Swiftpage E

How to Use Swiftpage for Microsoft Excel

Table of Contents

Basics of the Swiftpage for Microsoft Excel Integration

The Swiftpage for Microsoft Excel integration allows you to perform the following important marketing and sales functions:

1. **Email Marketing:** Swiftpage for Microsoft Excel gives you the tools to create beautiful email templates, send directly from your spreadsheet to your leads, contacts and groups, and track who opened and clicked your messages. You can Send Now or Schedule Send.

2. **Email Tracking:** When you send your email blast with Swiftpage 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.

3. **Surveys and Web Forms:** With Swiftpage's survey tool, you can gather valuable new contacts or become more informed on your contacts with Swiftpage General Surveys. Set up an **Autoresponder** email to automatically be sent to your respondents when they complete your surveys.

4. **Call List:** After you send an email blast to your contacts, your recipients open and click on the email message. Meanwhile Swiftpage creates a ranked list of the most interested contacts based on those interactions. You can then filter and assign Call Lists to other members of your team to follow up.

How to Install Swiftpage for Microsoft Excel and Set Up Your Account

Follow these instructions to install Swiftpage for Microsoft Excel and set up a new or existing Swiftpage account.

To install Swiftpage for Microsoft Excel:
1. Make sure Microsoft Excel is completely closed.
2. Go to the Swiftpage web site (www.swiftpage.com) and click on "Try Swiftpage Free." Then click on Swiftpage for Microsoft Excel.
3. Click on the Download Now button and run the installation file.
4. Once the installation is complete, reopen Microsoft Excel. You should now see Swiftpage on the toolbar within Excel. (In Excel 2007, Swiftpage should appear on the Add-Ins tab.)
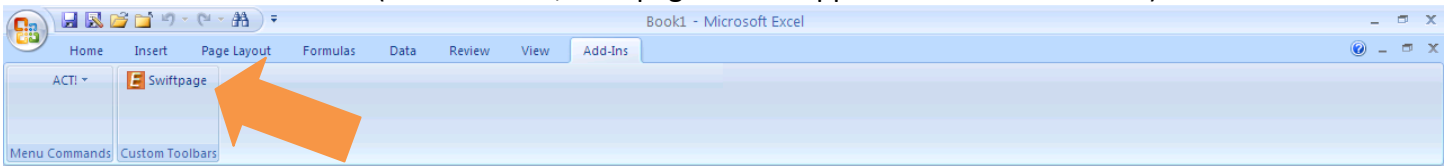
To set up your account for Swiftpage for Microsoft Excel:
1. The first time you click on the Swiftpage icon in Excel, choose any of the three options you are offered (Send to Worksheet, Send to Selection or Reports/Edit). On the screen that opens, you will be asked to either sign in with existing account details or create a new account:


   If you have a Swiftpage account already, sign in using those credentials. If not, click on the New button and you will be transferred to the Swiftpage web site to establish an account. Select the New Account radio button and click Submit, then enter the account details requested. **Note:** you can pick anything you want for your Swiftpage account name and user ID, but those names cannot include spaces or special characters. **Tip:** many people use a company name as the account name and the user's first name as the user ID.
2. That's it! Your account is set up and you can begin using Swiftpage for Microsoft Excel. **Note:** if you are not prompted to set up account when you first click on the Swiftpage icon in Excel, you can set up an account through our web site: http://www.swiftpage1.com/SpeBuildAccountV7.aspx

Creating Your Excel Database for Use with Swiftpage for Excel

Please refer to the image below. Start with an empty spreadsheet.

1. "Row 1" will have all your column headings. First Name, Last Name and Email Address are recommended (Email Address is required). You may have any other information within your database as you desire, just remember to name the column in Row 1.
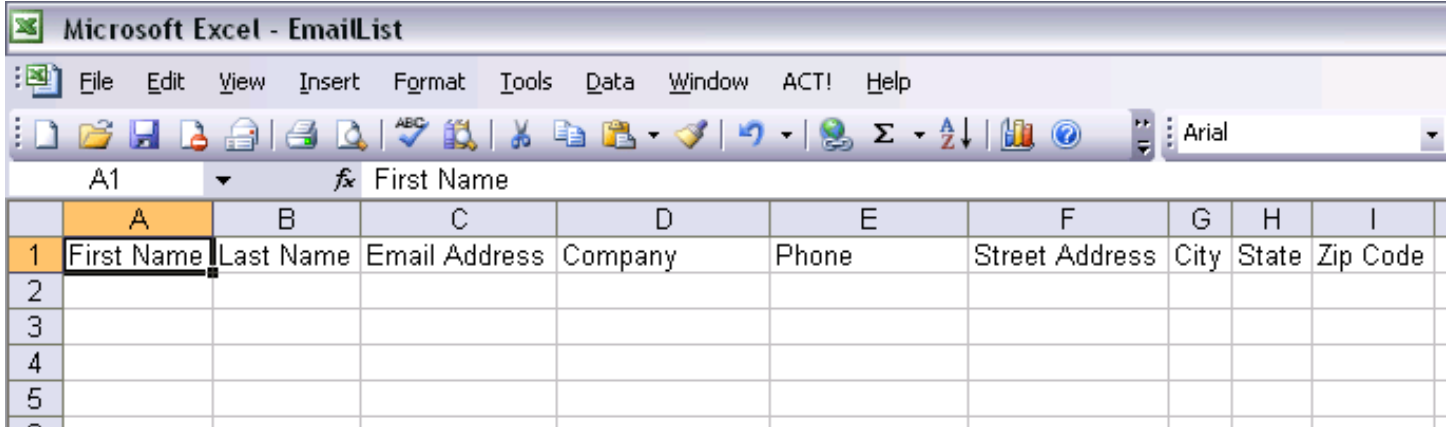
2. Now, add in your contacts into each row just as shown in the image below.
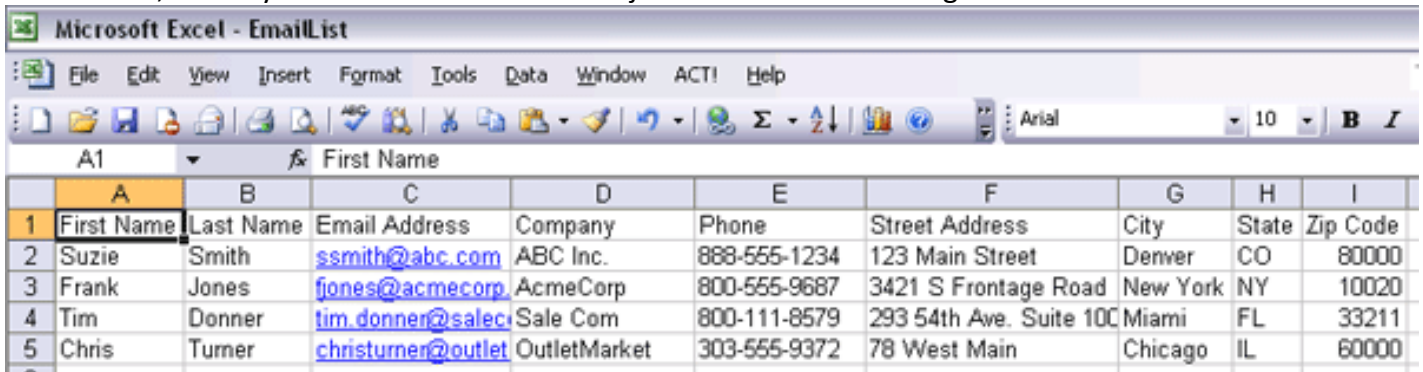
3. Click on File > Save, and then give the list a name. You are now finished creating your Excel list and can use it to send via Swiftpage for Excel.

Swiftpage Windows in Swiftpage for Microsoft Excel

Note: before you click on the Swiftpage icon in Microsoft Excel, you should have your spreadsheet of names open.

When you click on the Swiftpage icon in Microsoft Excel and log in with your account details, you will see the window below.

You have three options here: click Send to Worksheet (see #1 below), Send to Selection (see #1 below), and Reports/Edit (see #2, below). Whichever option you press, you will be asked to sign in with your account details on the window described in the previous section:

Note: if you have already logged into Swiftpage for Excel before, your account name and user ID will prepopulate in this area. In that case, simply enter your password and click Connect. **Another note:** if you check the box for "Remember Password, allow Auto Logon," you can skip this window in the future when you log in.

1. **Send to Worksheet and Send to Selection:** the purpose of these buttons is to initiate an email blast. If you click Send to Worksheet, you are telling Swiftpage for Excel you want to send to every name on your list. If you choose Send to Selection, you are telling Swiftpage for Excel you want to send to only those rows highlighted on your spreadsheet. Both choices will open the following Template Selection window:
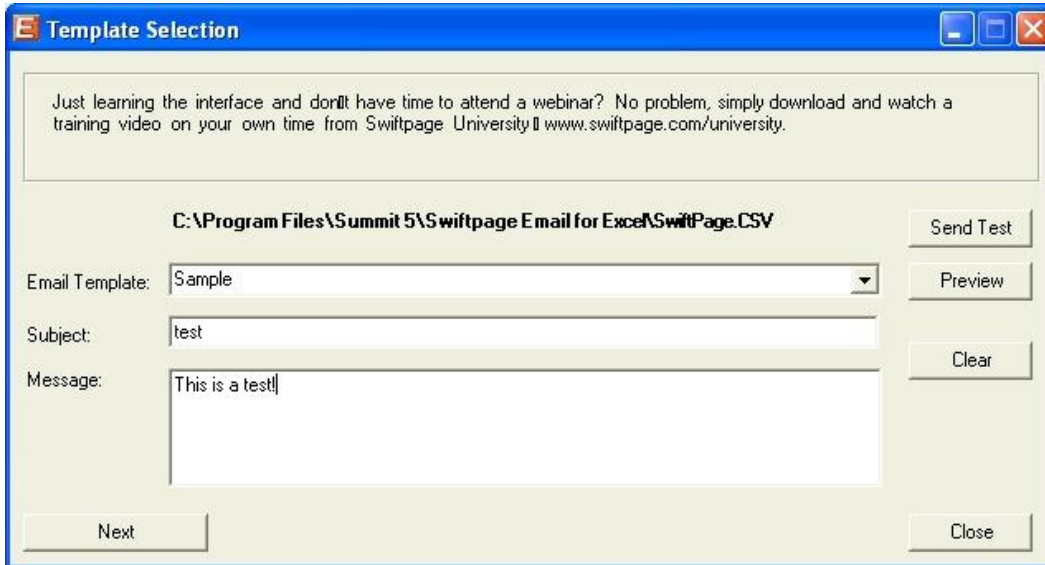
Here is a description of the function of each of the boxes and buttons in this window:
- Email Template, Subject and Message: respectively, these fields allow you to choose the email template you wish to send, enter a subject line and enter a personal message (for templates that contain a Personal Message mail merge field).
- Next: the Next button shows a brief preview screen showing you the first entries on your list (up to 25). Click Next again and you will be taken to an online confirmation screen like the one shown below, where you can see your template, verify your subject line and the number of contacts to whom you are sending. If you have a Pro or Team level account, you can also perform a Scheduled Send. (See the Scheduled Send section below.)
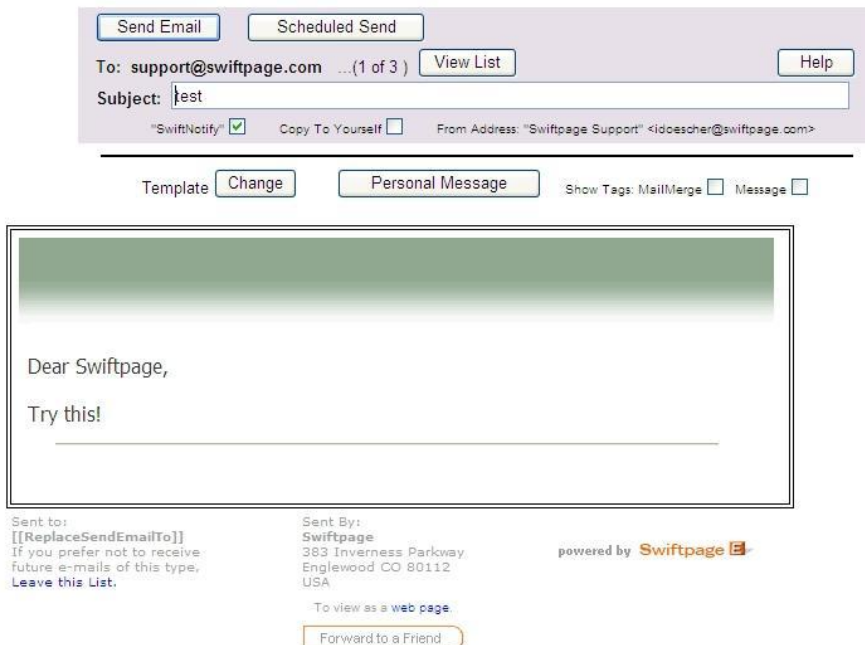
- Send Test: clicking this button allows you to send a single email to any email address you desire. Merely type in the email address you want to send the test to, then click Send with Preview and the test email will be sent.
- Preview: click this button to Preview the template selected in the Template dropdown menu.
- Clear: this button clears any text in the Subject and Message boxes.
- Close: click this button to close the Swiftpage for Excel window.

2. **Reports/Edit:** the purpose of this button is to provide access to editing your templates, viewing online reports and switching accounts. When you click Reports/Edit, you will see the following window:

Here is a description of the function of each of the boxes and buttons in this window:
- Email: this button is greyed out, because in Swiftpage for Excel you use the "Send to Worksheet" or "Send to Selection" buttons to initiate an email blast.
- Edit: this button launches the Swiftpage online editor, where you can edit your Swiftpage templates.
- Import: use this button to import your own templates, designed outside of Swiftpage in HTML editors like Dreamweaver or Frontpage. Once you click this button, you will be asked to browse for your .html file to import. Once the file is imported you will have a chance to review and verify it before it is placed in your Read Only Library. In the Swiftpage Basic Online Editor, you cannot edit imported templates.
- Reports: the Reports button takes you to your online reports, where you can view the results of your Swiftpage email blasts.
- Account: use this button to switch between Swiftpage accounts or between users on the same Swiftpage account.
- Help: this button accesses Swiftpage online help.

Template
Library

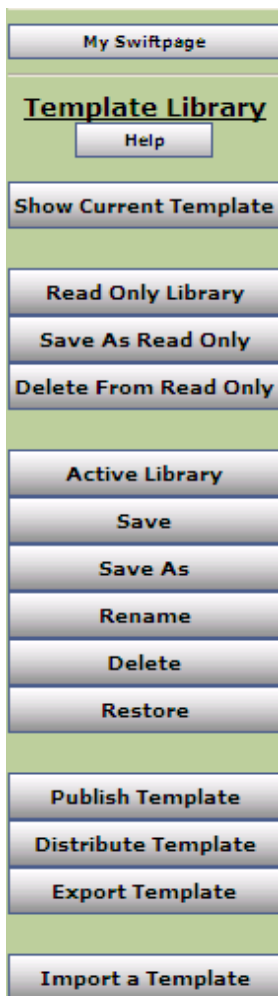Content
Editor

Customize
Template

Using the Swiftpage Online Editor

When you first enter the Swiftpage online editor, you will see three tabs on the left-hand side of the screen, Template Library, Content Editor, and Customize Template. **Note:** if you are using Swiftpage's beta editor, you may only see two tabs, Content Editor and Customize Template. The Template Library functions are handled by the Template Manager in the beta editor. (don't mention)

Generally speaking, you will use the Template Library to manage your template as a document—saving it, renaming it, deleting it and so on. 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 three tabs.

Template Library Functions

When you click on the Template Library tab, you will be presented with the buttons shown and described below. **Tip:** to start creating a Swiftpage template, click on the Read Only Library button (see #4, below).

My Swiftpage

Template Library
Help

Show Current Template

Read Only Library

Save As Read Only

Delete From Read Only

Active Library

Save

Save As

Rename

Delete

Restore

Publish Template

Distribute Template

Export Template

Import a Template

1. My Swiftpage: takes you back to the My Swiftpage portal, where you can access Surveys, Reports and more.

2. Help: accesses Swiftpage online help.

3. Show Current Template: displays the most current version of your Swiftpage template. Swiftpage only allows one template to be open at a time, so the "current template" is always the one that is open.

4. Read Only Library: this button accesses the Swiftpage Read Only Library. The Read Only Library consists of templates created by Swiftpage that cannot (in their read-only state) be modified. However, they can each be copied as an Active template so that you can edit them. Begin by visiting Swiftpage's online template gallery to find a template you want to work with. Then, enter the Swiftpage online editor, click on the Template Library tab and click on the Read Only Library button. Choose the template you want from the list of templates then click Submit. Next, click on Show Current Template. Finally, click on the Content Editor tab, and click on the Make Editable Copy button. You will be asked to give the template a new name. Type in the name and click Submit, then click on Show Current Template. Now you have a completely editable copy of the template that was found in the Read Only library.

5. Save As Read Only: this function is used to save your Active Templates as read-only, so they cannot be modified. You will need to save templates as Read Only if you are planning to send them using the Send As function (available with the Swiftpage Team service level). Once you save a template as Read Only, a copy of the template is saved in the Read Only library.

6. Delete from Read Only: use this button to delete a template from the Read Only Library. **Note:** you cannot delete Swiftpage's prepopulated templates (with a zzz prefix) from the Read Only library. You may only delete Read Only templates you have created.

7. Active Library: this button accesses your Active Library, which consists of fully editable templates that you have copied from the Read Only Library. Use this button to switch between templates.

8. Save: this button saves your template. Normally, Swiftpage will save your template as you go, but clicking this button before you exit Swiftpage guarantees that your work is saved.

9. Save As: click this button to make a copy of the current template under a new name. If you like the design of one of your templates and want to edit the text—but want to keep the original template as well—use the Save As button to make an exact copy of the template for editing.

10. Rename: use this button to rename the current active template.

11. Delete: this button will give you the option to delete a template from your active library.

12. Restore: when you click this button, you restore the template to the last time it was saved. The point of the last save may be the last time you clicked the Save button on the Template Library tab, or it may be the last time Swiftpage automatically saved the template. In some cases, using the Restore button can help you recover lost information. In other cases, if you have done more work since the template was last saved, you may lose work by clicking Restore. The Restore button is, generally, therefore only used in the case of broken templates (i.e. templates in which code or other programming has caused the template to function or appear incorrectly).

13. Publish Template: the Publish Template function is used to send a template from one Swiftpage user to another within the same Swiftpage account. Click this button and you will be presented with a list of users on your account. Highlight the user you want to send the template to—or hold down the control key to highlight several—and then click Submit. The template will then be published to the other user(s)'s Read Only Library.

14. Distribute Template: the Distribute Template function is used to send a template from one Swiftpage account to a user in a separate Swiftpage account. To use this function, you must first set up your distribution list. (**Note:** To do this, go to My Swiftpage > Your User Profile > Distribution List, put in the account name and user of anyone you want to receive templates from or send templates to and then click Submit. In order to receive templates from you, users in other accounts must add you to their Distribution List as well.) When you click on Distribute Template, you will see a list of the accounts and users to whom you can send a template. Highlight the account/user combination you want to send the template to—or hold down the control key to highlight several—and then click Submit. The template will then be published to the other user's Read Only Library on the separate Swiftpage account.

15. Export Template: this button will export your template in .html format and email it to any address you desire. The export function is used primarily for two reasons: to create a file backup of your Swiftpage template and to create web pages out of your Swiftpage templates.

16. Import a Template: use this button to import templates designed outside of Swiftpage, in HTML editors like Dreamweaver or Frontpage. Once you click this button, you will be asked to browse for your .html file to import. Once the file is imported you will have a chance to review and verify it before it is placed in your Read Only Library. In the Swiftpage Basic Online Editor, you cannot edit imported templates.

Content Editor Functions

When you click on the Content Editor tab, you will be presented with the buttons shown and described below.
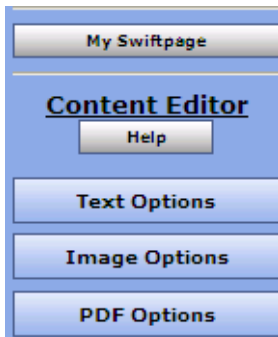
1. My Swiftpage: takes you back to the My Swiftpage portal, where you can access Surveys, Reports and more.

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 blue .

The Text Options Menu
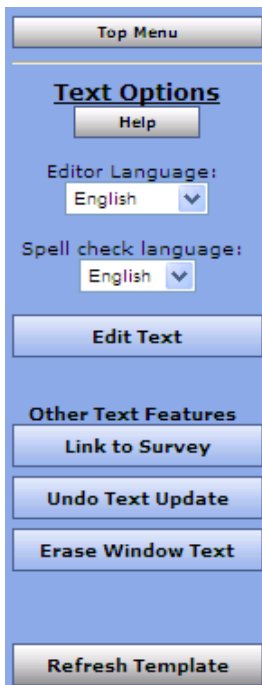
1. Top Menu: returns to the original Content Editor menu.

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
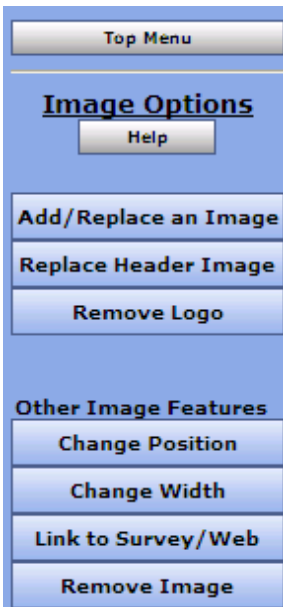
1. Top Menu: returns to the original Content Editor menu.
2. Help: accesses Swiftpage online help.
3. Add/Replace an Image: use this button to insert an image into the selected window of your template or to replace the image currently there. When you click this button, you will be asked to browse for 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.
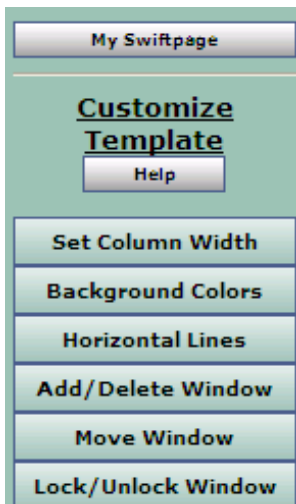
The PDF Options Menu

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.

My Swiftpage

Customize Template

Help

Set Column Width

Background Colors

Horizontal Lines

Add/Delete Window

Move Window

Lock/Unlock Window

1. My Swiftpage: takes you back to the My Swiftpage 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.

How to Send an Email in Swiftpage for Microsoft Excel

Follow these instructions to send email blasts within Swiftpage for Microsoft Excel. These instructions refer to the same Swiftpage windows discussed above.

1. Click on the Swiftpage icon in Microsoft Excel to open the Swiftpage window.
2. Click on "Send to Worksheet" to send your email to all of the contacts listed on your spreadsheet.
3. On the Swiftpage Template Selection window, select the template you wish to send from the Email Template dropdown list, enter your subject line and enter a Personal Message (if applicable). **Note:** you may use the Preview or Send Test buttons to perform those functions from this screen.
4. Once you have selected your template and entered your subject line, click Next.
5. You will see a preview screen, showing you the first entries on your list (up to 25). Click Next again.
6. You will be taken online and will see a confirmation screen that looks like this:
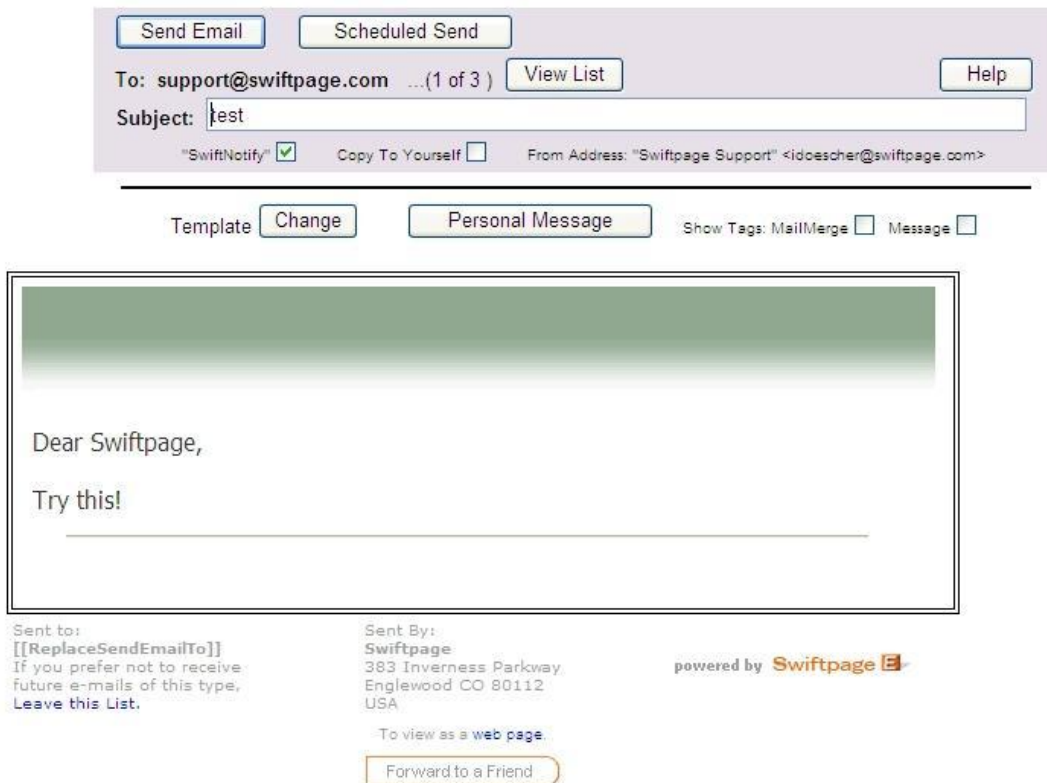
On this screen, you can review your template visually; click Change to edit your template, Personal Message to edit your personal message; or View List to see your send list. In terms of sending, you now have two options. The first option, if you want to send your email blast immediately, is to click the "Send Email" button. Once you do that, you are finished and the next screen gives you a summary of your completed send. The second option, described below under #7, is a Scheduled Send.

7. The second sending option is a Scheduled Send. The Scheduled Send allows you to determine the date and time you wish your email to be sent, up to sixty days in advance. When you click on Scheduled Send from the send confirmation screen, a screen similar to the one below will open. Click the date you wish to send the email, select the time from the dropdown menu, and then click on the Schedule Email Campaign button. You will receive a confirmation that your email has been scheduled and you are finished!

Select the Date and Time for Send

You may schedule an email campaign for up to 60 days in advance.
Click on the appropriate date and select the time to send this email.

December 2009

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

January 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

February 2010

Sun	Mon	Tue	Wed	Thu	Fri	Sat
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

DATE

TIME 4 AM ▾

Schedule Email Campaign

16

Accessing Call Lists and Surveys in Swiftpage for Microsoft Excel

Follow these instructions to access Swiftpage's Call Lists and survey tool from Swiftpage for Microsoft Excel.

**To access Call Lists using Swiftpage for Microsoft Excel:**
1. Go to Swiftpage's web site, www.swiftpage.com.
2. Log in at the top of the home page.
3. You will now be in the My Swiftpage portal. Click on the Call Lists button.
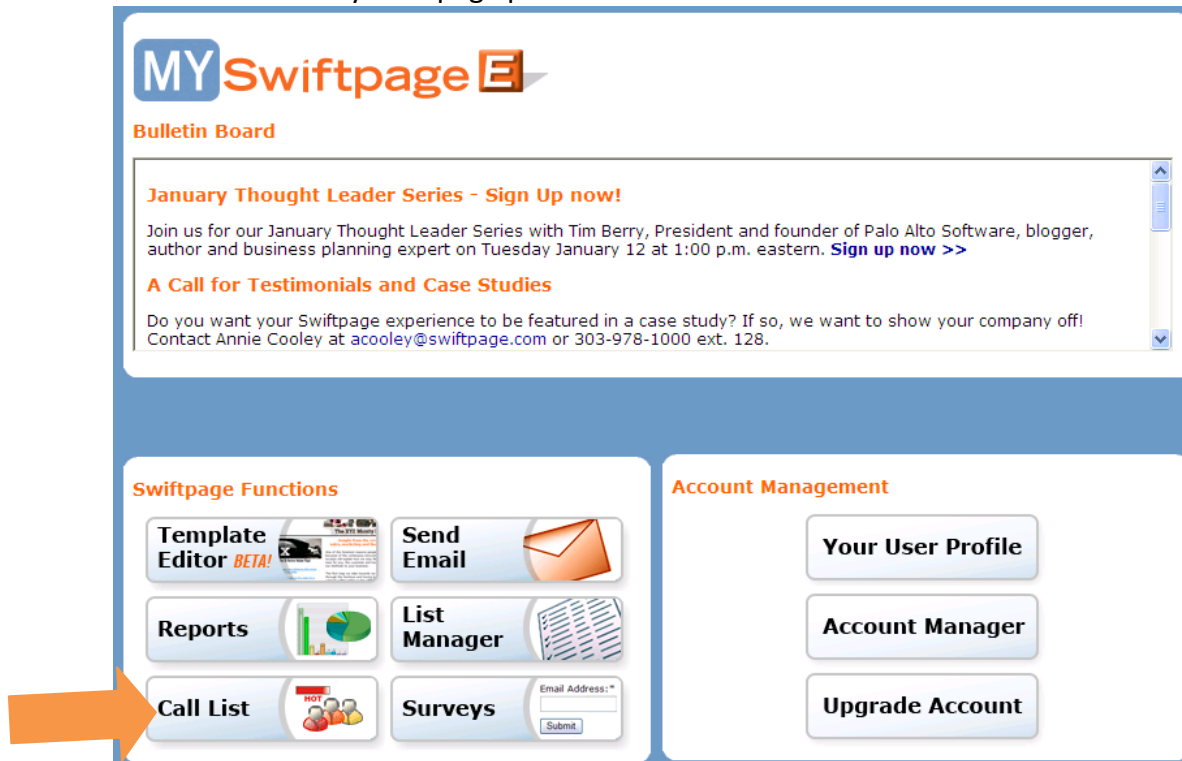
4. Swiftpage's online Call List dashboard will now launch. Once you are done creating your Call Lists, you may close the browser window and return to Swiftpage for Microsoft Excel.

To access Swiftpage's Survey tool using Swiftpage for Microsoft Excel:
1. Go to Swiftpage's web site, www.swiftpage.com.
2. Log in at the top of the home page.
3. You will now be in the My Swiftpage portal. Click on the Surveys button.
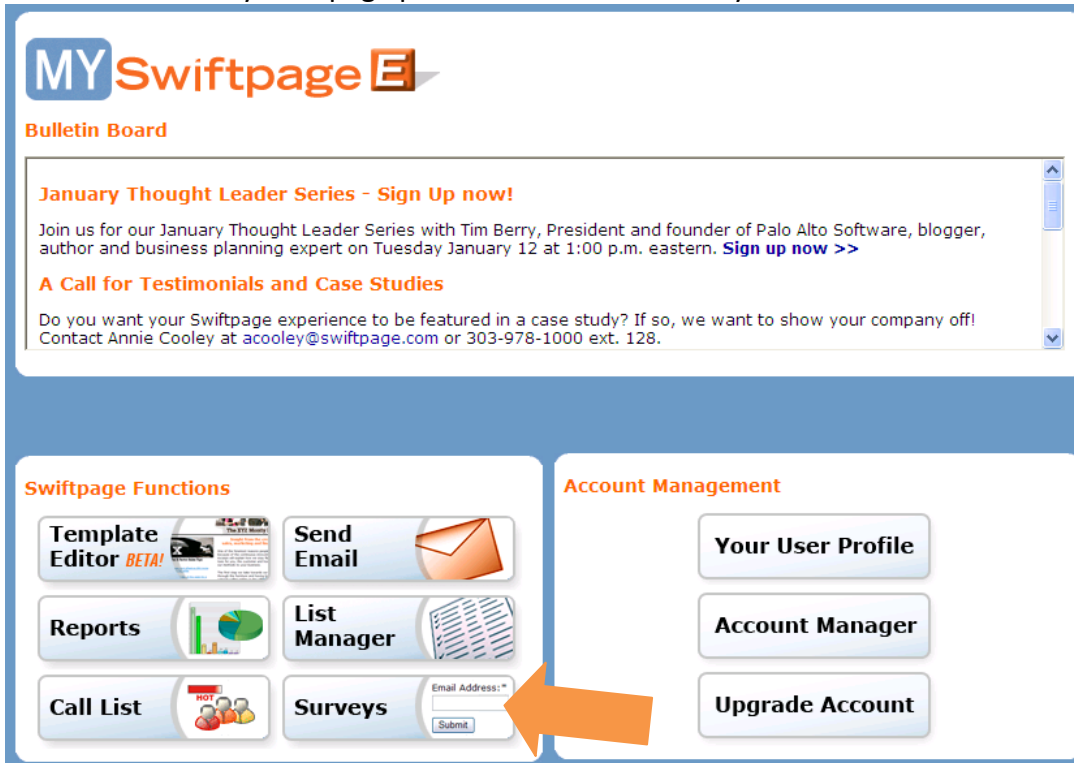
4. Swiftpage's Survey tool will now launch. Once you are done creating and editing your surveys, you may close the browser window and return to Swiftpage for Microsoft Excel.