf-of another user
ModifyDate	Date/Time	8	Last written date/time for this record
ModifyUser	String	12	SalesLogix user logged in at last written date
NumSubmitted	Long Int	4	Number of emails in batch
Scheduled	String	1	True, if this email batch was scheduled
SpeBatchID	String	32	Swiftpages' ID for the email batch
SpeQueryTag	String	64	Tag assigned to this email batch by sender
SpeSendID	String	12	Internal database ID for this record
SpeSubject	String	255	Subject of emails in email batch
SpeTemplate	String	255	Template used in email batch

Tables used by Swiftpage plug-in

1. History (size in bytes:1831 bytes)
   a. Association: None
   b. Type: n/a
   c. All fields (except UserDefs, ActivityBasedOn, & Ticketed are used)
   d. Rules:
      i. Created per contact per email send, only if the User selects the *Update History* option after an email send is complete.

Global Joins

1. Joined SpeHistory to Campaign table via SpeQueryTag=Campaign Name
2. Joined SpeHistory to CampaignTarget table via ContactID=EntityID
3. Joined SpeSurveyResponses to Contact table via ContactID

Forms Added by Swiftpage plug-in

1. SpeAccountChangeForm – Allows User to change which Swiftpage account is used
2. SpeCallListAssignToForm – Allows User to set the *Assigned To* field in SpeHistory used in a *call list*
3. SpeCallListForm – Allows user to setup/create/export a *call list* based on selectable filters using the SpeHistory records
4. SpeCampaignResultsForm – Allows user to get targets and email scores from Swiftpage drip campaigns
5. SpeCampaignScoreForm – Allow user to select a Swiftpage email batch and import the scores into the SpeHistory records
6. SpeCampaignSelectForm – Legacy (not used)
7. SpeChangeQueryTagForm – Allows the renaming of a query tag
8. SpeContactingServerForm – Just a progress meter to show activity
9. SpeCreateGroupForm – Allows user to create Ad-Hoc *call list* or *survey* group
10. SpeDripCampaignSyncForm – Facilitates the syncing of Drip campaign list to chosen SLX target group
11. SpeLeadUpdateVerifyForm – Allows user to selectively update or skip adding of contacts/leads from drip campaign stage results
12. SpeManageQueryTags – Facilitates the management of Tags
13. SpeMultiAcctSelect – Allows a User to select their account
14. SpePreScoresUpdateForm – Allows user to quickly select All,None or Custom importing of score data.
15. SpeScheduleCampaignForm – Allows user to set the Date/Time to send an email batch.
16. SpeSendAsCustomFieldForm –
17. SpeSendAsErrorForm – Error summary when attempting to send email blast on behalf-of another Swiftpage user
18. SpeSendAsForm – Select user and time/date for sending email blast on behalf-of another Swiftpage user
19. SpeSendAsSummaryForm – Confirm SendAs results prior to sending email blast
20. SpeSlogixV2Form – The main dialog box of Swiftpage Email for SalesLogix, which allows the user to pick targets, subject, templates, personal message and send method.
21. SpeSlogixServicesForm – The other main dialog of Swiftpage Email (Services). The user can view reports, get scores, build a call list, get surveys and responses.
22. SpeSurveyLookupForm – Allows the user to select a Swiftpage survey and see the responses and build/filter the results.
23. SpeSurveySelectionForm – Allows the user select a specific Swiftpage survey and import the survey questions and responses into SpeSurveys and SpeSurveyResponses, respectively.
24. *SpeUpdateHistoryForm* – Allows the user to select which additional fields and the user can give the email batch a *tag* and gives the user the option to either create a SpeHistory record or not – if select *Skip History* then NO history is written
25. SpeValidateAddressesForm – Allows the user to see the first 10 valid email addresses.
26. SpeVerifySendForm – Controls the actual Send and History update and shows the progress of a Swiftpage email batch being sent.
27. Swiftpage Email History – A view that shows all SpeHistory records per Contact
28. Swiftpage Email Responses – A view that shows all SpeHistory records per Contact
29. Swiftpage History – A view that shows all SpeLeadHistory records per Lead
30. Swiftpage Email Results – A view that shows all SpeHistory records that have the field SpeQueryTag equal to the campaign name in the detail view of a campaign

31. Swiftpage Email Survey – A view that shows all survey results per contact

Scripts Added by Swiftpage

1. SpeCallListScript – This script controls the Call List form and various attributes of the form
2. SpeGeneralHelpScript – This script loads Swiftpage help into a browser window
3. SpePluginScript – This script controls the main Swiftpage form and various attributes of the form.
4. SpeQueryHelpScript – This script loads Swiftpage query help into a browser window
5. SpeSButtonScript – This script controls the Swiftpage Services form
6. SpeSurveyLookupScript – This script controls the Swiftpage survey lookup form and various attributes of the form.

Menu items

- Tools→Swiftpage…
    - Send Emails – Invokes 'SpeSlogixForm' (see above for description)
    - Scores, Surveys, Reports and Call List – Invokes 'SpeSurveyLookupForm'
    - Help…
        - Swiftpage Email Plug-in – invokes a browser help page for main plug-in
        - Swiftpage Score Query – invokes a browser help page for services

Standard Toolbars items

- 'E' Icon – Invokes the main Swiftpage Email form ('SpeSlogixForm')
- 'S' Icon – Invokes the main Swiftpage Email services form ('SpeSlogixServicesForm')