



## 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:

E-marketing

Send Email Blast | Email Blast Results | **Call Lists** | Survey Responses | Drip Marketing

Swiftpage Account: **SwiftpageforWeb** User: **SLX**

**Filters**

Email history assigned to:  | Email score:  | Emails status:

Email target type:  | Activity date:  | Email tag:

Generate Call List

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

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

E-marketing

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Swiftpage Account: **SwiftpageforWeb** User: **SLX**

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	Name	Account	Phone	Email	Email Score	Email Status	Clicks	Opens	Assigned To	Email Tag	City	State	Postal Code
<input type="checkbox"/>	Scardino, David	Precision Company	5125550400	David@PrecisionCompany.demo	0	UnOpened	0	0			Austin	TX	78728
<input type="checkbox"/>	Scardino, David	Precision Company	5125550400	David@PrecisionCompany.demo	0	UnOpened	0	0			Austin	TX	78728

Change Filters

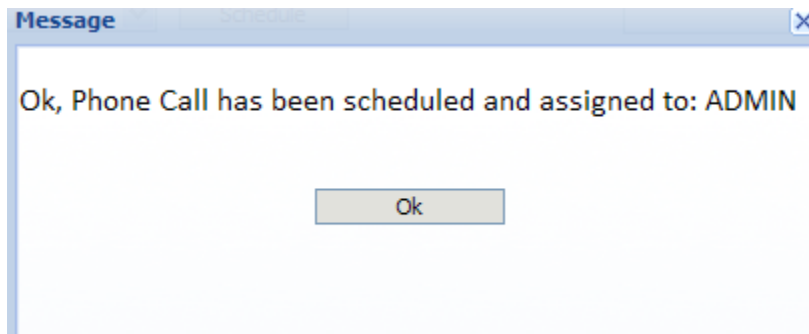
Schedule an Activity for the selected records

Assign a SalesLogix user to the selected records

Phone Call



- 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:



- 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:

E-marketing

Send Email Blast | Email Blast Results | **Call Lists** | Survey Responses | Drip Marketing

Swiftpage Account: **SwiftpageforWeb** User: **SLX**

Displaying: 1 - 2 of 2 Page: 1 of 1

	Name	Account	Phone	Email	Email Score	Email Status	Clicks	Opens	Assigned To	Email Tag
<input type="checkbox"/>	Scardino, David	Precision Company	5125550400	David@PrecisionCompany.demo	0	UnOpened	0	0	Schaefer, Aaron	
<input type="checkbox"/>	Scardino, David	Precision Company	5125550400	David@PrecisionCompany.demo	0	UnOpened	0	0		

Change Filters

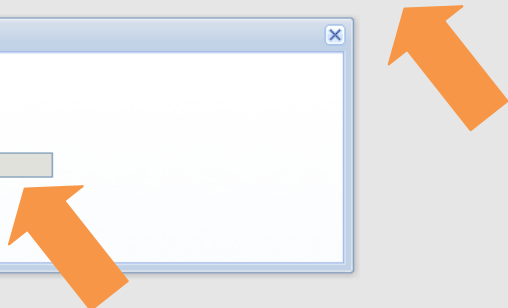
Schedule an Activity for the selected records

Assign a SalesLogix user to the selected records

Phone Call  Schaefer, Aaron

**Message**

Ok, 1 records were assigned



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