

Quick Start Guide To:

Adding a Contact to a Group

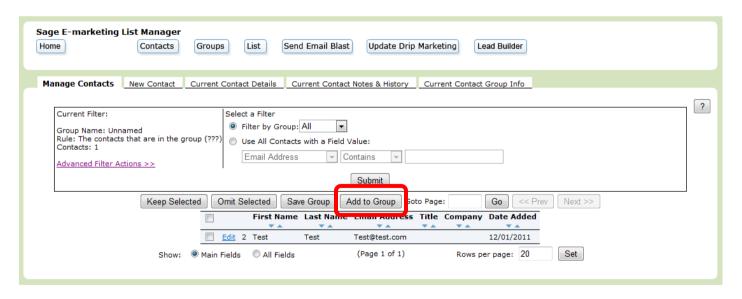
The Sage E-marketing List Manager can be used to import your contacts, modify contact information, create groups out of those contacts, filter your contacts by using "lookups," and then send to all contacts, groups or lookups. This Quick Start Guide explains some of these functions.

There are two ways to add contacts to a group within the List Manager.

Note: In order to add contacts to a group, the group must first be a Static Group. Dynamic groups do not allow for adding/deleting/changing contacts. To learn how to save a group as a Static Group, please refer to the Creating a Group documentation.

- 1. To start, open the Sage E-marketing List Manager by clicking on the "List Manager" button in the Sage E-marketing screen.
- 2. Contacts: click here to view your current list. If you have not uploaded a list yet, you will just see your contact information automatically added by Swiftpage. Your screen should look something like this:

WAY 1:

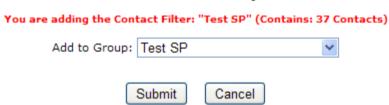


The "Select a Filter" section allows you to create a lookup of your contacts based on various criteria. You can choose the "Filter by Group" option to create a lookup from one of your Groups (i.e. view the contacts just in that Group, or you can select "Use All Contacts with a Field Value" and create criteria for the lookup. Click Submit, and your new list will be shown with the filters in place. Once your lookup is created, 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 Save Group button. This opens the following screen, which allows you to add a contact to a group:

Note: The Add to Group button will become available if so long as there is at least one static group in the List Manager. When you select contacts and click Add to Group, the following window appears:

Add to Group



Select a Group name from the drop-down list and click Submit to add all contacts in the current lookup to the Group shown. Those contacts are then added to the Group.

WAY 2:

Sage E-marketing List Manager Home Contacts Groups	List Send Email Blas	st Update Drip Marketing Lead Builder	
Manage Contacts New Contact Current Co	ntact Details Current Conta	act Notes & History Current Contact Group Info	
	Current	Contact Details	?
	<< Prev (Contact 1	of 1 in Group: Unnamed) Next >>	
	Copy Contact Delete C	Contact Send Email Company Info	
Email Address:	Test@test.com	Source:	
First Name:	Test	Category:	
Last Name:	Test	Salutation:	
Title:		Assigned for Send As:	
Company:		Custom 1:	
Address 1:		Custom 2:	
Address 2:		Custom 3:	
Address 3:		Custom 4:	
City:		Custom 5:	
State:		Custom 6:	
Country:		Custom 7:	
ZIP Code:		Custom 8:	
Phone:		Custom 9:	
Fax:		Custom 10:	
Web Site:		Opt-Out:	
Tag:		Add to Group: Select a Group ▼	
		Save Changes	

When looking at a Current Contacts Details, there is an option in the bottom right that will allow for you to Add to Group > Select a Group > Save Changes. Those contacts are then added to the Group.

Note: The Add to Group button will become available if so long as there is at least one static group in the List Manager.