



# How to Use Swiftpage for SalesLogix

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# Basics of the Swiftpage for SalesLogix Integration

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

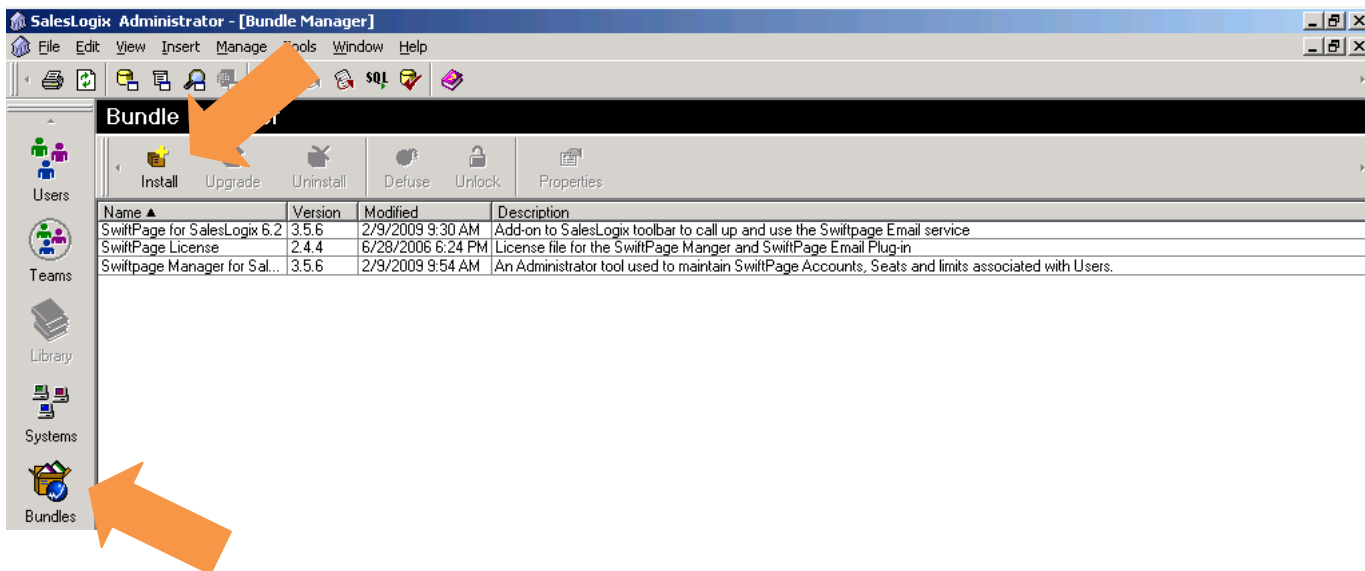
1. **Email Marketing:** Swiftpage for SalesLogix gives you the tools to create beautiful email templates, send directly from your database to your leads, contacts and groups, and track who opened and clicked your messages. You can Send Now or Schedule Send.
2. **Email Tracking:** When you send your email 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 SalesLogix'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 SalesLogix 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 SalesLogix.
5. **Drip Marketing:** Swiftpage Drip Marketing gives you the ability to create a sequence of messages that are automatically delivered to your SalesLogix contacts at the right time. Swiftpage Drip Marketing uses intelligent technology to send messages to contacts based on their interactions with previous messages or based on data in your SalesLogix database environment.

# How to Install Swiftpage for SalesLogix and Set Up Your Account

Follow these instructions to install Swiftpage for SalesLogix and set up a new or existing Swiftpage account.

## To install Swiftpage for SalesLogix:

1. Go to the Swiftpage web site ([www.swiftpage.com](http://www.swiftpage.com)) and click on “Try Swiftpage Free.” Then click on Swiftpage for SalesLogix.
2. Fill out the Swiftpage for SalesLogix Download form completely and click Submit.
3. Click on the download button to download the .zip file containing the Swiftpage for SalesLogix bundles.
4. Once downloaded, open the SalesLogix Administrator and click on the Bundles button. Then click Install and you will be given the option to install the Swiftpage for SalesLogix bundles you have just downloaded.



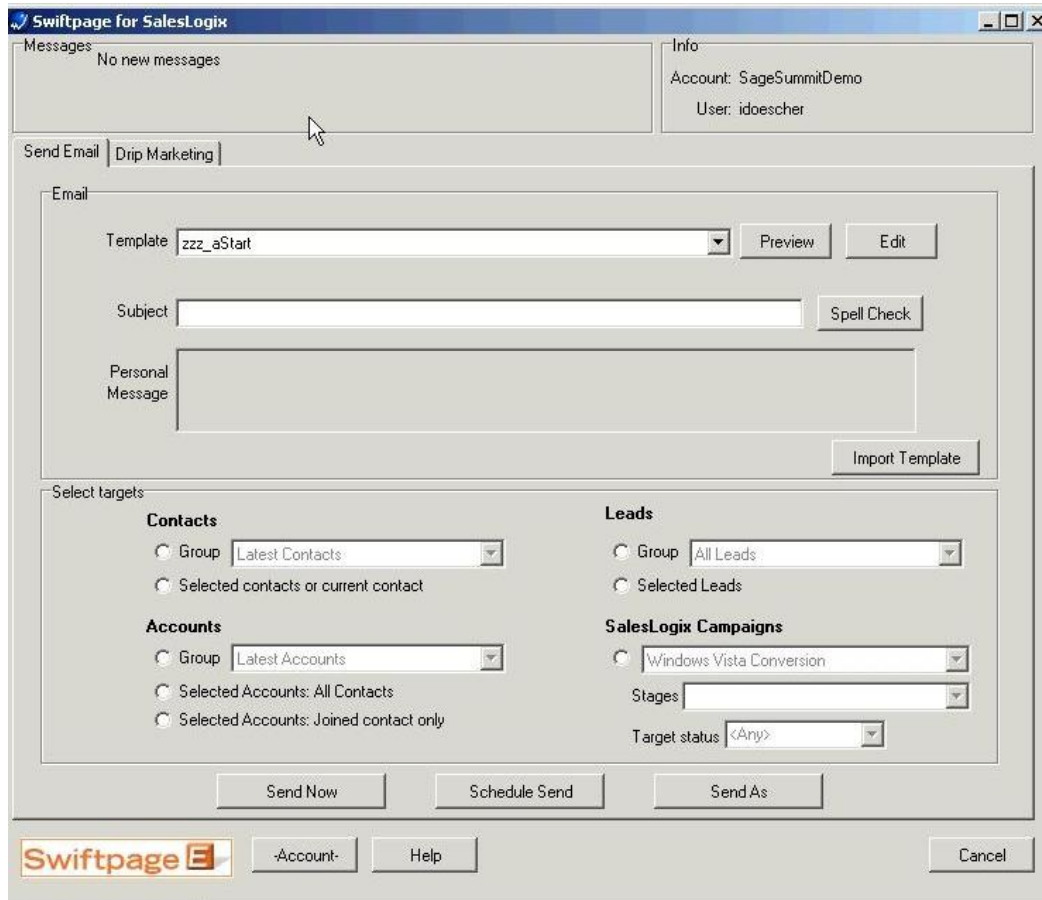
5. When the bundles are installed, you have the option of releasing them to various users. You should release the Swiftpage for SalesLogix bundle to all SalesLogix users who will be using Swiftpage. The Swiftpage Manager bundle should be release only to the user(s) who will be an administrator of your Swiftpage account.
6. Also from the SalesLogix Administrator, release Menus and Toolbars for the Swiftpage for SalesLogix bundle to all users. Release the Menu for the Swiftpage Manager bundle to the administrator(s).
7. It is helpful to read the Installation Guide included with your Swiftpage for SalesLogix download.
8. I would include more screenshots like the mapping of SLX users to SP users

## To set up your account in Swiftpage for SalesLogix:

1. After Swiftpage for SalesLogix is installed, open SalesLogix and go to Tools > Manage > Swiftpage Email Account > Create New Swiftpage Account. Create an account and click Submit. **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 SalesLogix.

# The E screen in Swiftpage for SalesLogix: Email Functions and Sending Email

When you click on the Swiftpage “E” icon in SalesLogix (after setting up your account), the Send Email and Drip Marketing window will open:



There are two tabs at the top of this window: Send Email and Drip Marketing. This section of the Swiftpage for SalesLogix Guide offers information on the Send Email tab. Information on the Drip Marketing tab is given in subsequent sections.

## The purpose and functions of the Send Email Tab in Swiftpage for SalesLogix:

- Click on the Preview Template button to view the template selected in the Email Template dropdown menu.
- Click on the Edit 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 SalesLogix.
- The Account button is used for various account functions—see the subsequent section on Swiftpage Account Settings in Swiftpage for SalesLogix.
- The Cancel button closes the window.

- Finally, the Email tab in Swiftpage for SalesLogix is used to send email blasts to your SalesLogix leads and contacts.

### How to send an email in Swiftpage for SalesLogix:

To send an email, follow these steps:

1. Select your email template from the dropdown menu.
2. Enter your subject line in the Email Subject box.
3. If applicable, enter a message in the Personal Message box.
4. Use the radio buttons to select the recipients: Contact Group, Selected contacts or current contact, Account Group, Selected Accounts, Lead Group, Selected Leads, or recipients from SalesLogix Campaigns.
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 targets (i.e. email recipients), when the email will be sent, and so on:

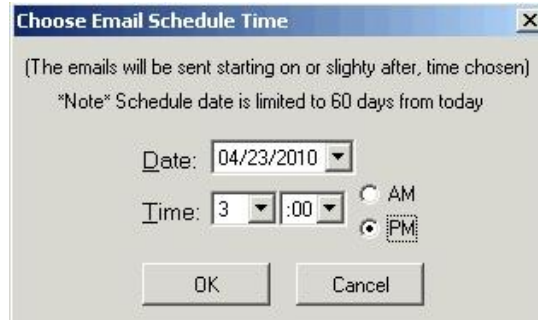


From here, you have three options:

1. Click the View Targets button to see a sample of your first contacts to verify that they look correct.
2. Click Yes to send your email blast. Once you do, you will receive a confirmation screen offering you the ability to assign a SalesLogix Query Tag (SpeQuery) to the email blast. Enter a query tag or enter an existing tag name and click Update History to write the email blast information to your SalesLogix History, or click Skip History to bypass writing to the History.
3. Cancel the send

## Email Option #2: Schedule Send

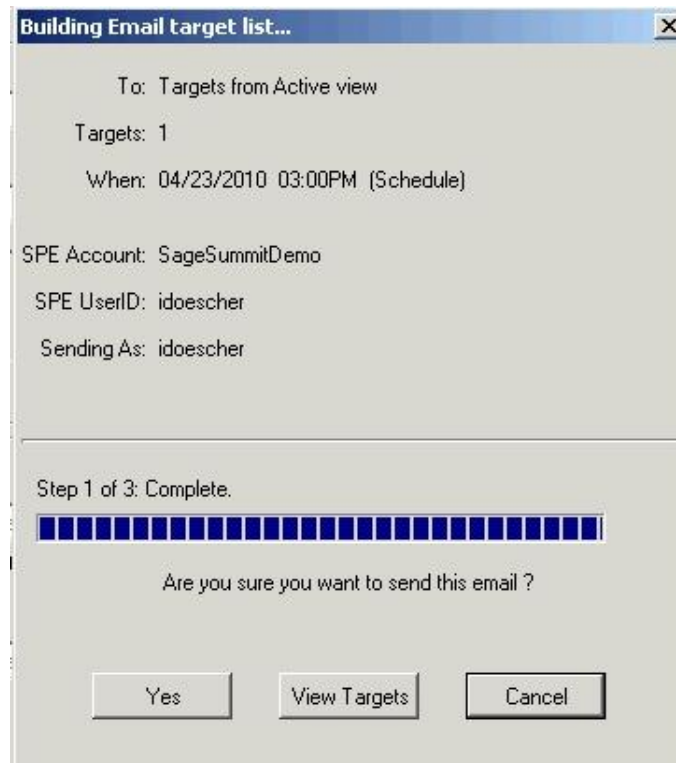
If you click on the Schedule Send option, a screen will open asking you to define when you want to send the email:



The dialog box titled "Choose Email Schedule Time" contains the following elements:

- Text: "(The emails will be sent starting on or slightly after, time chosen)"
- Note: "\*Note\* Schedule date is limited to 60 days from today"
- Date field: A dropdown menu showing "04/23/2010".
- Time field: Two dropdown menus showing "3" and ":00".
- Time selection: Radio buttons for "AM" and "PM", with "PM" selected.
- Buttons: "OK" and "Cancel".

Chose the date and time using the dropdown menus, then click OK. A confirmation window will appear similar to the Send Now option, except that now the "When" field now reflects the time you specified:



The dialog box titled "Building Email target list..." contains the following elements:

- To: Targets from Active view
- Targets: 1
- When: 04/23/2010 03:00PM (Schedule)
- SPE Account: SageSummitDemo
- SPE UserID: idoescher
- Sending As: idoescher
- Progress indicator: "Step 1 of 3: Complete." followed by a full blue progress bar.
- Text: "Are you sure you want to send this email ?"
- Buttons: "Yes", "View Targets", and "Cancel".

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 contacts to your list or remove contacts 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:** 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 SalesLogix 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 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 four choices for the sender on whose behalf you are sending:

Swiftpage - Send As

Choose sender

SalesLogix User Doescher, Ian  
Swiftpage User: idoescher

Swiftpage User awebb

Account Manager, of Contact or Lead

Custom field: Change  
Use: none

\*Note\* Acct. Mgr. or Custom field must be mapped to a Swiftpage User.  
Otherwise, the logged-on User will be the Sender.

Choose delivery time

Now  Schedule Select Date & Time

Enter Account password: \_\_\_\_\_

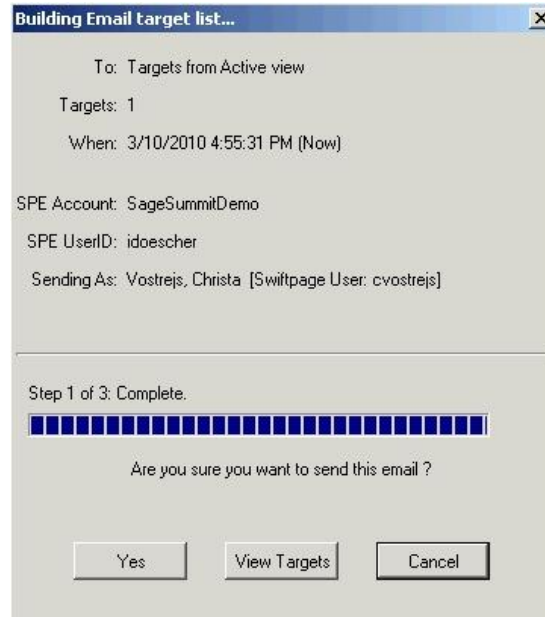
Next Cancel

1. Choose the SalesLogix User from the dropdown menu on whose behalf you would like to send the email. All SalesLogix users must be tied to Swiftpage user IDs in order for you to send on their behalf. In other words only SalesLogix users connected to Swiftpage user IDs will appear in this dropdown list.
2. Choose the Swiftpage User radio button and select the Swiftpage user from the dropdown menu to send on behalf of a particular Swiftpage user.
3. Choose the “Account Manager, of Contact or Lead” radio button to send on behalf of the record manager for each SalesLogix target to whom you are sending. **Note:** if you send on behalf of the Account Manager, make sure all of your Account Managers in SalesLogix 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.
4. Choose “Custom Field.” If your SalesLogix database has a custom field tied to particular SalesLogix 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 SalesLogix database called “Account Executive” that, for each contact, contains the name of one of your SalesLogix users.) The same rules apply for the Custom Field

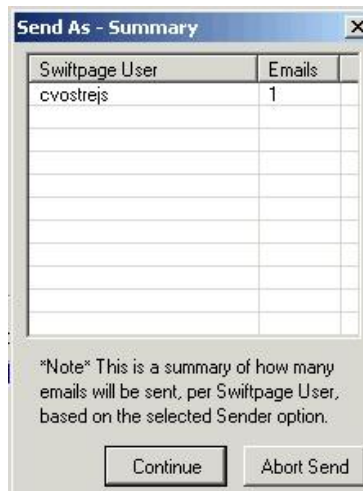


setting as it does for the Account Manager option: the SalesLogix user in the custom field must be connected to a Swiftpage user on your account.

After you have selected which user(s) the send as will be sent on behalf of, choose your delivery time: either 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 confirmation will appear, similar to the Send Now and Schedule Send options. Here, you can see the user(s) on whose behalf the email is being sent.



If the information looks correct, click Yes. You will receive a final confirmation screen showing you the Send As breakdown, and you have the option to Continue or Abort Send:



Click Continue and your email will be sent. Now 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.

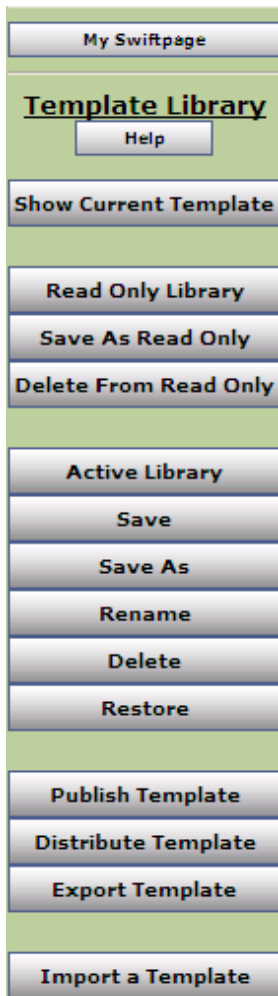
# Using the Swiftpage Online Editor

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 it, renaming it, deleting it and so on. You will primarily use the Content Editor tab when editing your template’s images and text. Finally, the Customize Template tab is primarily used for the structuring 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).

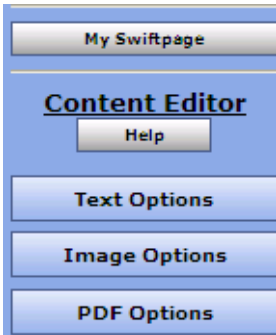


1. My Swiftpage: takes you back to the My Swiftpage portal, where you can access Surveys, Reports and more.
2. Help: accesses Swiftpage online help.
3. Show Current Template: displays the most current version of your Swiftpage template. Swiftpage only allows one template to be open at a time, so the “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 edit them. Begin by visiting [Swiftpage’s online template gallery](#) to find a template you want to work with. Then, enter 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. 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 template, 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.

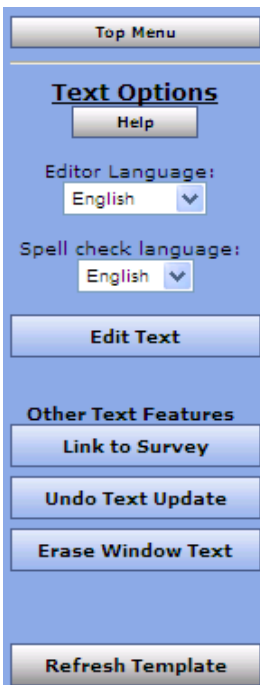
# Content Editor Functions

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 blue border.

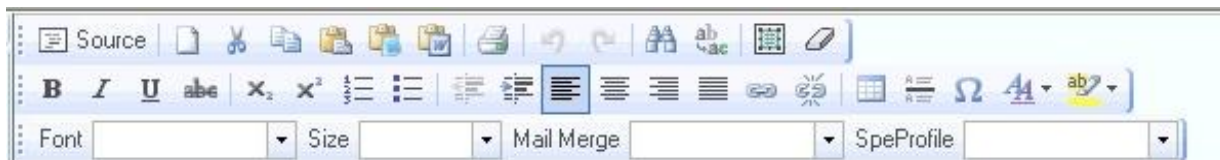
## The Text Options Menu



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

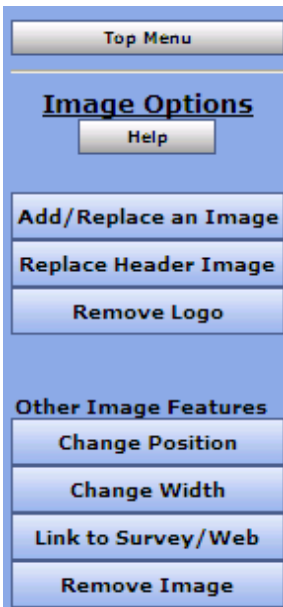
### Third Row:

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

### 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

## 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.

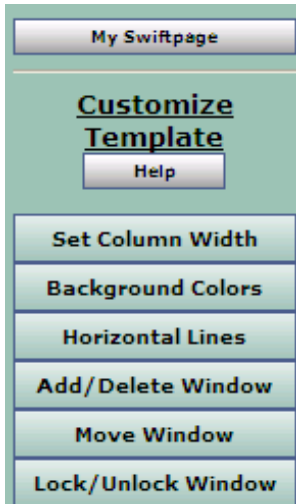
## The PDF Options Menu



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.

# Customize Template Functions

When you click on the Customize Template tab, you will be presented with the buttons shown and described below.



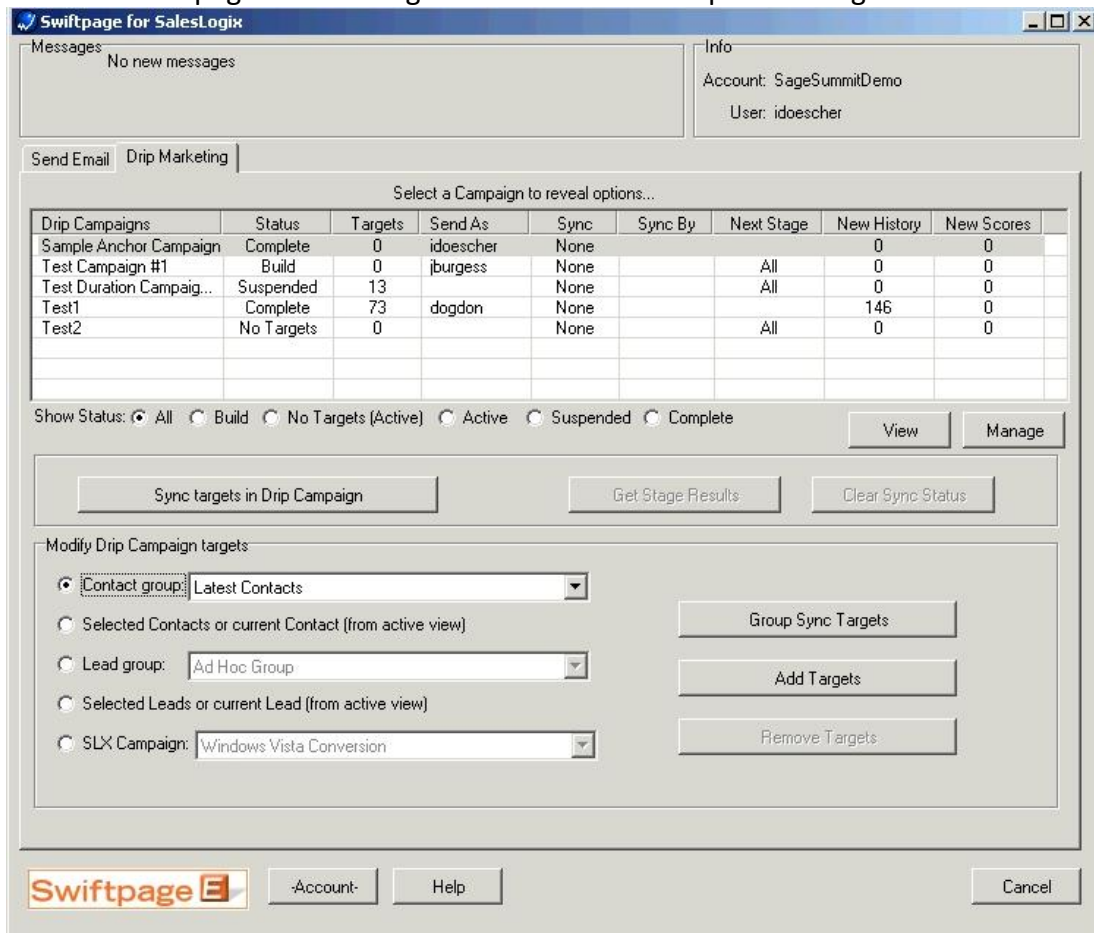
1. My Swiftpage: takes you back to the My Swiftpage portal, where you can access Surveys, Reports and more.
2. Help: accesses Swiftpage online help.
3. Set Column Width: every Swiftpage template is 600 pixels wide, and every Swiftpage template has two columns. (In some Swiftpage templates, the left-hand 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 entire 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 E screen in Swiftpage for SalesLogix: Drip Marketing

The second tab on the Swiftpage for SalesLogix “E” screen is the Drip Marketing tab:



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 targets it contains and other information. Radio buttons below the Campaign list allow you to filter which Campaigns you are seeing (based on status and number of targets).

On this screen, there are eight main functions:

1. **View:** this button takes you to the Drip Marketing Campaign editor for the selected Drip Marketing Campaign.
2. **Manage:** click this button to be redirected to the Swiftpage online Drip Marketing Campaign Manager, where you can create and edit Drip Marketing Campaigns.
3. **Sync targets in Drip Campaign:** click this button to sync the targets in your Drip Marketing Campaign with your SalesLogix database—it updates your Drip Marketing targets with the most current SalesLogix database information. When you select it, you will receive a confirmation screen. Click Yes and you will be notified that the contacts have been updated.
4. **Get Stage Results:** use this button to import the results of your Drip Marketing Campaigns into your SalesLogix database. There will be a number in the New History or New Scores at the top of the Drip Marketing window if a particular Campaign has results to import into SalesLogix. (This function is the



same as the Retrieving Scores function to be discussed in a subsequent 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:

Select a Stage from: Test1

test campaign	Email Blast	73	0
sync	Alert	73	0

\*Note\* Only stages which have executed and have data to retrieve are shown.

**Create Swiftpage history records for the targets who were part of the selected stage based on selected retrieval options.**

Create History for Targets with a Non-zero email score. (Email was opened, bounced, failed, etc)  
 Create History for Targets included in the stage (passed the stage filters)  
 Do Not create History records for these Targets. (These targets will be ignored in future requests)

Submit Cancel

Each Stage from your Drip Campaign with results to write shows up here, as well as the number of new History and new Scores results to write. Select a Stage at the top, and then select how you want to write History for those targets. When you have selected the option you want, click Submit. A confirmation window will appear, telling you that the results have been successfully imported.

5. Clear Sync Status: if you have set a Stage in your Drip Marketing Campaign to require a sync prior to the Stage’s execution, you can clear the needed Sync by highlighting the Campaign and clicking Clear Sync Status. Once you do this, the “Sync By” date will disappear.
6. Group Sync Targets: if you are using a specific SalesLogix group as the target group for a Drip Marketing Campaign, the Group Sync Targets button allows you to keep your Drip Campaign contact list current. Select your Group using the radio buttons in the “Modify Drip Campaign targets” section of the Drip Marketing tab. Then, when you select the Group Sync Targets button, the following screen appears:

Sync Drip Marketing campaign list

Drip Marketing campaign: Test1

\*Note\* Only the first 10 targets are shown in each Sync category. 'Do Not Solicit' targets ignored!

Matched	Missing	New
Alba, Jessica	Alba, Jessica	
Anthony, Carmelo	Anthony, Carmelo	
Bacon, Kevin	Bacon, Kevin	
Balboa, Rock	Balboa, Rock	
Brady, Wayne	Brady, Wayne	
Buffet, Warren	Buffet, Warren	
Farley, Chris	Farley, Chris	
Ferrell, Will	Ferrell, Will	
Hanks, Tom	Hanks, Tom	
Harding, Nick	Harding, Nick	

Total: 12                      Total: 61                      Total: 0

Select Sync options:

Update (all data fields)  
 Remove

Remove  
 Ignore

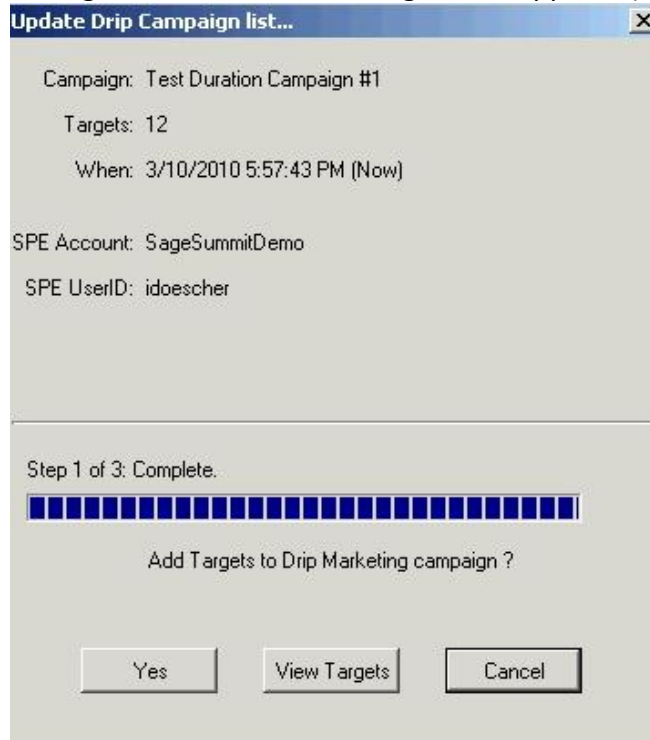
Add  
 Ignore

Targets that are in both the selected SLX group and the Drip marketing campaign list  
 Targets that are in the Drip marketing campaign list, but not in selected SLX group  
 Targets that are in the selected SLX group, but not in the Drip marketing campaign list

Apply changes Cancel

This window shows you how many contacts in the SalesLogix group matched with Drip Marketing contacts, how many are missing and how many are new. Select the radio buttons you desire— update or remove matching targets, remove or ignore missing targets, and add or ignore new targets. When you have selected the options you want, click Apply Changes and you will receive a confirmation screen telling you how many targets were updated, removed, added or ignored, as well as the new total number of targets in the Drip Marketing Campaign.

7. Add Targets: this button is used to add targets to Drip Marketing Campaigns. Select targets from the “Modify Drip Campaign targets” section of the Drip Marketing tab—Contact Group, Selected contacts or current contact, Lead Group, Selected leads or current lead, or SLX Campaign. When you select your targets and click the Add Targets button, the following screen appears (similar to send screens):



Click Yes to add the targets to your Drip Marketing Campaign and you will receive a confirmation screen telling you how many Targets are now in your Drip Marketing Campaign.

8. Remove Targets: use this button to remove targets from your Drip Marketing Campaign. Select targets from the “Modify Drip Campaign targets” section of the Drip Marketing tab—Contact Group, Selected contacts or current contact, Lead Group, Selected leads or current lead, or SLX Campaign. When you select your targets and click the Remove Targets button, a screen similar to the one shown above for Add Targets appears. Click Yes to remove the targets from your Drip Marketing Campaign, and you will receive a confirmation screen telling you how many Targets are now in your Drip Marketing Campaign.

# The S Screen in Swiftpage for SalesLogix: Scores, Surveys, Reports and Call Lists

When you click on the Swiftpage “S” icon in SalesLogix, the Scores, Surveys, Reports and Call Lists window will open:



Here are some of the simple functions of the “S” screen:

1. Online Reports: click this button to be taken online to the Email Reports section of Swiftpage to view your online reports for your email blasts.
2. How To: Swiftpage Call List: click this button to be taken to an online help video on Swiftpage Call Lists.
3. How To: Swiftpage Surveys: click this button to be taken to an online help video on Swiftpage surveys.
4. Help: launches online help for the Swiftpage for SalesLogix “S” screen.
5. Cancel: closes the window.

Other functions of this screen are explained in subsections.

## Retrieving Scores

Two buttons on the “S” screen have to do with Scores. The “Get All Scores” button automatically retrieves any scores (i.e. information on opens, clicks, bounces, etc. to be written into SalesLogix History records) and writes them into the appropriate target records. “Get All Scores” is a one-click solution to write scores into your SalesLogix History records. A confirmation screen tells you how many scores were written.

By contrast, the “Choose Scores” button allows you to choose which Scores to write into your SalesLogix database if you do not want to write the records automatically. When you click on “Choose Scores,” the following window appears:

	Email time and Subject	Updates
<input type="checkbox"/>	"02/27/10 10:26:31 AM, test, Sent To: iandoescher@gmail.com"	1
<input type="checkbox"/>	"02/27/10 10:02:38 AM, test"	1
<input type="checkbox"/>	"02/27/10 03:16:00 AM, C100227031600 -- unknown Subject, fully Sent As"	30

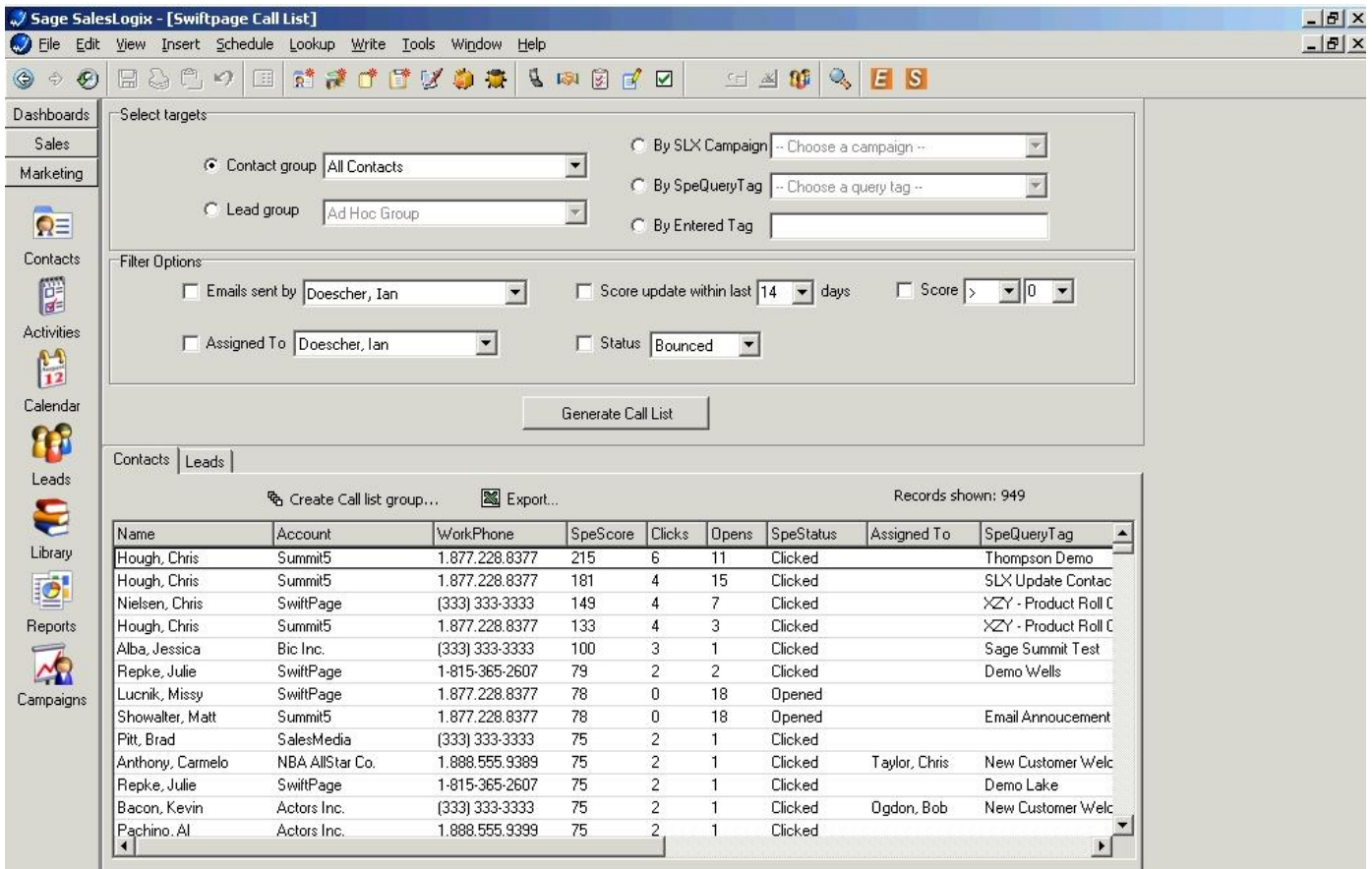
Toggle All       Create Campaign target response records      Submit      Cancel

Here, you can use the checkboxes to select which scores you want to write to your SalesLogix History. (Click Toggle All to select all available checkboxes.) Then, click Submit to write the scores for the selected email blast(s) into your SalesLogix History. You will receive a confirmation screen telling you how many scores were written.

## Swiftpage Call Lists

The Swiftpage Call List button opens a window within SalesLogix for creating Call Lists. Call Lists are ranked lists of your most interested contacts based on their interaction with a specific email campaign or a combination of email campaigns. For instance, if Joe opens your email three times and clicks on four different links in the email, he is considered a “Hot” contact, whereas Jane—who opened your email once and clicked on no links—is considered only a “Mild” contact. Joe’s name therefore appears higher on the Call List than Jane’s because Joe has shown more interest in the email. (In other words, the amount of opens and clicks a recipient has is a good indicator of their interest in your email.) The Call List is automatically sorted from the highest score to the lowest score, so that you can contact your most interested leads first.

When you click on the Swiftpage Call List button in Swiftpage for SalesLogix, the following screen appears:



In this window, you can create Call Lists based on various factors:

- In the Select Targets section, select specific targets you want to include in the Call List. (You are required to make a selection in this section.)
- In the Filter Options section, you can select additional filters based on who sent the email, how recently the score has been updated, a range of scores, to whom the targets are assigned, and/or the Status. Choosing different filters will change the nature of your Call List. (You are not required to choose filters.)

When you have selected the Targets and Filters you need, click the Generate Call List button. In a few seconds, the Call List names will appear in the window at the bottom (under the Contacts or Leads tab depending on what type of targets you have selected). At this point, you have a few options:

- Sort by various columns by clicking on the column headings.
- Click the “Create Call List group...” button to create a new SalesLogix Group out of the contacts shown on the Call List.
- Click the Export button to export the entire Call List in Excel format.

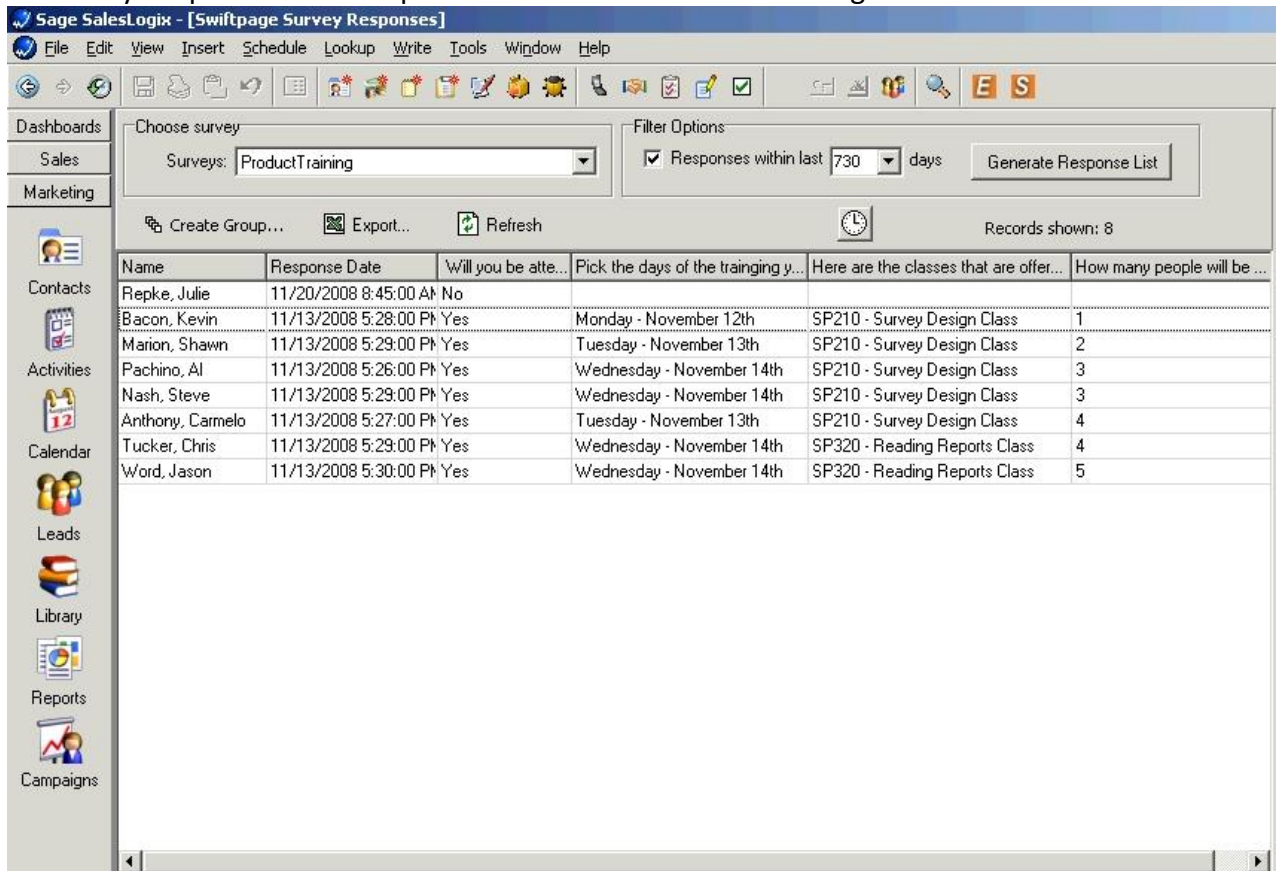
That’s it! The Call List function allows you to make specific groups of targets and group them easily by who opened and clicked your email, whose emails bounced, and many more factors.

## Surveys in Swiftpage for SalesLogix

There are two ways to access your surveys in Swiftpage for SalesLogix, the View Survey Responses button or the Get Surveys and/or Responses button.

### View Survey Responses

The View Survey Responses button opens a new window within SalesLogix:



Name	Response Date	Will you be attending?	Pick the days of the training you...	Here are the classes that are offered...	How many people will be ...
Repke, Julie	11/20/2008 8:45:00 AM	No			
Bacon, Kevin	11/13/2008 5:28:00 PM	Yes	Monday - November 12th	SP210 - Survey Design Class	1
Marion, Shawn	11/13/2008 5:29:00 PM	Yes	Tuesday - November 13th	SP210 - Survey Design Class	2
Pachino, Al	11/13/2008 5:26:00 PM	Yes	Wednesday - November 14th	SP210 - Survey Design Class	3
Nash, Steve	11/13/2008 5:29:00 PM	Yes	Wednesday - November 14th	SP210 - Survey Design Class	3
Anthony, Carmelo	11/13/2008 5:27:00 PM	Yes	Tuesday - November 13th	SP210 - Survey Design Class	4
Tucker, Chris	11/13/2008 5:29:00 PM	Yes	Wednesday - November 14th	SP320 - Reading Reports Class	4
Word, Jason	11/13/2008 5:30:00 PM	Yes	Wednesday - November 14th	SP320 - Reading Reports Class	5

This screen allows you to view survey responses for particular surveys. In the Choose Survey section, select a survey from the dropdown menu. Then, from the Filter Options section, select a time range for which to review survey responses. When you have selected the survey and time range for which you wish to view responses, click the Generate Response List button. Survey results will appear in the white window at the bottom of the screen. At this point, you have a few options:

- Sort by various columns by clicking on the column headings.
- Click the “Create group...” button to create a new SalesLogix Group out of the contacts shown on the survey responses.
- Click the Export button to export all displayed survey responses in Excel format.
- Click the Refresh button to update the list (in case new survey responses have come in).

This View Survey Responses function allows you to view how your targets have responded to your Swiftpage surveys and create Groups of those targets.

## Get Surveys and/or Responses

When you click the Get Surveys and/or Responses button, the following screen appears:

Surveys	Type	Responses	Not Applied
Sample	General	0	0
SampleContactUpdate	List Updater	5	0
SampleContactUpdateLong	List Builder	1	1
SpListBuilder	List Builder	5	0
SpListBuilderLong	List Builder	4	0

Show Type:  List Builder  List Updater  General

Prompt me before Creating or Updating Leads/Contacts

Owner for New Leads/Contacts: Everyone

Create Leads Create Contacts Update Contacts/Leads Cancel

Survey Preview  
Preview your surveys online

Survey Editor  
View and/or modify surveys

Import Responses  
Store survey and responses

Export Responses  
Download results to CSV file

This window shows you three types of Swiftpage surveys: General, List Updater and List Builder surveys. (See the next subsection if you are unclear about what List Updater and List Builder surveys are, or how to create them.) You have six options on this screen:

1. Survey Preview: highlight a survey and click Survey Preview to be taken online to see how your survey appears.
2. Survey Editor: highlight a survey and click this button to be taken online to Swiftpage's Survey Editor, to add or edit questions, change survey design and so on.
3. Import Responses: this button imports the responses to the highlighted survey, so that they are available in the View Survey Responses section of SalesLogix (see above). In other words, the Import Responses button automatically writes all survey responses into SalesLogix target records.
4. Export Responses: this button will export your survey responses in Excel format (CSV). To export responses, follow these steps: first, click on the file folder icon, enter a file name and choose a location for the file, and click Save. The file location and file name will then appear in the window next to the file folder icon. Finally, click the Export Responses button. A confirmation message will show you that the CSV file has been created.
5. Create Leads/Create Contacts: if you have highlighted a List Builder survey with some "not applied" surveys (i.e. survey responses still waiting to be written to the SalesLogix database), click one of these buttons to turn those List Builder survey responses into either SalesLogix Leads or Contacts. **Note:** check the "Prompt me before Creating or Updating Leads/Contacts" checkbox to review the Leads or Contacts before they are created. If you choose not to check this box, the Leads or Contacts will be automatically created. If you do check it, you will be taken to a confirmation screen showing you the new targets and asking what you want to do with them:

Questions	Maps to Field	Existing field values	*New* field values
<input type="checkbox"/> Time Stamp			02/27/2010 11:53
<input checked="" type="checkbox"/> First Name			Ian
<input checked="" type="checkbox"/> Last Name			Doescher
<input checked="" type="checkbox"/> Title			CEO
<input checked="" type="checkbox"/> Company Name			Swiftpage
<input checked="" type="checkbox"/> Phone Number			877-228-8377
<input checked="" type="checkbox"/> Mobile			
<input checked="" type="checkbox"/> Fax			
<input checked="" type="checkbox"/> Address			
<input checked="" type="checkbox"/> Address 2			
<input checked="" type="checkbox"/> Address 3			
<input checked="" type="checkbox"/> City			
<input checked="" type="checkbox"/> State			
<input checked="" type="checkbox"/> Zip Code			
<input checked="" type="checkbox"/> Country			Select Country
<input checked="" type="checkbox"/> Website			

This is a \*New\* Lead. What do you want to do ?

At this point, you can create or ignore the new leads/contacts as you wish.

- Update Contacts/Leads: if you have highlighted a List Updater survey with some “not applied” surveys (i.e. survey responses still waiting to be written to the SalesLogix database), click this button to update your SalesLogix targets using the List Updater survey responses. **Note:** check the “Prompt me before Creating or Updating Leads/Contacts” checkbox to review the Leads or Contacts before they are updated. If you choose not to check this box, the Leads or Contacts will be automatically updated. If you do check it, you will be taken to a confirmation screen similar to the one shown above showing the targets to be updated and asking what you want to do with them.

## List Updater and List Builder Surveys

A List Builder survey is a Swiftpage survey that can be used to gather new targets that will be added to your SalesLogix database. A List Updater survey is a survey that can be used to update target information that already exists in your SalesLogix 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.

- From SalesLogix, click on the S button, click on the Get Surveys and/or Responses button, then highlight any survey and 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 whatever 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).
- When you are finished with your survey, click on the Survey Result Options button. There, select the checkbox next to SalesLogix Database Update, then click on either the List Builder or List Updater radio button, and click Submit.
- The next screen to open will ask you to map fields from your List Builder survey questions with fields in your SalesLogix database. Match up questions with the fields as appropriate (you can also simply have the answers written to the Notes section in SalesLogix if you do not have an appropriate SalesLogix field for each question). When you are finished mapping the fields, click Submit.



In addition to SalesLogix Lead/Contacts fields, questions can be mapped to the following special processing values:

\*\*\*\* None \*\*\*\* The question will not be imported to SalesLogix.

\*\*\*\* Notes \*\*\*\* The question and answer will be placed in the Lead notes field in SalesLogix.

<u>Database Fields</u>	<u>Survey Questions</u>
FIRSTNAME	First Name
LASTNAME	Last Name
EMAIL	Email Address
**** Notes ****	Company Name
**** Notes ****	Phone Number

Submit Reset Cancel Finalize the Survey Result Options

- If you are using a List Builder survey, click on the Survey Management button, and 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 SalesLogix contacts.
- After your survey is live, use the steps described in the previous subsection to add List Builder survey responses as targets to your SalesLogix database, or update SalesLogix targets using responses from List Updater surveys.

## Manage Tags

The final function of the "S" screen in Swiftpage for SalesLogix is the Manage Tags function. The Manage Tags function allows you to edit the query tags you have created with your Swiftpage email blasts, and make them public or private. When you click the Manage Tags button, the following screen appears:

Swiftpage - Manage Query Tags

Tag Filters:

My: All  My: Public  My: Private  Other: Public

	Scope
Hiwa	Public
Newsletter - January	Private
Sample	Private

Selected Tag: Delete Rename Make Private Copy

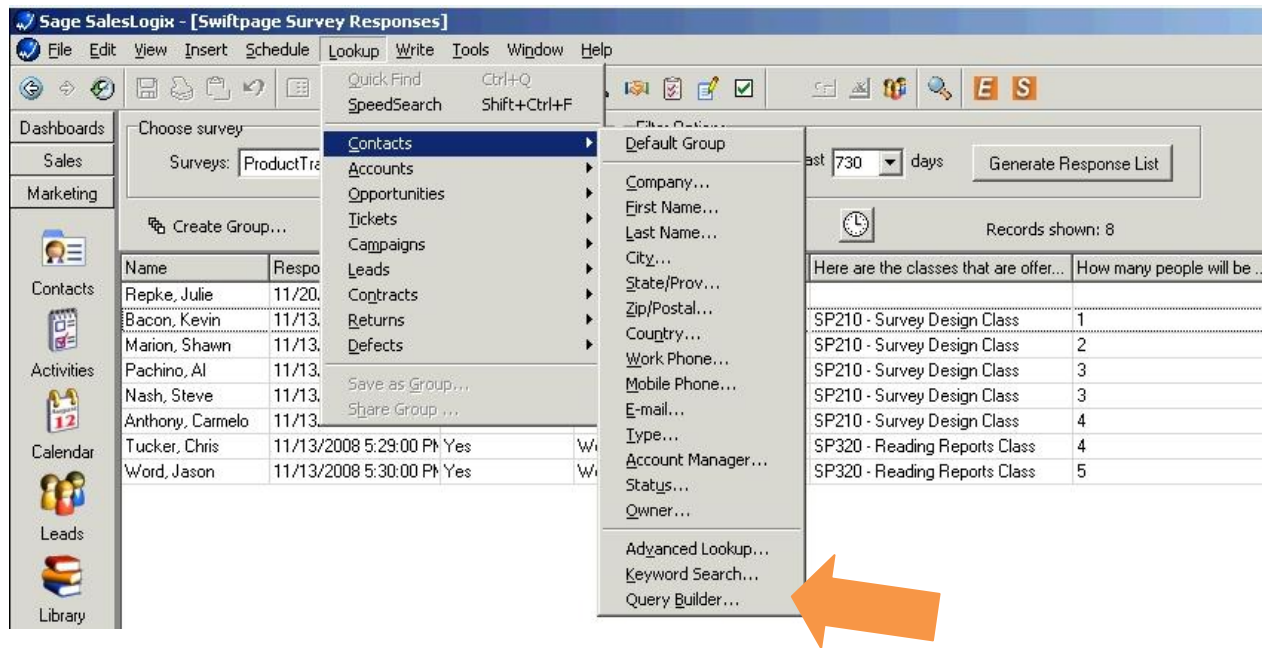
New Tag:  Add

Cancel

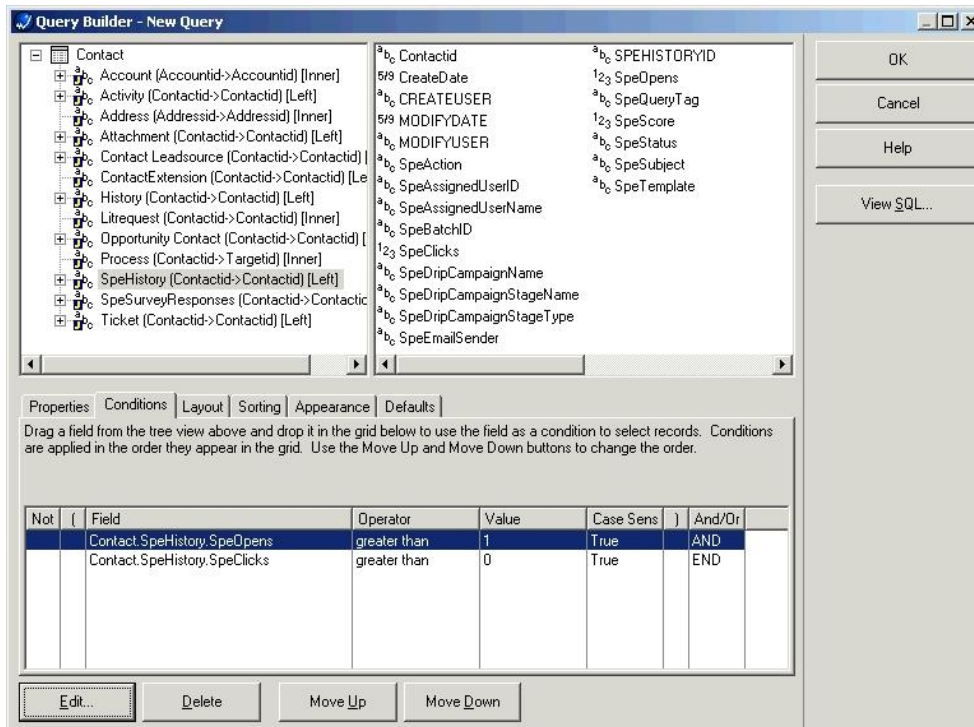
Radio buttons at the top of this screen allow you to switch between different views: all of your tags, your public tags, your private tags and other users' public tags. Use the Delete or Rename buttons at the bottom of the screen to perform those functions on your tags. Create a new tag by putting a name in the window and clicking Add. Finally, highlight particular tags and click Make Private or Make Public (the button name changes depending on the type of tag you highlight) to change the status of the tag from public to private or vice versa. You also have the option to Copy other users' public tags for your own use.

# Using the Query Builder with Swiftpage in SalesLogix

You can use data from your Swiftpage for SalesLogix email blasts and Drip Campaigns to create query tags in SalesLogix. Begin by clicking on Lookup > Contacts > Query Builder in SalesLogix:



When you do this, the Query Builder window will open. \*Note, under the Contacts menu, there are two options for Swiftpage results: SpeHistory and SpeSurveyResults. Click on one of those options, and you will see a menu of variables appear in the right-hand portion of the window. On the Properties tab, name your query. Then click on the Conditions tab to add various conditions for your Query. In the example shown below, a Query is built to find SalesLogix targets who have an SpeHistory Opens score greater than 1, and an SpeHistory Clicks score greater than 0 (i.e. any targets who opened an email at least twice and clicked on at least 1 link):



When all the Conditions you want to specify are in place, you can click on other tabs to determine the layout of the Query. Finally, click the OK button and your Query is built and displayed. The first contact's record appears and you can scroll through the matching targets one by one. You can now send to the contacts in this Query by clicking on the Swiftpage E in SalesLogix, and finding the Query under the Contact Groups radio button.

**Note:** this process can be repeated for Leads by following the same process under Lookup > Leads > Query Builder.

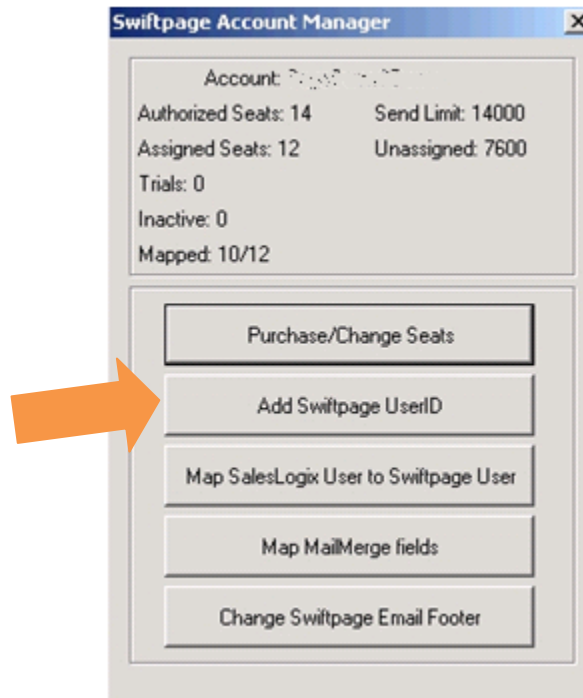
# Swiftpage Account Settings in Swiftpage for SalesLogix

## To change your User Password:

Click on the Account button on the Swiftpage window in SalesLogix (E or S button) and you can change your Swiftpage email password. Enter the old password, the new password, and click Submit.

## To add more users to your account:

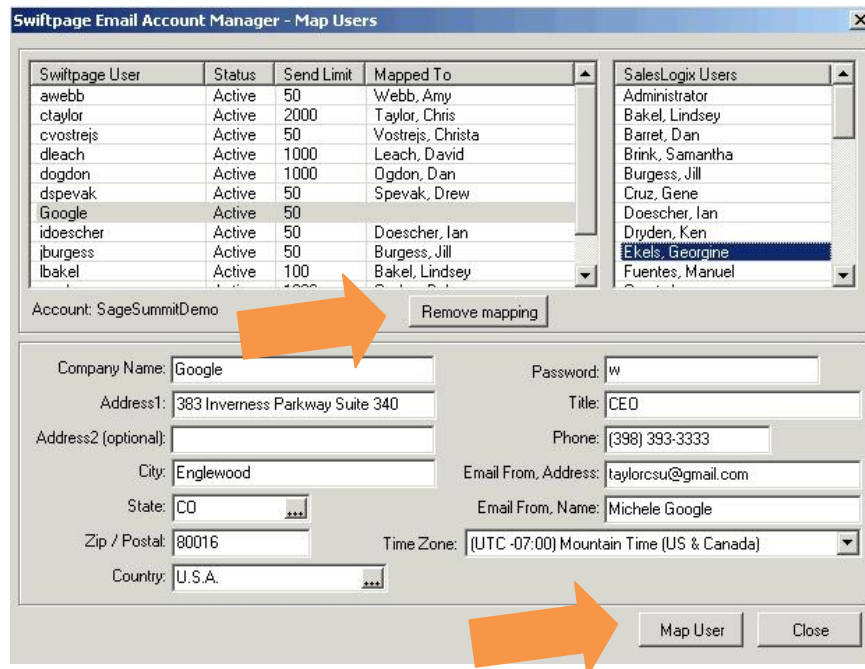
1. Within SalesLogix, click on Tools > Manage > Swiftpage Email Account.
2. Select the Manage Swiftpage Account option and enter your account password when prompted.
3. On the menu that appears, select the option to Add Swiftpage UserID.



4. Select the SalesLogix user you wish to associate with the new Swiftpage user, enter the User Information requested and click Submit.
5. Your user has been created!

## To map SalesLogix users to Swiftpage users:

1. Within SalesLogix, click on Tools > Manage > Swiftpage Email Account.
2. Select the Manage Swiftpage Account option and enter your account password when prompted.
3. Select the option to Map SalesLogix User to Swiftpage User:



4. Swiftpage users show up on the left, and if they are mapped to SalesLogix users that will show as well. You can highlight mapped users and click "Remove mapping" to disconnect Swiftpage users from SalesLogix users. Or, click on an unmapped Swiftpage user on the left and a SalesLogix user in the right column and click the Map User button to map those users to each other.
5. If you change any of the contact information in the bottom half of the screen, those changes will only take place if you use the "Map User" button and connect an unmapped Swiftpage user to a SalesLogix user.