Swiftpage E

Quick Start Guide To:

Using the Swiftpage Hosted List Manager

The Swiftpage Hosted List Manager can be used to import your contacts, modify contact information, create groups out of those contacts, filter your contacts by using "lookups," and then send to all contacts, groups or lookups. This Quick Start Guide explains some of these functions.

When you open the Swiftpage Hosted List Manager by clicking on the "List Manager" button in the My Swiftpage screen, you will see the following menu:

Each of the six buttons on this top menu are explained in numbers 1-6 below:

1. **My Swiftpage:** this button returns you to the My Swiftpage menu.

2. **Contacts:** click here to view your current list. If you have not uploaded a list yet, you will see a "John Doe" contact automatically added by Swiftpage. (See below, under step 4, the List button, for instructions on uploading.) Your screen should look something like this:
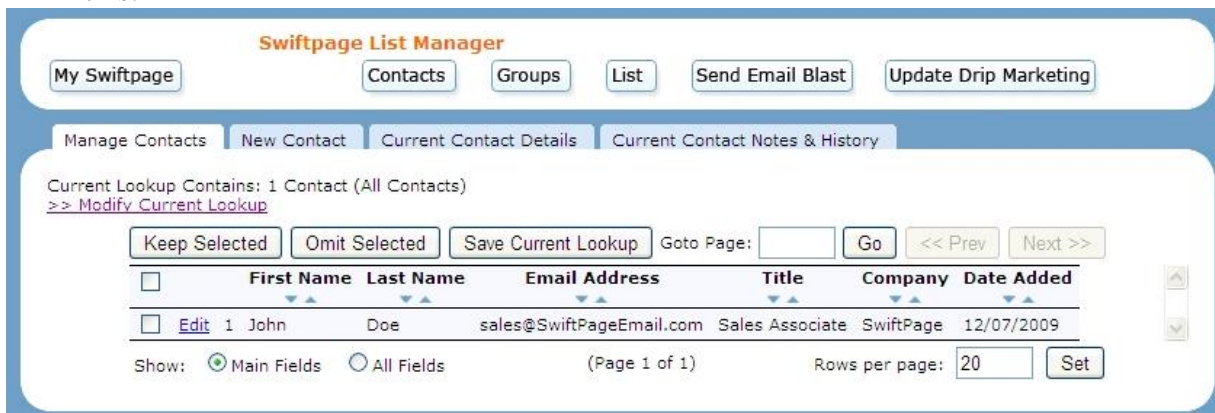
Here, you can have a few options via the tabs at the top of the Contacts screen:
   - Manage Contacts: click here to view your contacts.
   - New Contact: click here to receive a new screen to add a contact to your list.
   - Current Contact Details: this tab shows you all the available details for a contact and allows you to modify contact information.
   - Current Contact Notes & History: you can write notes about a contact in this section and information about email blasts sent to your contacts will be automatically recorded by Swiftpage in the History section of this tab.

From this screen, you can also click on the "Modify Current Lookup" link to filter contacts by various criteria, and create new lookups or groups out of those filtered contacts. When you click on "Modify Current Lookup," the following menu expands:

Here, you can choose the "Lookup Group" option to create a lookup from one of your groups, or you can select "Use All Contacts with a Field Value" and create criteria for the lookup. On the right-hand side of the screen, select whether you want to replace the current lookup with your new selection, add matching or un-matching contacts to the lookup, or remove matching contacts from the lookup. When you have chosen your filters, click Submit. Your new list will be shown with the filters in place. In the example below, the criteria "Email Address Contains 'son'" was used, resulting in a list of three contacts whose email address contains the letters "son":

From here, you can select contacts and choose either "Keep Selected" or "Omit Selected" to add or remove contacts to your list manually. Once the lookup is as you want it, click the "Save Current Lookup" button. This opens the following screen, which allows you to create a contact Group:

- Select "Create a new Static Group" to keep only the contacts in your lookup in this group. In other words, this group will only ever contain the contacts in your current lookup.
- Or, select "Create a new Dynamic Group" to allow the group to change based on the filters you have established. In the example above, any new contacts that are added to your list who have the letters "son" in their email address will automatically be added to this Group if you save it as a dynamic group.
- Enter a Group name, click Submit, and your Group has been created and will now be available as a contact Group.

3. **Groups:** click on the Groups button at the top of the List Manager menu to manage your Groups. When you select this button, you will see a Manage Groups screen, from which you can Edit, Rename, Delete or look up the contacts in any of your current Groups:

4. **List:** the List button allows you to import a new list. Click the List button, and then click on Browse to search for your CSV file of contact names. Once you have selected your file and clicked Submit, you will be given a chance to map the fields in your contact list with Swiftpage's field names:

Import List

Your data fields must be mapped to Swiftpage Contact List fields.

Field Map: (Default)

Save Map as:

Original Column Name	Swiftpage Contact List Column
Company	Company
First Name	First Name
Last Name	Last Name
Email	Email Address
Phone	Phone
Address 1	Address 1
Address 2	Address 2
City	City
State	State
Zip	ZIP Code

Submit   Cancel

Once the mapping is complete, click Submit, and your list is imported and ready to use.

5. **Send Email Blast:** click here to send your blast. When you click this button, you are presented with a screen where you can select which contacts you want to send the email to, choose a template to send, enter a subject line and then send:

Send an Email Blast

Select Contacts

○ Current Contact - Ryan Jacobson
○ Current Lookup - 36 Contacts (All Contacts)
⊙ Group: All ▾
○ All Contacts

Email Template: Test 1 ▾   Preview

Enter Subject: This is my test subject line!

Enter Name*: First Email Blast

*Name is optional. It is used for identifying Email Blasts in Results

Send Email   Scheduled Send   Send As   Send Test

If desired, you can also select the buttons for "Scheduled Send" to schedule the send up to 60 days in advance, "Send As" to send on behalf of another Swiftpage user or "Send

Test" to send an email to yourself first. **Note:** Scheduled Send requires a Pro or Team level account, and Send As requires a Team level account.

6. **Update Drip Marketing:** the final button on the List Manager menu allows you to add contacts to a Drip Marketing Campaign. Select the radio button next to the Campaign you wish to change, then click on Connect to Group to add contacts to that Campaign, Sync Selected to sync your contacts to that Campaign or View Drip Campaigns to launch the Drip Marketing Campaign Manager.

Update Drip Marketing

Select Drip Campaign

	Campaign	Hosted Group	Status	Contacts	SendAs	Sync	Sync by	Next Stage	Results
⊙	Sample Anchor Campaign		No Contacts	0				2/1/2010	No
○	Test Campaign #1		Build	0	jburgess			All	No
○	Test Duration Campaign #1		Active	1				All	Yes

[Connect to Group] [Sync Selected] [View Drip Campaigns]