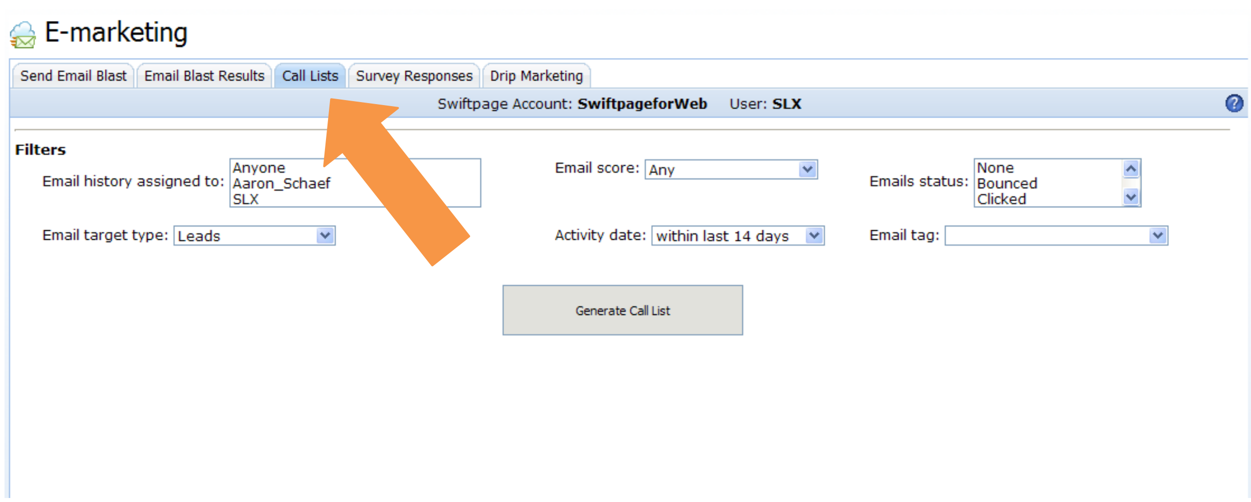
Sage SalesLogix
E-marketing

**Sage SalesLogix E-marketing Quick Start Guide To:**

## Call Lists

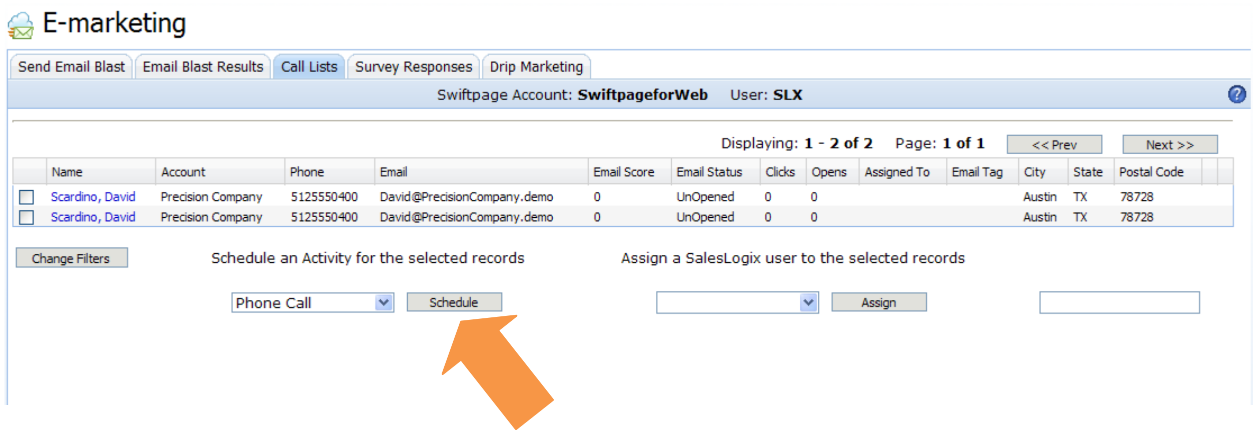
This Quick Start Guide takes you through generating a Call List in Sage SalesLogix Web Client:

1. Click on the E-Marketing button on the left hand side in SalesLogix. Click on the Call Lists tab at the top:

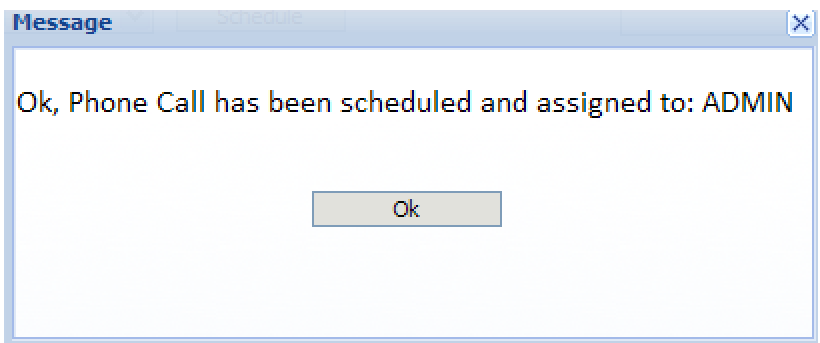



2. You will see several categories which you can use to filter your call list:
    - Email history assigned to: filters based on who the email was sent out as
    - Email target type: filters based on the target group (Leads, Contacts, or Contacts & Leads).
    - Email score: set the parameter for scores included in Call List
    - Activity date: set the time range for when contacts interacted with the email
    - Emails status: filter by the status of the email – opened, clicked, bounced, duplicate, failed, invalid, opt-out, unopened or suppressed.
    - Email tag: filters by tags assigned to email blasts

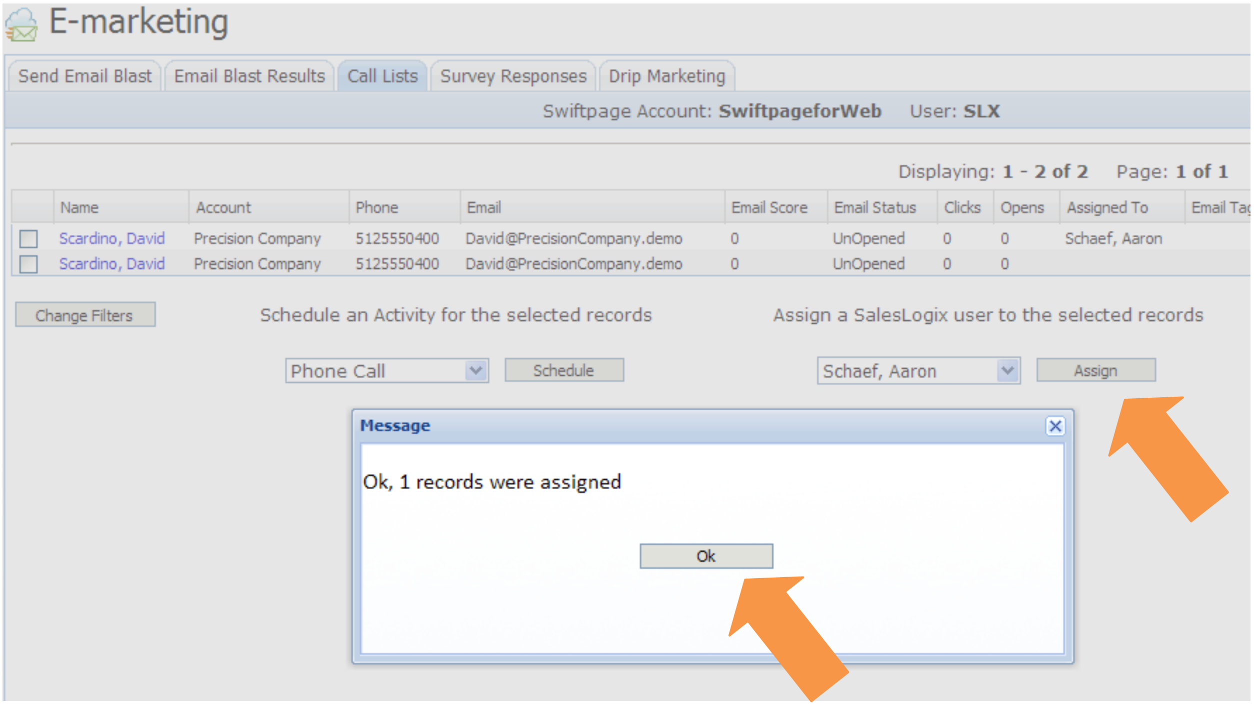
3. Once you have set the desired filters, click the Generate Call List button and the Call List will appear:




4. The Call List page allows you to view your contacts information and interaction details with the email. Here you can Schedule an Activity for selected contacts by checking the box next to the contact, selecting the activity from the drop down list and clicking Schedule. You will get the following message indicating the Activity has been scheduled and assigned:




5. You can also Assign selected records in the Call List to another SalesLogix user using the Assign button. You will see a window verifying that the record has been assigned to the user:




6. Finally, you can also adjust the Call List by clicking Change Filters.