



Quick Start Guide To:

Managing Contacts using the Sage E-marketing List Manager

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.

When you open the Sage E-marketing List Manager by clicking on the “List Manager” button in the Sage E-marketing screen, you will see the following menu:

Manage Contacts

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

The screenshot shows the 'Manage Contacts' interface. At the top is a navigation bar with tabs: 'Manage Contacts' (1), 'New Contact', 'Current Contact Details' (2), 'Current Contact Notes & History', and 'Current Contact Group Info'. Below the navigation bar is a 'Current Filter' section (3) showing 'Group Name: "Test"', 'Rule: Email Address Contains', and 'Contacts: 1'. A link for 'Advanced Filter Actions >>' is also present. To the right is a 'Select a Filter' section (4) with two radio buttons: 'Filter by Group: Test (Email Address Contains "'')' (selected) and 'Use All Contacts with a Field Value:'. Below this are dropdown menus for 'Email Address' and 'Contains', and a 'Submit' button (5). Below the filter sections is a toolbar with buttons: 'Keep Selected', 'Omit Selected', 'Save Group', 'Add to Group', 'Goto Page: [input]', 'Go', '<< Prev', and 'Next >>'. Below the toolbar is a table (6) with columns: 'First Name', 'Last Name', 'Email Address', 'Title', 'Company', and 'Date Added'. The table contains one row: '1 Test Test test@swiftpage.com Swiftpage 01/07/2011'. Below the table is a 'Show:' section (7) with radio buttons for 'Main Fields' (selected) and 'All Fields', and a 'Set' button (8). The page footer shows '(Page 1 of 1)' and 'Rows per page: 20'.

- 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

- 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.
 - 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.
 - 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:

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.