



How to Use Sage SalesLogix E-Marketing Client (LAN)

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Basics of Sage SalesLogix E-marketing

Sage SalesLogix E-marketing

Swiftpage provides a powerful email marketing and automated marketing solution for Sage SalesLogix. Sage SalesLogix E-marketing allows you to send emails from your SalesLogix as well as record your send results into your database.

Email Marketing

Sage SalesLogix E-marketing gives you the tools to create beautiful email templates, send directly from your database to your accounts, leads, contacts and campaigns and track who opened and clicked your messages. With top-notch deliverability standards, including ISP Relations and Spam check, you can be sure your message makes it to your recipient's inbox when you send it using Swiftpage.

Highlights

- Send Now, Schedule Send or Send As
- Send As "Record Manager" for each contact in your email list easily

Email Tracking

When you send your email blast with Sage Saleslogix E-marketing 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. And your contact's interactions with your email send are recorded into your SalesLogix database for easy reference.

Surveys and Web Forms

Sage Saleslogix E-marketing Surveys are more than just data gathering. Map your survey responses back to specific fields in your database and watch your SalesLogix database grow! Set up an **Autoresponder** email to automatically be sent to your respondents when they complete your surveys and with **Drip Marketing Autoloader** you can automatically load them into a Drip Marketing Campaign to receive a series of marketing communications. And quickly view your survey responses in your SalesLogix database and organize into groups based on survey responses.

Call List

After you send an email blast to your contacts, your recipients open and click on the email message. Sage Saleslogix E-marketing creates a ranked list of the most interested contacts based on those interactions. You can also view and assign contacts from your Call List in your database to their record manager with a single click.

Drip Marketing

Sage Saleslogix E-marketing Drip Marketing gives you the ability to create a sequence of messages that are automatically delivered to your SalesLogix contacts at the right time. Drip Marketing uses intelligent technology to send messages to contacts based on their interactions with previous messages and based on data in your SalesLogix database environment.

Sage SalesLogix E-marketing LAN Fresh Installation Procedure

1. Open up the Sage SalesLogix *Administrator* and log in as an Admin.



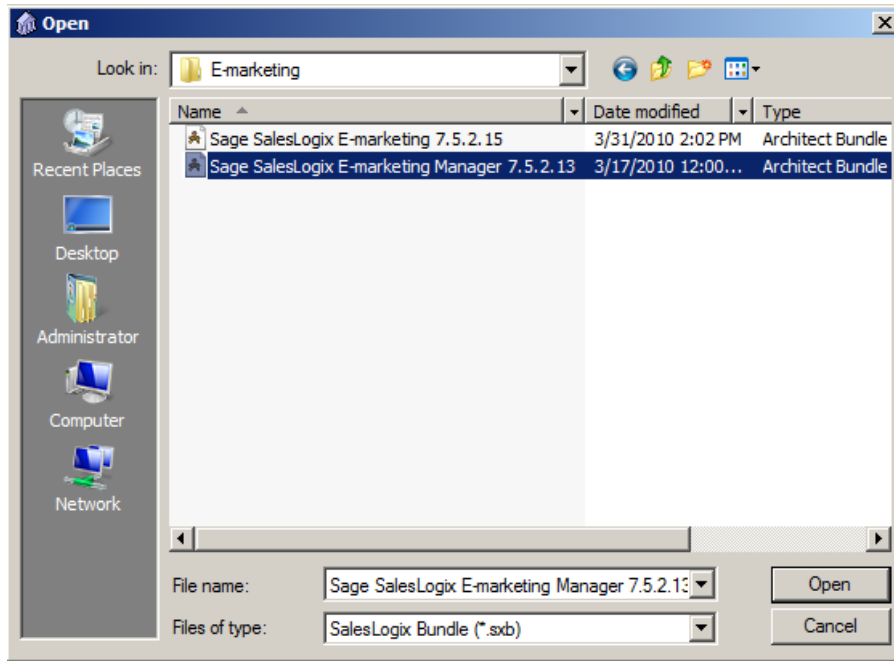
2. Navigate to the *Bundle Manager* by clicking on the *Bundles* button on the left-hand pane.



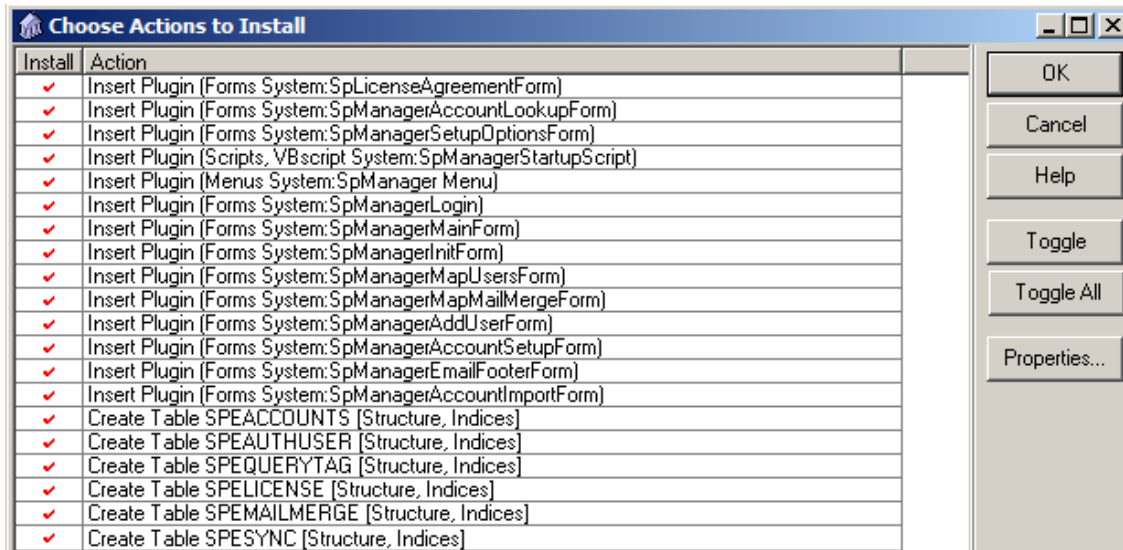
3. Once in the *Bundle Manager* click the *Install* button. If *Swiftpage for Sage SaleLogix* is installed, uninstall it first.



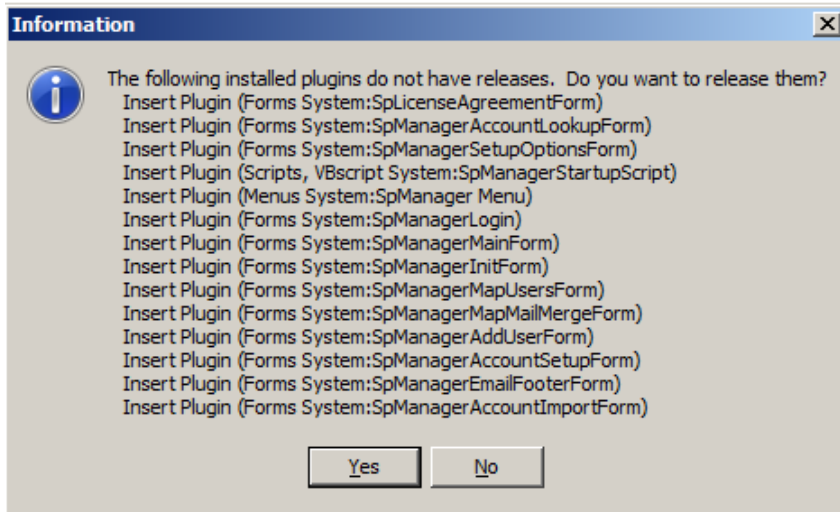
4. Navigate to the *Sage SalesLogix E-marketing Manger LAN* bundle, select it and click *Open*.



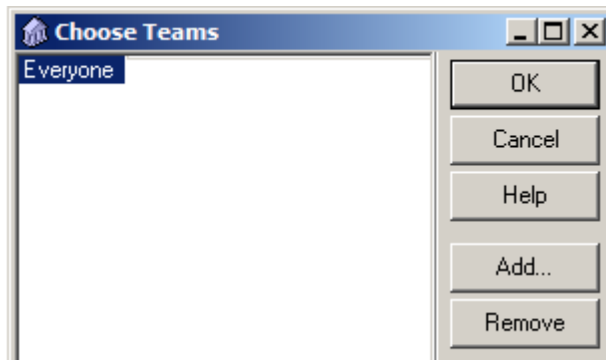
5. On the *Choose Actions to Install* window ensure all options are checked and click the *OK* button.



6. Click *Yes* on the next window to release the bundle.



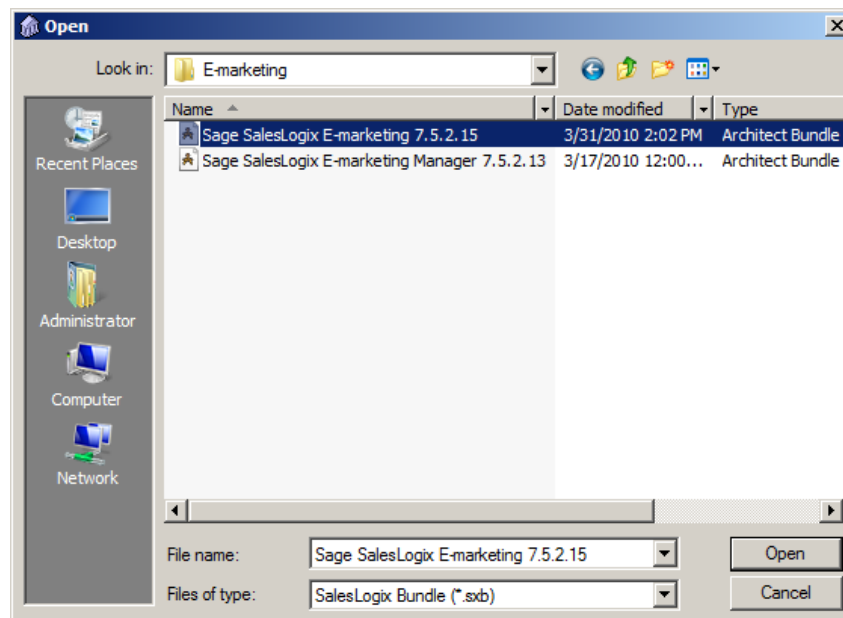
7. Select the Sage SalesLogix *Team* you would like the bundle released to, then click *OK*



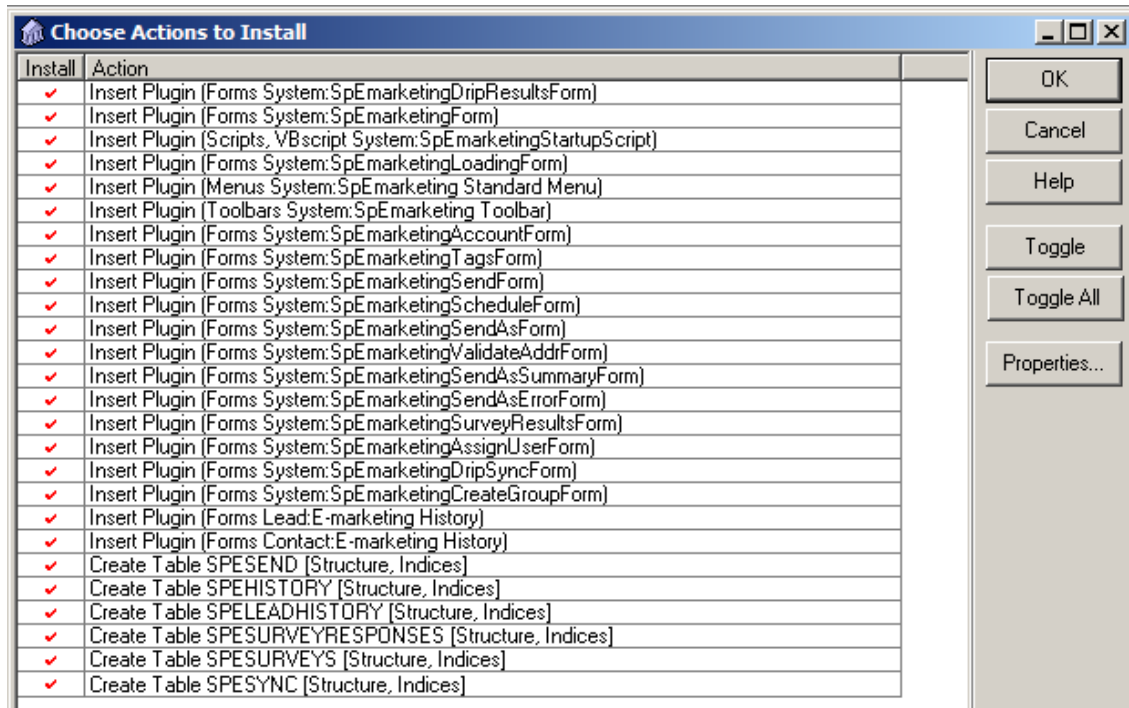
8. In the *Bundle Manager* click the *Install* button again to install the second bundle.



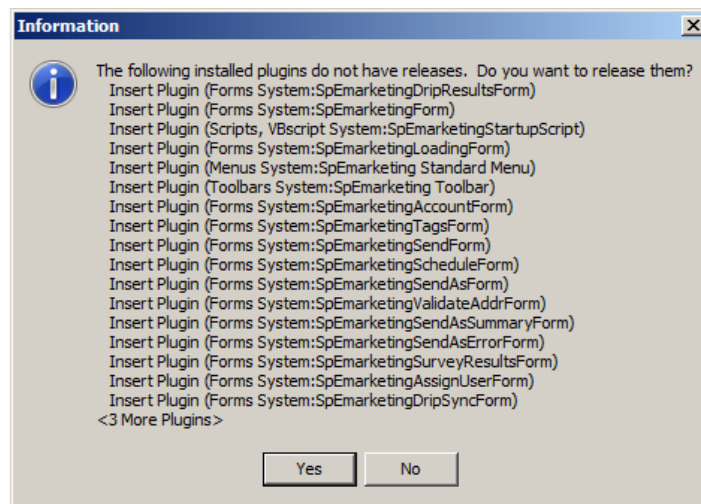
9. Navigate to the *Sage SalesLogix E-marketing LAN* bundle, select it and click *Open*.



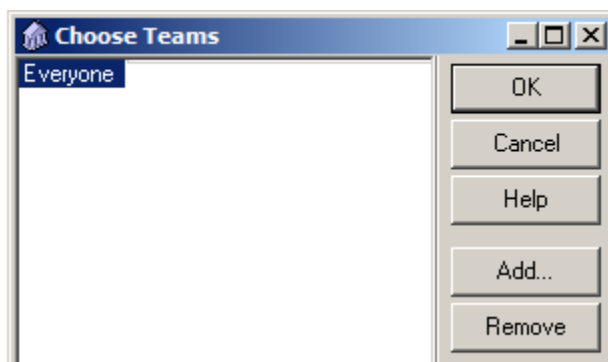
10. On the *Choose Actions to Install* window ensure all options are checked and click the *OK* button.



11. Click *Yes* on the next window to release the bundle.



12. Select the Sage SalesLogix *Team* you would like the bundle released to, then click *OK*



Sage SalesLogix E-marketing LAN Upgrade Procedure

Sage SalesLogix E-marketing LAN Upgrade Procedure

1. Open up the Sage SalesLogix *Administrator* and log in as an Admin.



2. Navigate to the *Bundle Manager* by clicking on the *Bundles* button on the left-hand pane.


3. Once in the *Bundle Manager* select the *Sage SalesLogix E-marketing Manger LAN* bundle and click the *Upgrade* button. If *Swiftpage for Sage SalesLogix* is installed, uninstall it first.



Name ▲	Version	Modified	Description
Sage SalesLogix E-marketing	7.5.2	3/31/2010 2:02 PM	E-marketing services for Sage SalesLogix
Sage SalesLogix E-marketing Manager	7.5.2	3/17/2010 10:34 ...	Gives access and allows modification of S
SalesLogix v7.5 Service Pack 2	7.5.2	11/19/2009 4:10 ...	SalesLogix v7.5 Service Pack 2


a. To uninstall the *Swiftpage for Sage SalesLogix Client* bundle, select *Swiftpage for SaleLogix 6.2*, and click the *Uninstall* button.

Name ▲	Version
SalesLogix v7.5 Service Pack 2	7.5.2
SwiftPage for SalesLogix 6.2	3.5.7
Swiftpage Manager for SalesLogix 6.2	3.5.6

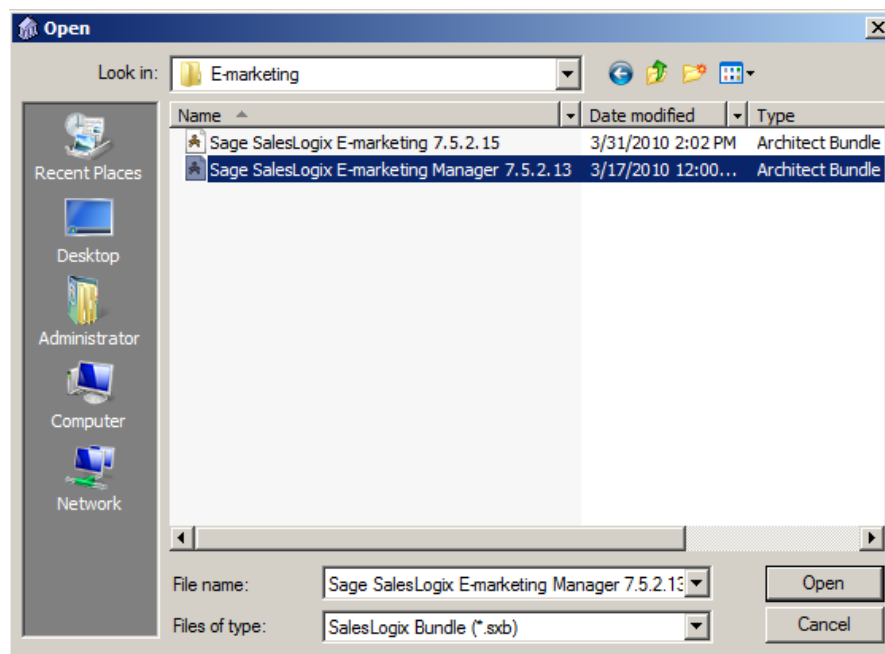


b. To uninstall the *Swiftpage for Sage SalesLogix Manager* bundle, select *Swiftpage Manager for SaleLogix 6.2*, and click the *Uninstall* button.

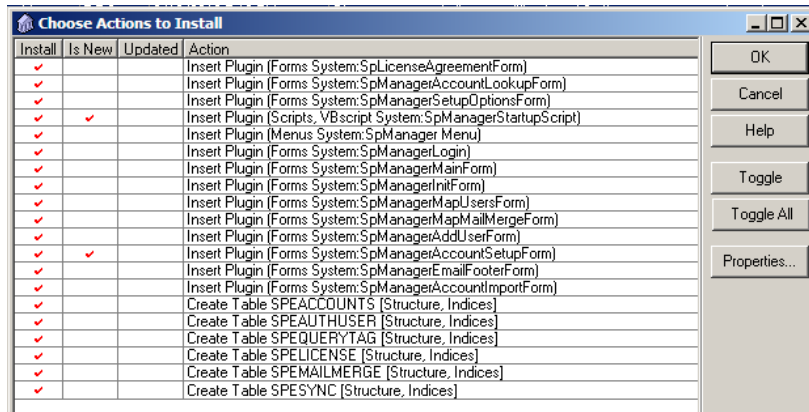
Name ▲	Version
SalesLogix v7.5 Service Pack 2	7.5.2
SwiftPage for SalesLogix 6.2	3.5.7
Swiftpage Manager for SalesLogix 6.2	3.5.6



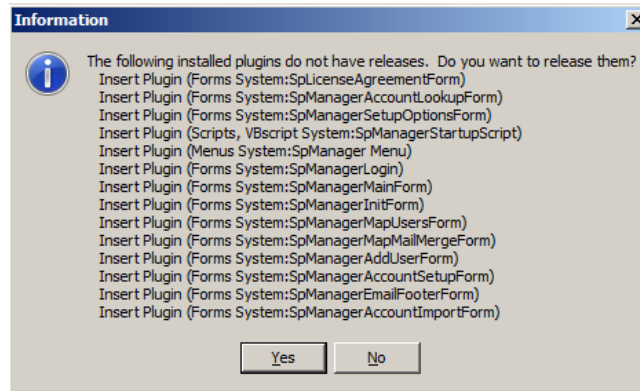
4. Navigate to the new *Sage SalesLogix E-marketing Manger LAN* bundle, select it and click *Open*.



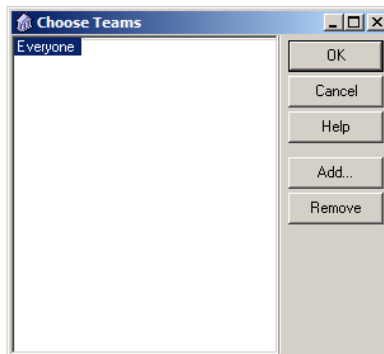
5. On the *Choose Actions to Install* window click the *OK* button.



6. Click *Yes* on the next window to release the bundle.



7. Select the Sage SalesLogix *Team* you would like the bundle released to, then click *OK*

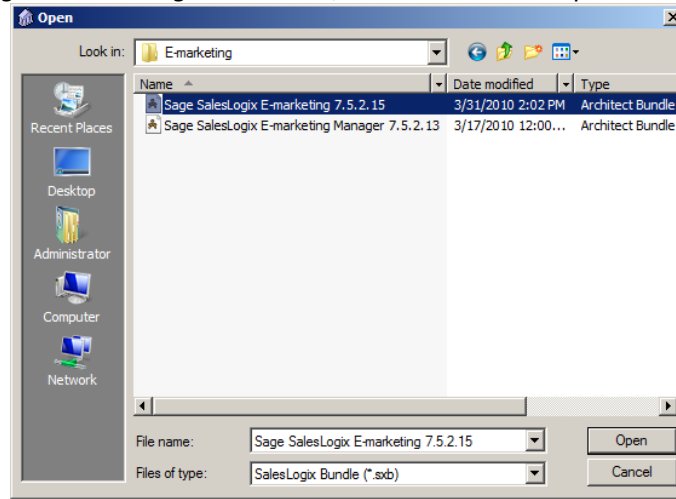


8. In the *Bundle Manager* select the Sage SalesLogix *E-marketing LAN* bundle and click the *Upgrade* button again.

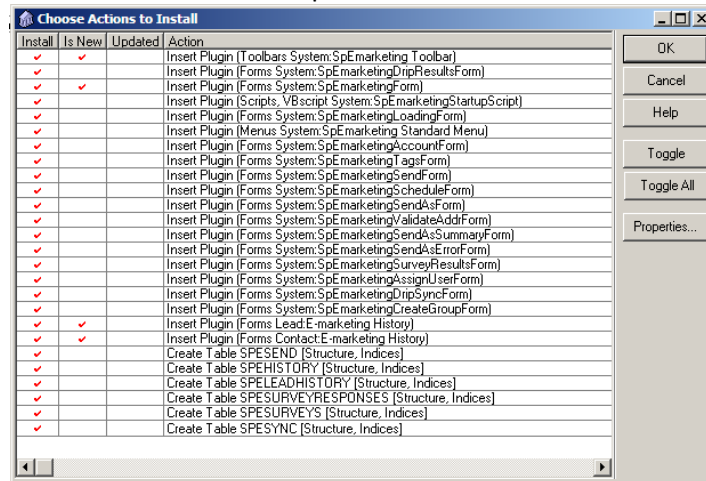
Name ▲	Version	Modified	Description
Sage SalesLogix E-marketing	7.5.2	3/31/2010 2:02 PM	E-marketing services for Sage SalesLogix
Sage SalesLogix E-marketing Manager	7.5.2	3/17/2010 10:34 ...	Gives access and allows modification of Sw
SalesLogix v7.5 Service Pack 2	7.5.2	11/19/2009 4:10 ...	SalesLogix v7.5 Service Pack 2



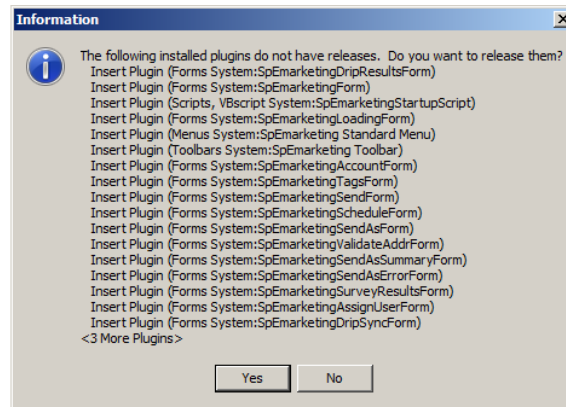
9. Navigate to the Sage SalesLogix E-marketing LAN bundle, select it and click *Open*.



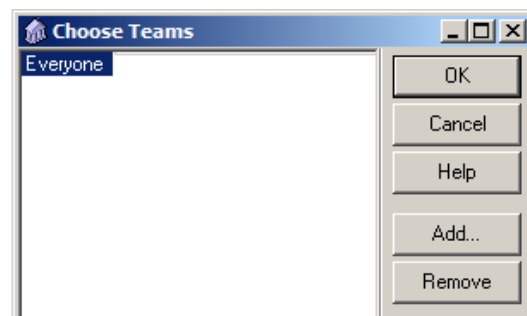
10. On the *Choose Actions to Install* window ensure all options are checked and click the *OK* button.



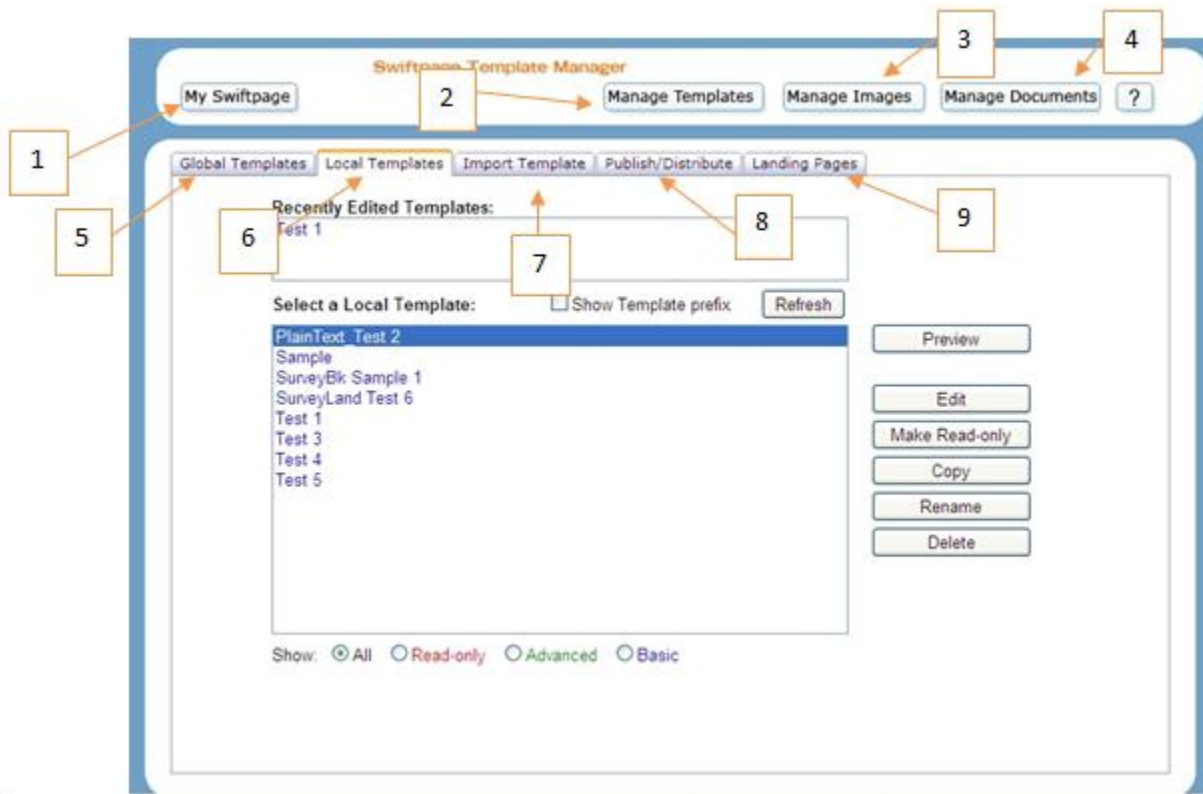
11. Click *Yes* on the next window to release the bundle.



12. Select the Sage SalesLogix *Team* you would like the bundle released to, then click *OK*



Template Manager



1. **My Swiftpage:** click here to return to the Swiftpage Connect screen.
2. **Manage Templates:** this button returns you to the Template Manager, if you have clicked away to the Image Manager or Document Manager.
3. **Manage Images:** click here to be taken to your Image Manager, where you can upload and store images to be used in your Swiftpage templates.
4. **Manage Documents:** this button opens your Document Manager, where you can upload and store PDF documents to be used and linked to from your Swiftpage templates.
5. **Global Templates:** this tab displays all of the Swiftpage global templates which you can then Preview or copy to your Local Templates. For more information [click here](#).
6. **Local Templates:** click on this tab to display your Local Templates. You can then preview, edit, copy, rename, or delete those templates, or convert them to read-only (i.e. non-editable) format. For more information [click here](#).
7. **Import Template:** this tab allows you to import a template in HTML format. For more information [click here](#).
8. **Publish/Distribute:** use this tab to send your Swiftpage templates to other Swiftpage users, both within your account (Publish) and from another account (Distribute). For more information [click here](#).

Using the Swiftpage Online Basic Editor

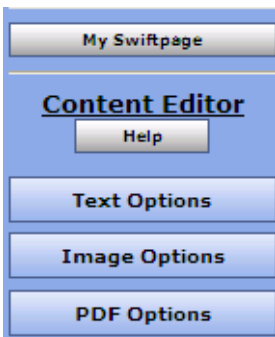


When you first enter the Swiftpage online editor, you will see two tabs on the left-hand side of the screen; Content Editor, and Customize Template.

You will primarily use the Content Editor tab when editing your template's images and text. And the Customize Template tab is primarily used for the structure your template, including column widths, colors, adding windows, and so on. The following sections explain the functions of each of these tabs.

Content Editor Functions

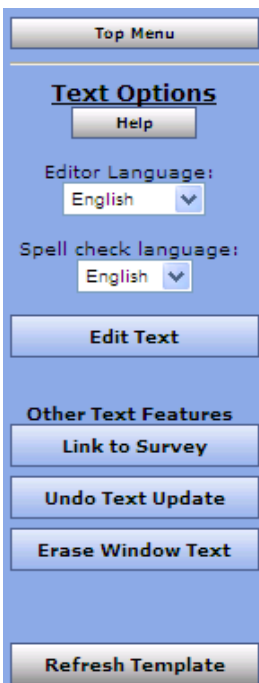
When you click on the Content Editor tab, you will be presented with the buttons shown and described below.



1. My Swiftpage: takes you back to the Swiftpage Connect 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:

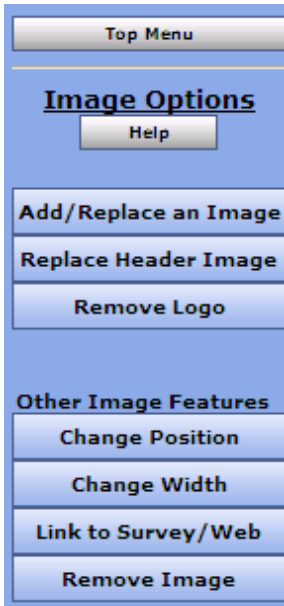
1. Source: allows you to edit the HTML source code.
2. Clears text: clears all text
3. Cut text
4. Copy text
5. Paste
6. Paste as plain text
7. Paste from Microsoft Word
8. Print
9. Undo
10. Redo
11. Find
12. Replace
13. Select all
14. Remove format

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.

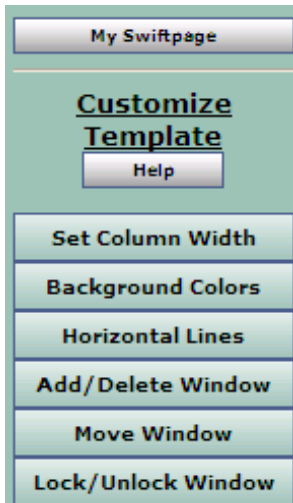
The PDF Options Menu



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

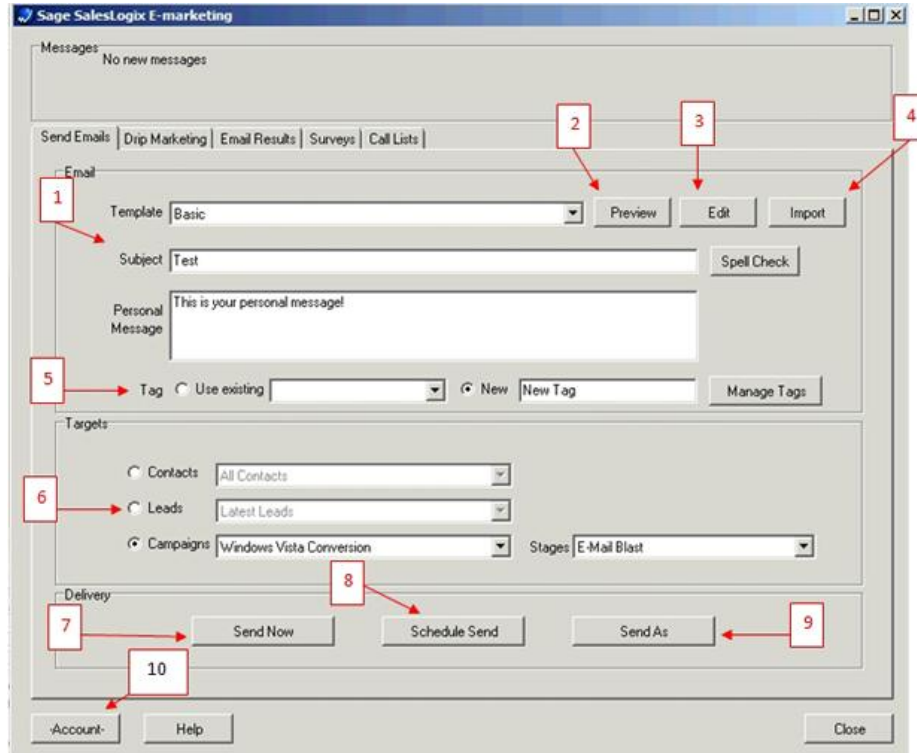
When you click on the Customize Template tab, you will be presented with the buttons shown and described below.



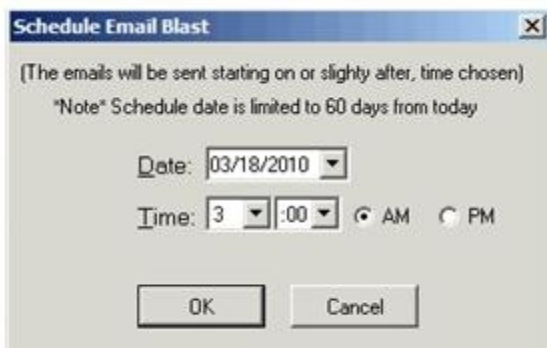
1. **My Swiftpage:** takes you back to the Swiftpage Connect portal, where you can access Surveys, Reports, and more.
2. **Help:** accesses Swiftpage online help.
3. **Set Column Width:** every Swiftpage template is 600 pixels wide, and every Swiftpage template has two columns. (In some Swiftpage templates, 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, if you so desire.

Send Email Blast Tab

This page explains the features of the Sage SalesLogix E-Marketing Send Email Blast tab.



1. In Send Email Blast tab, use the Email section to select your template from the Template drop-down list, enter the subject line for your email blast, and add a Personal Message if applicable.
2. The Preview button opens a new web page with a preview of the template selected in the Template drop-down list.
3. The Edit button opens the Sage SalesLogix E-Marketing Template Editor, where you can edit the template selected in the Template drop-down list.
4. The Import button allows you to browse for an import your own HTML file to send as an email blast through Sage SalesLogix E-Marketing.
5. In the Tag section, you can use the option button and drop-down list to select one of your existing Sage SalesLogix tags for your email blast. Or, use the option button for New and enter a new tag name. Click Manage Tags to rename, edit or delete Sage SalesLogix tags.
6. There are three types of Targets you can send to. Select the option button for Contacts, Leads or Campaign, and then use the drop-down list to select specific targets for your email blast.
7. Under Delivery, you can choose to Send Now (which will queue the email blast for immediate delivery). (See below for further options.) When you click this button, the following confirmation screen appears. Click Yes to proceed and send your email blast.
8. The Schedule Send option opens a calendar from which you can choose the date and time of your email blast.



Choose the date and time using the drop-down list, then click OK. A confirmation window will appear similar to the Send Now option, except that the “When” field now reflects the time you specified. Click “Yes” to schedule your send for the time specified.

9. Send As allows you to send on behalf of another Sage SalesLogix user. When you click Send As, the following screen appears:

The screenshot shows a dialog box titled "Sage SalesLogix E-marketing". It contains three main sections. The first section, "Choose sender", has three radio buttons: "SalesLogix User" (selected), "Account Manager of target", and "Custom field". The "SalesLogix User" option has a dropdown menu showing "Administrator" and "Switpage User: Aaron". The "Custom field" option has a dropdown menu showing "UserField4". Below this is a note: "*Note* Acct. Mgr. or Custom field must be mapped to a Switpage User. Otherwise, the logged-on User will be the Sender." The second section, "Choose delivery time", has two radio buttons: "Now" and "Schedule" (selected), with a "Select Date & Time" button next to it. The third section is a password field labeled "Accounts 'SendAs' password:" with a masked password "*****". At the bottom are "Next" and "Cancel" buttons.

You now have the following option

- From the drop-down list, choose the Sage SalesLogix user on whose behalf you would like to send the email. All Sage SalesLogix users must be tied to Sage SalesLogix E-Marketing users in order for you to send on their behalf. In other words, only Sage SalesLogix users who have E-Marketing user IDs will appear in this drop-down list.
- Choose the "Account Manager of target" option button to send on behalf of the record manager for each Sage SalesLogix target to whom you are sending. **Note:** if you select this option, make sure all of the Sage SalesLogix Account Managers are connected to active users on your Sage SalesLogix E-Marketing account. Otherwise, the email will appear to be from the user who is doing the Send As.
- Choose "Custom Field." If your Sage SalesLogix database has a custom field tied to particular Sage 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 Sage SalesLogix database called "Account Executive" that, for each contact, contains the name of one of your Sage SalesLogix users.) The same rules apply for the Custom Field setting as it does for the Account Manager option: the Sage SalesLogix user in the custom field must be connected to a Sage SalesLogix E-Marketing user on your account.

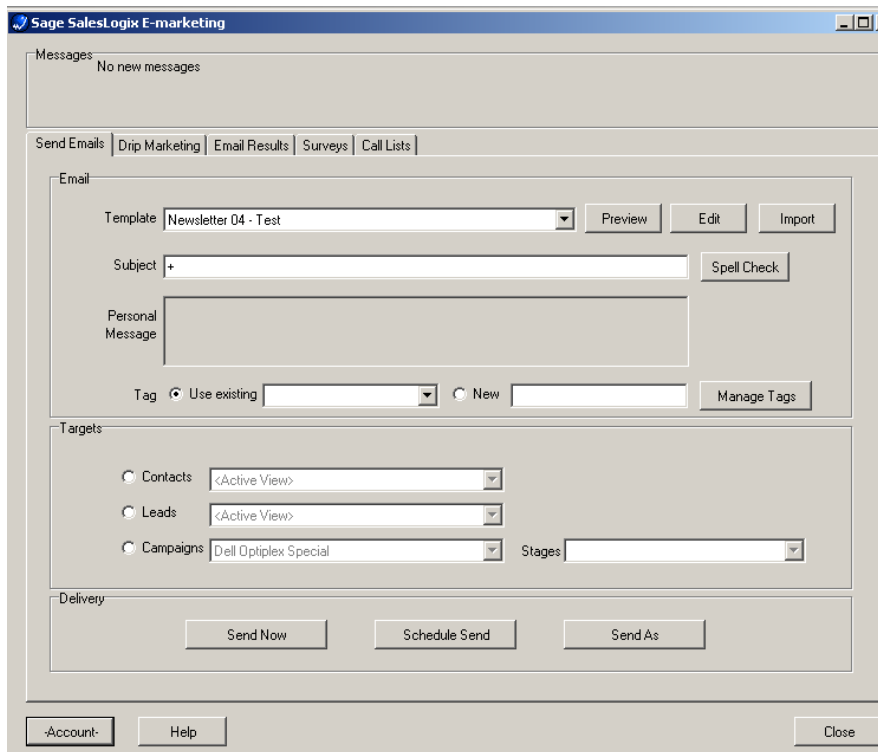
After you have selected which user(s) to send as, choose your delivery time: either now or scheduled for the future. (See previous section for information on what the scheduled send will look like.) Then, enter your account password, and click Next. A confirmation screen will appear. Click "Yes" to confirm, and you will see a final Send As confirmation screen. Click Continue to send (or schedule) your email blast.

10. The Account button allows you to adjust certain options on your Sage SalesLogix E-Marketing account

Sending an Email

Follow the steps below for sending an email through Sage SalesLogix Client, including features such as Scheduled Send and Send As.

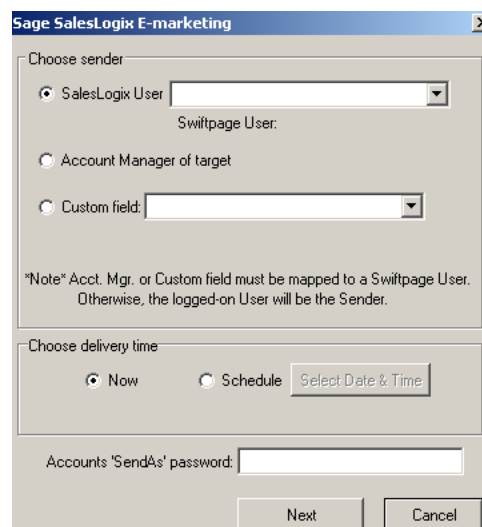
1. Click on the E-marketing icon in SalesLogix. The following screen will appear:



Under the Send Emails tab, you can select your template, Preview a template or click Edit to be taken to the Template Editor online. Type in your Subject Line and enter a Personal Message (if applicable). You can add a Tag to the send using an Existing tag or create a New one. You can manage your tags by clicking Manage Tags. Then, select your Targets by Contacts, Leads or Campaigns. When you have selected the contacts you want to send your email to, select the Delivery type:

When you have selected the contacts you want to send your email to, click on one of the following buttons:

- Send Now: to send the email immediately (skip below to Step 4)
- Scheduled Send: to schedule the email to go out up to 60 days in advance (skip below to Step 3)
- Send As: to send an email on behalf of another SalesLogix user on your Sage SalesLogix E-marketing account (below, Step 2)

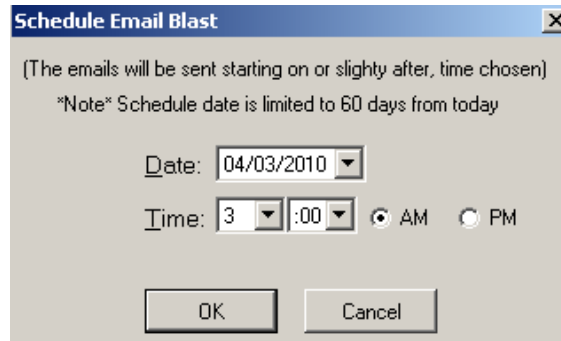


2. If you click the Send As button, you'll see this window:

Here, you can choose a SalesLogix user, Account Manager of target or a Custom Field to send on behalf of. **Note:** anyone on whose behalf you send must be tied to a Sage SalesLogix E-marketing user ID or you will become the default sender for that email.

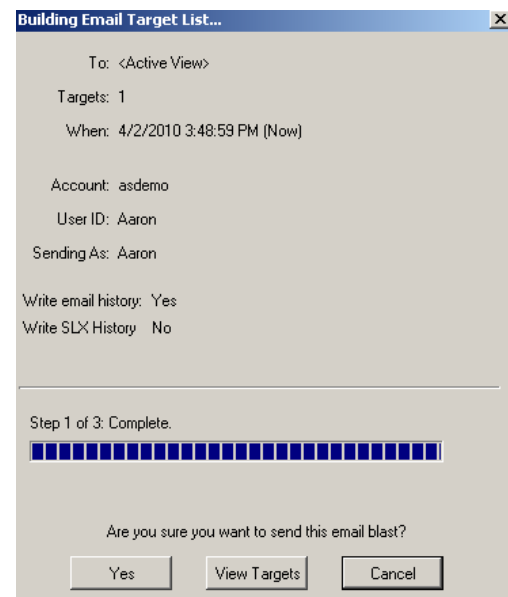
Then, choose your delivery time, now (skip to Step 4) or Schedule (proceed to Step 3). Finally, enter your Sage SalesLogix E-marketing account password in the box provided and click Next.

3. When scheduling a send, this window will appear:



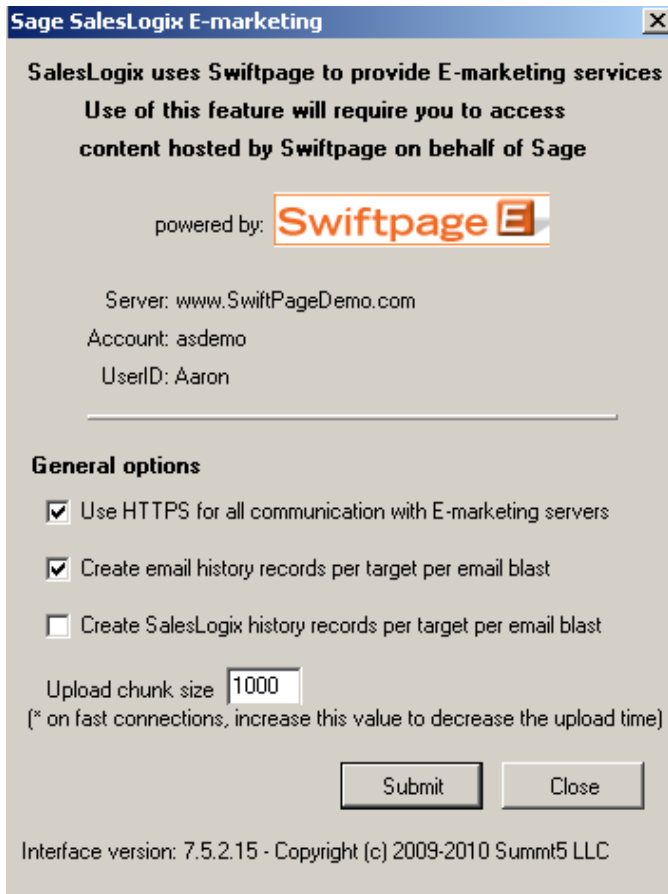
Set the date and time you wish for your email to be sent, then click OK.

4. The final sending screen will appear and will look like this:

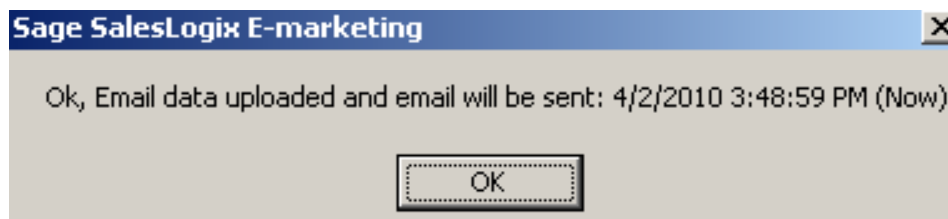


To view a list of your targets, click on "View Targets."
If you are ready to send your email, click Yes.

The number of “targets” (or emails to be sent) will be shown, as will the date and time the email is to be sent. The Sage SalesLogix E-marketing account, user ID doing the sending, and the user on whose behalf the email will be sent are shown. You will also see the current settings of History writing selected. To manage your History settings, click on the Account button from the Send Emails Tab. You will see this screen:



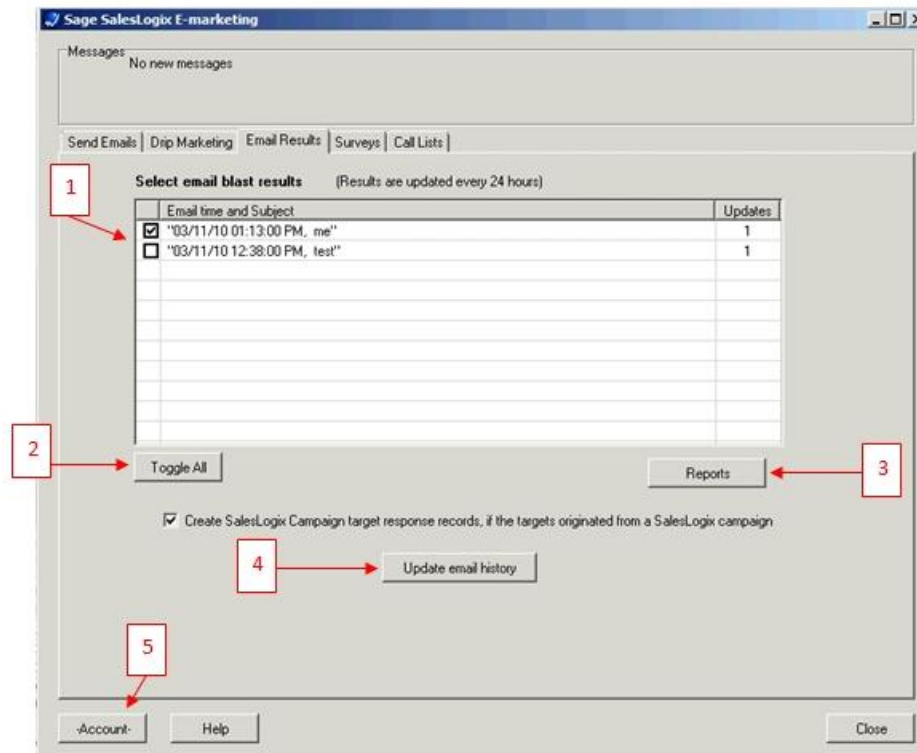
5. The confirmation screen will appear, looking like this:



6. You are done! You have successfully sent an email through Sage SalesLogix E-marketing.

Email Blast Results Tab

This page explains the features of the Sage SalesLogix E-Marketing Email Results tab.



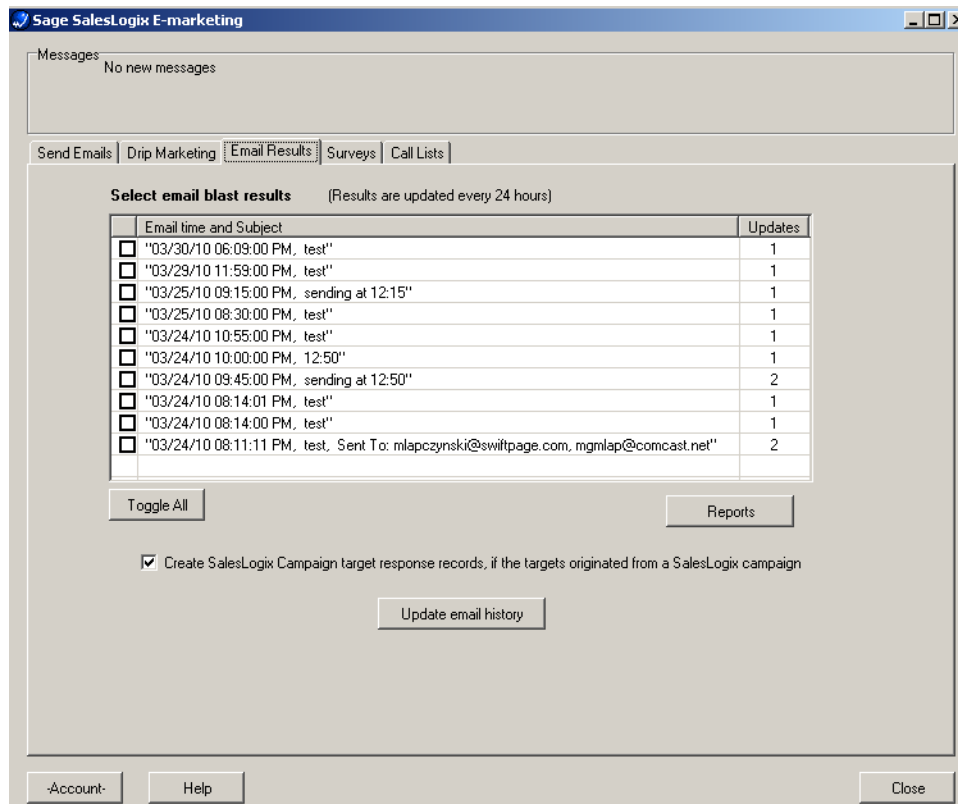
1. Any email blasts with results to write back to your Sage SalesLogix database will appear at the top of the screen, including the date/time of the send, the subject line, and finally how many updates are ready to be written into Sage SalesLogix.
2. The Toggle All button will select all of the email blasts listed at once.
3. Click Reports to open a web page showing your Reports menu, where you can view detailed reports for any email blast in the past sixty days.
4. Click Update email history to write the results of the selected email blast into your Sage SalesLogix email history records. Note: if desired, select the box to "Create SalesLogix Campaign target response records, if the targets originated from a SalesLogix campaign." After you click Update email history, a confirmation message appears saying the records were successfully updated:



5. The Account button allows you to adjust certain options on your Sage SalesLogix E-Marketing account.

Email Blast Results

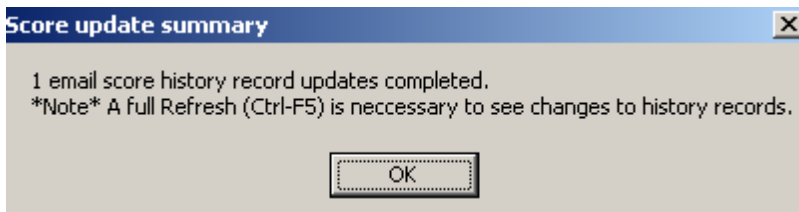
Use the following directions below for accessing and retrieving your reports and scores in Sage SalesLogix Client. Click on the E-marketing icon in SalesLogix. The following screen will appear:



You will see a screen with all your email blasts with information about Email time, Subject and the number of Updates.

You can individually check the email blasts or select Toggle All to select which emails to update contact history. There is a check box to Create SalesLogix Campaign target response records as well for SalesLogix Campaign sends. Once the emails are selected, click the Update email history button.

You will see this window:



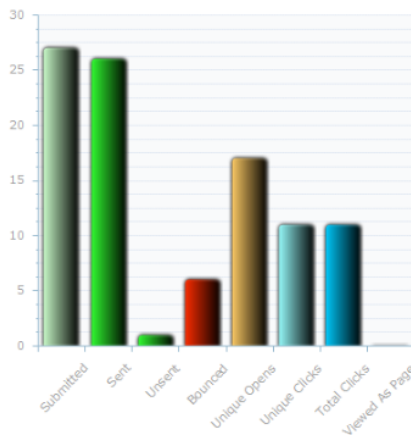
You can also click the Reports button to be taken to your Online Reports section

Email Blast Summary

Email Blast Summary

Name: Sample
Submitted on: 7/10/2012 1:18:00 PM
Subject: Sample
Template: Sample
Opened: 85.0%
To view the Email [click here](#)

To Print: Right Click here and select 'Print'



Summary Reports

- Opens and Clicks
- Opens
- Opens over Time
- Clicks
- Clicks over Time
- Create Call List

Detail Reports

- Submitted
- Unique Opens by Time
- Unique Opens by Email
- Opens by Time
- Opens by Email
- Unique Clicks by Link
- Unique Clicks by Email
- Clicks by Link
- Clicks by Email
- Unopened
- Bounced
- Unsent

1. **Campaign Summary Graph** – Graphic layout of the reports generated

2. **Summary Reports** – A general layout of all the reports generated

Opens and Clicks: The opens and clicks report provides you with details about how your email recipients interacted with your email.

Opens: Out of how many people the email was sent to, the number of email addresses that opened it.

Opens over Time: This is a graphical overview of when the email was opened over time. This graph shows individual opens only.

Clicks: This is the number of times the links within the email have been clicked on.

Clicks over Time: This is a graphical overview of all links clicked on by individuals. The taller the bar is, the more times that link was clicked on within that period of time.

3. **Detail Reports** – All specific detailed reports generated

Submitted: Total emails that were submitted for the send.

Unique Opens by Time: Number of individuals that have opened up an email in order of the time opened. Individuals are only counted once per email sent out if they opened it.

Unique Opens by Email: Number of individuals that have opened up an email in order of their email address. Individuals are only counted once per email sent out if they opened it.

Opens by Time: Detail Report of All Opens by Time

Opens by Email: Detail Report of All Opens by Email

Unique Clicks by Link: Number of links that an individual clicked on in order of the Links; an individual can only count once per link within an email.

Unique Clicks by Email: Number of links that an individual clicked on in order of the Email Address; an individual can only count once per link within an email.

Clicks by Link: This list shows every single link that was clicked on, and if a person clicked on a link more than once, their email address will be listed more than once along with the time they clicked on each link. This list is sorted by the links in your email.

Clicks by Email: This list shows every single link that was clicked on, and if a person clicked on a link more than once, their email address will be listed more than once along with the time they clicked on each link. This list is sorted alphabetically by email addresses.

Unopened: These email addresses have been sent this particular email campaign you are viewing the report for. However, these email addresses have not yet opened your email, as they count as an unopened. When he or she opens your email, their name will not appear in this particular report anymore.

Bounced: This report is going to show all the bounced email addresses you have sent this particular email to. Listed will be the email address, followed by a code number with the reason for being bounced in the right column.

Unsent: Email addresses listed in the Unsent report will not have been sent this particular email. It will list the reasoning as to why.

4. **Create Call List** – The Call List has replaced our old “Rank by Score” report and will open in a new browser tab when you click on it from the Open-Click Reports section. Email recipients can be found in the Call List if they have opened the email you sent them. Swiftpage gives each recipient in the Call List a number score and a rank (Hot, Warm, Mild) based on their interaction with your email.

Call Lists Tab

This page explains the features of the Sage SalesLogix E-Marketing Call Lists tab.

The screenshot shows the Sage SalesLogix E-marketing interface. At the top, there are tabs for 'Send Emails', 'Drip Marketing', 'Email Results', 'Surveys', and 'Call Lists'. Below this is a 'Filter for email history records' section with radio buttons for 'Contacts' and 'Leads', and dropdown menus for 'All Contacts', 'Campaigns', and 'Email Tag'. A 'Filters' section includes checkboxes for 'Emails sent by', 'Assigned To', 'Score update within last', and 'Status', with corresponding dropdown menus and input fields. A 'Generate Call List' button is located below the filters. The main area shows a table of contacts with columns for Name, Account, Phone, Score, Status, Clicks, Opens, Assigned To, and Email Tag. The table is sorted by Score in descending order. A 'Create Call list group...' button and an 'Export...' button are located above the table. The interface also includes a 'Messages' section at the top left, a 'Close' button at the bottom right, and 'Account' and 'Help' buttons at the bottom left.

Name	Account	Phone	Score	Status	Clicks	Opens	Assigned To	Email Tag
Pitt, Brad	SalesMedia		116	Clicked	3	5		
Leno, Jay	Barqs International		112	Clicked	3	4		
Pachino, Al	Actors Inc.		112	Clicked	3	4		
Sweet, Allison	Voicecom		112	Clicked	3	4		
Alba, Jessica	Bic Inc.		112	Clicked	3	4		
Iverson, Allen	NBA AllStar Co.		108	Clicked	3	3		
Hanks, Tom	Wilson Co.		108	Clicked	3	3		
Harding, Nick	Sharpie Inc.		108	Clicked	3	3		
Nash, Steve	NBA AllStar Co.		108	Clicked	3	3		
Minko, Frank	Crinson International		100	Clicked	?	?		

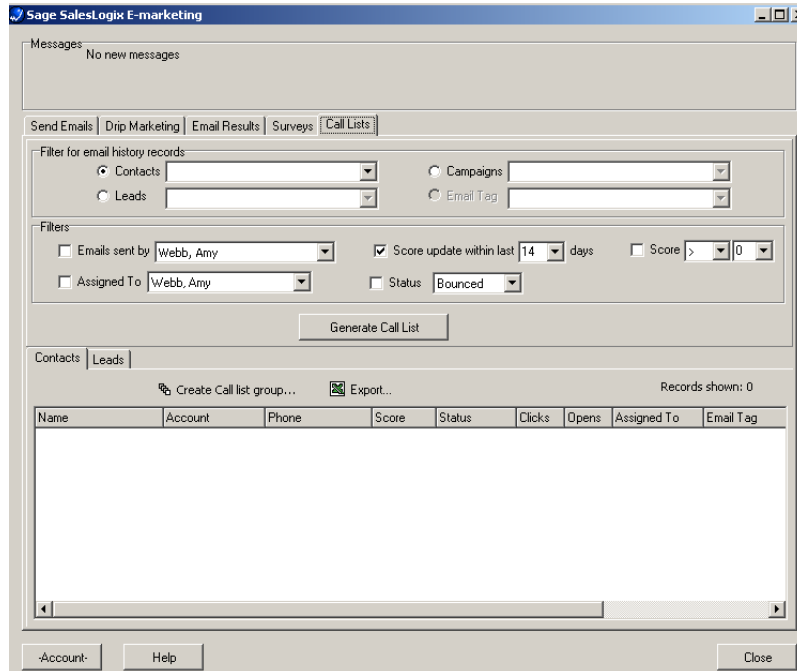
Call Lists are ranked lists of your most interested contacts based on their interaction with a specific email campaign or a combination of email campaigns. For instance, if Joe opens your email three times and clicks on four different links in the email, he is considered a “Hot” contact, whereas Jane—who 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.

1. In the “Filter for email history records” section, select specific targets you want to include in the Call List. Select by Contact groups, Lead groups, Campaigns or existing Sage SalesLogix email blast tags. **Note:** you are required to make a selection in this section.

- In the Filters section, filter based on who the email was sent by, who the targets have been assigned to, when the score was updated, the score itself, or the email status (with options for bounces, clicks, opens, and so on). **Note:** the filters in the Filters section are optional.
- When you are finished setting your filters, click Generate Call List, and the Call List will appear in the lower half of the screen.
- Once your Call List is created, click "Create Call List group..." to create a new Sage SalesLogix Group out of the targets shown on the Call List.
- Click Export to export the entire Call List in Excel format.
- The Account button allows you to adjust certain options on your Sage SalesLogix E-Marketing account.

Creating and Assigning Call Lists

- Click on the E-Marketing button at the top of SalesLogix. Click on the Call Lists tab at the top:



2. Within the Sage SalesLogix E-marketing Call list, you have the ability to filter the list. The filter options are listed below:

Emails history Records - filter based on the type of record (Contacts, Leads, Campaigns or Email Tag).

Emails sent by – filters based on which SalesLogix user sent the email.

Assigned to - will generate a call list based on which SalesLogix user a contact is assigned to.

Score update within last __ days - this filter allows the user to create a call list based on the score of a contact that had been updated within the selected time frame.

Status - there are multiple options for filtering by status. These options are as follows: bounced, clicked, duplicate, failed, invalid opened, opted-out, suppressed and unopened. This allows a SalesLogix user to easily create a call list based on the data within SalesLogix.

Score – set will create a call list based on the scores of a contact within an email blast or Drip Marketing campaign.

3. Now, click on the Generate Call List button to create your Sage SalesLogix E-marketing Call List. Here, you will see a list of contacts being listed with the highest score at the top, based on the criteria you have set for filters:

Send Emails | Drip Marketing | Email Results | Surveys | Call Lists

Filter for email history records

Contacts Campaigns
 Leads Email Tag

Filters

Emails sent by Webb, Amy Score update within last 60 days Score > 0
 Assigned To Webb, Amy Status Bounced

Generate Call List

Contacts | Leads

Create Call list group... Export... Records shown: 11

Name	Account	Phone	Score	Status	Clicks	Opens	Assigned To	Email Tag
lapczynski, marlene	test	(222) 222-2222	100	Clicked	3	1		
lap, mar	test	(111) 111-1111	75	Clicked	2	1		
lapczynski, marlene	test	(222) 222-2222	61	Clicked	3	1		
lap, mar	test	(111) 111-1111	41	Clicked	2	1		
Anthony, Carmelo	NBA AllStar Co.		10	Opened	0	1		
lap, mar	test	(111) 111-1111	0	UnOpened	0	0		test
lap, mar	test	(111) 111-1111	0	UnOpened	0	0		
lapczynski, marlene	test	(222) 222-2222	0	UnOpened	0	0		test
lapczynski, marlene	test	(222) 222-2222	0	UnOpened	0	0		
Test, tester	test	(111) 111-1111	0	UnOpened	0	0		

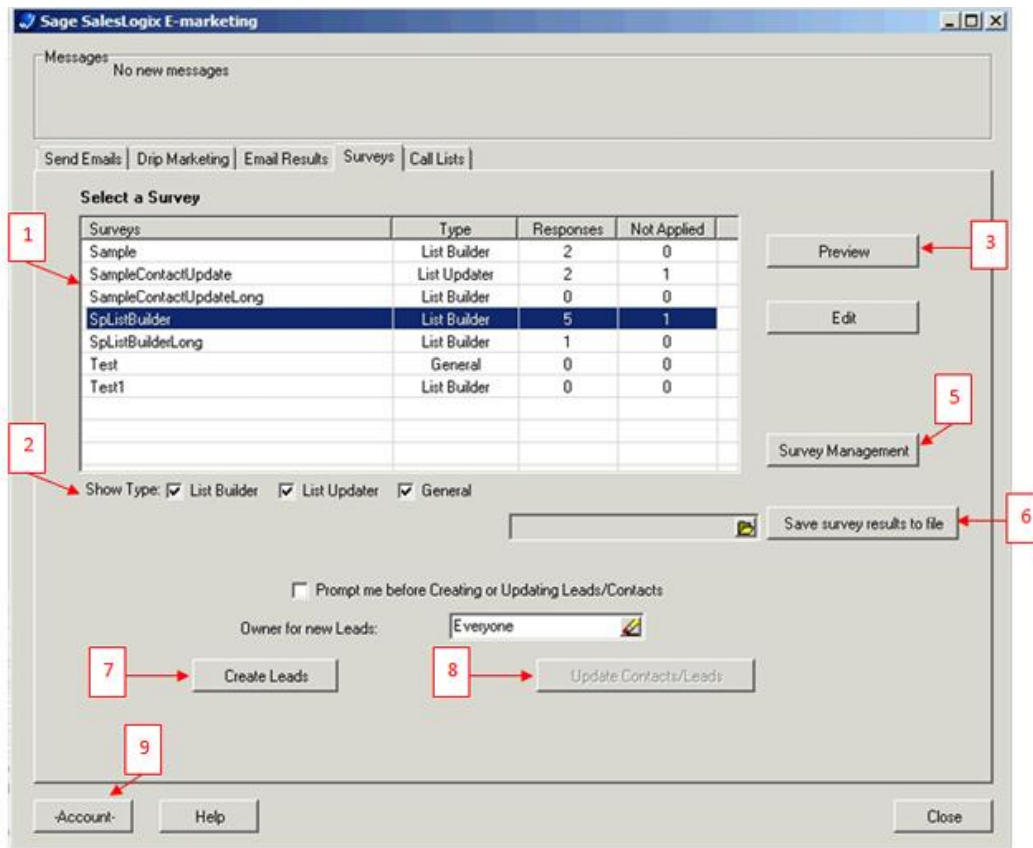
-Account- Help Close

4. The Call List page allows you to view your contacts information and interaction details with the email. Double click on the top contact to be taken to his/her information.

There is also an option for creating a Call List group based on the contacts that are in the generated call list. Also, the call list that is created can be exported to an Excel spreadsheet (.csv file).

Survey Responses Tab

This page explains the features of the Sage SalesLogix E-Marketing Surveys tab.



1. All of your surveys will appear at the top of the screen, along with their type, the number of total responses the survey has received, and finally the number of responses that have not yet been applied to your Sage SalesLogix database.
2. Filter the survey view by selecting checkboxes to display particular types of surveys. **Note about List Builder and List Updater surveys:** a List Builder survey is a survey that can be used to gather new targets that will be added to your Sage SalesLogix database. A List Updater survey is a survey that can be used to update target information that already exists in your Sage SalesLogix database.
3. The Preview button opens a web page displaying the highlighted survey as it will appear to your customers.
4. The Edit button opens a web page showing the Survey Editor for the highlighted survey, so you can make changes to the survey.
5. The Survey Management button opens a web page with the general Survey Management screen, where you can create new surveys or manage and edit existing surveys.
6. Save survey results to file: 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 Export Responses. A confirmation message will show you that the CSV file has been created.
7. If you have highlighted a List Builder survey with some "not applied" surveys (i.e. survey responses still waiting to be written to the Sage SalesLogix database), click Create Leads to turn those List Builder survey responses into either Sage SalesLogix Leads. **Note:** you can define the owner for the new leads by using the "Owner for new leads" window. Also, select the "Prompt me before Creating or Updating Leads/Contacts" checkbox to review the Leads before they are created. If you choose not to select this box, the Leads will be automatically created.

8. If you do select it, the following screen appears:

Questions	Maps to Field	Existing field values	"New" field values
<input type="checkbox"/> Time Stamp			03/17/2010 15:45
<input checked="" type="checkbox"/> First Name	firstname		Ian
<input checked="" type="checkbox"/> Last Name	lastname		Doescher
<input checked="" type="checkbox"/> Email Address	email		idoescher@swiltpage....
<input checked="" type="checkbox"/> Company Name	company		Swiltpage
<input checked="" type="checkbox"/> Phone Number	workphone		877-228-8377
<input type="checkbox"/> SpBuilder Applied			Not Checked

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

9. If you have highlighted a List Updater survey with some "not applied" surveys (i.e. survey responses still waiting to be written to the Sage SalesLogix database), click Update Contacts/Leads to update your Sage SalesLogix targets using the List Updater survey responses. **Note:** select 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 select this box, the Leads or Contacts will be automatically updated. If you do select it, you will be taken to a confirmation screen (similar to the one shown above) showing the targets to be updated and giving you the option to update or ignore them as desired.
10. The Account button allows you to adjust certain options on your Sage SalesLogix E-Marketing account.

Accessing and Updating Survey Responses

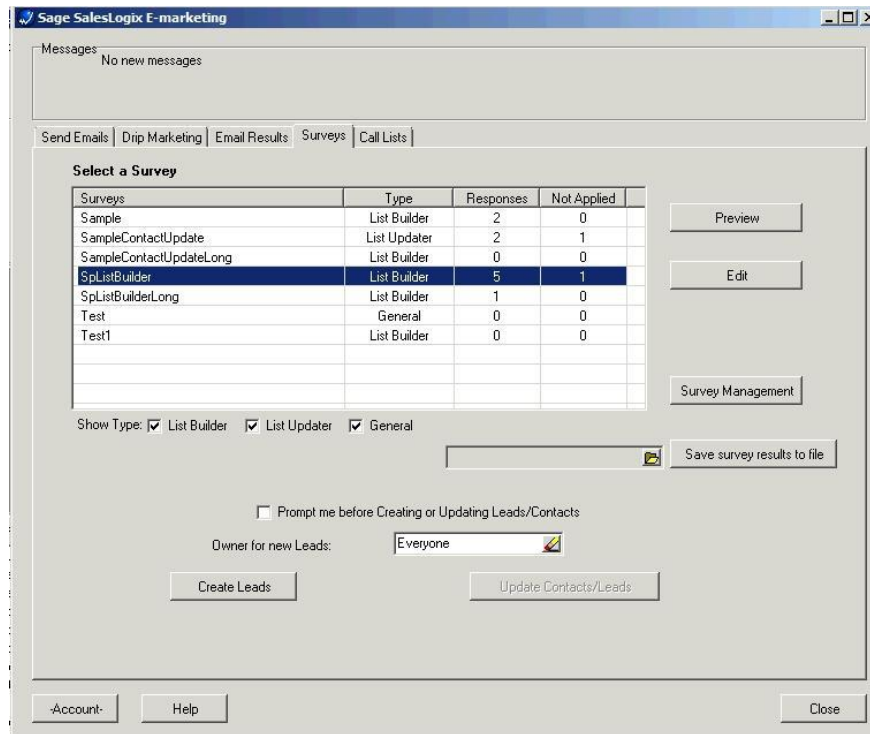
This page explains the features of the Sage SalesLogix E-Marketing Surveys tab.

From SalesLogix, click on the E-marketing button at the top and then select the Survey Responses tab at the top:

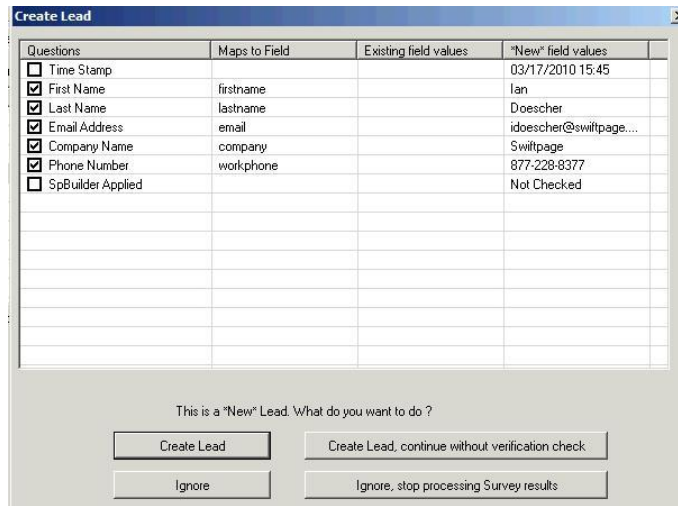
Sage SalesLogix E-marketing

Messages: No new messages

Send Emails | Drip Marketing | Email Results | **Surveys** | Call Lists



1. All of your surveys will appear at the top of the screen, along with their type, the number of total responses the survey has received, and finally the number of responses that have not yet been applied to your Sage SalesLogix database.
2. Filter the survey view by selecting checkboxes to display particular types of surveys. **Note about List Builder and List Updater surveys:** a List Builder survey is a survey that can be used to gather new targets that will be added to your Sage SalesLogix database. A List Updater survey is a survey that can be used to update target information that already exists in your Sage SalesLogix database.
3. The Preview button opens a web page displaying the highlighted survey as it will appear to your customers.
4. The Edit button opens a web page showing the Survey Editor for the highlighted survey, so you can make changes to the survey.
5. The Survey Management button opens a web page with the general Survey Management screen, where you can create new surveys or manage and edit existing surveys.
6. Save survey results to file: 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 Export Responses. A confirmation message will show you that the CSV file has been created.
7. If you have highlighted a List Builder survey with some “not applied” surveys (i.e. survey responses still waiting to be written to the Sage SalesLogix database), click Create Leads to turn those List Builder survey responses into either Sage SalesLogix Leads. **Note:** you can define the owner for the new leads by using the “Owner for new leads” window. Also, select the “Prompt me before Creating or Updating Leads/Contacts” checkbox to review the Leads before they are created. If you choose not to select this box, the Leads will be automatically created. If you do select it, the following screen appears:



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

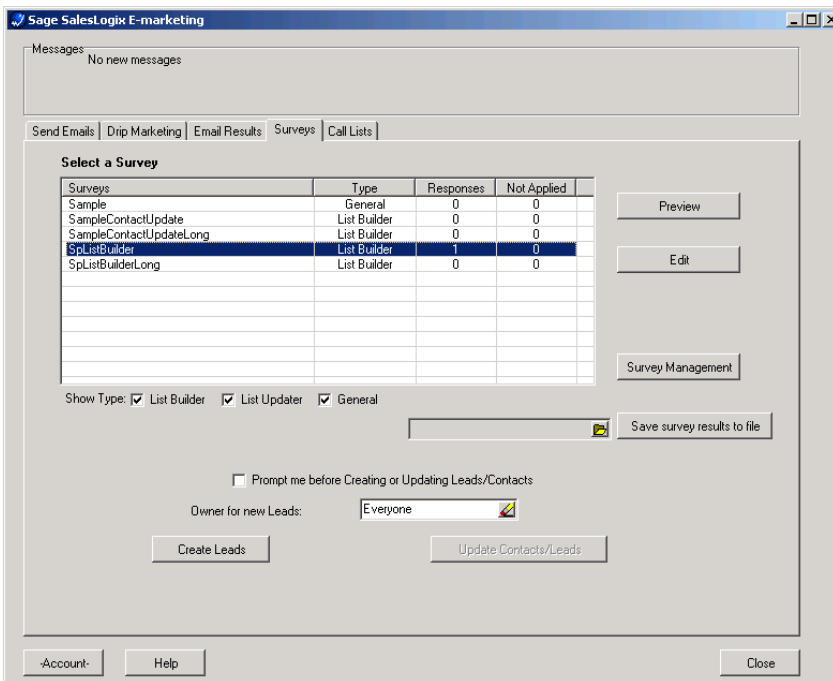
8. If you have highlighted a List Updater survey with some “not applied” surveys (i.e. survey responses still waiting to be written to the Sage SalesLogix database), click Update Contacts/Leads to update your Sage SalesLogix targets using the List Updater survey responses. **Note:** select the “Prompt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

9. The Account button allows you to adjust certain options on your Sage SalesLogix E-Marketing account.

List Builder and List Updater Surveys in Sage SalesLogix

A List Builder survey is used to gather new contacts that will be added to your Sage SalesLogix database. A List Updater survey is used to update information that already exists in your Sage SalesLogix database. Follow these steps to create these surveys:

1. From Sage SalesLogix, click the E-marketing tab, then click the Surveys tab. Select one of the pre-made surveys provided (for List Builder or List Updater), then click Edit.



2. Create a survey, 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 use and edit one of the existing List Builder or List Updater surveys already provided (called SpListBuilder, SpListBuilderLong and ListUpdater).

3. 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.

4. The next screen to open will ask you to map fields from your List Builder survey questions with fields in your Sage SalesLogix database. Match up questions with the fields as appropriate (you can also simply have the answers written to the Notes tab in Sage SalesLogix if you do not have an appropriate Sage 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.

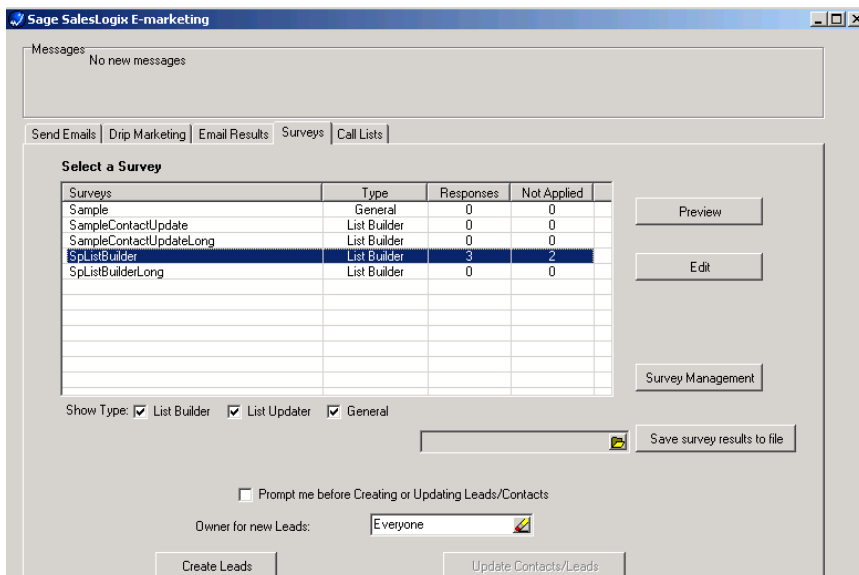
Database Fields	Survey Questions
FIRSTNAME	First Name
LASTNAME	Last Name
EMAIL	Email Address
**** Notes ****	Company Name
**** Notes ****	Phone Number

Submit Reset Cancel Finalize the Survey Result Options

- **For List Builder:** click on the Survey Management button, and then link to the List Builder survey from your web site using the hyperlink given on the Survey Management page. Your List Builder survey is now connected to your web site, which is driving people to the survey to gather new contact information.
- **For List Updater:** once your survey is finished, you can either send a Sage SalesLogix E-marketing email to your contacts from Sage SalesLogix, linking to the List Updater survey, or you can link to the List Updater survey from your web site. **Note:** if you link to the List Updater survey from an email you send out through Sage SalesLogix E-marketing, there are no required fields. However, if you link to the List Updater survey from your 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 Sage SalesLogix contacts.

5. After you have launched the List Builder or List Updater survey, click on the E-marketing button, then click the Surveys tab.

6. On the screen that appears, you will see your surveys listed. Under the appropriate List Builder or List Updater survey, you will see the number of people who have filled out the survey (under Responses) as well as the number of records yet to be applied to the Sage SalesLogix database (under Not Applied). So, for example, a few days after you connect your web site to your List Builder survey, you might have three Responses to your survey, and two Not Applied:

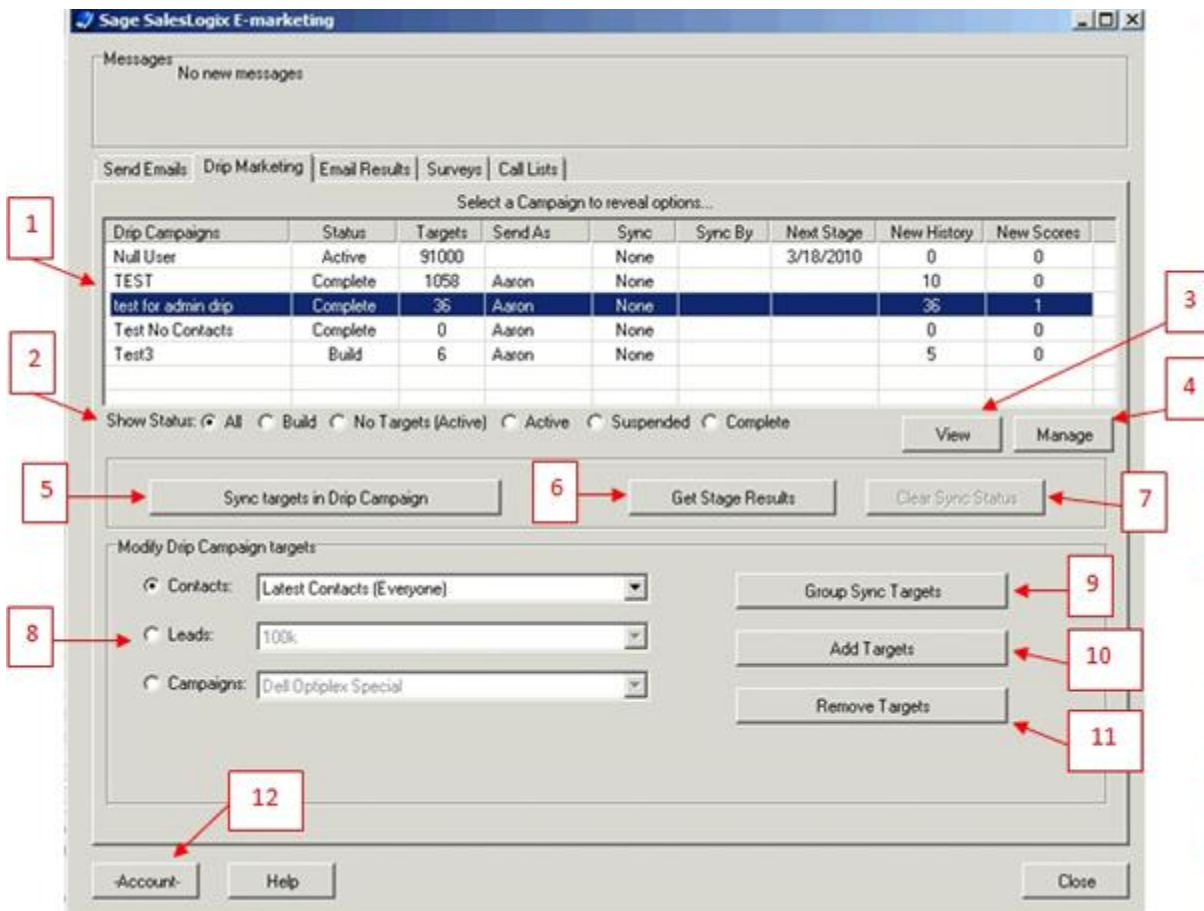


7. Highlight the survey and click on the Create Leads button. (See step 7 in the previous section.)

8. The List Builder survey has successfully added contacts to your Sage SalesLogix database (or the List Updater has updated your Sage SalesLogix contacts). Simply repeat the process of adding new Not Applied contacts as more people fill out your surveys, and your Sage SalesLogix database will continue to be updated.

Drip Marketing Tab

This page explains the features of the Sage SalesLogix E-Marketing Drip Marketing tab.



1. All of your Drip Marketing Campaigns will appear at the top of the screen, along with their Status, the number of targets they include, the Sage SalesLogix on whose behalf emails in the Campaign are sent, the presence of any Sync Stage or Sync By date, the Next Stage to come, the number of New History records to be written, and the number of New Scores to be written.
2. Choose which Drip Marketing Campaigns are shown by selecting one of the option buttons to filter the view if desired.
3. The View button opens a web page showing the highlighted Drip Marketing Campaign.
4. The Manage button opens web page showing the Drip Marketing Campaign Manager screen, where you can create and edit your Drip Marketing Campaigns.
5. Click Sync Targets in Drip campaign to sync the targets in your Drip Marketing Campaign with your Sage SalesLogix database. This updates your Drip Marketing targets with the most current Sage SalesLogix database information. When you select it, you will see a confirmation screen. Click Yes and the targets of your Drip Marketing Campaign will be updated.
6. Click Get Stage Results to import the results of your Drip Marketing Campaigns into your Sage 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 Sage SalesLogix. When you click this button, the following screen will appear:

Drip Marketing stage results [X]

Select a Stage from: test for admin drip

Execute Stage Name	Stage Type	New History	New Scores
test for admin drip	Email Blast	36	1

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

Create email 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]

Choose the option button you want, depending on the type of history records you wish to create for the targets shown. When you have made your select, click Submit, and your Stage results are written to your Sage SalesLogix database.

- 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.
- In the Modify Drip Campaign targets section, you can select targets based on Contact groups, Lead groups, or Campaigns. Use the option buttons and drop-down lists to select the targets you wish to add or remove to/from your Drip Marketing Campaign. At that point, you have the option to perform the functions listed in 9-11 below.
- Group Sync Targets: if you are using a specific Sage 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 option buttons in the "Modify Drip Campaign targets" section of the Drip Marketing tab. Then click Group Sync Targets, and a screen will appear confirming the sync with the selected Sage SalesLogix group:

Drip Marketing Sync [X]

Drip Marketing campaign: TEST

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

Matched	Missing	New
Abbott, John	Buffet, Warren	Alba, Jessica
Abbott, Keith	Ferrell, Will	Anthony, Carmelo
Aberle, K.	Balboa, Rock	Bacon, Kevin
Aceti, Janet	Hanks, Tom	Balboa, Rock
Adamo, Juan	Neal, Elisa	Buffet, Warren
Adams, Dave	Nelson, Craig	Ferrell, Will
Adams, Georgia	Nelson, P	Hanks, Tom
Adams, Joe	Nelson, Richard	Iverson, Allen
...
Total: 687	Total: 371	Total: 13

Select Sync options:

<input checked="" type="radio"/> Update (all data fields) <input type="radio"/> Remove	<input checked="" type="radio"/> Remove <input type="radio"/> Ignore	<input checked="" type="radio"/> Add <input type="radio"/> 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

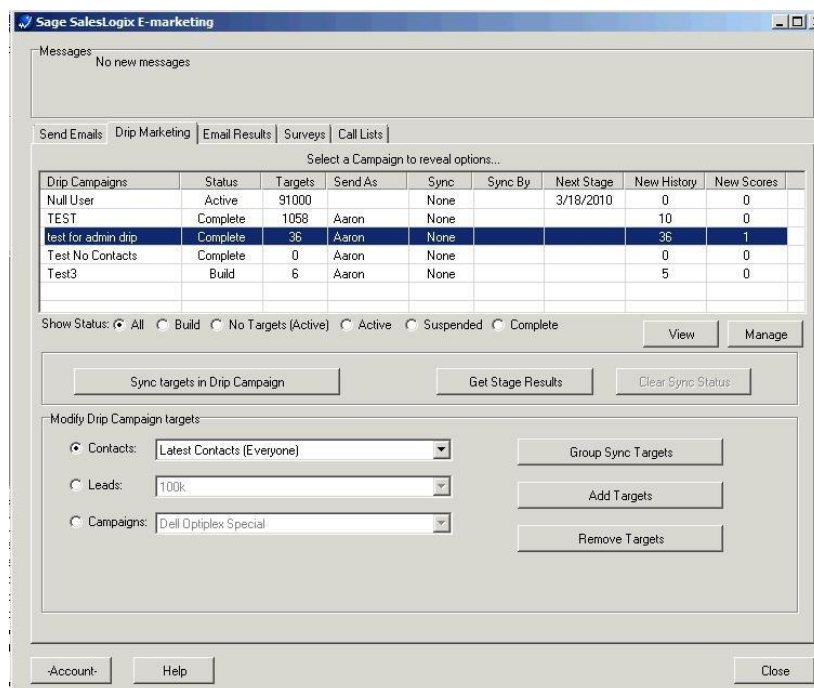
Apply changes [Cancel]

This window shows you how many contacts in the Sage SalesLogix group matched with Drip Marketing contacts, how many are missing, and how many are new. Select the option 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. (**Note:** groups larger than 3,000 will have to be synced by using the Add and Remove Targets functions.)

10. Add Targets: this button is used to add targets to Drip Marketing Campaigns (the targets selected in the Modify Drip Campaign targets section). When you select your targets and click Add Targets, a screen will appear confirming the targets to be added to your Drip Marketing Campaign. Click Yes and the targets are added.
11. Remove Targets: this button is used to remove targets from Drip Marketing Campaigns (the targets selected in the Modify Drip Campaign targets section). When you select your targets and click Remove Targets, a screen will appear confirming the targets to be removed from your Drip Marketing Campaign. Click Yes and the targets are removed.
12. The Account button allows you to adjust certain options on your Sage SalesLogix E-Marketing account.

Accessing Drip Marketing

Click on the E-marketing button at the top in SalesLogix and then click on the Drip Marketing tab. The following screen will appear:



1. All of your Drip Marketing Campaigns will appear at the top of the screen, along with their Status, the number of targets they include, the Sage SalesLogix on whose behalf emails in the Campaign are sent, the presence of any Sync Stage or Sync By date, the Next Stage to come, the number of New History records to be written, and the number of New Scores to be written.
2. Choose which Drip Marketing Campaigns are shown by selecting one of the option buttons to filter the view if desired.
3. The View button opens a web page showing the highlighted Drip Marketing Campaign.
4. The Manage button opens web page showing the Drip Marketing Campaign Manager screen, where you can create and edit your Drip Marketing Campaigns.
5. Click Sync Targets in Drip campaign to sync the targets in your Drip Marketing Campaign with your Sage SalesLogix database. This updates your Drip Marketing targets with the most current Sage SalesLogix database information. When you select it, you will see a confirmation screen. Click Yes and the targets of your Drip Marketing Campaign will be updated.
6. Click Get Stage Results to import the results of your Drip Marketing Campaigns into your Sage 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 Sage SalesLogix. When you click this button, the following screen will appear:

Drip Marketing stage results [X]

Select a Stage from: test for admin drip

Execute Stage Name	Stage Type	New History	New Scores
test for admin drip	Email Blast	36	1

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

Create email 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]

Choose the option button you want, depending on the type of history records you wish to create for the targets shown. When you have made your select, click Submit, and your Stage results are written to your Sage SalesLogix database.

7. 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.

8. In the Modify Drip Campaign targets section, you can select targets based on Contact groups, Lead groups, or Campaigns. Use the option buttons and drop-down lists to select the targets you wish to add or remove to/from your Drip Marketing Campaign. At that point, you have the option to perform the functions listed in 9-11 below.

9. Group Sync Targets: if you are using a specific Sage 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 option buttons in the "Modify Drip Campaign targets" section of the Drip Marketing tab. Then click Group Sync Targets, and a screen will appear confirming the sync with the selected Sage SalesLogix group:

Drip Marketing Sync [X]

Drip Marketing campaign: TEST

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

Matched	Missing	New
Abbott, John	Buffet, Warren	Alba, Jessica
Abbott, Keith	Ferrell, Will	Anthony, Carmelo
Aberle, K	Balboa, Rock	Bacon, Kevin
Aceti, Janet	Hanks, Tom	Balboa, Rock
Adamo, Juan	Neall, Elisa	Buffet, Warren
Adams, Dave	Nelson, Craig	Ferrell, Will
Adams, Georgia	Nelson, P	Hanks, Tom
Adams, Joe	Nelson, Richard	Iverson, Allen
Adams, Robert	Neall, Keith	Iverson, Allen

Total: 687 Total: 371 Total: 13

Select Sync options:

Matched	Missing	New
<input checked="" type="radio"/> Update (all data fields) <input type="radio"/> Remove	<input checked="" type="radio"/> Remove <input type="radio"/> Ignore	<input checked="" type="radio"/> Add <input type="radio"/> 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 Sage SalesLogix group matched with Drip Marketing contacts, how many are missing, and how many are new. Select the option 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. (**Note:** groups larger than 3,000 will have to be synced by using the Add and Remove Targets functions.)

10. Add Targets: this button is used to add targets to Drip Marketing Campaigns (the targets selected in the Modify Drip Campaign targets section). When you select your targets and click Add Targets, a screen will appear confirming the targets to be added to your Drip Marketing Campaign. Click Yes and the targets are added.

11. Remove Targets: this button is used to remove targets from Drip Marketing Campaigns (the targets selected in the Modify Drip Campaign targets section). When you select your targets and click Remove Targets, a screen will appear confirming the targets to be removed from your Drip Marketing Campaign. Click Yes and the targets are removed.

12. The Account button allows you to adjust certain options on your Sage SalesLogix E-Marketing account.

Account Manager

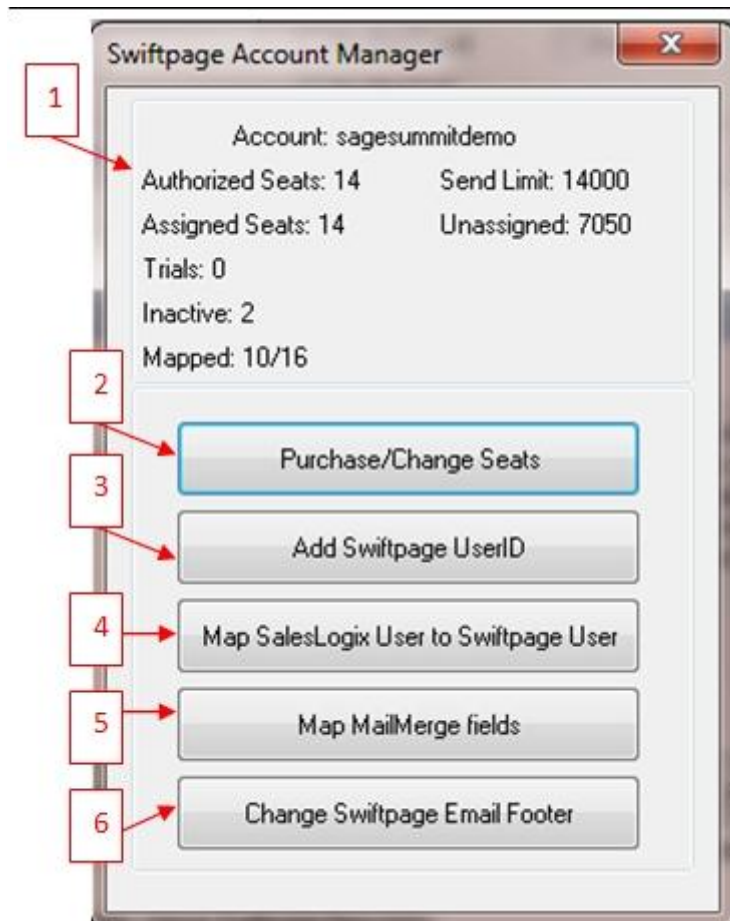
This page explains the features of the Sage SalesLogix E-Marketing Account Manager. When you first click on the option to Manage your E-marketing Account, the following screen appears:



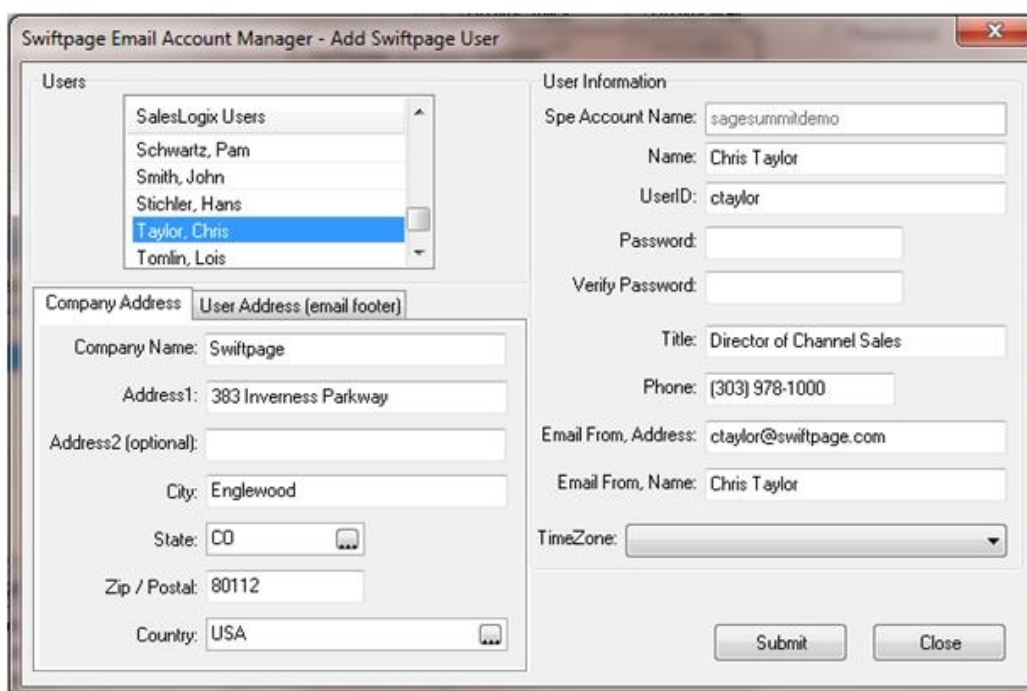
1. Click Create New Swiftpage Account to create a new Sage SalesLogix E-marketing account. This option is not available if your E-marketing account is already set up.
2. Click Manage Existing Account to enter the E-marketing Account Manager. (See the additional information later on this page.)
3. Click "Use existing Account" to connect your Sage SalesLogix database to a previously existing E-marketing account.

The Manage Account Window

When you click on the Manage existing Account button, you will be asked to input your Account password. Do so, and the following screen appears:

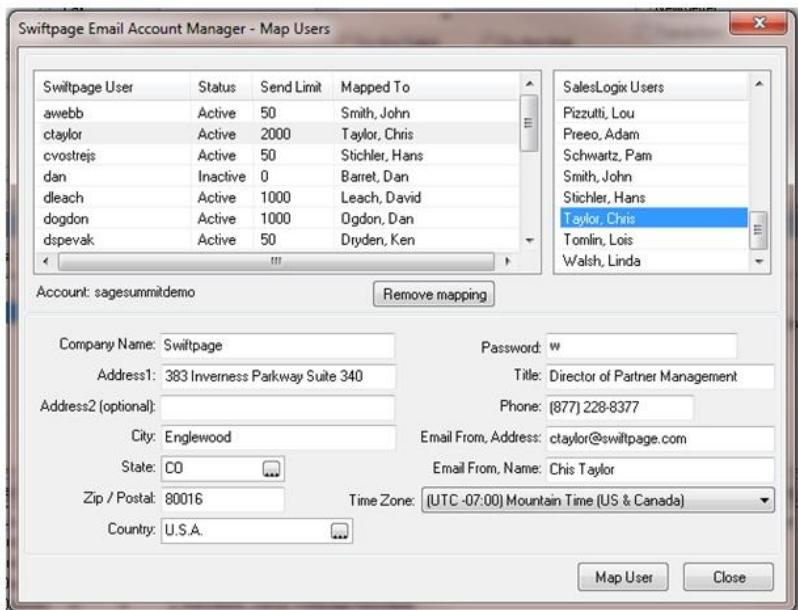


1. Your Sage SalesLogix E-marketing account details are shown at the top of the screen, including your send limit, number of seats on your account, and so on.
2. Purchase/Change Seats: this button opens an Internet browser with your Sage SalesLogix E-marketing account settings, where you can add new seats to your existing account, raise your send limit, manage your credit card information, and so on.
3. Add Swiftpage User ID: use this button to add a Sage SalesLogix E-marketing user to your account. When you click Add Swiftpage User ID, the following screen appears:



Select a Sage SalesLogix user from the menu on the top left, and that user's information is automatically populated into the applicable windows. (In the example above, selecting Chris Taylor as the Sage SalesLogix user automatically adds her contact information into other fields.) You can change any of the information you wish, including the suggested User ID that is shown. Once you have the correct options in place, click Submit and the user is both created and mapped to the Sage SalesLogix user you chose.

4. Map SalesLogix User to Swiftpage User: this button allows you connect Sage SalesLogix users with Sage SalesLogix E-Marketing users. When you click this button, the following screen appears:

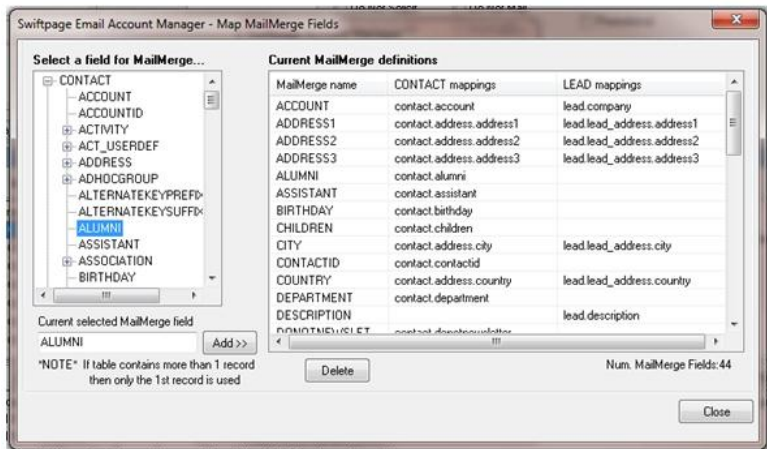


Sage SalesLogix E-marketing users are shown on the left-hand side, alongside the name of the Sage SalesLogix user to whom they are mapped. Highlight a user and click Remove Mapping to remove the mapping (i.e. to break the connection between the E-marketing user and the Sage SalesLogix user). If the "Mapped to" field is blank for a user, the E-marketing user is not yet mapped to a Sage SalesLogix user. In that case, highlight the E-marketing user on the left and select (from the list on the right) the Sage SalesLogix user you wish to map to the E-marketing user, then click on Map User. The E-marketing user is then mapped to the Sage SalesLogix user.

5. Map Swiftpage Mail Merge Fields: use this button to map your Sage SalesLogix database fields to mail merge fields for use in your Sage SalesLogix E-marketing templates. When you click Map Swiftpage Mail Merge Fields, the following screen appears:

Click the plus sign (+) next to the Contact or Lead headings to display all available contact and lead fields. Click any field, and its name will appear in the "Current selected Mail Merge field" box. You can modify it at this point if you wish, then click Add. The new mail merge field will now appear in the right-hand column for "Current Mail Merge definitions." That mail merge field is now mapped to the Sage SalesLogix contact or lead database field shown, and may be used in your E-marketing templates. You can also use the Delete button to remove existing Mail Merge fields.

6. Change Swiftpage Email Footer: to modify the footer automatically added to your email blasts when sent, click this button and the following screen appears:





Modify details here as needed, then select E-marketing users to apply the changes to. Click Submit when you are finished, and the email footers are updated.

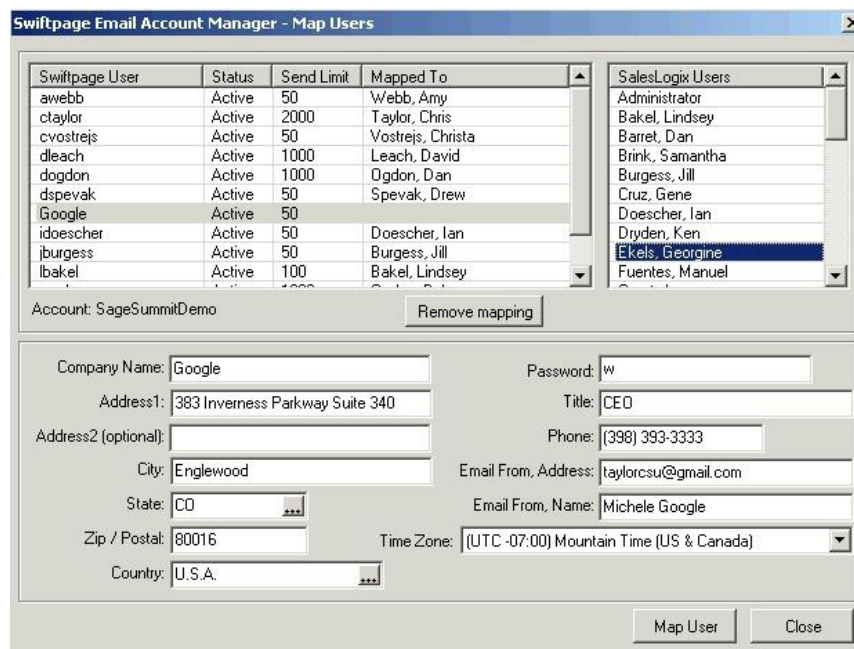
Managing Swiftpage Users in Sage SalesLogix Web Client

Mapping Sage SalesLogix E-marketing Users

This Quick Start Guide explains how to use manage users in Sage SalesLogix Client.

Note: The first thing to understand regarding users in Sage SalesLogix E-marketing is that only one SalesLogix user can be mapped to any one Swiftpage User ID. In other words, two SalesLogix users cannot access the same Swiftpage user ID. To manage users, follow these steps:

1. Within Sage SalesLogix, click on Tools > Manage > E-marketing.
2. You will be prompted to enter your account password. Do so, and click Submit.
3. On the menu that appears, select the option to Map SalesLogix User to Swiftpage User:

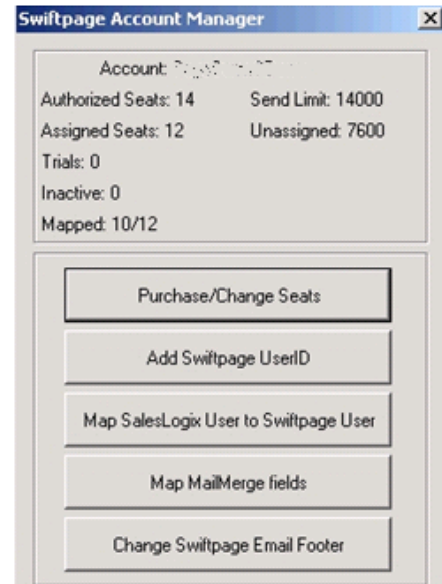


4. Sage SalesLogix E-marketing users show up on the left, and if they are mapped to Sage SalesLogix users that will show as well. You can highlight mapped users and click “Remove mapping” to disconnect E-marketing users from Sage SalesLogix users. Or, click on an unmapped E-marketing user on the left and a Sage 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 E-marketing user to a Sage SalesLogix user.

How to Add New Users in Sage SalesLogix Web Client

Note: The first thing to understand regarding users in Sage SalesLogix E-marketing is that only one SalesLogix user can be mapped to any one Swiftpage User ID. In other words, two SalesLogix users cannot access the same Swiftpage user ID. To add users, follow these steps:

1. Within Sage SalesLogix, click on Tools > Manage > E-marketing Account.
2. You will be prompted to enter your account password. Do so, and click Submit.
3. On the menu that appears, select the option to Add Swiftpage UserID.



The screenshot shows the 'Add Swiftpage User' form. It is divided into two main sections: 'Users' and 'User Information'. The 'Users' section contains a table with the following data:

SalesLogix Users	
Administrator	
Schaefer, Aaron	
Taylor, Chris	
Webb, Amy	

Below the table are two tabs: 'Company Address' and 'User Address (email footer)'. The 'Company Address' tab is active, showing fields for Company Name, Address1, Address2 (optional), City, State (with a dropdown arrow), Zip / Postal, and Country (with a dropdown arrow). The 'User Information' section contains fields for Spe Account Name (pre-filled with 'asdemo'), Name, UserID, Password, Verify Password, Title, Phone, Email From, Address, Email From, Name, and TimeZone (with a dropdown arrow). At the bottom right are 'Submit' and 'Close' buttons.

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

Sage SalesLogix E-marketing for SalesLogix LAN 7.5.2+ TECHNICAL SPECIFICATIONS

Plug-in version 7.5.2.15

***note* this plug-in requires SalesLogix lan client version 7.5.2 or higher**

General Stats:

Been tested to fully work with SalesLogix 7.5.2

SalesLogix tables modified: **None**

SalesLogix tables written to: 1 (History)

Tables added: 4 (SpeHistory, SpeLeadHistory, SpeSurveyResponses, SpeSurveys, SpeSend)

Forms added: 17 (under the *System, Contact and/or Lead* family)

Scripts added: 1

Menu items: 1

Toolbar items: 1

Tables created by E-Marketing 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 or stage results from a Drip Marketing campaign

ii. Email 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 Call list item assignment
SpeAssignedUserName	String	255	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	Drip campaign, if created from stage results
SpeDripCampaignStage	String	32	Name of stage data is applicable to
SpeDripCampaignStageType	String	128	Type of Drip marketing campaign stage

Sage SalesLogix E-marketing for SalesLogix LAN 7.5.2+ TECHNICAL SPECIFICATIONS

***note* this plug-in requires SalesLogix lan client version 7.5.2 or higher**

General Stats:

Been tested to fully work with SalesLogix lan client 7.5.2

SalesLogix tables modified and written: **None**

Database Tables added for manager: 6

Global joins added: 0

Forms added: 11 (under the *System* family)

Scripts added: 1

Menus added: 1

Tables created by E-marketing Account Manager

1. SpeAccounts (Fields: 30, Size in bytes: 1725 bytes)

a. Association: None

b. Rules: This table will add 1 row per Swiftpage account created or imported.

Field Name	Type	Length	Description
CreateDate	Date/Time	8	Date record was created
CreateUser	String	12	SalesLogix user logged in at creation time
MaxCallListRecs	Long Int	4	Max displayable records in Call List
MaxTargets	Long Int	4	Max number of email targets per account
MaxTargetsPerPost	Long Int	4	Max targets data sent per HTTP transaction
ModifyDate	Date/Time	8	Last written date/time for this record
ModifyUser	String	12	User whom last updated this record
SpeAccountAddress1	String	64	Line 1 of account address
SpeAccountAddress2	String	64	Optional 2 nd line of

SpeAccountCity	String	32	account address
SpeAccountCompany Name	String	128	Accounts'' city name Accounts'' company name
SpeAccountCorpPw	String	128	Password for Swiftpage account
SpeAccountCountry	String	64	Accounts'' country name
SpeAccountName	String	255	Accounts'' name
SpeAccountOwnerID	String	12	Primary user SalesLogix user id
SpeAccountPostalAd dr1	String	64	Postal address, line 1, for account
SpeAccountPostalAd dr2	String	64	Postal address, optional line 2, for account
SpeAccountPostalCit y	String	32	Postal city of account
SpeAccountPostalCo de	String	24	Postal code of account
SpeAccountPostalCo untry	String	64	Postal country of account
SpeAccountPostalNa me	String	255	Company name for Postal address
SpeAccountPostalSta te	String	32	Postal state of account
SpeAccountPostalZip	String	32	Zip code of account
SpeAccountServer	String	128	Swiftpage server account resides on
SpeAccountsID	String	12	Internal database ID for this record
SpeAccountState	String	24	Accounts'' State name
SpeAccountTimeZon e	Short Int	2	Accounts'' Swiftpage time zone index
SpeAccountUserID	String	64	SalesLogix User who created account
SpeAccountWebAdd ress	String	128	Accounts'' web address