



## Quick Start Guide To:

### Creating a New 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 create groups within the List Manager.

Note: There's the option to create a Dynamic group (not changeable) and Static group (can add/delete/change contact within group).

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:

**Sage E-marketing List Manager**

Home    Contacts    Groups    List    Send Email Blast    Update Drip Marketing

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

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Current Filter:  
Group Name: "Test"  
Rule: Email Address Contains  
Contacts: 1  
[Advanced Filter Actions >>](#)

Select a Filter  
 Filter by Group: **Test (Email Address Contains "")** ▼  
 Use All Contacts with a Field Value:  
Email Address    Contains      
Submit

Keep Selected    Omit Selected    **Save Group**    Add to Group    Goto Page:  Go    << Prev    Next >>

	First Name	Last Name	Email Address	Title	Company	Date Added
<input type="checkbox"/>						
<input type="checkbox"/>	<a href="#">Edit</a> 1	Test	Test	test@swiftpage.com	Swiftpage	01/07/2011

Show:  Main Fields     All Fields    (Page 1 of 1)    Rows per page:  Set

## 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 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:

- 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.

**WAY 2:**

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

**Manage Groups**

All
Test (Email Address Contains "")

Show:  All  Static  Dynamic

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.

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:

**Create a new Dynamic Group**

Use All Contacts with a Field Value:

Email Address  Contains

Group Name

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.