



## 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 screenshot shows the Sage E-marketing List Manager interface. At the top, there are navigation buttons: Home, Contacts, Groups, List, Send Email Blast, Update Drip Marketing, and Lead Builder. Below this is a 'Manage Contacts' section with tabs for New Contact, Current Contact Details, Current Contact Notes & History, and Current Contact Group Info. The main area displays 'Current Filter' information, including 'Group Name: Unnamed', 'Rule: The contacts that are in the group (???)', and 'Contacts: 1'. There is a 'Select a Filter' section with two options: 'Filter by Group: All' (selected) and 'Use All Contacts with a Field Value:'. The 'Filter by Group' option has a dropdown menu set to 'All'. The 'Use All Contacts with a Field Value' option has a dropdown menu set to 'Email Address' and a 'Contains' dropdown menu. A 'Submit' button is located below the filter options. Below the filter section, there are buttons for 'Keep Selected', 'Omit Selected', 'Save Group', and 'Add to Group' (highlighted with a red box). There is also a 'Go to Page:' field with 'Go', '<< Prev', and 'Next >>' buttons. Below these buttons is a table with columns: First Name, Last Name, Email Address, Title, Company, and Date Added. The table contains one row with the following data: Edit, 2, Test, Test, Test@test.com, and 12/01/2011. At the bottom, there are 'Show:' options for 'Main Fields' (selected) and 'All Fields', '(Page 1 of 1)', 'Rows per page: 20', and a 'Set' button.

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

You are adding the Contact Filter: "Test SP" (Contains: 37 Contacts)

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:

The screenshot shows the Sage E-marketing List Manager interface. At the top, there are navigation buttons: Home, Contacts, Groups, List, Send Email Blast, Update Drip Marketing, and Lead Builder. Below this is a sub-navigation bar with: Manage Contacts, New Contact, Current Contact Details (selected), Current Contact Notes & History, and Current Contact Group Info. The main content area is titled 'Current Contact Details' and includes a navigation bar with '<< Prev', '(Contact 1 of 1 in Group: Unnamed)', and 'Next >>'. Below this are buttons for Copy Contact, Delete Contact, Send Email, and Company Info. The form contains various fields for contact information, including Email Address (Test@test.com), First Name (Test), Last Name (Test), Title, Company, Address 1-3, City, State, Country, ZIP Code, Phone, Fax, Web Site, and Tag. On the right side, there are fields for Source, Category, Salutation, Assigned for Send As, and Custom 1-10. At the bottom right, there is an 'Opt-Out' checkbox and an 'Add to Group' dropdown menu with 'Select a Group' as the selected option. A red box highlights the 'Add to Group' dropdown and the 'Save Changes' button below it.

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.