How to Use
Sage SalesLogix
E-Marketing
Web Client

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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 Web Fresh Installation Procedure

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

2. Navigate to the *Project Explorer*, right-click the *Web Project* and click *Install Bundle*
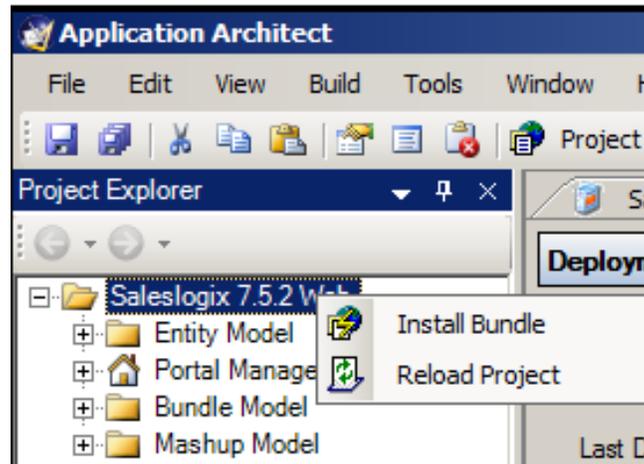

3. Navigate to the *Sage SalesLogix E-marketing* Web bundle, select it and click *Open*.
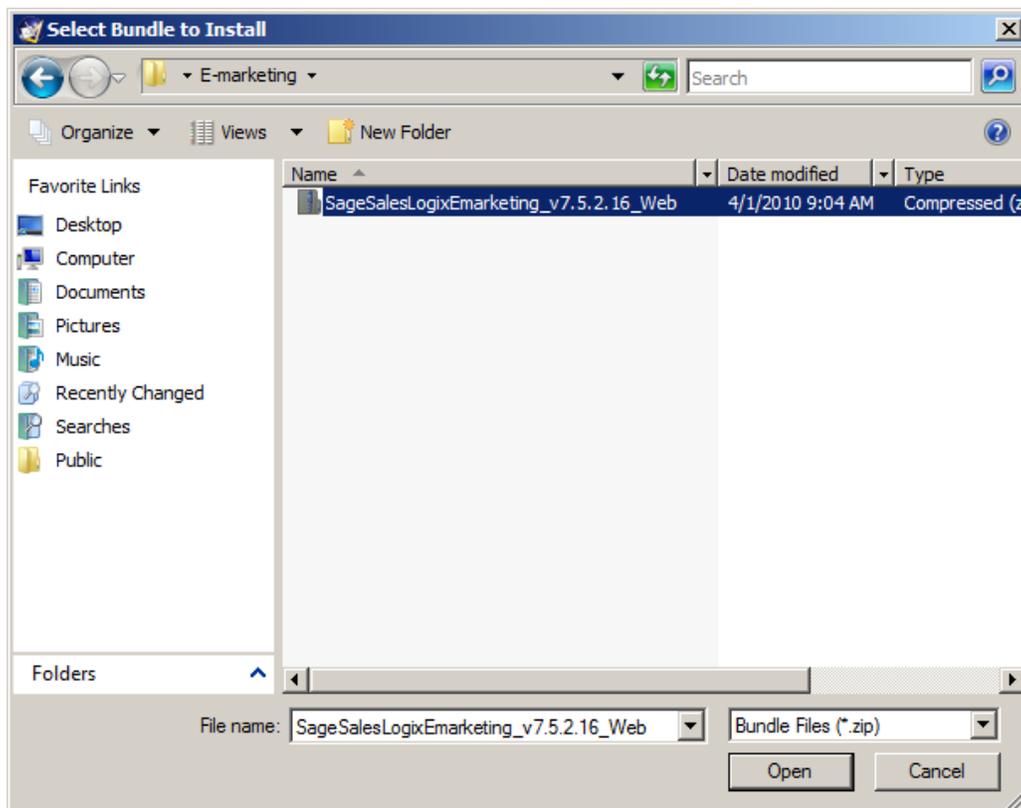
4. Ensure the *Sage SalesLogix E-marketing* Web *Bundle Path* is correct and click *Next*.
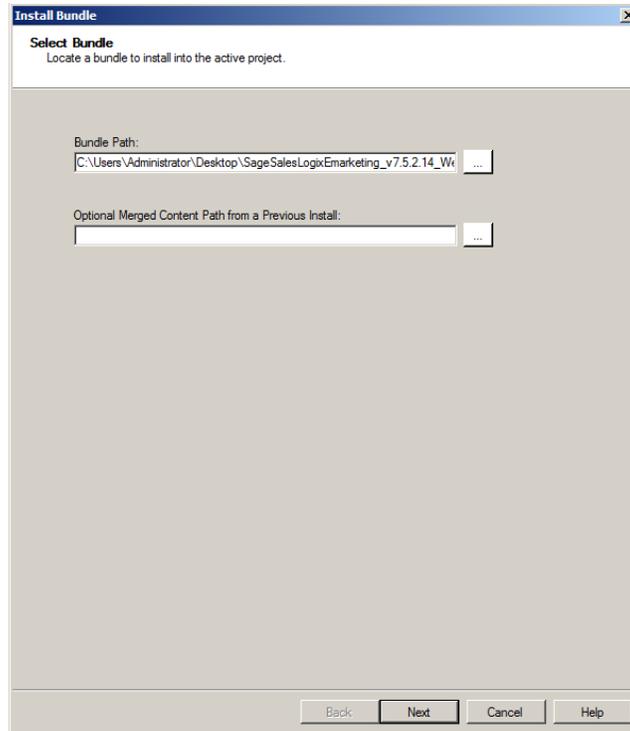
5. Navigate to "Entity Model\Packages\SalesLogix Application Entities\", click the + next to *Contact* and *Lead* entities, and then uncheck the *Lead* and *Contact* checkbox. Now check the boxes for "SwiftpageHistory" form under the "Contact" entity, and the "SwiftpageLeadHistory" form under the "Lead" entity. Once that is done click *Next*.
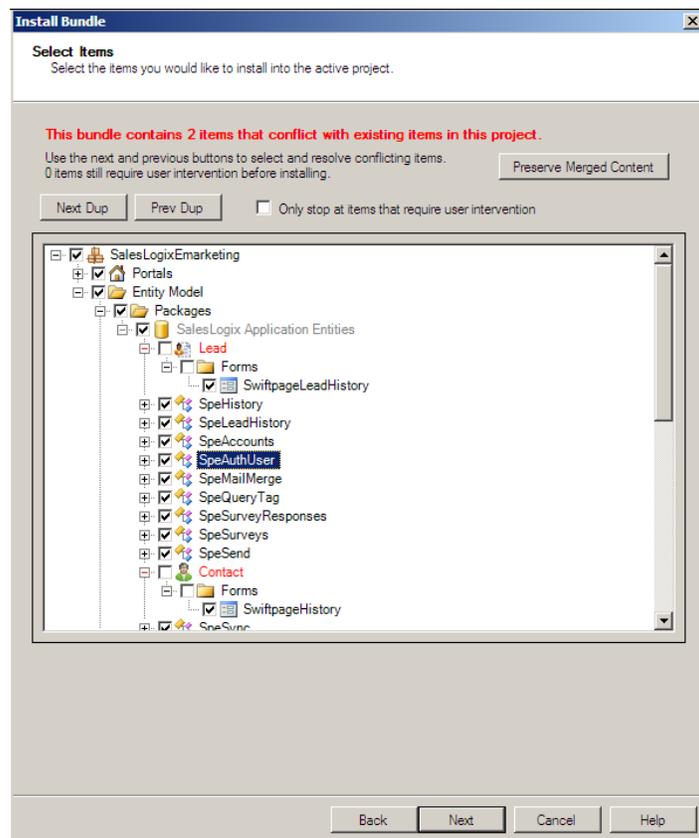
6. If the LAN version of *Sage SalesLogix E-marketing* is *not* installed then leave all boxes checked, click *Next*.
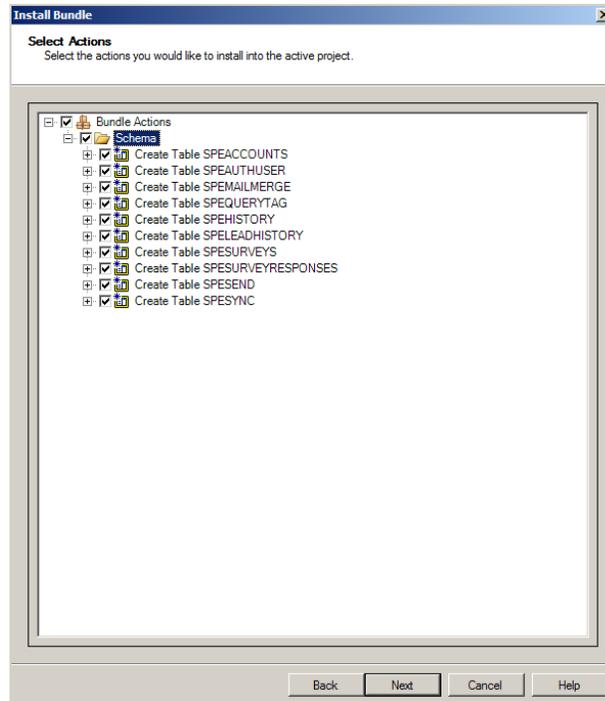
7. If the LAN version of *Sage SalesLogix E-marketing is* installed then uncheck *Schema*, click *Next*.
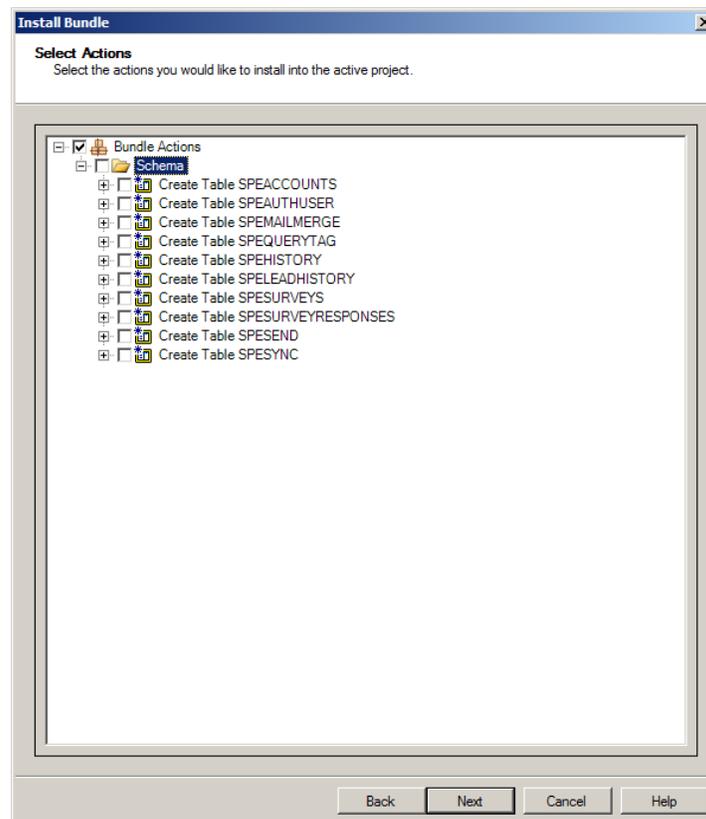
8. If Schema was *not* unchecked and the E-marketing tables were previously written, then an *Install Error* message opens for each table conflict. Simply click *Yes* for each of the 10 conflicts.
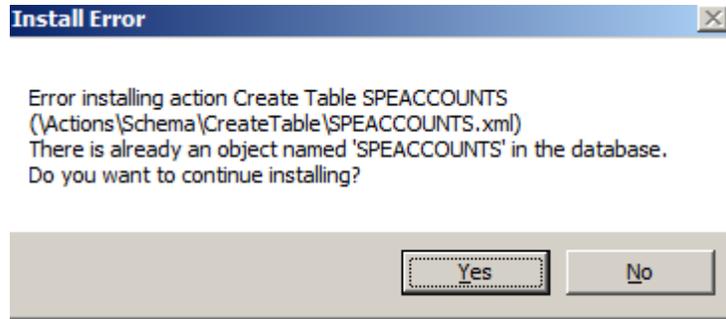
9. When the installation has finished, click *Finish*. Ensure there are no errors in the *Output Window* save for *Create Table* errors.
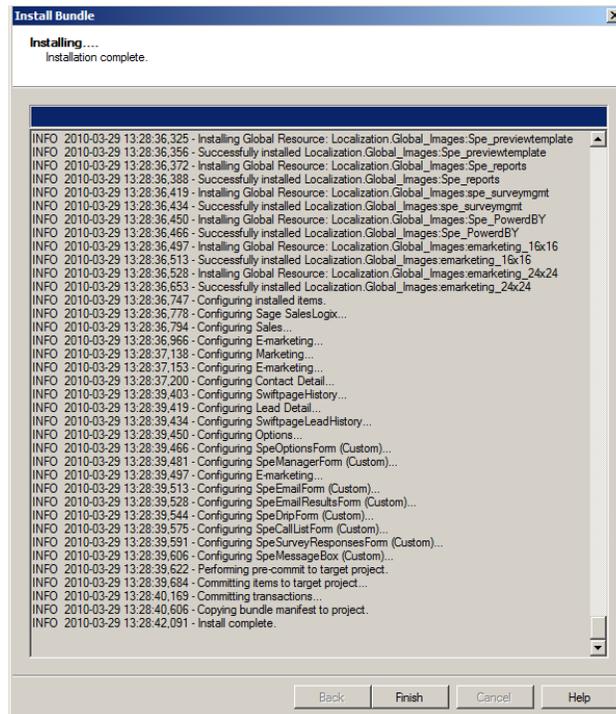
10. Ensure the web project is still selected then click the *Build Interfaces* button on the toolbar. Ensure there are no errors in the *Output Window*.
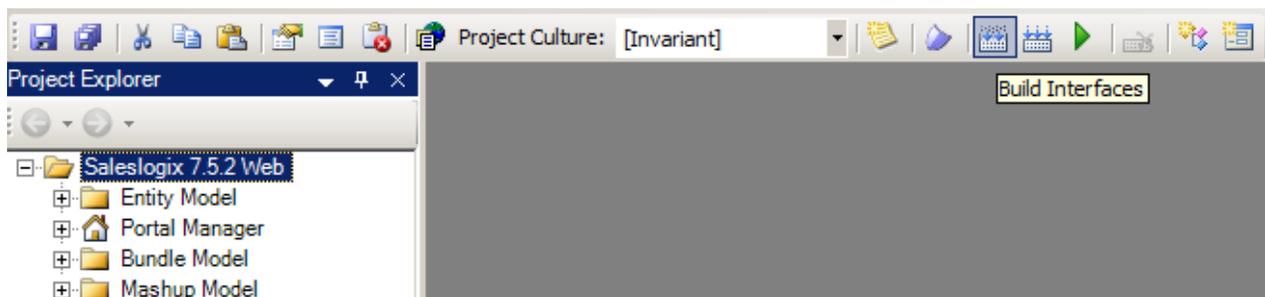
11. Ensure the web project is still selected then navigate to the *Build* menu and click *Rebuild Web Platform* from the menu. Ensure there are no errors in the *Output Window*.
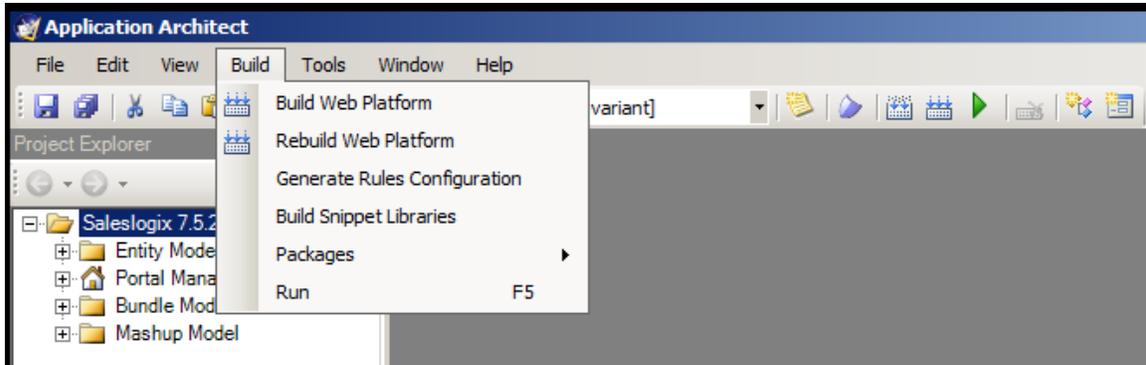
12. Click the *+* next to the Web project, and *Portal* Manager then double-click *Sage SalesLogix*. Click the *Deployment* tab and then double-click *Core Portals*.
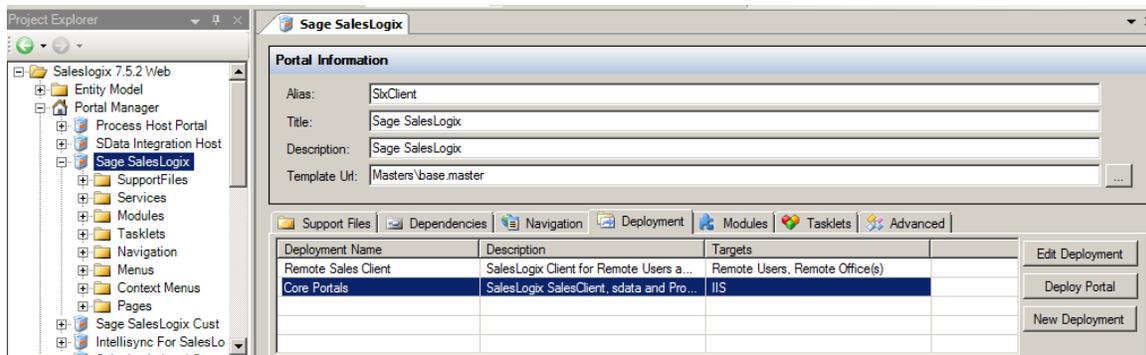
13. Under the *Core Portals* tab click on *SlxClient* and ensure the *Precompile* box is checked.
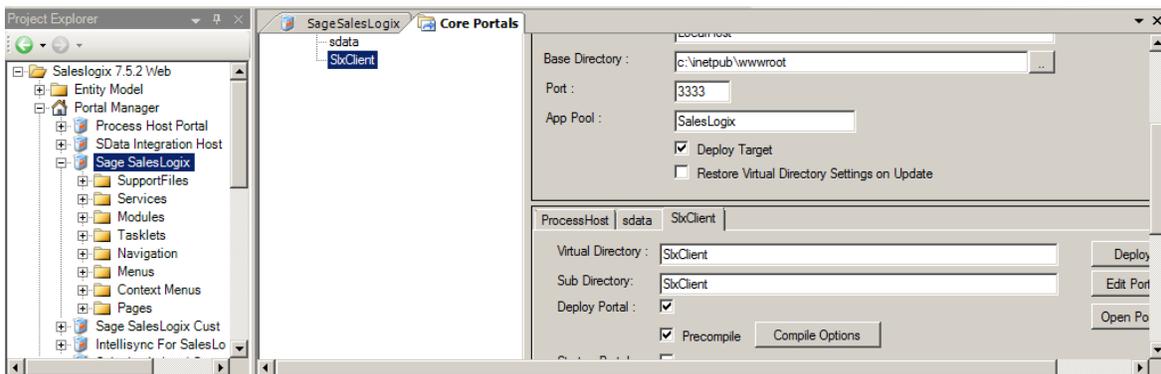
14. Click the *Deploy All* button under *Core Portals*. Ensure there are no errors in the *Output Window*.
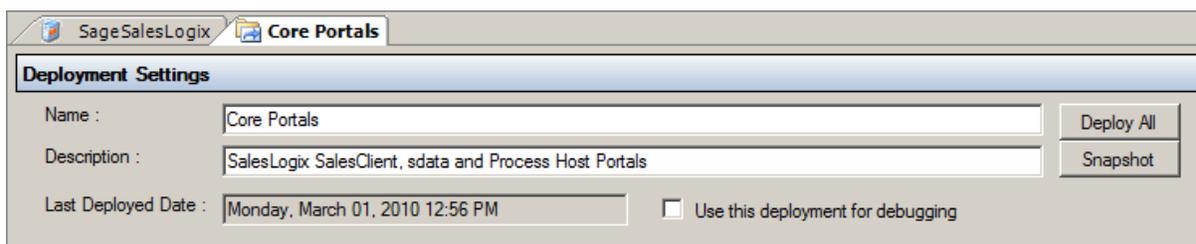
Sage SalesLogix E-marketing Web Upgrade Procedure

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

2. Navigate to the *Project Explorer*, right-click the *Web Project* and click *Install Bundle*
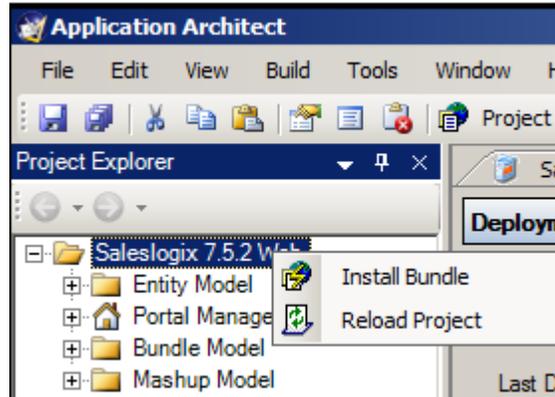
3. Navigate to the new *Sage SalesLogix E-marketing* Web bundle, select it and click *Open*.
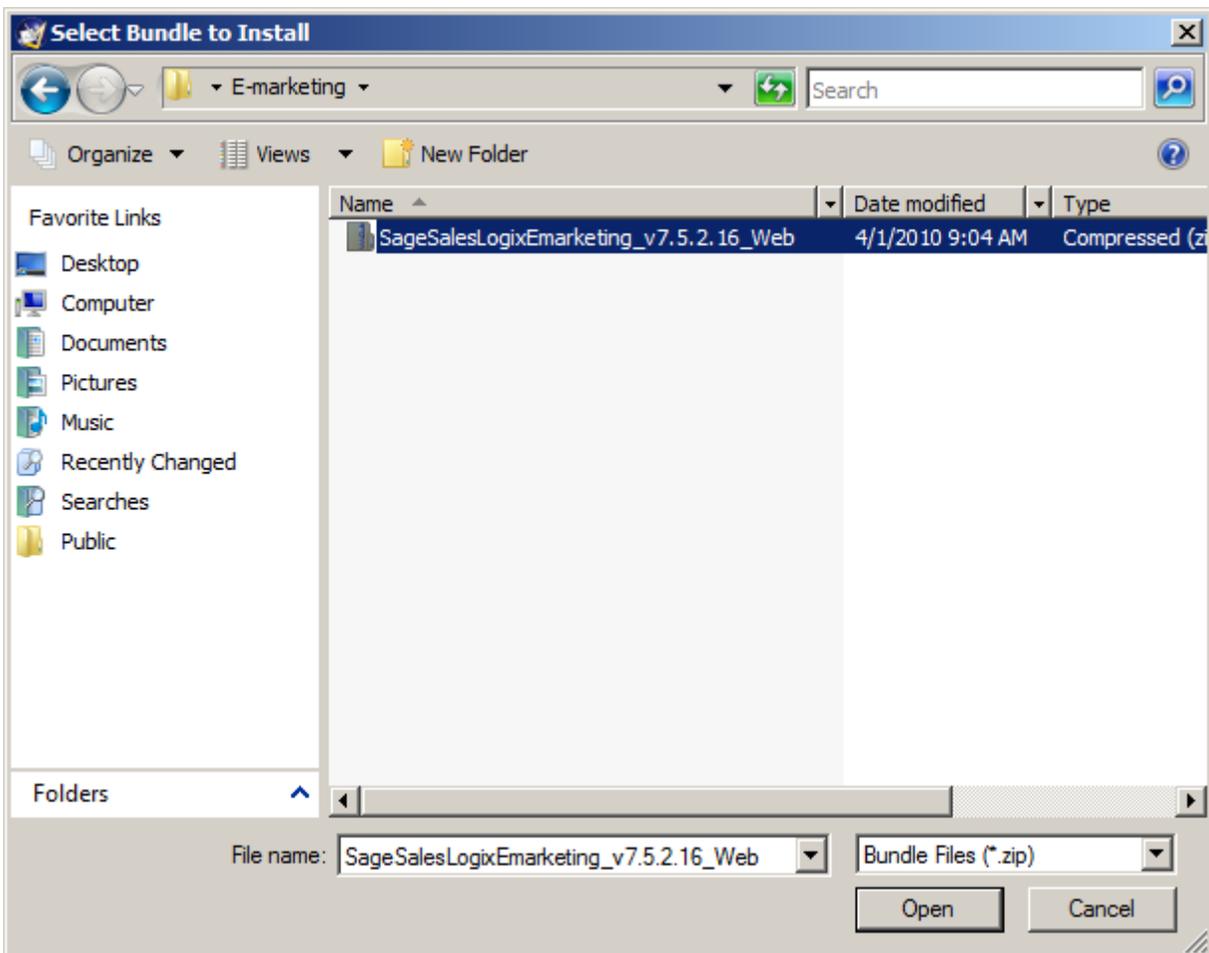
4. Ensure the new *Sage SalesLogix E-marketing* Web *Bundle Path* is correct and click *Next*.
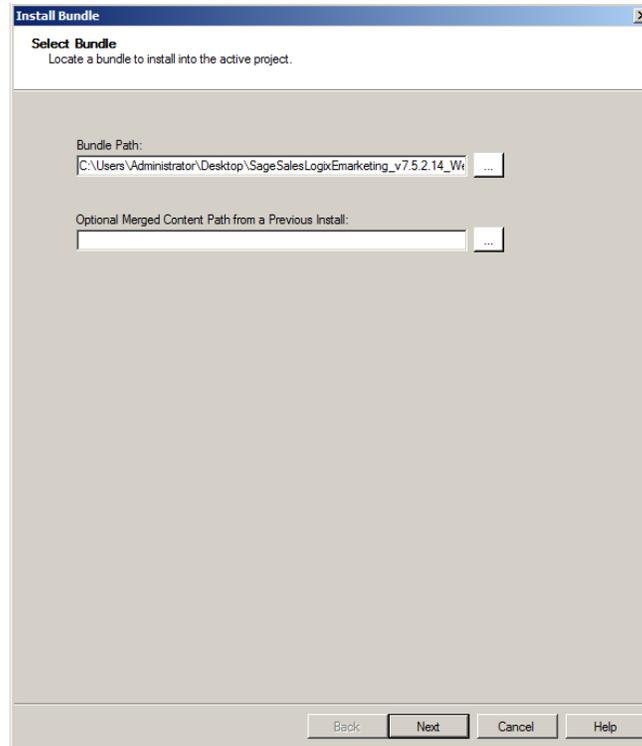
1. Navigate to "Entity Model\Packages\SalesLogix Application Entities\", click the + next to *Contact* and *Lead* entities, and then uncheck the *Lead* and *Contact* checkbox. Now check the boxes for "SwiftpageHistory" form under the "Contact" entity, and the "SwiftpageLeadHistory" form under the "Lead" entity. Once that is done click *Next*.
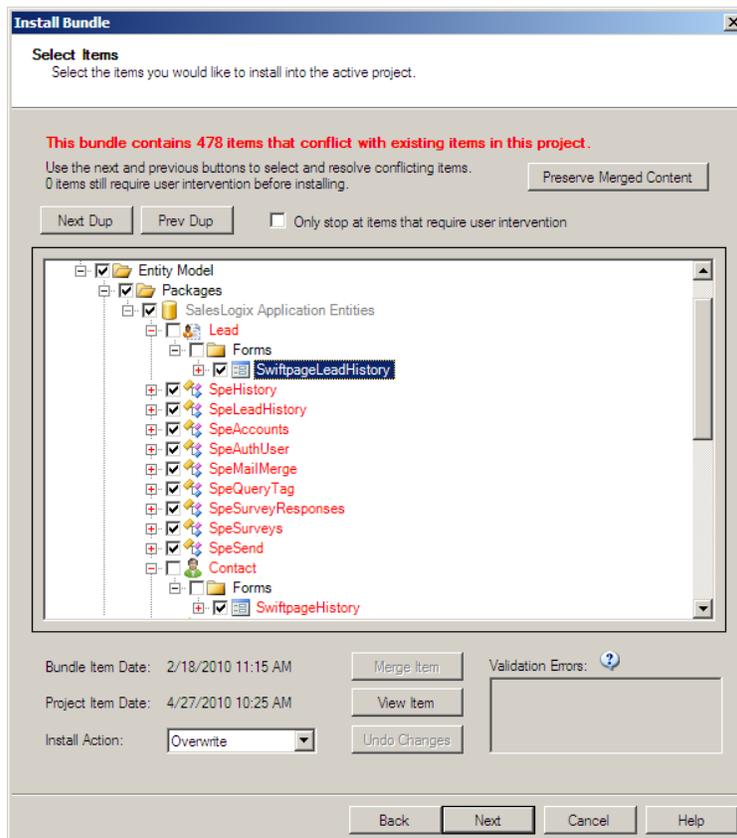
5. Uncheck *Schema*, click *Next*.
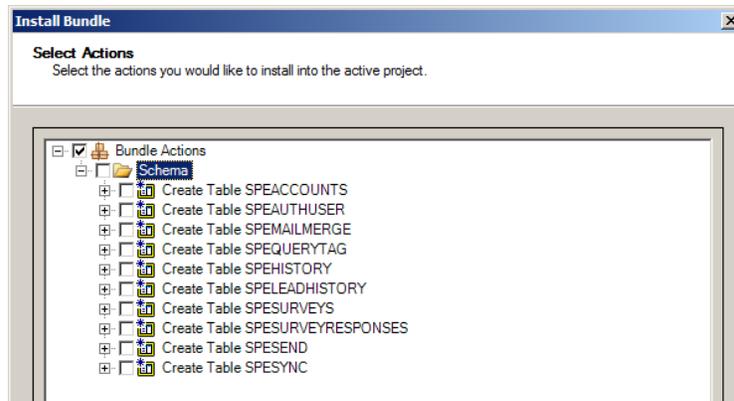
6. If Schema was *not* unchecked an *Install Error* message opens for each table conflict. Simply click *Yes* for each of the 10 conflicts.
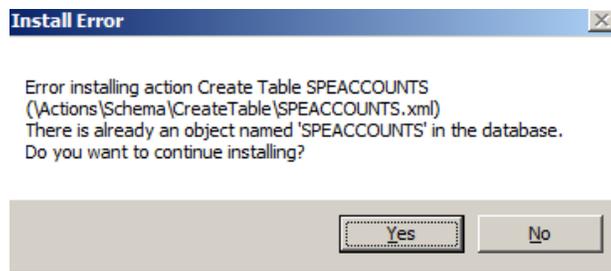
7. When the installation has finished, click *Finish*. Ensure there are no errors in the *Output Window* save for *Create Table* errors.
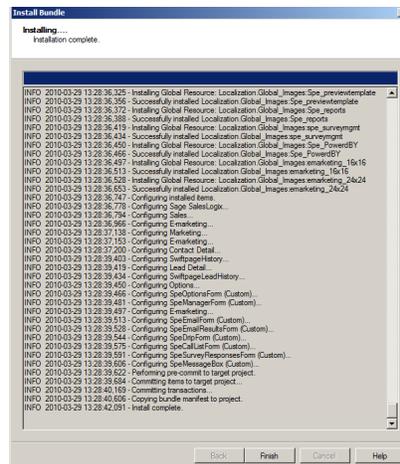

8. Ensure the web project is still selected then click the *Build Interfaces* button on the toolbar. Ensure there are no errors in the *Output Window*.
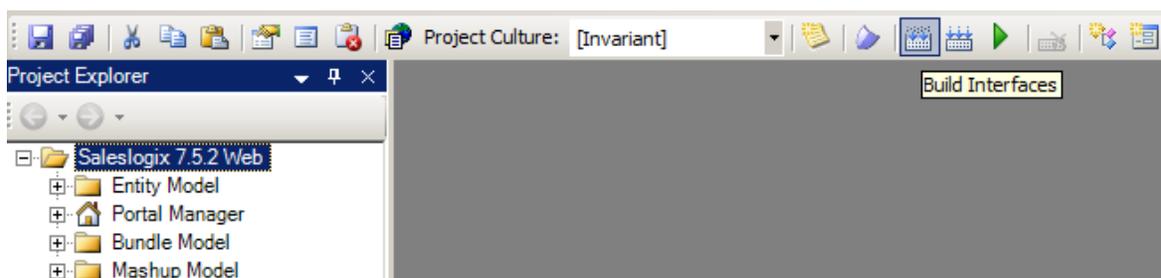
9. Ensure the web project is still selected then navigate to the *Build* menu and click *Rebuild Web Platform* from the menu. Ensure there are no errors in the *Output Window*.
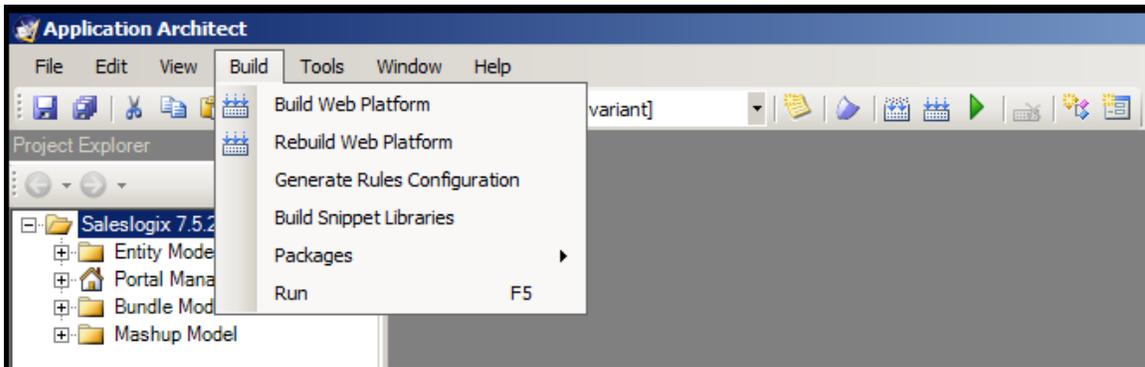

10. Click the *+* next to the Web project, and *Portal* Manager then double-click *Sage SalesLogix*. Click the *Deployment* tab and then double-click *Core Portals*.
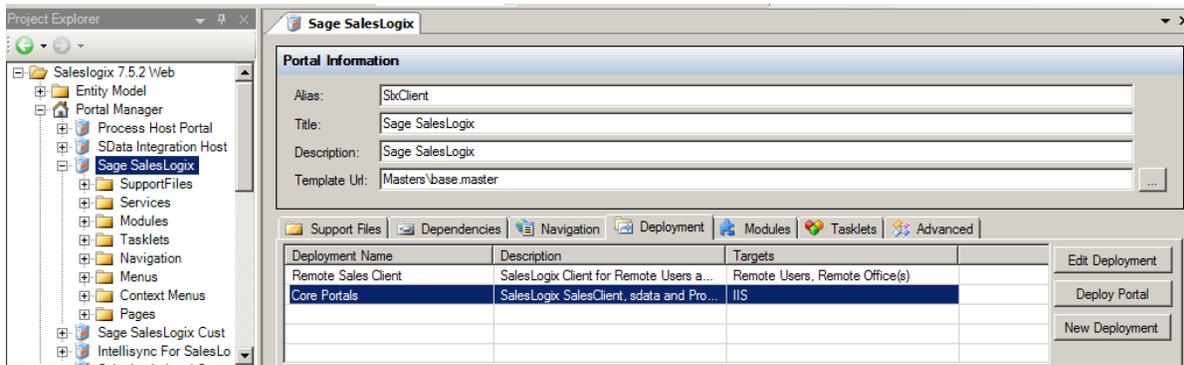
11. Under the *Core Portals* tab click on *SlxClient* and ensure the *Precompile* box is checked.
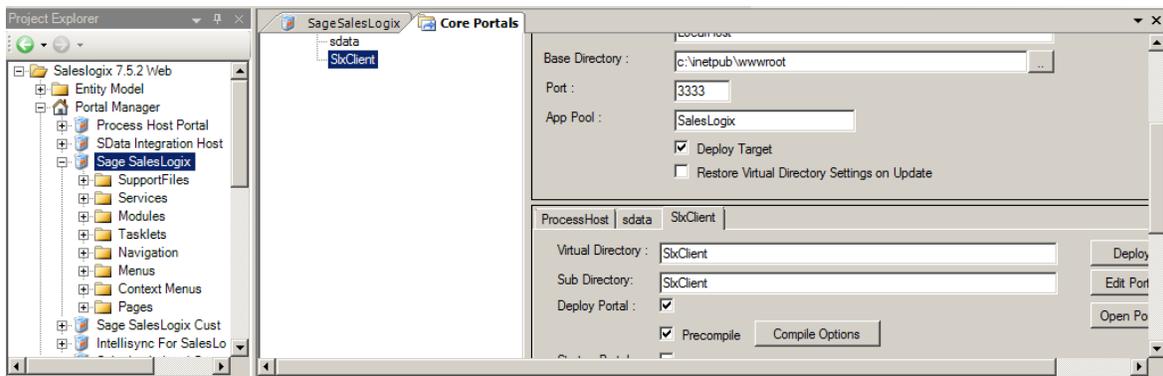

12. Click the *Deploy All* button under *Core Portals*. Ensure there are no errors in the *Output Window*.
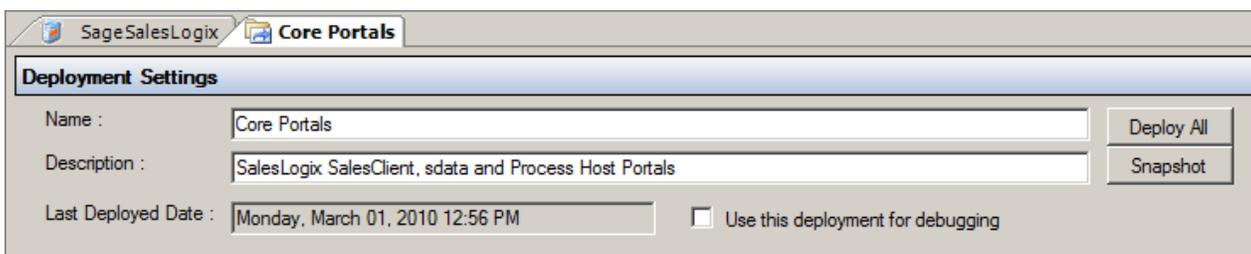
Template Manager
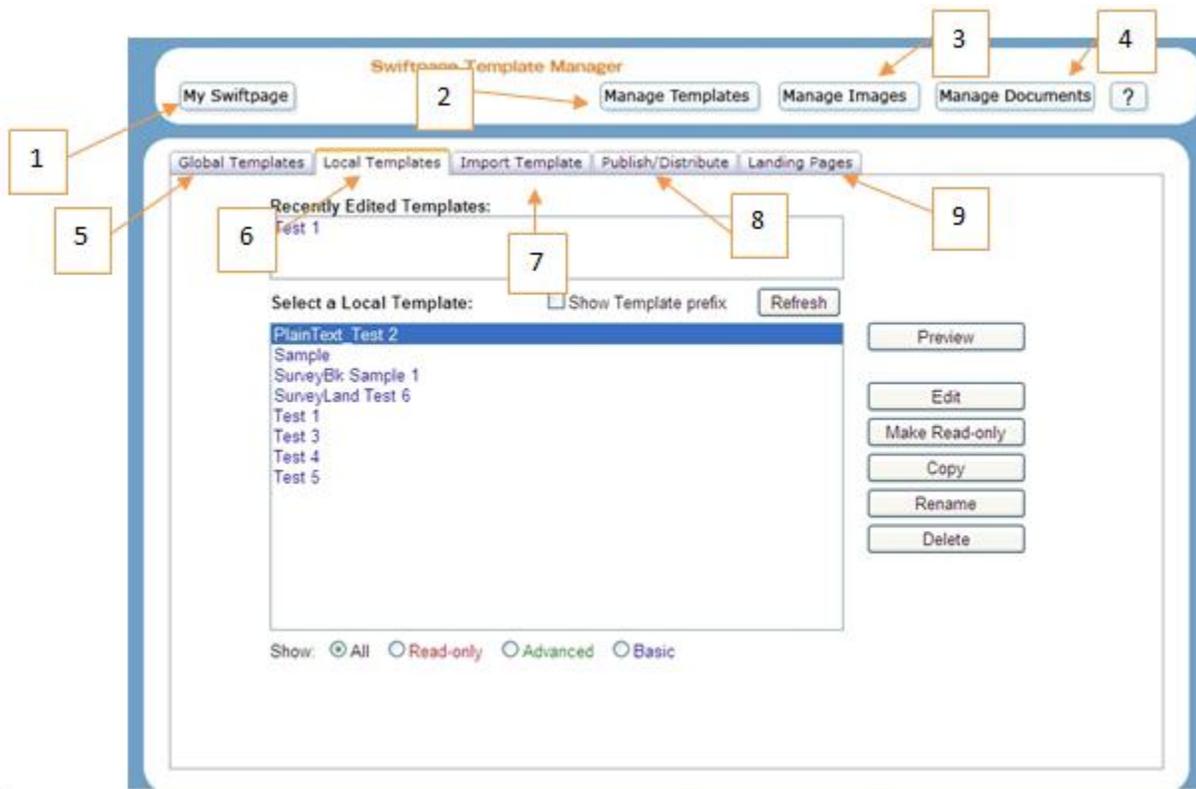
1. **My Swiftpage**: click here to return to the Swiftpage Connect screen.

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.
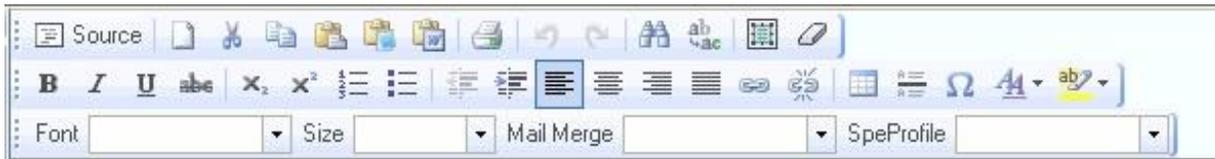
First Row:

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

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

Third Row:

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

The Image Options Menu
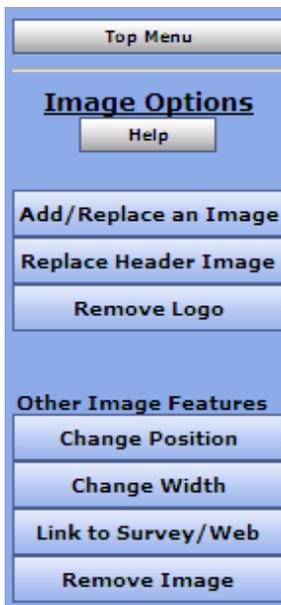
1. Top Menu: returns to the original Content Editor menu.
2. Help: accesses Swiftpage online help.
3. Add/Replace an Image: use this button to insert an image into the selected window of your template, or to replace the image currently there. When you click this button, you will be asked to browse for 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.
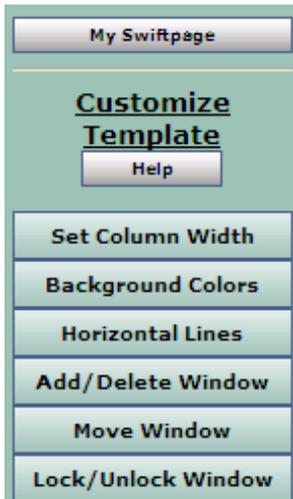
1. My Swiftpage: takes you back to the Swiftpage Connect portal, where you can access Surveys, Reports, and more.
2. Help: accesses Swiftpage online help.
3. Set Column Width: every Swiftpage template is 600 pixels wide, and every Swiftpage template has two columns. (In some Swiftpage templates, the 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.

Mapping Mail Merge Fields in Sage SalesLogix E-marketing

To map custom fields, follow these steps:

1. In Sage SalesLogix Web Client, click on the Options button on the upper right hand corner and then select the E-Marketing tab. The following screen will appear:
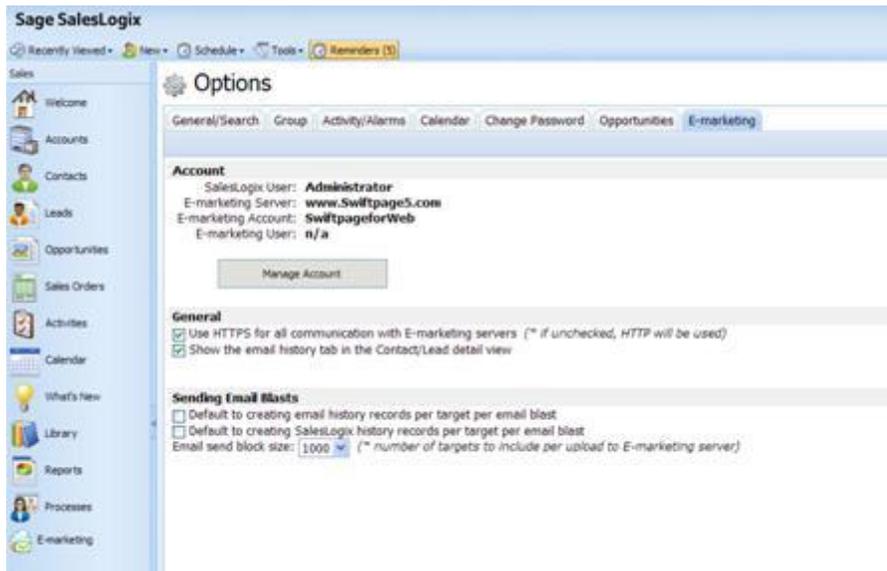
2. Click on the "Manage Account" button. You will be prompted to enter your account password. Enter it, click Submit and the next screen will appear:
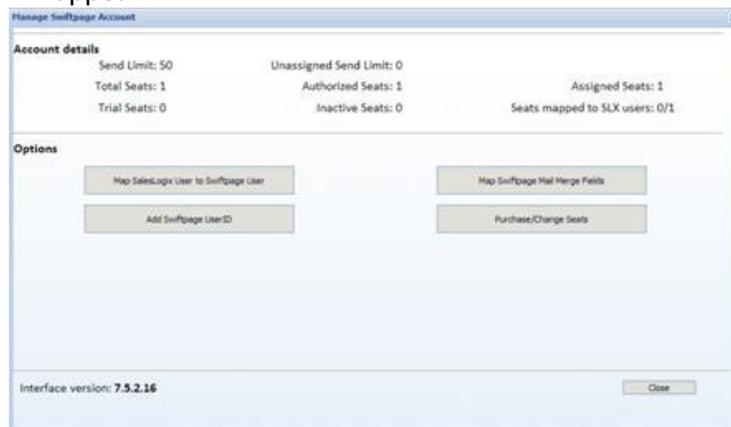
4. Click on the Map Swiftpage Mail Merge Fields button. A window will open, showing all of your SalesLogix fields for both Contacts and Leads on the left-hand side, and your existing available mail merge fields (and their definitions) in a box on the right.

5.
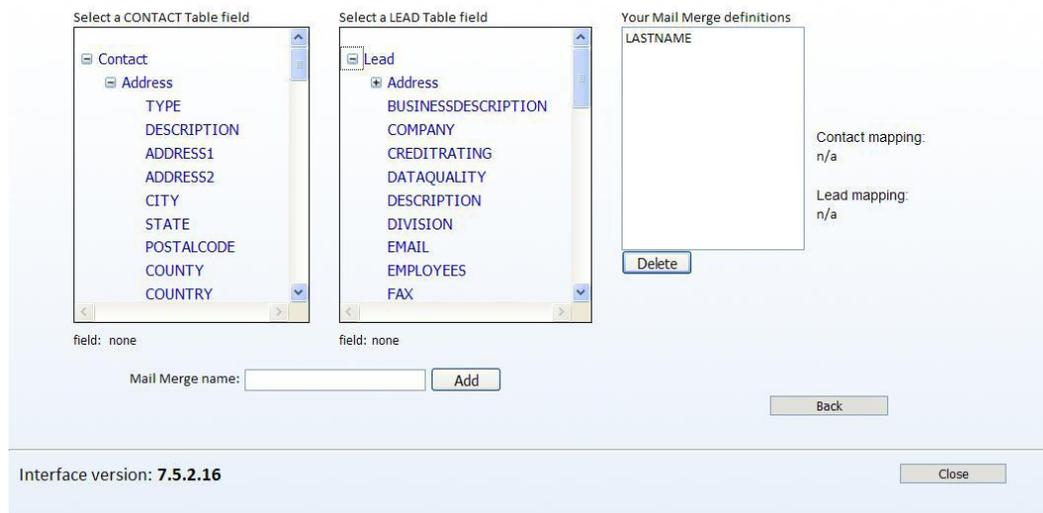
4. Highlight a mail merge field on the left and click on Add to add the field to your list of possible Swiftpage mail merge templates. To delete a mail merge field, click on it in the right-hand box and click on Delete.

5. Click Close when you are finished with your mail merge fields.

6. The next time you enter the template editor, you should see your new mail merge fields available.

Send Email Blast Tab
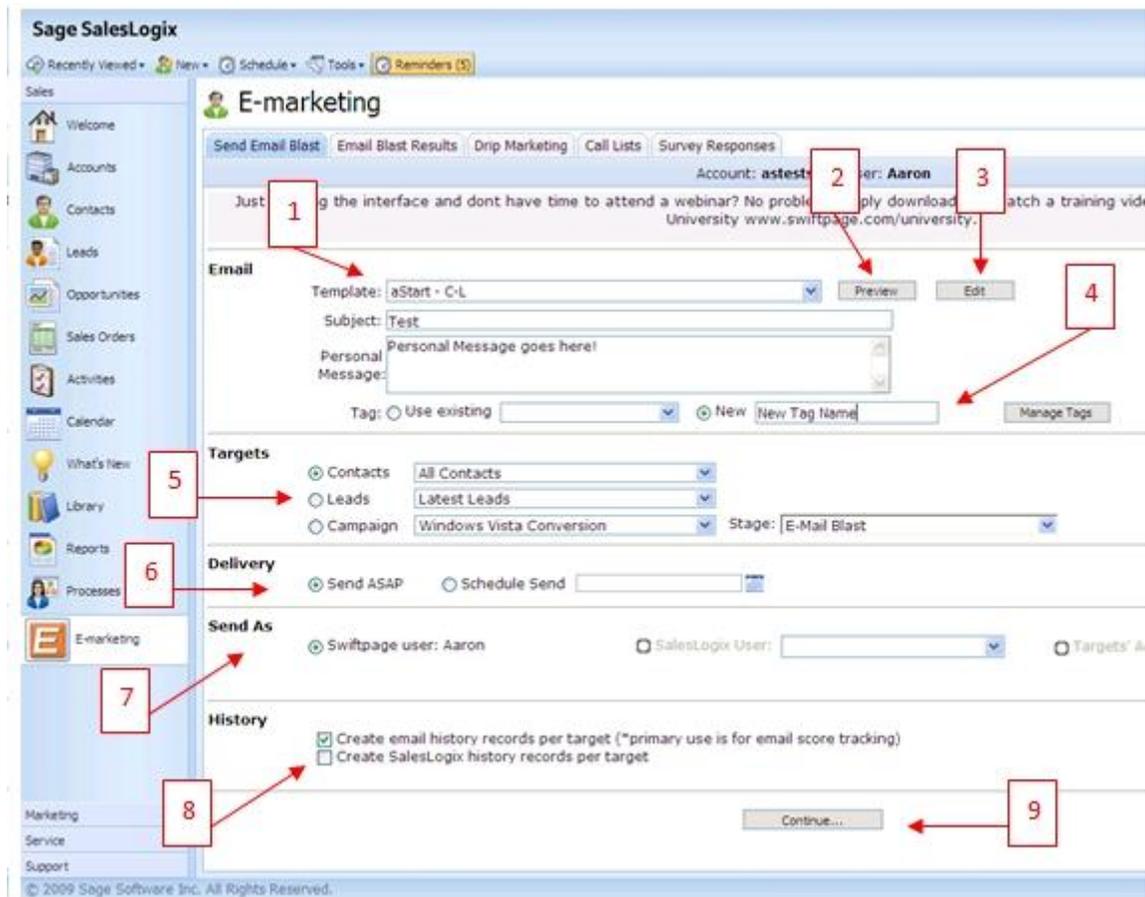
1. In the Email section of the Send Email Blast tab, you can select your template from the Template drop-down list. Enter the subject line for your email blast, and a Personal Message (if applicable).
2. The Preview button opens a new web page with a preview of the template selected in the Template drop-down 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. 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.
5. 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 lists to select specific targets for your email blast.
6. Under Delivery, you can choose either to Send ASAP (which will queue the email blast for immediate delivery) or Schedule Send. The Schedule Send option opens a calendar from which you can choose the date and time of your email blast (see below).

7. Send As: you have three choices here:
   o   Choose to send as the user you are logged in as,
   o   Choose a Sage SalesLogix user from the drop-down list to send on that user's behalf, or
   o   Select the Targets' Account Manager option to send each email on behalf of the Sage SalesLogix user who is specified as each target's account manager. (For instance, if target Mike Jones' account manager is Sage SalesLogix user Shelia and target Jane Franklin's account manager is Sage SalesLogix user James, the email to Mike will appear to be from Shelia and the email to Jane will appear to be from James.) **Note:** if you use this option, make sure that each account manager for the selected targets is also an active Sage SalesLogix E-Marketing user on your account.
8. History: choose to create email history records for each target ,and/or Sage SalesLogix history records for each target, or neither.
9. The Continue… button will offer a verification page showing you which targets will be included, when the email will be sent, the Sage SalesLogix user(s) the email will be sent as, and other details of the send:
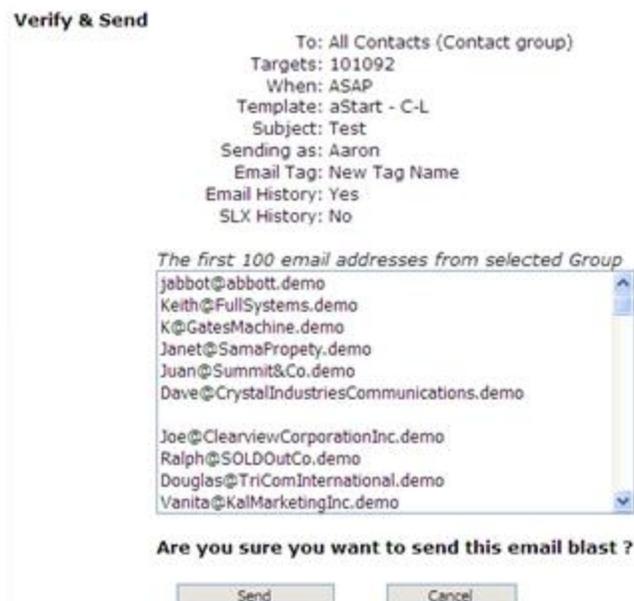
If this looks correct, click Send, and your email blast will be sent (or scheduled if you used the Schedule Send function). You are finished sending your email blast!

Sending an Email

Below are the steps of sending an email through Sage SalesLogix Web Client, including features such as Scheduled Send and Send As.

1. Click on the E-Marketing Button in SalesLogix. The following screen will appear:

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 contacts by groups, leads or campaign. When you have selected the contacts you want to send your email to, select the Delivery type:

- Send ASAP: 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
    - When scheduling a send, this window will appear:


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

2. Now you will want to select who the email will appear to be sent as under Send As:

You can send as a Swiftpage User, SalesLogix User or Targets' Account Manager. **Note:** anyone on whose behalf you send must be tied to a Swiftpage user ID or you will become the default sender for that email.

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3. Finally, under the History section, you can Create email history records per target (*primary use is for email score tracking) or Create SalesLogix history records per target.

4. Click Continue to verify the Email Blast and Send the email. A confirmation screen will appear:
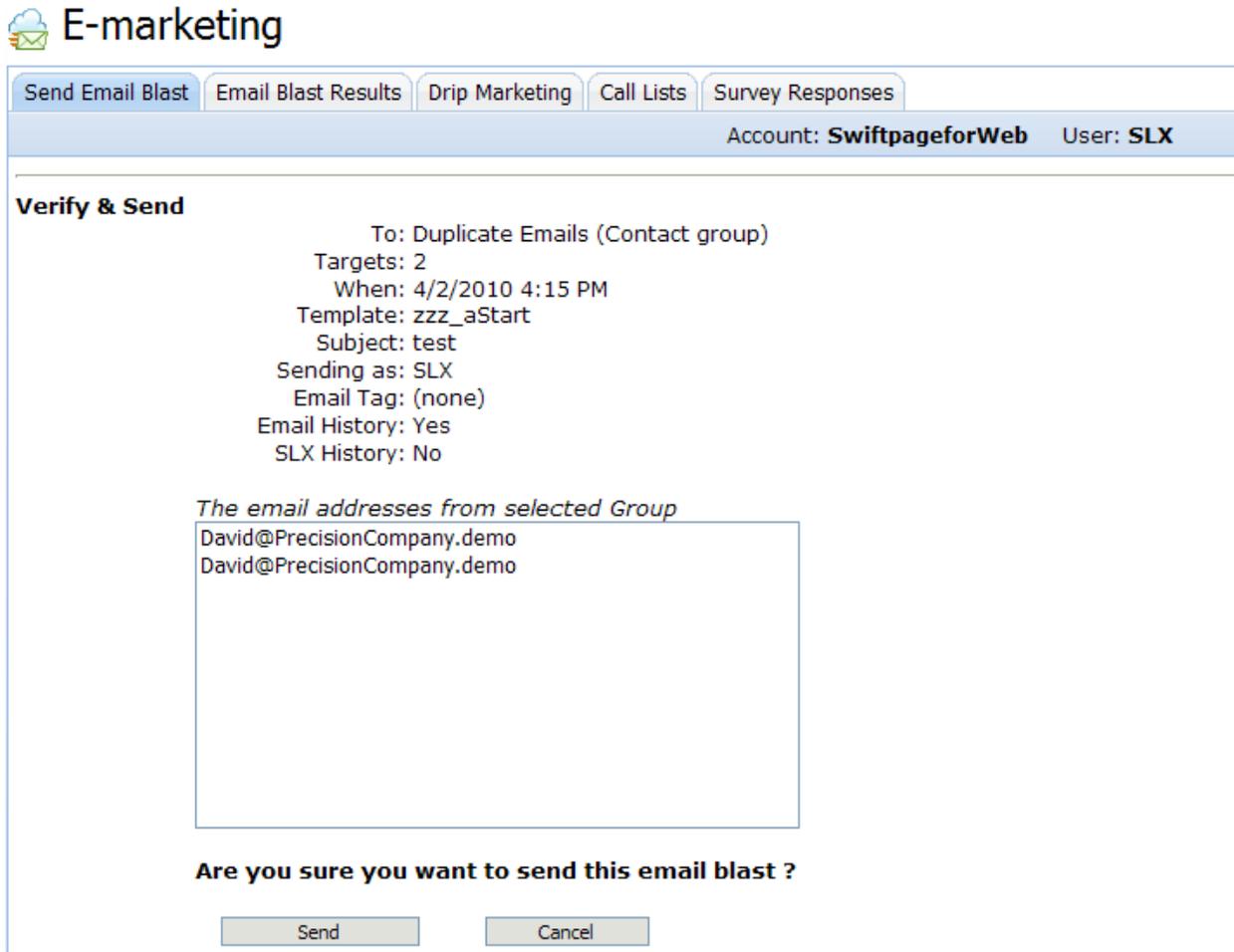
This screen will show you the target selection, number of "targets" (or emails to be sent), the date and time the email is to be sent, Template and Subject line, the Sender, Email tag and the history records you chose to be written. A preview of the email addresses in the batch will also be shown. If you are ready to send your email, click Send.

5. The screen will appear, looking like this:
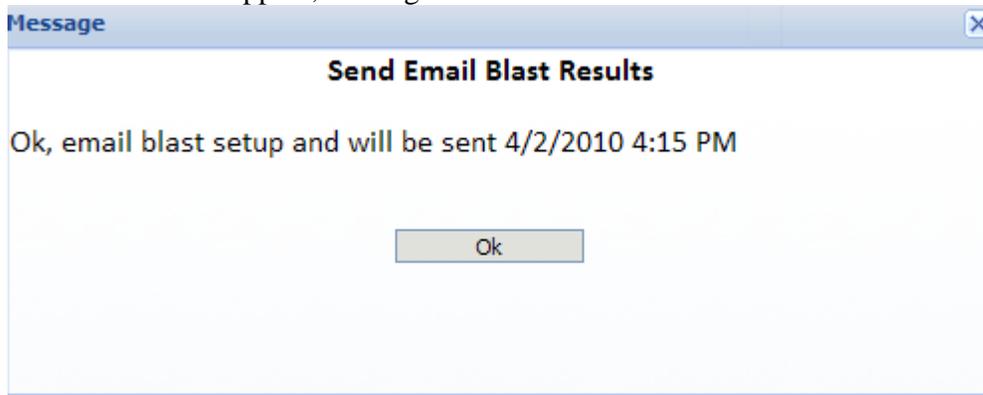
6. You are done! You have successfully sent an email through Sage SalesLogix E-marketing for Web.

Email Blast Results Tab

This page explains the features of the Sage SalesLogix E-Marketing Email Blast 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, any tag associated with the email blast, the subject line, template name, and finally how many updates are ready to be written into Sage SalesLogix.
2. The Report link to the right of each email blast listed opens a new web page with the detailed report for that email blast.
3. Click Submit (under "Create/Update email history records with data retrieved from selected email blast") to write the results of the selected email blast into your Sage SalesLogix email history records. You will receive a confirmation message saying the records were successfully written.
4. Click View Reports to open a new web page showing your Reports menu, where you can view detailed reports for any email blast in the past sixty days.

Email Blast Results

Use the steps below to access and retrieve your email blast results in Sage SalesLogix Web Client.
1. Click on the E-Marketing button on the left hand side in SalesLogix. Click on the Email Blast Results tab at the top:

2. Here you should see a list of recent email blasts that have updates (new scores) that are waiting to be written. You can select the email blast that you want to update scores for and click the Submit button. This will create/update email history records with information such as opens, clicks, bounces, opt-outs, etc. for each of your contacts.

*Note: scores take 24 hours from the time of your email blast to become available for writing to SalesLogix.

3. You can also click View Reports to be taken online to your Reports page. Here you can view graphical representations of your email blasts, view scheduled emails, access your suppression list and view account level reports.

Email Blast Summary

Email Blast Summary

Name: Sample
Submitted on: 7/10/2012 1:18:00 PM   To Print: Right Click here and select 'Print'
Subject: Sample
Template: Sample
Opened: 85.0%
To view the Email click here
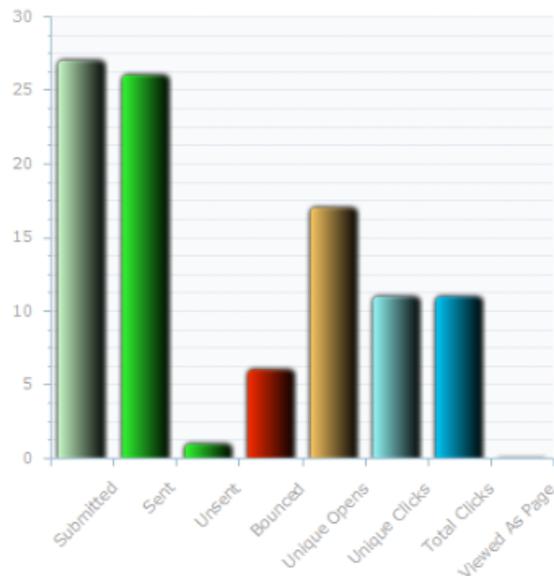
Summary Reports	Detail Reports
Opens and Clicks	Submitted
Opens	Unique Opens by Time
Opens over Time	Unique Opens by Email
Clicks	Opens by Time
Clicks over Time	Opens by Email
	Unique Clicks by Link
Create Call List	Unique Clicks by Email
	Clicks by Link
	Clicks by Email
	Unopened
	Bounced
	Unsent

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 guide explains the features of the Sage SalesLogix E-Marketing Call Lists tab.
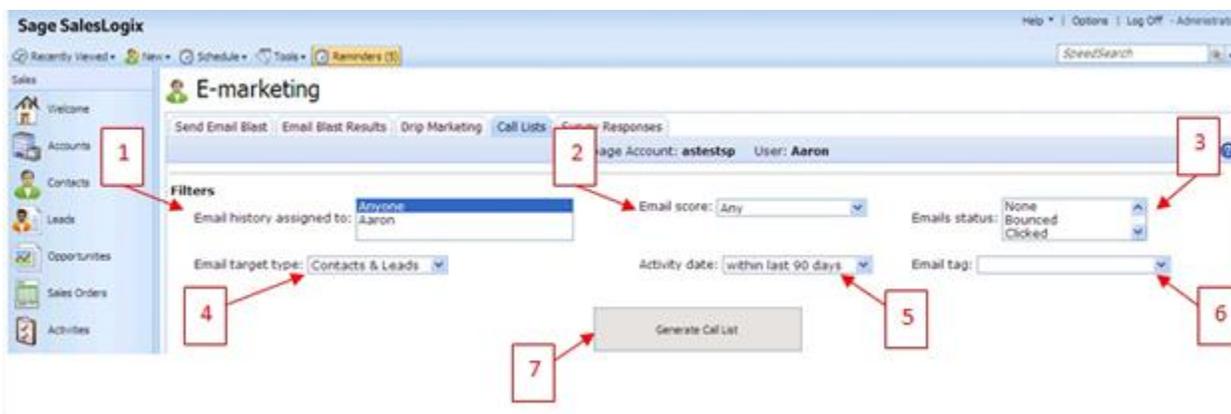
Call Lists are ranked lists of your most interested contacts based on their interaction with a specific email campaign or a combination of email campaigns. For instance, if Joe opens your email three times and clicks on four different links in the email, he is considered a "Hot" contact, whereas Jane—who 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. (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. Create a Call List based on the filters listed in 1-6 below. **Note:** all of these filters are optional.

1. Filter based on which Sage SalesLogix user the email history has been assigned to. Highlight the user or just highlight "Anyone" to select all users.
2. Filter based on Email score. Scores are determined based on opens, clicks, bounces, and so on.
3. Filter based on Email status, again with options for bounces, clicks, opens, and so on.
4. Filter based on Email target type—contacts, leads, or contacts & leads.
5. Filter based on Activity date, based on how recently you sent the email blast(s) to be included in the Call List.
6. Filter based on Email tag, from tags you have defined in previous Sage SalesLogix E-Marketing sends.
7. When you are finished setting your filters, click Generate Call List and the Call List will appear in the lower half of the screen. From that point, further options appear allowing you to assign the Call List to a specific Sage SaleLogix user or schedule a phone call for Call List targets.

Creating and Assigning Call Lists

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:
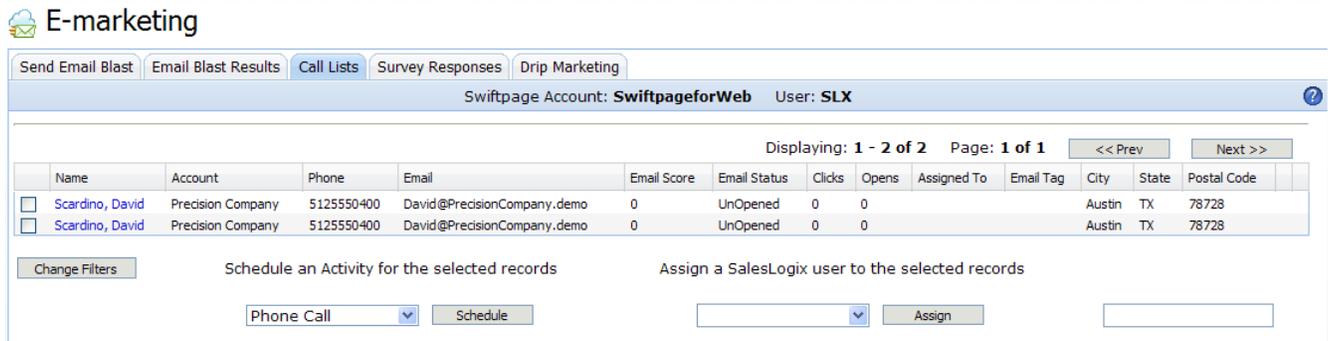

4. The Call List page allows you to view your contacts information and interaction details with the email. Here you can Schedule an Activity for selected contacts by checking the box next to the contact, selecting the activity from the drop down list and clicking Schedule. You will get the following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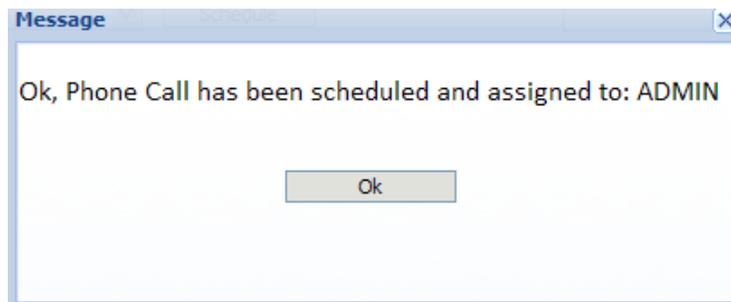
5. You can also Assign selected records in the Call List to another SalesLogix user using the Assign button.

You will see a window verifying that the record has been assigned to the user:
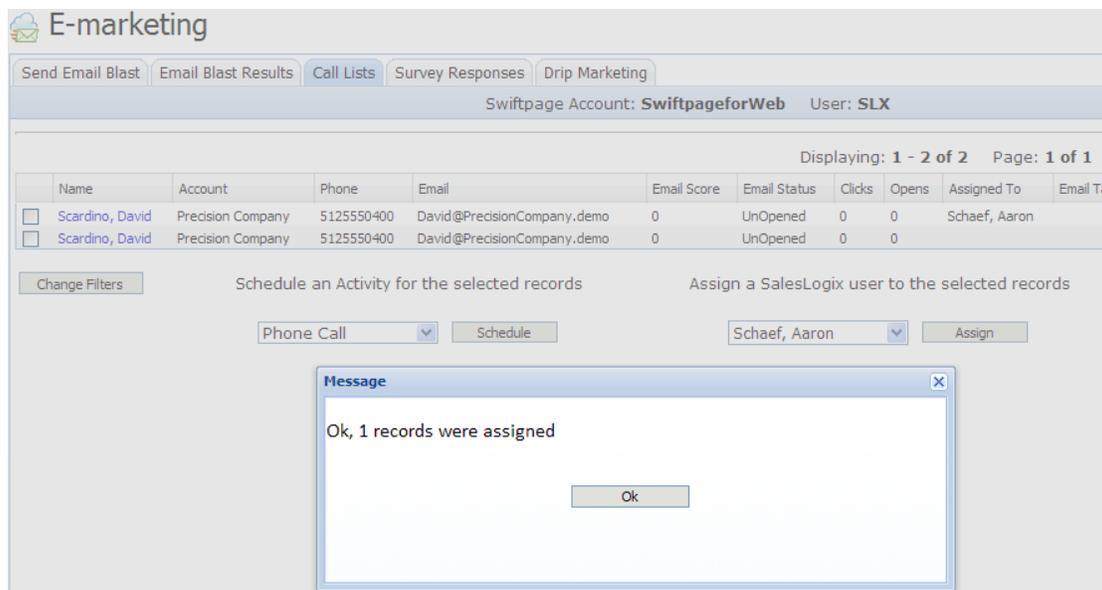
6. Finally, you can also adjust the Call List by clicking Change Filters.

Survey Responses Tab

The following is a guide which explains the features of the Sage SalesLogix E-Marketing Survey Responses tab.
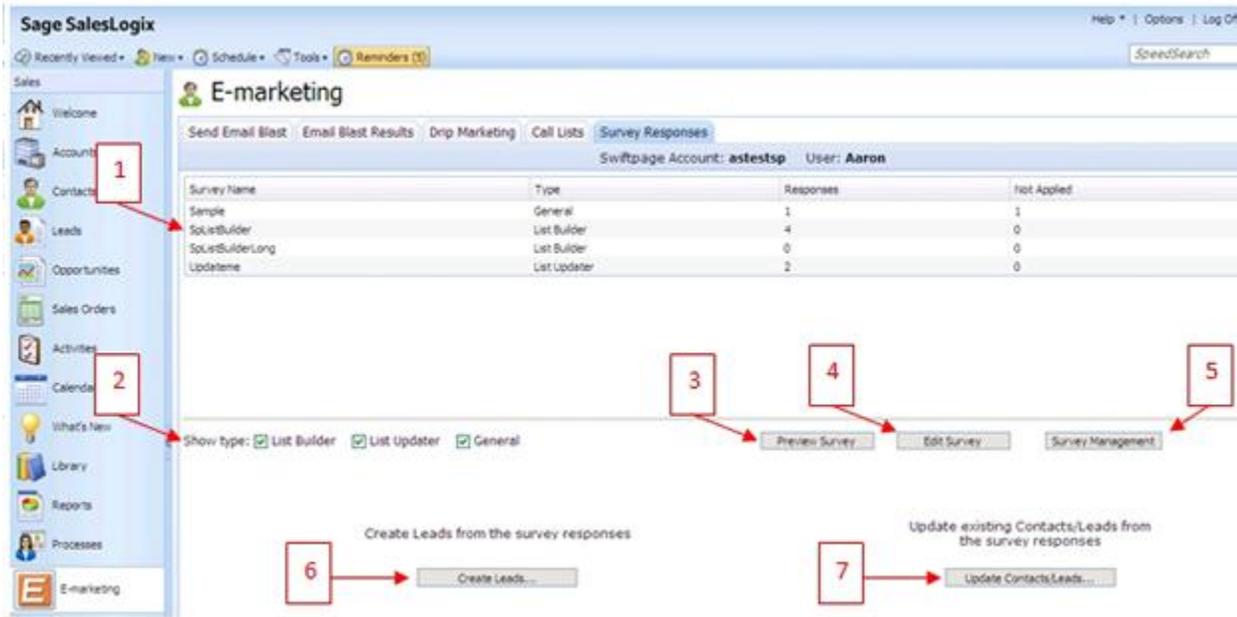
1. All of your surveys will appear at the top of the screen, along with their type, the number of total responses the survey has received, and finally the number of responses that have not yet been applied to your Sage SalesLogix database.
2. Filter the survey view by selecting check boxes to display 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 Survey button opens a new web page that displays the highlighted survey as it will appear to your customers.
4. The Edit Survey button opens a new web page that shows the Survey Editor for the highlighted survey, so you can make changes to the survey.
5. The Survey Management button opens a new web page with the general Survey Management screen, where you can create new surveys or manage and edit existing surveys.
6. 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. You will be taken to a confirmation screen showing you the new targets to be added and giving you the option to ignore them if desired.
7. 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. You will be taken to a confirmation screen showing the targets to be updated and giving you the option to ignore them if desired.

Accessing and Updating Survey Responses

1. From SalesLogix, click on the E-marketing button on the left hand side and then select the Survey Responses tab at the top:
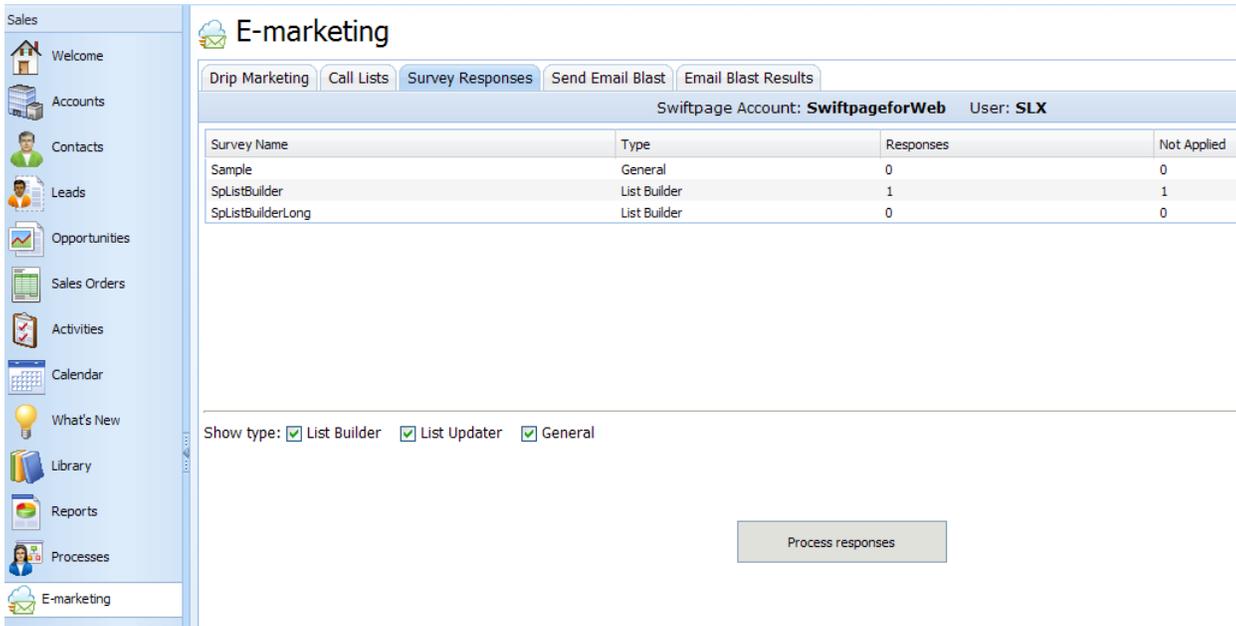
2. You will see a list of your Surveys, including Survey Name, Type, number of Responses and updates Not Applied. You can filter the surveys shown by changing the Show type check boxes.

3. If you click on a particular survey, you will be presented with more options, as shown below:
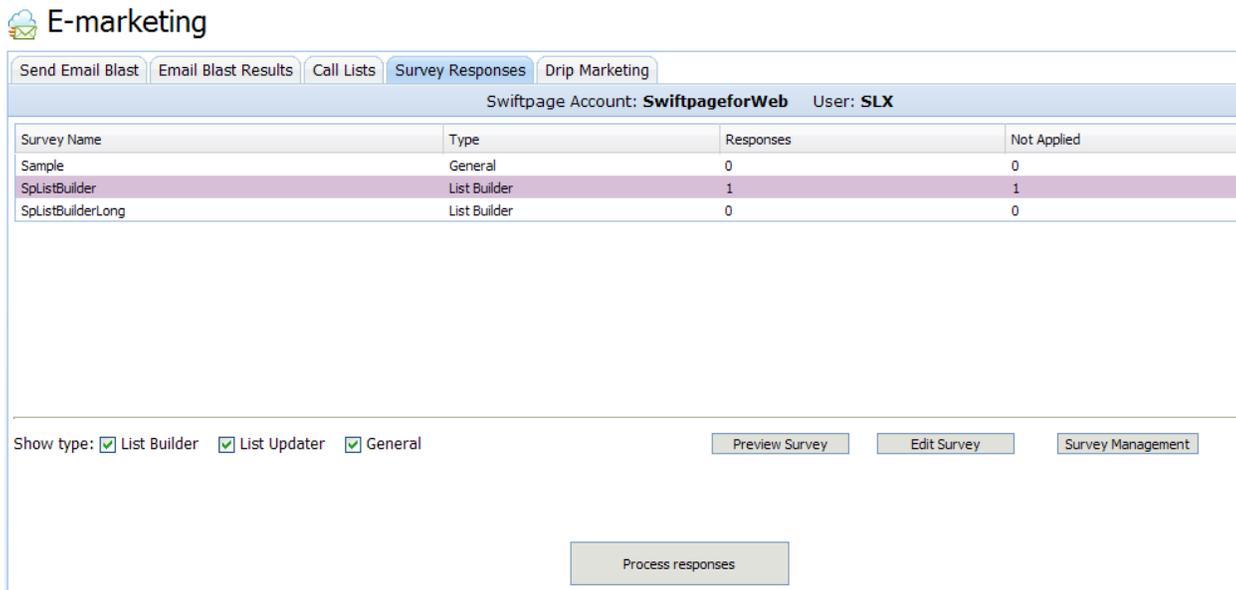
- Preview Survey: you will see a pop up window of what the survey looks like.
- Edit Survey: you will be taken online to the Survey Editor – Survey Design page to edit the selected template.
- Survey Management: takes you online to the Survey Editor – Survey Management page.

4. To update survey responses into your contacts' records, simply click the Process Responses button. You will be taken to a screen detailing the responses with more options:


List Builder Surveys: if your survey response is for a List Builder, this will show you the new contact information that will be written into your database and create the new Lead for you. If you wish to add the new Lead, click Create Lead. You can choose to Skip Response and the new contact will remain Not Applied. *Note: at this time, we are only able to process List Builder Survey responses. You will still be able to view General and List Updater survey responses online.

5. Once you click Create Lead, you will see a verification email that the survey responses were processed. You have successfully updated your survey responses!
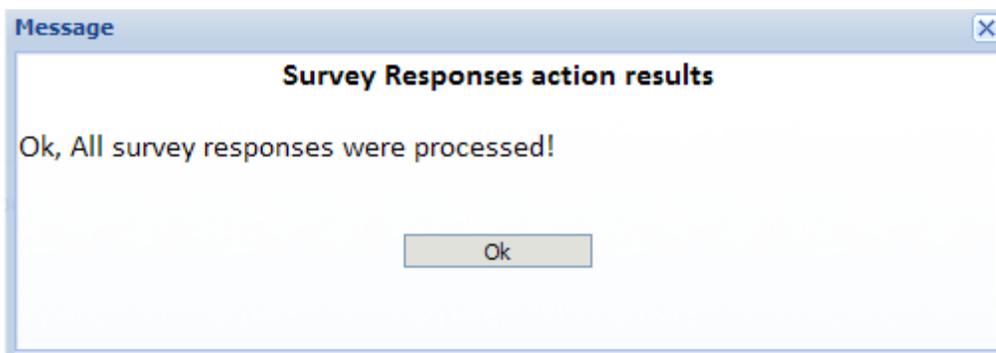
Drip Marketing Tab

This guide explains the features of the Sage SalesLogix E-Marketing Drip Marketing tab.
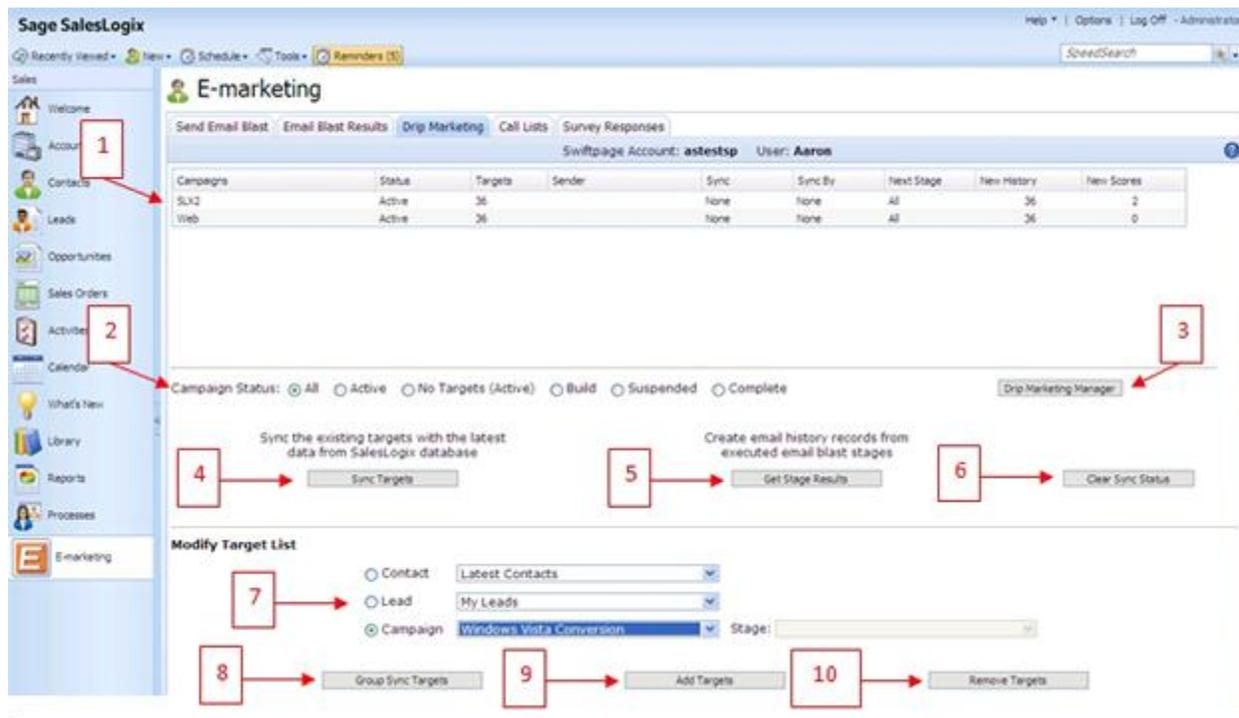
1. All of your Drip Marketing Campaigns will appear at the top of the screen, along with their Status, the number of targets they include, the Sage SalesLogix user on whose behalf emails in the Campaign are sent, the presence of any Sync Stage or Sync By date, the Next Stage to come, the number of New 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 Drip Marketing Manager button opens a new web page and shows the Drip Marketing Campaign Manager screen, where you can create and edit your Drip Marketing Campaigns.
4. Click Sync Targets to sync the targets in your Drip Marketing Campaign with your Sage SalesLogix database—it updates your Drip Marketing targets with the most current Sage SalesLogix database information. When you select it, you will receive a confirmation screen:
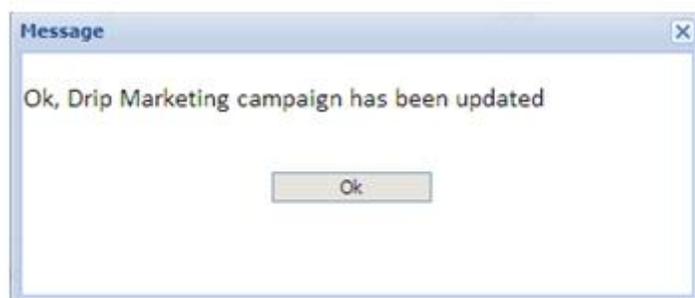
5. Click Get Stage Results to import the results of your Drip Marketing Campaigns into your Sage SalesLogix database. There will be a number in the New History or New Scores at the top of the Drip Marketing window if a particular Campaign has results to import into Sage SalesLogix. When you click this button, the following screen will appear:

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.

6. 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.
7. In the Modify Target List 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. Then you have the following options:
8. 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 Target List" 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. (**Note:** groups larger than 3,000 will have to be synced by using the Add and Remove Targets functions.)
9. Add Targets: this button is used to add targets to Drip Marketing Campaigns (the targets selected in the Modify Target List 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.
10. Remove Targets: this button is used to remove targets from Drip Marketing Campaigns (the targets selected in the Modify Target List 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.

Accessing Drip Marketing

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

Your Drip Marketing Campaigns will appear on this screen and you can use the radio buttons to determine which Campaigns are shown. The information displayed for each Campaign includes status (Active, No Targets (Active), Build, Suspended or Complete), the number of targets in the Campaign, whose behalf the Campaign is being sent on (if not the original user), and information about syncing, next stages, new history and new scores. From here, you can perform several functions:

1. Drip Marketing Manager: will take you to the online Drip Marketing Campaign Manager, where you can view and edit your Campaigns.

2. Sync Targets: click this button to sync your SalesLogix contacts with your existing Drip Marketing contacts. Performing this function ensures that your Drip Marketing Campaign always has the most current contact information from your SalesLogix database.

3. Get Stage Results: if the New History or New Scores column for your Drip Marketing Campaign indicates that there is information to be written back to your SalesLogix database, click the Get Stage Results button to write the information back to SalesLogix. A screen will appear with options for writing Email History:

4. Clear Sync Status: if the Sync or Sync By column for your Drip Marketing Campaign indicates that a sync needs to be performed, you can clear that sync by clicking the Clear Sync Status button.

In the "Modify Target List" section, choose the contacts you want to add to or remove from your Drip Marketing Campaign (the options for contacts are similar to the options when sending an email through Swiftpage for SalesLogix: contacts, leads, campaigns). Select the contacts you want to add or remove, then click the appropriate button (Add Targets or Remove Targets). A confirmation screen will appear:

Select the contacts you want to add or remove, then click the appropriate button (Add Targets or Remove Targets).
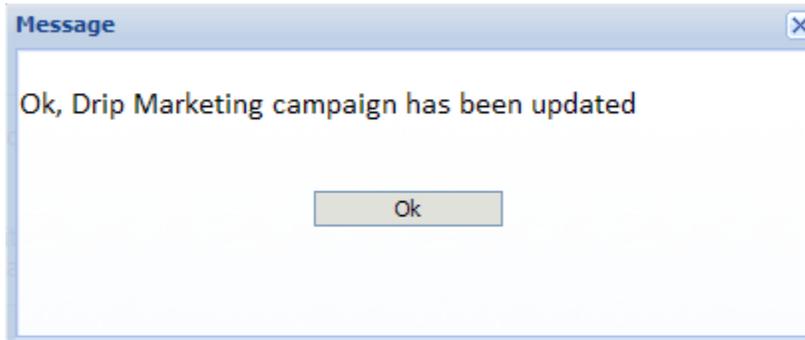
A confirmation screen will appear:

Group Sync Targets: click this button to sync an entire SalesLogix group to your Drip Marketing contact list. When you click this button, the following screen will appear:

This screen shows you which contacts from the SalesLogix group match up with your Drip Marketing contact list, which are missing from your SalesLogix database and which are new to be imported to the Drip Marketing contact list. You can choose to Update or Remove all contacts that match, Remove or Ignore any missing contacts, or Add or Ignore any new contacts. Then click the Sync button.

Account Manager

This page explains the features of the Sage SalesLogix E-Marketing Account Manager. When you first click on the Options button and then the E-Marketing tab, the following screen appears:
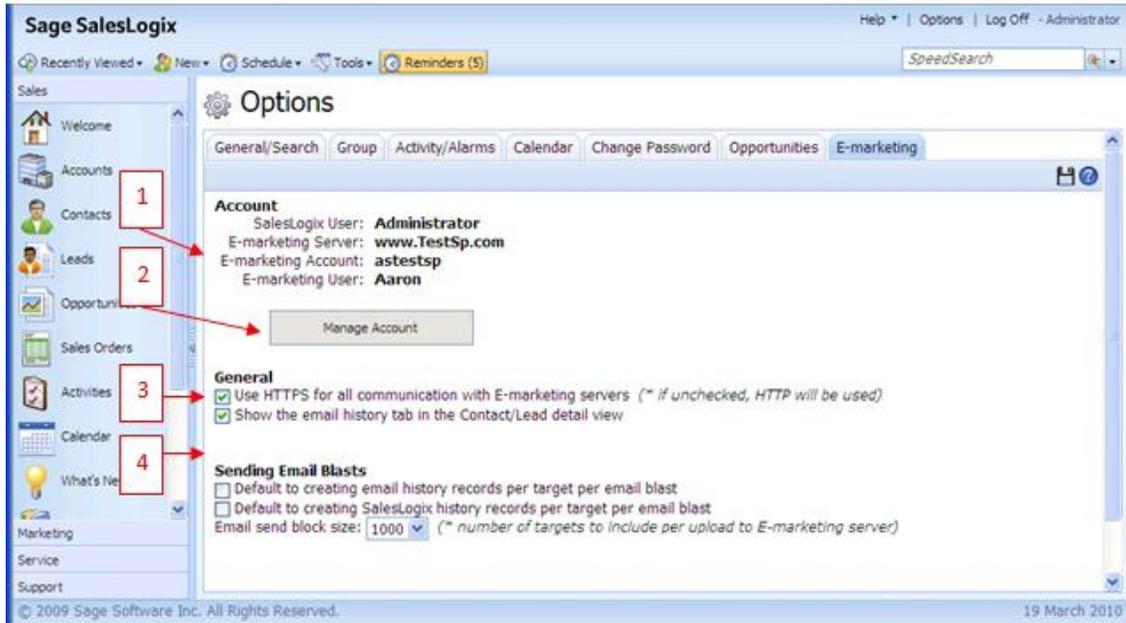
1. Your Sage SalesLogix user name, E-marketing Account name and E-marketing user appear at the top of the screen.
2. Enter the E-marketing Account Manager by clicking on the "Manage Account" button (see below for details).
3. Under the "General" heading, you can decide how you want to connect to Sage SalesLogix E-marketing servers, and how much history to shown in the Contact/Lead detail view.
4. Under "Sending Email Blasts," you can choose what history records are written when sending an email blast, and how many records are transferred to the server at once. (Higher numbers can affect system performance, lower numbers may take longer.)

The Manage Account Window
When you click on the Manage Account button, you will be asked to input your Account password. Do so, and the following screen appears:
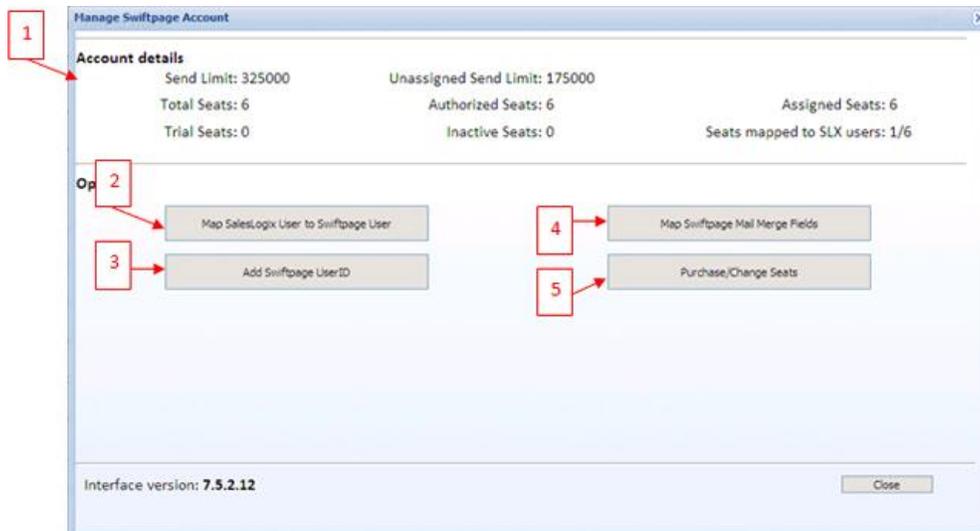
1. Your Sage SalesLogix E-marketing account details are shown at the top of the screen, including your send limit, number of seats on your account, and so on.
2. Map Sage SalesLogix User to Swiftpage User: this button allows you connect Sage SalesLogix users with Sage SalesLogix E-Marketing users. When you click this button, the following screen appears:
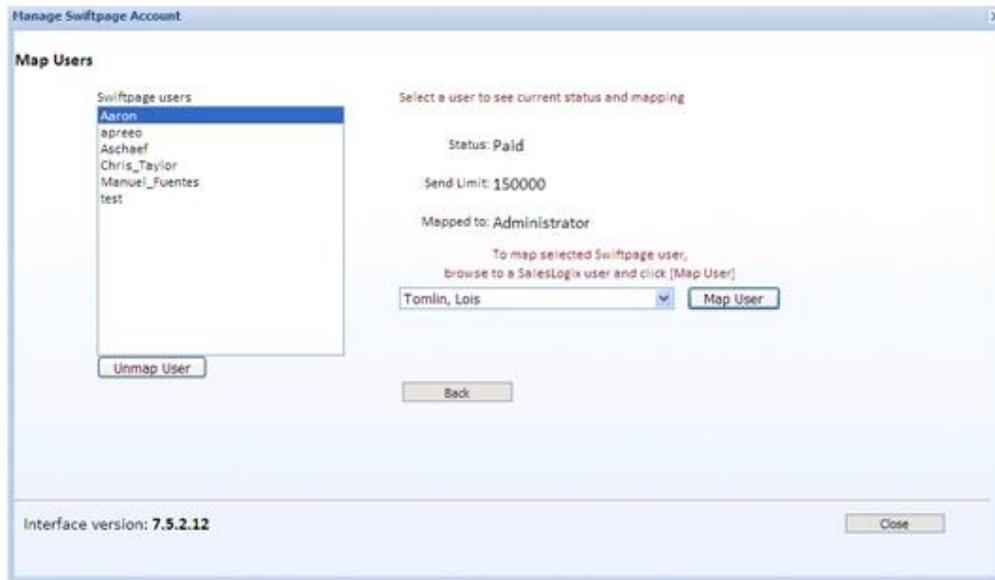
Sage SalesLogix E-marketing users are shown on the left-hand side. When you highlight an E-marketing user, their status and send limit appear, as well as the name of the Sage SalesLogix user to whom they are mapped. Click Unmap User to remove the mapping (i.e. to break the connection between the E-marketing user and the Sage SalesLogix user). If the "Mapped to" field is blank, the E-marketing user is not yet mapped to a Sage SalesLogix user. In that case, select (from the drop-down list) 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. Click Back at any time to return to the previous menu.

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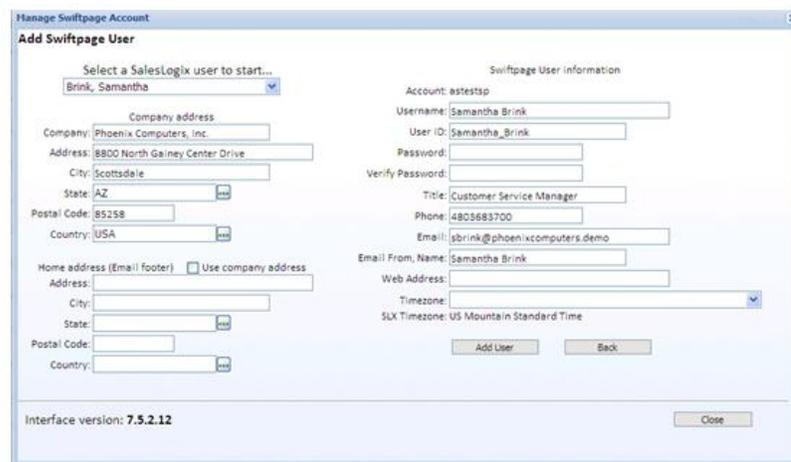
Select a Sage SalesLogix user from the drop-down list on the top left, and that user's information is automatically populated into the applicable windows. (In the example above, selecting Samantha Brink as the Sage SalesLogix user automatically adds her contact information into other fields.) You can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

4. 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:
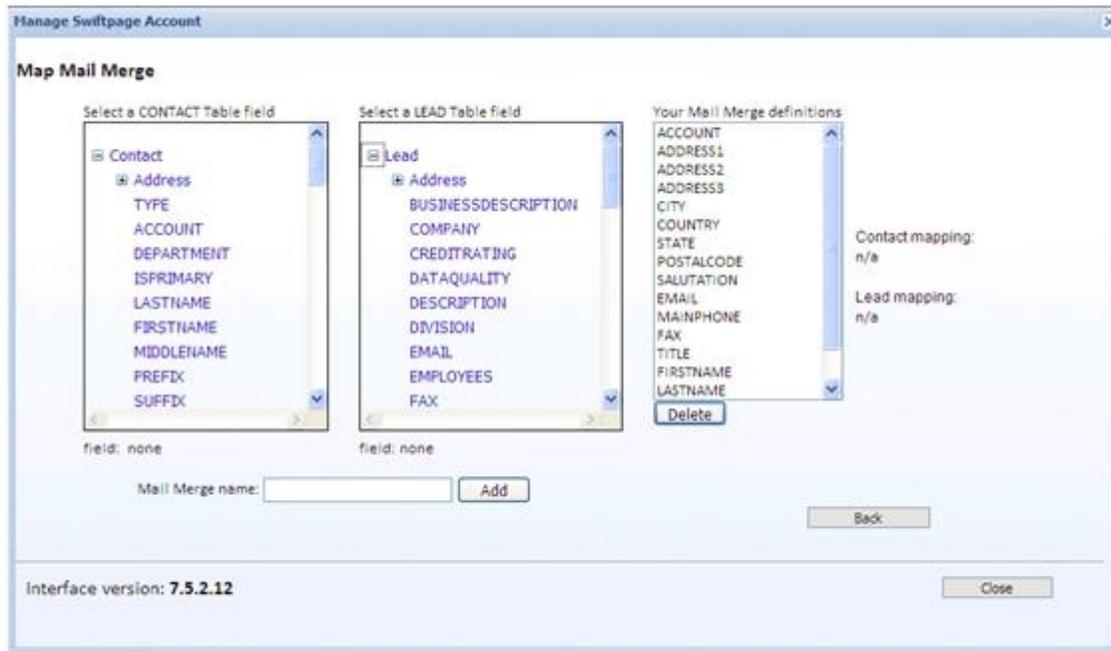
Click the plus sign (+) next to the Contact or Lead headings to display all available contact and lead fields. Click any field, and its name will appear in the "Mail Merge name" box. You can modify it at this point if you wish, then click Add. The new mail merge field will now appear in the right-hand column for "Your Mail Merge definitions." That mail merge field is now mapped to a Sage SalesLogix contact or lead database field, and may be used in your E-marketing templates.

5. Purchase/Change Seats: this button opens a new web page 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.

Managing Swiftpage Users in Sage SalesLogix Web Client

Note: The first thing to understand regarding users in Sage SalesLogix E-marketing for Web 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. In SalesLogix for Web, click on Options in the upper right hand corner and then select the E-Marketing Tab .
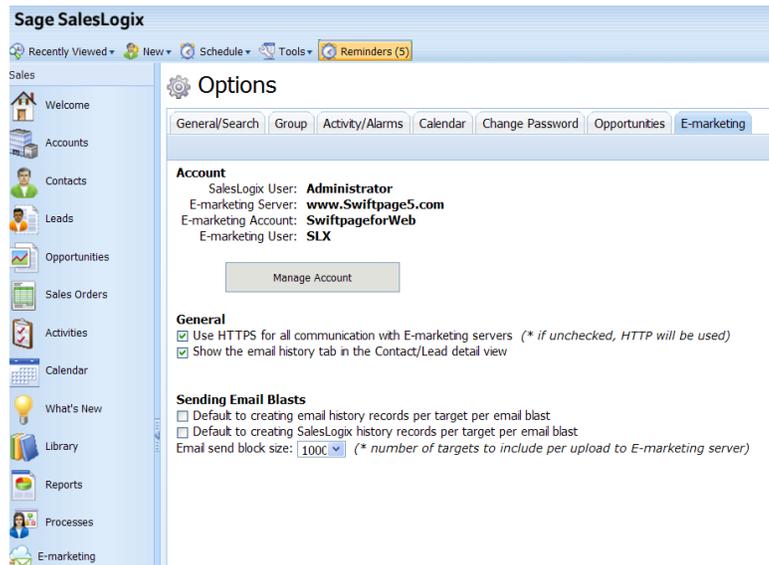
The following screen will appear:

2. Click on the "Manage Account" button. You will be prompted to enter your account password. Enter it, click
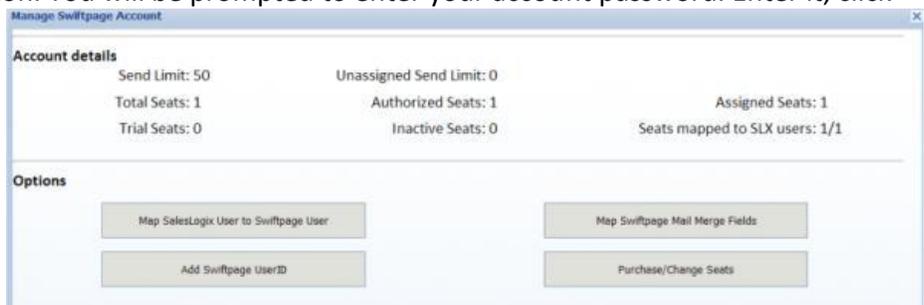
Login and the next screen will appear:

3. Click on the Map SalesLogix User to Swiftpage User button. A window will open, showing a list of Swiftpage users on the left box. If you highlight a user, the Status, Send Limit and Mapped to allocation are shown. You can highlight a Swiftpage User and click Unmap User to disconnect the mapping, or highlight a Swiftpage user on the left and a SalesLogix user in the right-hand drop-down menu and click Map User to map those users to each other.
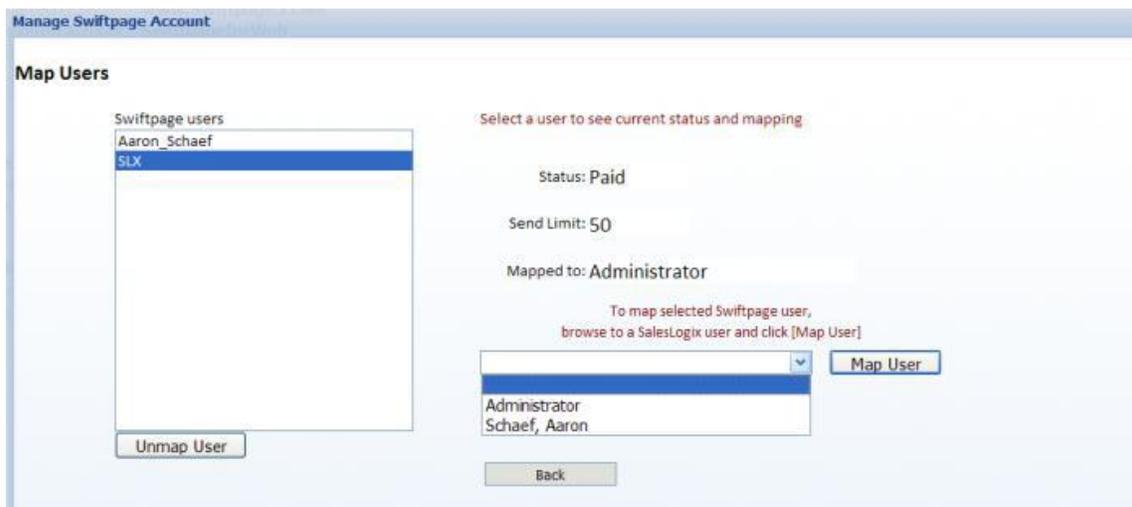
4. Click Close when you are finished mapping and you are done!

# How to Add New Users in Sage SalesLogix Web Client

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

1. In SalesLogix, click on Options in the upper right hand corner and then select the E-Marketing Tab . The following screen will appear:
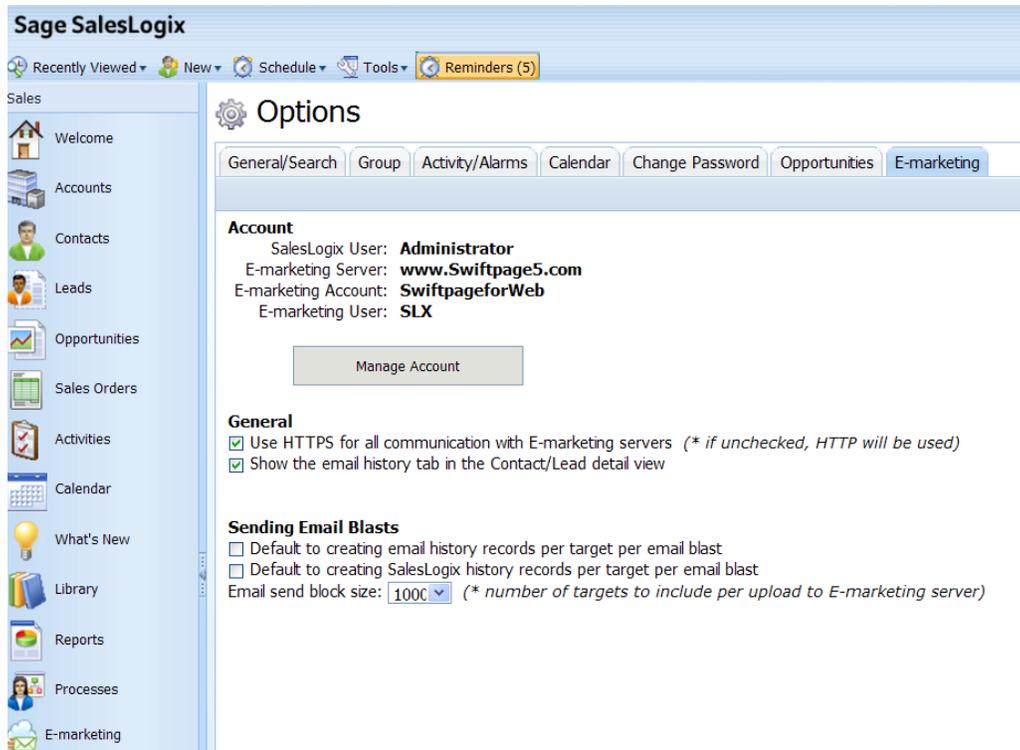

2. Click on the "Manage Account" button. You will be prompted to enter your account password. Enter it, click Login and the next screen will appear:
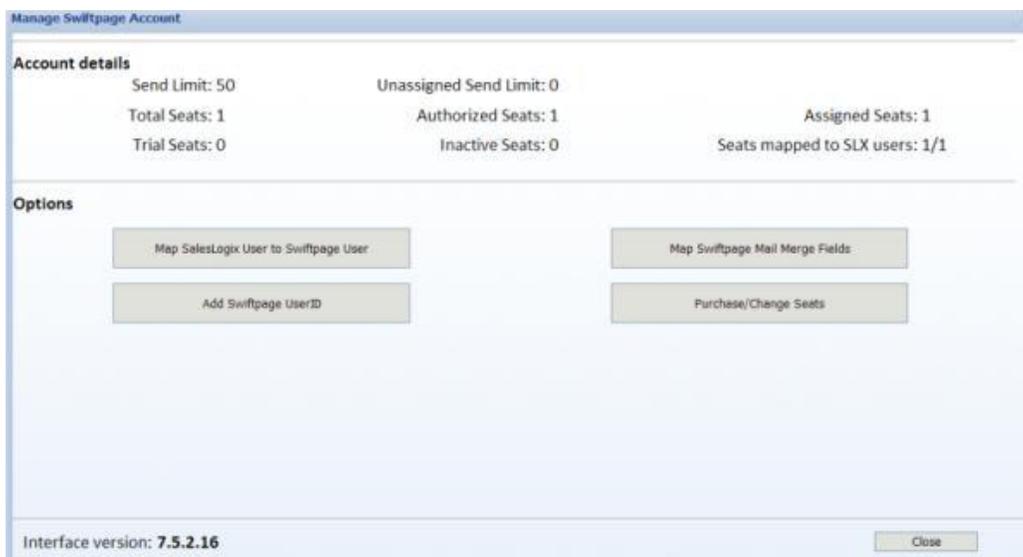
3. Click on the Add SalesLogix User ID button. A window will open where you can create a New Swiftpage User. To start, Select a SalesLogix user from the drop-down menu on the left. Then fill in all the fields and create a new User ID.

4. Click Add User when you are finished and you are done!

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

Plug-in version 7.5.2.16
General Stats:
Been tested to fully work with SalesLogix Web 7.5.2
SalesLogix tables modified: **None**
SalesLogix tables written to: 1 (History)
Tables added: 4 (SpeHistory, SpeLeadHistory, SpeSurveyResponses, SpeSurveys, SpeSend)
User controls added: 8
Navigation 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 from Swiftpage or stage results from Swiftpage Drip campaign
        ii.   Swiftpage Score information is also stored in this table
    d. Fields:

Field Name	Type	Length	Description
ContactID or LeadID	String	12	Entity whom this record belongs
CreateDate	Date/Time	8	Date record was created
CreateUser	String	12	SalesLogix user logged in at creation time
ModifyDate	Date/Time	8	Last written date/time for this record
ModifyUser	String	12	SalesLogix user logged in when created
SpeAction	String	32	Filter criteria type for Swiftpage Call list
SpeAssignedUserID	String	12	ID of Swiftpage Call list item assignment
SpeAssignedUserName	String	255	Swiftpage Call list item

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			assignment
SpeBatchID	String	14	Email batch sent that entity was included
SpeClicks	Short Int	2	Nbr. of times entity clicked a link in email
SpeHistoryID	String	12	Internal database ID for this record
SpeOpens	Short Int	2	Nbr. of times entity opened email
SpeQueryTag	String	64	Entered name (tag) given to email batch
SpeScore	Short Int	2	Tabulation of opens and clicks
SpeStatus	String	24	Swiftpage
SpeSubject	String	255	Subject line of the email batch sent
SpeTemplate	String	255	Template used in email batch sent
SpeEmailSender	String	128	Send As Swiftpage UserID
SpeDripCampaignName	String	128	Swiftpage drip campaign, if created from stage results
SpeDripCampaignStage	String	32	Name of stage data is applicable to
SpeDripCampaignStageType	String	128	Type of Swiftpage drip campaign stage

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

Plug-in version 7.5.2.16

General Stats:
Been tested to fully work with SalesLogix Web 7.5.2
SalesLogix tables modified: **None**
SalesLogix tables written to: 1 (History)
Tables added: 4 (SpeHistory, SpeLeadHistory, SpeSurveyResponses, SpeSurveys, SpeSend)
User controls added: 8
Navigation 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 from Swiftpage or stage results from Swiftpage Drip campaign
        ii. Swiftpage Score information is also stored in this table
    d. Fields:

Field Name	Type	Length	Description
ContactID or LeadID	String	12	Entity whom this record belongs
CreateDate	Date/Time	8	Date record was created
CreateUser	String	12	SalesLogix user logged in at creation time
ModifyDate	Date/Time	8	Last written date/time for this record
ModifyUser	String	12	SalesLogix user logged in when created
SpeAction	String	32	Filter criteria type for Swiftpage Call list
SpeAssignedUserID	String	12	ID of Swiftpage Call list item assignment
SpeAssignedUserName	String	255	Swiftpage Call list item assignment
SpeBatchID	String	14	Email batch sent that entity

				was included
SpeClicks	Short Int	2		Nbr. of times entity clicked a link in email
SpeHistoryID	String	12		Internal database ID for this record
SpeOpens	Short Int	2		Nbr. of times entity opened email
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