

Quick Start Guide to:

Creating a Sage E-marketing 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 Sage E-marketing Call List:

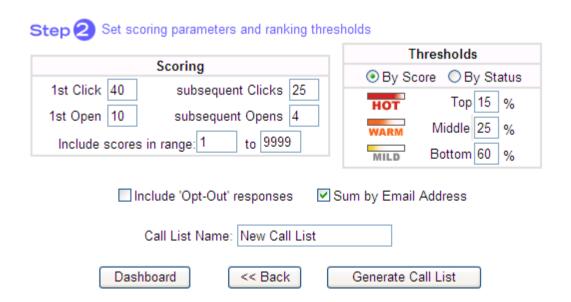
1. Log into the Sage E-marketing portal our web site: http://www.swiftpage.com/logineditor.htm. Once you are logged into Sage E-marketing, click on the Call List button. (**Note:** ACT! users can get to this same place by clicking the Online Call List button in the Call List window of Marketing Results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



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: O Campaigns O Individuals O Campaigns + Individuals or O 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.



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 Next>> Action Strength First Name Last Name Phone Company Name Email Address Score Sent Opens Clicks Called Edit HOT Bob Ogdon 8772288377 Swiftpage bogdon@swiftpage.com Details [20 Mar 2009] dogdon schedule a meeting Edit 1.888.555.9389 NBA AllStar Co. 2 Carmelo Anthony canthony@swiftpageemail.com 112 4 3 Details [19 Jun 2009] dogdon Edit 3 Dan 8772288377 Details HOT Ogdon swiftpage dogdon@swiftpage.com 100 1 3 1 Called [23 Apr 2009] dogdon Edit HOT Howard Smith 555.993.9389 Gripings International hsmith@swiftpageemail.com 83 3 2 Details 1 нот 5 Edit Warren Buffet 555.383.9992 ISI Marketing wbuffet@swiftpageemail.com 83 1 3 Details Edit 6 Meg Ryan 555.329.0299 Got Mail Inc. mryan@swiftpageemail.com 58 1 3 Details Edit Brian 555.838.9288 CSU Engineering 1 3 Johnson bjohnson@swiftpageemail.com 58 Details Edit 8 Tom 555.399.9328 2 Details Hanks Wilson Co. thanks@swiftpageemail.com 54 1 9 Edit LeBron 1.888.555.9389 NBA AllStar Co. 1 2 James ljames@swiftpageemail.com 54 Details 10 Edit Jim Walking 555,399,9923 jwalking@swiftpageemail.com 54 1 2 Details 11 Edit Matt 1 2 Walker 555,282,9999 Bic Inc. mwalker@swiftpageemail.com 54 Details 12 Edit Allison 1 1 Details Sweet 555.399.9923 Voicecom Asweet@swiftpageemail.com 50 13 Edit MILD Jay Leno 555.329.3773 Bargs International jleno@swiftpageemail.com 50 1 1 1 Details 14 Edit MILD Mighty Details Jason 555.993.9389 Gripings International jmighty@swiftpageemail.com 50 1 1 15 Edit MILD Will Ferrell 555.299.9399 wferrell@swiftpageemail.com 50 1 1 Details View modes: Hide 'Actioned' Hide 'Assigned' 🔲 Show Assign column Rows per page: 15 Go Page: 1 of 2 Goto page:

Dashboard List Management View current assignments