

Quick Start Guide to:

Creating and Using List Updater Surveys

A List Updater survey is used to update the contact information in your List Manager database. This Quick Start Guide details how to create and implement a List Updater survey.

- 1. Go to www.Swiftpage.com.
- 2. Enter your account details at the top of the screen and click Submit.
- 3. Once you are on the Swiftpage Connect Portal, click Surveys.



- 4. Create a survey that asks for basic contact information and any other data that you would like to gather (**note:** List Updater surveys must include an email address field). Swiftpage provides two surveys (SpListBuilder and SpListBuilderLong) that you might consider using as a foundation and then catering to meet your needs.
- 5. Click Survey Result Options.

Swif Hon	itpage Surveys ne	Survey Management	Sur	Survey Result Options	Survey Responses	Edit Responses	

6. Check the Database Update checkbox. Click the List Updater radio button, select SpeHosted from the drop down menu, and then click Submit.



7. Map each survey question to the desired database field by selecting the field from the drop down. Click Submit.

Survey Result Options							
Current Survey: UpdateContactDetails							
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						
First Name 🔻	First Name						
Last Name 👻	Last Name						
Email Address 🔹	Email Address						
Company -	Company Name						
Phone -	Phone Number						
Submit Reset Cancel Finalize the Survey Result Options							

- 8. Create a template which contains a link to your survey and then send the email to your contacts.
- 9. Once you have some results, return to the Swiftpage Connect Portal and click List Manager.

Swiftpag	ge 🖅 🚽	
Connect		
Template Editor	Send Email	emai templatas - postrards
Reports	List Manager	landing pages - microsites logos - and more
Call List	Surveys	Account Name rs_121211_spe UserID
Drip Marketing	Social Sharing	rs_121211_spe Service Level Team
Leads .		Drip Marketing Service Level Free Send Limit 100
Resource	e center	Account Management
► Live Demos	Feature Tours	Edit User Profile
Consultants	Swiftpage Support	Manage Account
Deliverability	Education Center	Upgrade Account
		Support Information
		Monday-Friday, 5:00am - 8:00pm EST Phone: 1 (677) 228-8377 For international customers +1-303-978-1000 Email: support@swiftpage.com

10. Click List.

Swiftpage List Manager Home Contacts Green List Send Email Blast Update Drip Marketing Lead Builder

11. Click Import Survey.

Swiftpage Li	Send Email Blast Update Drip Marketing Lead Builder	
	Import Survey Export List Field Maps List Options	
Use My List	O Use Sample List ?]
	From a CSV file: File may not be larger than 1.5MB	
	From a Contacts file on the Data Bridge: Remove file from Data Bridge	
	Submit Cancel	

12. Select the survey and click Build/Update List.

Import List Import Survey	Export List Field M	aps List Opti	ons Irvey		
Pro					
	Surveys	Survey Type	Total Responses	Not Applied	
\odot	SpListBuilder	List Builder	1	0	
\odot	SpListBuilderLong	List Builder	0	0	
۲	UpdateContactDetails	List Updater	4	1	

13. Review the survey data. Click Update All Fields to overwrite all of the preexisting data or select which fields to update and then click Update Selected Fields Only. Click Ignore Contact to skip the contact and not overwrite any of the data. Choose Ignore this contact and all others to skip the current contact and any remaining contacts.

Import List Import Survey	E	xport List Field	Maps List Options							
Update Contact										
Select Fields to update for:Ryan Sullivan										
Retain Contact(s) as Not Applied										
Update All Fields	Update All Fields Update Selected I			ontact Ignore this cont		tact and all others				
		Field Name	New Value	Existing Value						
	V	First Name	New	Ryan						
		Last Name	Sample	Sullivan						
	1	Email Address	Sample@swiftpage.com	Sample@swiftpage.com						
		Company Name	Swiftpage	Swiftpage						
	V Phone Number		3039781000	3039781000						
						-				

14. Review the results. Click OK to return to the initial Import Survey page.

Import List	Import Survey	Export List	Field Maps	List Options	
			Survey 3	Import R	esults
	The survey	data was suc	cessfully ret	rieved and pro	cessed with the following results:
			1 Re	cord downloade	d
			0 Ne	w records addeo	1
			1 rec	cord updated	
				OK	