



## Quick Start Guide to:

### Using the My Swiftpage Portal

The My Swiftpage portal is the one-stop center for accessing all Swiftpage functions. This Quick Start Guide explains all of the buttons you will find on the My Swiftpage portal:

**MY Swiftpage**

**Bulletin Board**

**Editor Changes**  
If you access the online editor through any plug-in (ACT!, SlaesLogix, Outlook, etc.), you will notice there are only 3 tabs available - the tabs that have to do with editing templates. The Reports, Surveys and User Profile tabs have been removed and may be accessed via MySwiftpage.

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**Swiftpage Functions**

- 1. **Template Editor**
- 2. **Send Email**
- 3. **Reports**
- 4. **Call List**
- 5. **List Manager**
- 6. **Surveys**
- 7. **Account Management**
- 8. **Your User Profile**
- 9. **Account Manager**
- 10. **Upgrade Account**

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**User Overview**

Account Name: 2weeksinc  
UserID: landesh  
Service Level: Team  
Drip Marketing Service Level: Platinum  
Send Limit: 1000  
[Upgrade now! Add users, increase service level >>](#)

**Swiftpage Resources**

- Trainings and Live Webinars  
Learn how to work Swiftpage on a live training session!  
[View training times and sign up now >>](#)
- Swiftpage University**  
The main portal to finding help on Swiftpage is at the University. Find what you need or search the knowledgebase, [visit Swiftpage University now >>](#)
- Swiftpage Fast Track**  
Get started with Swiftpage fast by going through short tutorials and exercises via PDFs, videos and screenshots. [Get started on the Swiftpage Fast Track now >>](#)

**Support Information**

**Monday - Friday, 8:00am - 8:00pm EST**  
**Phone:** 1 (877) 228-8377  
For international customers +1-303-978-1000  
**Email:** [support@swiftpage.com](mailto:support@swiftpage.com)  
[? Visit the Support Homepage >>](#)

12. **Swiftpage Resources**

13. **Support Information**

1. The Bulletin Board gives you important information about upcoming and ongoing Swiftpage features.

### **Swiftpage Functions:**

2. The Template Editor button launches the template editor, where you can edit your Swiftpage templates to get them ready to send.
3. The Reports button allows you to view your online reports for email blasts and individual sends. You may also view any scheduled sends, request your opt-out list and generate account-wide reports.
4. The Call List button allows you to generate online Call Lists (ranked lists of your contacts based on how they interacted with your email blast). **Note:** this feature is available only with Pro and Team level accounts.
5. The Send Email button takes you to a screen that allows you to view and edit the CSV list of names that you have uploaded to Swiftpage's web site, and send your email template to that list or to a single contact. **Note:** users of Swiftpage's integrations for ACT!, SalesLogix, SageCRM, Excel and Outlook generally will not use this section of My Swiftpage, because email blasts are sent and contact lists are maintained in each of those programs rather than online.
6. The List Manager button launches a section of the site in which you can upload a CSV list of names, view the list and edit it. **Note:** users of Swiftpage's integrations for ACT!, SalesLogix, SageCRM, Excel and Outlook generally will not use this section of My Swiftpage, because contact lists are maintained in each of those programs rather than online.
7. The Surveys button allows you to create surveys, view survey results and define what will happen with a survey after it is filled out.

### **Account Management**

8. The Your User Profile button takes you to a screen with several options: the ability to change the company information used in [[SpeOwner]] mail merges, the postal address that appears in the footer of each email you send out, your logo, your list for distributing templates to and from other Swiftpage accounts, your user password, and your notification settings.
9. The Account Manager button launches the account management section of the Swiftpage web site. **Note:** if your user password and your account password are different from one another, you may have to reenter your account password after hitting his button.

10. The Upgrade Account button opens a new window where you can upgrade your Swiftpage account (or purchase it for the first time). **Note:** if your user password and your account password are different from one another, you may have to reenter your account password after hitting his button.

### **Other Features**

11. The User Overview window shows you the current level of your account, including your account name and user ID.
12. The Swiftpage Resources window offers helpful links to the Support section of Swiftpage's web site.
13. Finally, the Support Information window gives the hours and contact information for Swiftpage's Support department and a link to the Support section of the Swiftpage web site.