Quick Start Guide To:

Using the Swiftpage Connect List Manager

The Swiftpage Connect 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.

When you open the Swiftpage Connect List Manager by clicking on the "List Manager" button in the Swiftpage Connect screen, you will see the following menu:

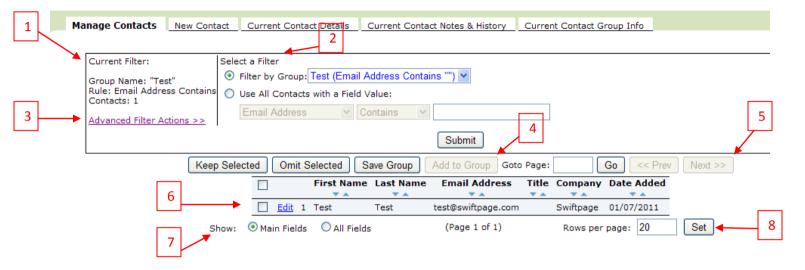Each of the six buttons on this top menu are explained in numbers 1-6 below:

1. Home: this button returns you to the Swiftpage Connect Home Console.

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. (See below, under step 4, the List button, for instructions on uploading.) Your screen should look something like this:

Here, you can have a few options via the tabs at the top of the Contacts screen:

Manage Contacts

When you click on the Manage Contacts tab, the following screen appears:

- The Current Filter area shows you which contacts you are viewing and what criteria (if any) are being used to filter them. The Group name appears, the rule used to determine the group, and how many contacts are in the Group. (In the example shown above, the "Group" is all contacts.)

- 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 create a contact Group:

New Group

You are saving the Contact Filter: "Test", Email Address Contains (Contains: 1 Contact)

⦿ Save the Filtered Contacts as a New Static Group

Group Name: [_____]

◯ Save the Filter Rule as a Dynamic Group (Contains: 1 Contact)
The members of this group type will automatically change as contacts are added and modified.

Group Name: [_____]

◯ Save as an existing Group: [_____ ▾]

[Submit]   [Cancel]

- o Select "Save the Filtered Contacts as a new Static Group" to keep only the contacts in your lookup in this group. In other words, this group will only ever contain the contacts in your current lookup. Enter a Group name, and click Submit, and your Group has been created and will now be available as a contact Group.

- o Or, select "Save the Filter Rule as a Dynamic Group" to allow the group to change based on the filters you have established. In the example above, any new contacts who are added to your list who have the letters "CSU" in their company name will automatically be added to this Group if you save it as a dynamic group. Enter a Group name, and click Submit, and your Group has been created and will now be available as a contact Group.

- o If you have selected particular contacts from your lookup by checking the boxes next to their names, the "Save as an existing Group" option will be available, which allows you to add those selected contacts to an existing Static Group. Choose the Group from a drop-down list, click Submit, and those contacts are added to the Static Group.

- The Advanced Filter Actions link expands and contracts the "Select an Action" window. Here, select whether you want to replace the current lookup with your new selection, add matching or un-matching contacts to the lookup, or remove matching contacts from the lookup. When you have chosen your action along with the filters described in number 2, above, click Submit.

- 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)
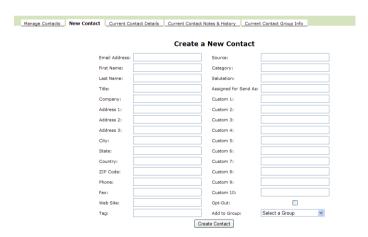
Add to Group: [Test SP ▾]

[Submit]   [Cancel]

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.

- The GoTo Page window allows you to enter which page of contacts you view, and click Go to be taken there. <<Prev and Next >> allow you to go to the previous or next pages of contacts.

- Data for each contact is shown, including the date they were added to your online database. Click Edit to be taken to the Current Contact Details screen, where you can edit contact information.

- Toggle Main Fields or All Fields to see different views of contact data. Main Fields will show only first name, last name, email address, title and company, whereas All Fields will show every field in your online database (a scrollbar will appear allowing the information to be viewed from left to right).

- The number of contact rows per page can be set at the bottom right. Input the number of contacts you want to view on each page, and click Set.
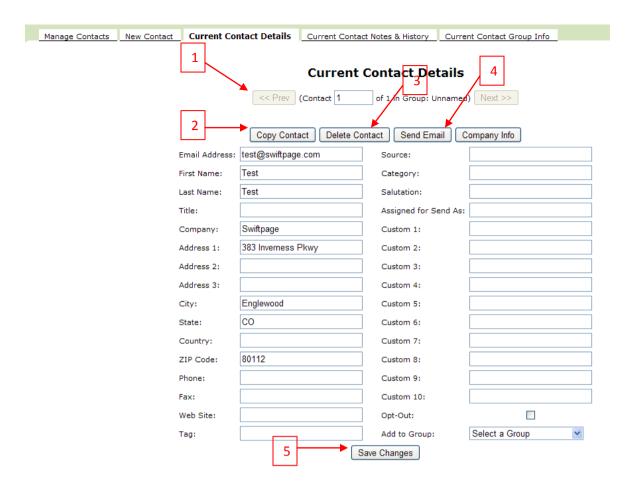
New Contact

When you click on the New Contact tab, the following screen appears:

All of the fields in your online database will appear on this screen, ready to have information input into them. If you need to opt-out the new contact, you can select that checkbox as well. Type new contact details, click Create Contact, and the new contact will be added to your online database.
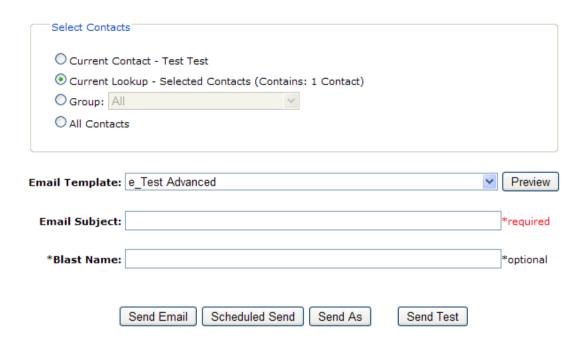
Contact Details

This tab shows you all the available details for a contact and allows you to modify contact information. When you click on the Current Contact Details tab, the following screen appears:

| Manage Contacts | New Contact | **Current Contact Details** | Current Contact Notes & History | Current Contact Group Info |

Current Contact Details

1

4

3

<< Prev (Contact 1 of 1 in Group: Unnamed) Next >>

2

Copy Contact Delete Contact Send Email Company Info

Email Address:	test@swiftpage.com	Source:	
First Name:	Test	Category:	
Last Name:	Test	Salutation:	
Title:		Assigned for Send As:	
Company:	Swiftpage	Custom 1:	
Address 1:	383 Inverness Pkwy	Custom 2:	
Address 2:		Custom 3:	
Address 3:		Custom 4:	
City:	Englewood	Custom 5:	
State:	CO	Custom 6:	
Country:		Custom 7:	
ZIP Code:	80112	Custom 8:	
Phone:		Custom 9:	
Fax:		Custom 10:	
Web Site:		Opt-Out:	☐
Tag:		Add to Group:	Select a Group ▼

5

Save Changes

All contact details for the current contact are displayed. From here, you have the following options:

1. Use << Prev and Next >> to navigate to the previous and next contacts in your list. Where you are in your list is shown in between the buttons (i.e. Contact x of xxx).
2. Copy Contact automatically makes an exact copy of the contact shown, and puts the copy at the end of your list.
3. Delete Contact allows you to delete the contact shown. Click it, and you will receive a confirmation asking if you are sure you want to delete the contact. Click OK, and the contact is deleted. A confirmation message is shown.
4. Send Email allows you to send a single email to the contact shown. It opens the Send Email Blast screen, listing the contact you select as the current contact and offering normal sending options:
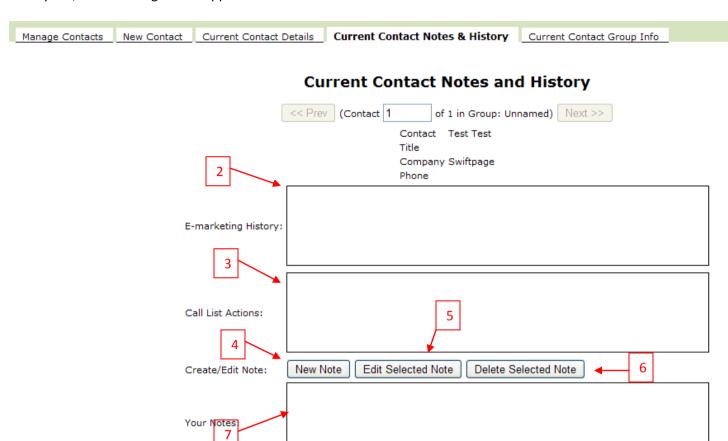
Send an Email Blast

Select Contacts

○ Current Contact - Test Test

◉ Current Lookup - Selected Contacts (Contains: 1 Contact)

○ Group: [All ▾]

○ All Contacts

Email Template: [e_Test Advanced ▾] [Preview]

Email Subject: [   ] *required

*Blast Name: [   ] *optional

[Send Email] [Scheduled Send] [Send As] [Send Test]

Select your email template and enter a subject line. Then click Send Email to send immediately, Scheduled Send to send in the future, or Send As to send on behalf of another user.

5. If you make changes to the current contact information, click Save Changes to save those changes to your online database

Contact Notes History

You can write notes about a contact in this section and information about email blasts sent to your contacts will be automatically recorded by Swiftpage in the History section of this tab. When you click on the Current Contact Notes & History tab, the following screen appears:

Some details for the current contact are displayed. From here, you have the following options:

1. Use << Prev and Next >> to navigate to the previous and next contacts in your list. Where you are in your list is shown in between the buttons (i.e. Contact x of xxx).

2. The E-marketing History box shows you information about every email you have sent the current contact and what happened with the email (opens, clicks, etc.).

3. If you have created a Call List with the current contact and have assigned an action to that call list (such as Follow Up), that action will appear here.

4. Click New Note to create a new note for the current contact. When you click New Note, the following screen appears:

New/Edit Note

Note Date: May ▾ 2 ▾ 2011 ▾

Note:

[Save]   [Cancel]

Input your note in the Note box, and edit the note date if you wish. Click Save, and the note is added to the current contact's History & Notes page.

5.   Select the radio button next to a note and click Edit Selected Note to make any changes to the existing note. A screen similar to the one shown above appears, allowing you to edit the note.

6.   Select the radio button next to a note and click Delete Selected Note to remove the note. Be aware that there is no confirmation message—the note just automatically deletes.

7.   All notes for the current contact display in the "Your Notes" box.

3. Groups

When you click on the Groups button, the following screen appears:

Manage Groups

1

All
Test (Email Address Contains "")

Show: ⊙ All   ○ Static   ○ Dynamic

2 → [View]   [Rename]   [Delete]   [Create Dynamic Group] ← 5

3   4

1.   All of the Groups you have created in the Contacts section are displayed here. Static groups—groups that contain only the individual contacts you choose to include in them—are displayed in black. Dynamic groups— groups that are automatically updated based on various contact criteria—are shown in blue. The group called "All" cannot be renamed or deleted, as it represents your entire contact list.

2.   Highlight a Group and click View, and you are taken to the Manage Contacts tab, where all members of the selected Group are displayed. There, you can add contacts to static Groups or remove them.

3. Highlight a Group and click Rename to give the Group a new name. **Note:** Group names cannot contain special characters.

4. Highlight a Group and click Delete to delete the Group. A confirmation question will appear, asking if you are sure you want to delete the Group. Click OK, and the Group is deleted. This operation cannot be undone.

5. Click Create Dynamic Group to create a new dynamic Group (static Groups can be created in the Contacts area). When you click Create Dynamic Group, the following window appears:

Here, select a contact field from the drop-down list and a modifier (contains, is greater than, etc.) from the next drop-down, and then put the value in the box on the right. Enter a Group name in the box below, and click Submit to create your dynamic Group.

4. **List:**

Import List

When you click on the Import List tab, the following screen appears:

This screen is used to import contacts into your online database, and you have two options:

- Import files from a Contacts CSV File on your computer. Click Browse… to navigate to the CSV file of contacts on your computer. Locate it, click Open, and then click Submit on the Import List screen to import the CSV list. The following mapping screen appears

Import List

Your data fields must be mapped to List Manager fields.

Field Map: (Default)

Save Map as: [   ]

Original Column Name	Swiftpage Contact List Column
Company	Company
First Name	First Name
Last Name	Last Name
e-mail addresses	Email Address
Phone	Phone
Address 1	Address 1
Address 2	Address 2
City	City
State	State
Zip	ZIP Code

Submit   Cancel

Map your database fields here—fields from your CSV file are shown on the left, and available fields for your Swiftpage online database are shown on the right. Match fields up, then click Submit. (Enter a name in the "Save Map As" box if you want to save this mapping for future use.)

- o If duplicate contacts are found with your existing online database, you will have the option to ignore the duplicates, replace the old contact with the new contact, or skip the new contacts.

Possible duplicate contact

One of the contacts being imported appears to be the same as a contact already in your list.

Ignore   Ignore All   Replace   Replace All   Skip   Skip All

Field Name	Existing Contact	Imported Contact
Email Address	dsteinmetz@swiftpage.com	dsteinmetz@swiftpage.com
First Name	Ryan	Dave
Last Name	Jacobson	Steinmetz
Title		(no import data)
Company	CSU Engineering	Got Mail Inc.
Address 1	555 Vollo St.	229 E. Carstine Ave
Address 2	Suite 100	Suite 100
Address 3		(no import data)
City	Fort Collins	Willcert
State	CO	AK
Country		(no import data)
ZIP Code	39838	34544
Phone	(555)838-9288	555.329.0299
Fax		(no import data)
Web Site		(no import data)
Tag		(no import data)
Source		(no import data)
Category		(no import data)
Salutation		(no import data)
Assigned for Send As		(no import data)
Custom 1		(no import data)

The final step is to go through various options after importing your list. Those options are as follows:

Import Options

Your List has been imported successfully.

Step 1: Groups can be used to Send Email or Update Drip Marketing. Choose a Group option below:
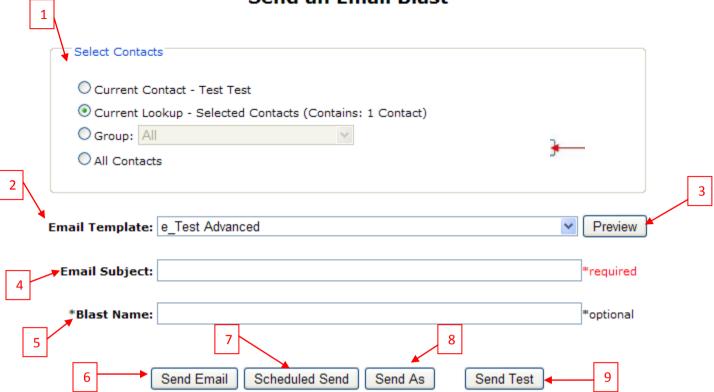
- ◉ Create a Group with this name: `5/12/2011`
- ○ Add to an existing Group: `Select a Group ▾`
- ○ Replace an existing Group: `Select a Group ▾`
- ○ Do not Group my Import

Step 2: An optional Tag can be added for each of your imported contacts. The tag will be added to the selected fiel

Enter a Tag (optional): `_____`   Add to Field: `Tag ▾`

`Submit`

You can create a new Group from the list you have imported, or add the imported contacts to an existing Group. You can also replace an existing Group with your new import, or skip putting your imported contacts into a Group. You can also add a Tag to all of the imported contacts, if desired (this is optional). Input the text tag in the box, select the field you wish to write the Tag to (you can select any contact data field, but the default field is Tag). When you have made your selections on this screen, click Submit. Now your import is finished, and you are taken back to the Contacts section with your updated contact list displayed.
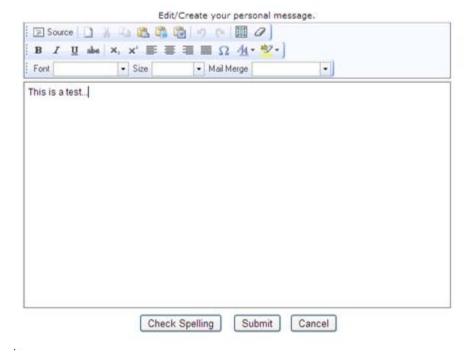
2. Import files from a Contacts File on the Swiftpage Data Bridge. If you have a file of contacts available to you either by a bridge with another database product (such as ACT! by Sage) or from a purchased list, you can select that list from the drop-down list and click Submit. From there, the process is the same as that shown above, including the mapping and duplicates steps.

5. Send Email Blast: click here to send your blast. When you click this button, you are presented with a screen where you can select which contacts you want to send the email to, choose a template to send, enter a subject line and then send:

When you click on the Send Email Blast button, the following screen appears:
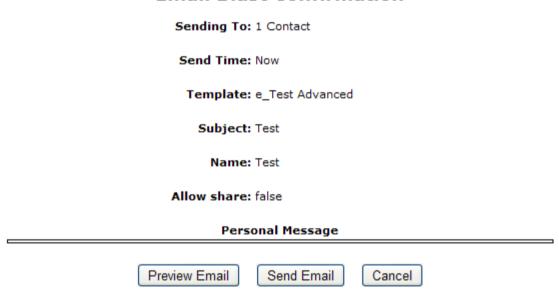
Send an Email Blast

1. Use the option buttons to select the Contacts you want to send your email to. You can select the current contact (to send a single email), the current lookup, one of your Groups from your online database, or All Contacts.

2. Choose the template you want to send from the Email Template drop-down list.

3. Click Preview to see your template in a new window if you want to check it prior to sending.

4. Enter the Subject line for your email blast.

5. If desired, enter a reporting Name for the email blast. This is a name used to identify the email blast in your reports, and will not be seen by your contacts. This is an optional field.

6. Click Send Email to send your email blast immediately. When you click this option, you will go one of two places. If you had an [[SpePersonalMessage]] mail merge in your template, the next screen will ask you to input your personal message. Enter your personal message, and click Submit:

Edit/Create your personal message.

This is a test...|

Check Spelling   Submit   Cancel

Once you have clicked Submit (or if you did not have an [[SpePersonalMessage]] mail merge in your template), you will see a confirmation screen for your email blast:

Email Blast Confirmation

Sending To: 1 Contact

Send Time: Now

Template: e_Test Advanced

Subject: Test

Name: Test

Allow share: false

Personal Message

Preview Email   Send Email   Cancel

Click Preview Email to see the email one more time before sending, or click Send Email to go ahead and send your email blast.

7. Click the Scheduled Send button to schedule your email up to 60 days in advance (available only with Swiftpage's Pro or Team level services). As in number 6, above, a personal message screen will appear if applicable. Then the Schedule Send window opens:

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.

May 2011						
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				

June 2011						
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		

July 2011						
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						

DATE:
TIME: 4 AM

Submit   Cancel

Click on the date on which you would like to schedule your send, and select the time of send from the drop-down list. Then click Submit. A confirmation window will appear similar to the confirmation shown in number 6, above. Click Send Email and your email is scheduled for the future.

8. Click the Send As button to send the email on behalf of another Swiftpage user. As in number 6, above, a personal message screen will appear if applicable. Then the Send As window opens:

Send As

Choose Sender

- ⦿ Swiftpage User   Select a User ▾
- ◯ List Field   Assigned for Send As ▾

The Account Password must be provided for Send As

Account Password: [   ]

Send As   Scheduled Send As   Cancel

Choose the user on whose behalf you would like to send from the option button. You can select "Swiftpage user" and then select the specific user from the drop-down list. Or, you can select "List Field" and then choose the field in your online database that is tied to a Swiftpage user(s). For instance, you might have a field in your online database that contains the name of a Swiftpage user who is the record manager of each contact. You would choose that field here. Once you have selected your Sender option, enter your account password in the box provided. Then you have two options: Send As will take you to a confirmation screen (similar to that shown in number 6, above. Scheduled Send As will take you to a window that allows you to choose the date and time of your send (similar to that shown in number 7, above), and then takes you to the confirmation screen.

9. Click Send Test to send a single test email. As in number 6, above, a personal message screen will appear if applicable. Then the Send Test window opens:
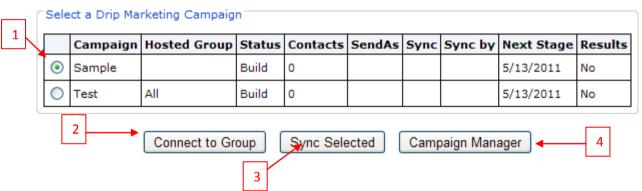
Send Test Email

Email Test to: jess@swiftpage.com

[Submit]   [Cancel]

Enter the email address you want to send the test email to, and click Submit. A confirmation window appears, similar to the one shown in step 6, above. Click Send Email to send your test.

6. Update Drip Marketing: the final button on the List Manager menu allows you to add contacts to a Drip Marketing Campaign. When you click on the Update Drip Marketing button, the following screen appears:

Update Drip Marketing

Select a Drip Marketing Campaign

1

	Campaign	Hosted Group	Status	Contacts	SendAs	Sync	Sync by	Next Stage	Results
⦿	Sample		Build	0				5/13/2011	No
○	Test	All	Build	0				5/13/2011	No

2 → [Connect to Group]   [Sync Selected]   [Campaign Manager] ← 4

3

1. All of your Drip Marketing Campaigns (with Swiftpage Contact List as their source) are shown here. You can see the following information:

    o Campaign name,
    o The contact Group the Campaign is currently associated with (in the sample above, the "Duration Test" Campaign is associated with the contact Group "Conference Attendees"),
    o The Status of the Campaign,
    o The number of Contacts,
    o Who the Campaign is being sent on behalf of (if not the signed-in user),
    o Information about any required Syncs in the Campaign,
    o When the Next Stage occurs (if the Campaign is a Calendar or Anchor type Campaign), and
    o Whether the Campaign has any History results to report.

2. Use the option buttons to select a Drip Marketing Campaign, then click Connect to Group to associate the selected Campaign with one of your online database contact Groups. The Connect to Group window opens:

Connect to Group

Select a Group to connect to the Drip Marketing Campaign: Sample

Test (Email Address Contains "") ⌄

[Connect]   [Cancel]

Select the Group you want from the drop-down list, and click Connect. A confirmation window appears telling you how many contacts matched existing Campaign contacts, are new to the Campaign, or were missing from the Campaign list. It will then take the action listed in the Action column. Click Finish Sync to sync the Group with your Drip Campaign.

Drip Marketing Sync

37 Contacts (Group: Test, Email Address Contains)
Were compared to those in the Drip Marketing Campaign: Sample
The comparison results are below. Review the actions that will be taken , then press "Finish Sync".

Result Type	Count	Action
Matched	0	Update
New	37	Add
Missing	0	Remove

[Finish Sync]   [Cancel]

A confirmation window appears telling you how many contacts are now in your Campaign. Click OK, and you are finished.

Sage E-marketing List Manager

OK Your Drip Marketing campaign has been updated. Added: 37, Updated: 0, Removed: 0, New Total in List: 37

[OK]

3. Use the option buttons to select a Drip Marketing Campaign and click Sync Selected to sync the contacts in your online database contact Group with those in your Drip Marketing Campaign. **Note:** to use this function, you must first connect one of your contact Groups to your Drip Marketing Campaign, as described in number 2, above. When you click the Sync Selected button, the following screen appears:

Drip Marketing Sync

37 Contacts (Group: Test, Email Address Contains)
Were compared to those in the Drip Marketing Campaign: Sample
The comparison results are below. Review the actions that will be taken , then press "Finish Sync".

Result Type	Count	Action
Matched	37	Update
New	0	Add
Missing	0	Remove

[Finish Sync]   [Cancel]

This screen tells you how many Group contacts matched with contacts in your Drip Marketing Campaign and will therefore be updated, how many Group contacts are new and will be added to your Campaign, and how many Campaign contacts were missing from your Group and will therefore be removed from your Campaign. Click Finish Sync to complete the process, and a confirmation window appears (similar to the one shown above at the end of number 2) summarizing your updates and telling you how many contacts are now in the Drip Campaign.

4. Click Campaign Manager to be taken to the Drip Marketing Campaign Manager to view and edit your Drip Marketing Campaigns.