Quick Start Guide To:

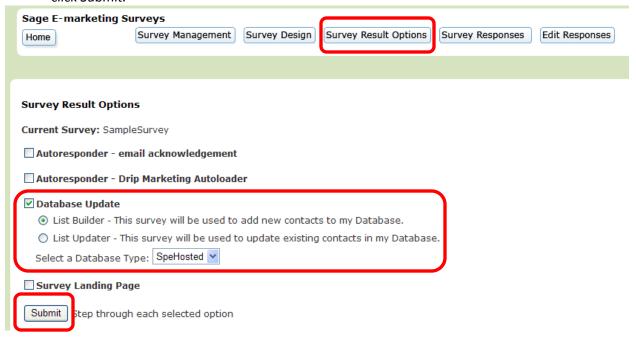## Creating and Using List Builder and List Updater Surveys in Swiftpage Connect

A List Builder survey is used to gather new contacts that will be added to your List Manager database. A List Updater survey is used to update information that already exists in your List Manager database. Follow these steps to create these surveys:

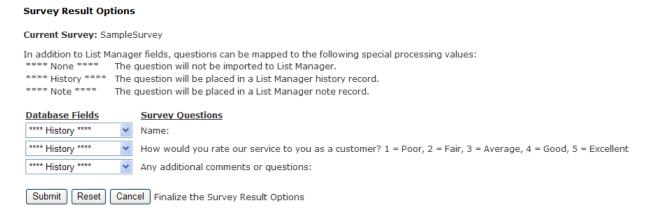1. From My Swiftpage, click on the Surveys.

2. Create a survey in Swiftpage asking for basic contact information (List Builder) or any information you want to update (List Updater), and whatever other information you wish to gather from your contact (would you like to subscribe to our newsletter, what is your favorite color, what is your annual household income, etc.). If you wish, you can also use and edit one of the existing List Builder or List Updater surveys that Swiftpage automatically provides (called SpListBuilder, SpListBuilderLong and ListUpdater). How to create surveys - Click Here

3. When you are finished with your survey, click on the Survey Result Options button. There, click on either the List Builder or List Updater radio button, Select a Database Type: SpeHosted and click Submit.

Sage E-marketing Surveys

Home   Survey Management   Survey Design   **Survey Result Options**   Survey Responses   Edit Responses

Survey Result Options

Current Survey: SampleSurvey

☐ **Autoresponder - email acknowledgement**

☐ **Autoresponder - Drip Marketing Autoloader**

☑ **Database Update**
  ◉ List Builder - This survey will be used to add new contacts to my Database.
  ○ List Updater - This survey will be used to update existing contacts in my Database.
  Select a Database Type: SpeHosted ▾

☐ **Survey Landing Page**

Submit   Step through each selected option

4. The next screen to open will ask you to map fields from your List Builder survey questions with fields in your List Manager database. Match up questions with the fields as appropriate. When you are finished mapping the fields, click Submit.

Survey Result Options

Current Survey: SampleSurvey

In addition to List Manager fields, questions can be mapped to the following special processing values:
**** None ****   The question will not be imported to List Manager.
**** History ****   The question will be placed in a List Manager history record.
**** Note ****   The question will be placed in a List Manager note record.

Database Fields	Survey Questions
**** History ****	Name:
**** History ****	How would you rate our service to you as a customer? 1 = Poor, 2 = Fair, 3 = Average, 4 = Good, 5 = Excellent
**** History ****	Any additional comments or questions:

Submit   Reset   Cancel   Finalize the Survey Result Options

For List Builder: click on the Survey Management button and then link to the List Builder survey from your web site using the hyperlink given on the Survey Management page. Your List Builder survey is now connected to your web site, which is driving people to the survey to gather new contact information.
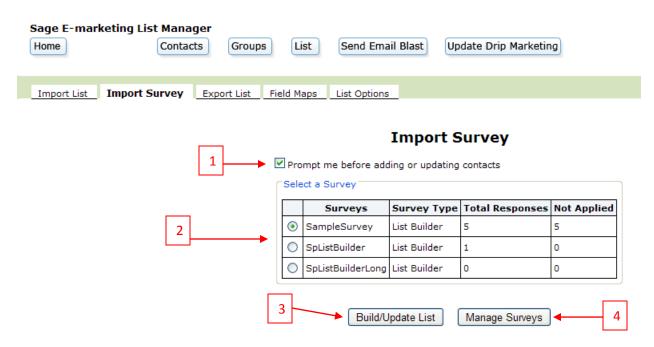
For List Updater: once your survey is finished, you can either send a Swiftpage email to your contacts from Swiftpage Connect linking to the List Updater survey, or you can link to the List Updater survey from your web site. **Note:** if you link to the List Updater survey from an email you send out through Swiftpage, there are no required fields. However, if you link to the List Updater survey from outside of Swiftpage (i.e. through your web site), you must ask for the contact's Email Address—that is the field that will be used to match up survey respondents with List Manager contacts.

5. After you have launched the List Builder or List Updater survey, click on the Surveys, and then click on "Survey Responses."

6. On the screen that appears, you will see your surveys listed. Under the appropriate List Builder or List Updater survey, you will see the number of people who have filled out the survey and their responses. 1

To update your contacts with the survey results, you'll want to go to My Swiftpage > List Manager > List > Import Survey >

Import Survey

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

This screen is used to import results of your List Builder or List Updater surveys into your online database.

1. The "Prompt me before adding or updating contacts" checkbox allows you to either review your added/updated contacts, or to just update contacts automatically. If the box is checked when you click Build/Update List, you will be taken to a second screen (see below, under number 3). If the box is unchecked, you will be taken directly to a confirmation screen.
2. Your Swiftpage List Builder and List Updater surveys are shown in the window. Any responses that have not yet been applied to your online database will appear in the "Not Applied" column.
3. Select a survey using the option button next to the survey name and click Build/Update List to apply the "Not Applied" surveys to your online database. If you have unchecked the "Prompt me before adding or updating contacts" checkbox, you will automatically be taken to a confirmation screen telling you how many contacts were updated or added. If the "Prompt me before adding or updating contacts" checkbox is checked, you will be taken to a review screen. (**Note:** the review screen shown here is for a List Builder survey, but options are very similar for a List Updater survey.)

Add Contact

Do you want to add this contact to your list?

☐ Retain Contact(s) as Not Applied

| Add New Contact | Add this contact and all others | Ignore Contact | Ignore this contact and all others |

Field Name	Value
History: Name:	
History: How would you rate our service to you as a customer? 1 = Poor, 2 = Fair, 3 = Average, 4 = Good, 5 = Excellent	
History: Any additional comments or questions:	
History: Do you attend WOLCC?	
History: Do you attend Pulse Youth Ministries - Impulse, Activate or Pulse?	
History: How much do you like the services?	
History: Would you like to be apart of our mailing list?	

Here, you can review the contact to be added or updated, and choose from a variety of options:

- o Add New Contact: add this contact to your online database.
- o Add this contact and all others: automatically adds all contacts to your online database.
- o Ignore Contacts: ignores this contact and does not add them.
- o Ignore this contact and all others: automatically ignores all contacts and does not add them.

Check the "Retain Contact(s) as Not Applied" if you want to keep the survey respondents showing as "Not Applied" on your Import Survey screen, so you can (re-)add or update them later. When you have made your selection of one of the four buttons, you will see a confirmation screen:

Survey Import Results

The survey data was successfully retrieved and processed with the following results:

1 Record downloaded
1 New record added
0 records updated

OK

Final note: if you unchecked the "Prompt me before adding or updating contacts" checkbox before clicking Build/Update List, you will immediately be taken to this confirmation screen.

4. Select a survey using the option button next to the survey name and click Manage Surveys to be taken to the Survey Design screen for that survey.

Now your contacts will be updated with your survey responses.