Quick Start Guide to:

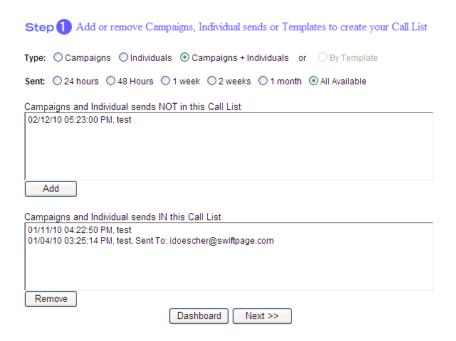## Creating a Swiftpage Call List

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.

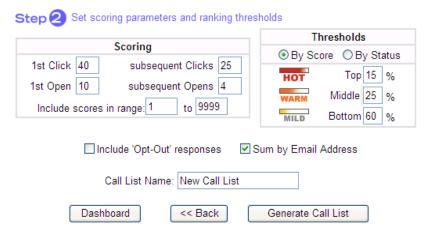**Follow these steps to create a Swiftpage Call List:**

1. Log into the My Swiftpage portal our web site: http://www.swiftpage.com/logineditor.htm. Once you are logged into My Swiftpage, click on the Call List button. (**Note:** ACT! users can get to this same place by clicking the Online Call List button in the Call List window of Snapshot.)

2. Click Create Call List and choose from the filter options for the Type and Time Frame the email blast went out. Choose any combination of email blasts to build a Call List from using the Add button. Your email(s) will appear in the lower window once included and you can click Next when you are done.

Step ① Add or remove Campaigns, Individual sends or Templates to create your Call List

Type: ○ Campaigns ○ Individuals ⦿ Campaigns + Individuals or ○ By Template

Sent: ○ 24 hours ○ 48 Hours ○ 1 week ○ 2 weeks ○ 1 month ⦿ All Available

Campaigns and Individual sends NOT in this Call List

02/12/10 05:23:00 PM, test

[Add]

Campaigns and Individual sends IN this Call List

01/11/10 04:22:50 PM, test
01/04/10 03:25:14 PM, test, Sent To: idoescher@swiftpage.com

[Remove]

[Dashboard] [Next >>]

3. On the next screen you can change the scoring parameters, which reflects what degree of Hot, Warm and Mild you contacts get, based upon their interactions with the email campaign. Give the new Call List a name and click the Generate Call List button.

Step ② Set scoring parameters and ranking thresholds

Scoring

| 1st Click | 40 | subsequent Clicks | 25 |
| 1st Open | 10 | subsequent Opens | 4 |

Include scores in range: 1 to 9999

Thresholds

⦿ By Score ○ By Status

HOT Top 15 %
WARM Middle 25 %
MILD Bottom 60 %

☐ Include 'Opt-Out' responses   ☑ Sum by Email Address

Call List Name: New Call List

[Dashboard] [<< Back] [Generate Call List]

4. Now you will see the online version of your new Call List. (ACT! users can click the Sync to Online Call List in the Call List window to pull this new Call List into the ACT! database.) You are done!

This is a ranked list of your most interested contacts based on their interaction with included campaigns.

| Call List: **Lawn Care Interest** | | | Sender: **dogdon** | | | Rows: **29** of 29 | | | | | | |

#		Action	Strength	First Name	Last Name	Phone	Company Name	Email Address	Score	Sent	Opens	Clicks	
1	Edit	Called [20 Mar 2009] dogdon	HOT	Bob	Ogdon	8772288377	Swiftpage	bogdon@swiftpage.com	116	1	5	3	Details
2	Edit	schedule a meeting [19 Jun 2009] dogdon	HOT	Carmelo	Anthony	1.888.555.9389	NBA AllStar Co.	canthony@swiftpageemail.com	112	1	4	3	Details
3	Edit		HOT	Dan	Ogdon	8772288377	swiftpage	dogdon@swiftpage.com	100	1	1	3	Details
4	Edit	Called [23 Apr 2009] dogdon	HOT	Howard	Smith	555.993.9389	Gripings International	hsmith@swiftpageemail.com	83	1	3	2	Details
5	Edit		HOT	Warren	Buffet	555.383.9992	ISI Marketing	wbuffet@swiftpageemail.com	83	1	3	2	Details
6	Edit		WARM	Meg	Ryan	555.329.0299	Got Mail Inc.	mryan@swiftpageemail.com	58	1	3	1	Details
7	Edit		WARM	Brian	Johnson	555.838.9288	CSU Engineering	bjohnson@swiftpageemail.com	58	1	3	1	Details
8	Edit		WARM	Tom	Hanks	555.399.9328	Wilson Co.	thanks@swiftpageemail.com	54	1	2	1	Details
9	Edit		WARM	LeBron	James	1.888.555.9389	NBA AllStar Co.	ljames@swiftpageemail.com	54	1	2	1	Details
10	Edit		WARM	Jim	Walking	555.399.9923	Voicecom	jwalking@swiftpageemail.com	54	1	2	1	Details
11	Edit		WARM	Matt	Walker	555.282.9999	Bic Inc.	mwalker@swiftpageemail.com	54	1	2	1	Details
12	Edit		WARM	Allison	Sweet	555.399.9923	Voicecom	Asweet@swiftpageemail.com	50	1	1	1	Details
13	Edit		MILD	Jay	Leno	555.329.3773	Barqs International	jleno@swiftpageemail.com	50	1	1	1	Details
14	Edit		MILD	Jason	Mighty	555.993.9389	Gripings International	jmighty@swiftpageemail.com	50	1	1	1	Details
15	Edit		MILD	Will	Ferrell	555.299.9399	Dylan Inc.	wferrell@swiftpageemail.com	50	1	1	1	Details

View modes: ☐ Hide 'Actioned' ☐ Hide 'Assigned' ☐ Show Assign column   Rows per page: [15 ▼]   Page: 1 of 2   Goto page: [____] [Go]

[Dashboard]   [List Management]   [View current assignments]