



Quick Start Guide To:

Assigning a Call List

To assign all of or portions of a Call List, you will need to have the online version of a Call List that you wish to assign, pulled up in your internet browser.

Also, please note that the assignment feature is only for Team level Swiftpage users.

From this view click the List Management button.

The three boxed sections will represent the three step process you want to go through.

The first step is to apply a filter to the Call List if need be. Basically, do you want the assignee to have the Hot, Warm, Mild, or a combination of the three to follow up with?

Filter the list by choosing an action, a strength, and then apply new filters.

This will be the new call list for assigning purposes.

Now for the second step, go back to List Management and assign the current filters to one of your other Swiftpage Users selecting them from the scroll box and then checking their box.

Next click Assign Current Filters and you will see the current assignment listed above.

The third step are the options to send the currently filtered call list to any email address that you choose and then also the option of sending this currently filtered call list a follow up Swiftpage email blast.