



Quick Start Guide To:

Creating and Using List Builder and List Updater Surveys in Swiftpage for SalesLogix

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

1. From SalesLogix, click on the S, then on the “Get Surveys and/or Responses” button, and then click on the Survey Editor button.

The screenshot shows the Swiftpage Services for SalesLogix interface. On the left, a sidebar contains several buttons: 'Online Reports', 'Get All Scores', 'Swiftpage Call List', 'Get Surveys and/or Responses' (highlighted with an orange arrow), 'View Survey Responses', and 'Manage Tags'. The main window displays the 'Swiftpage Survey Responses' dialog box. This dialog has a title bar and a close button. It features a table titled 'Select a Survey' with the following data:

Surveys	Type	Responses	Not Applied
Sample	General	0	0
SampleContactUpdate	List Updater	5	0
SampleContactUpdateLong	List Builder	1	1
SpListBuilder	List Builder	5	
SpListBuilderLong	List Builder	4	

Below the table, there are checkboxes for 'Show Type: List Builder', 'List Updater', and 'General', all of which are checked. There is also a checkbox for 'Prompt me before Creating or Updating Leads/Contacts' which is unchecked. A dropdown menu for 'Owner for New Leads/Contacts' is set to 'Everyone'. At the bottom of the dialog, there are buttons for 'Create Leads', 'Create Contacts', 'Update Contacts/Leads', and 'Cancel'. On the right side of the dialog, there are buttons for 'Survey Preview', 'Survey Editor' (highlighted with an orange arrow), 'Import Responses', and 'Export Responses'. Text labels next to these buttons indicate their functions: 'Preview your surveys online', 'View and/or modify surveys', 'Store survey and responses', and 'Download results to CSV file'.

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).
3. When you are finished with your survey, click on the Survey Result Options button. There, select the checkbox next to SalesLogix Database Update, then click on either the List Builder or List Updater radio button and click Submit.
4. The next screen to open will ask you to map fields from your List Builder survey questions with fields in your SalesLogix database. Match up questions with the fields as appropriate (you can also simply have the answers written to the tab in SalesLogix if you

do not have an appropriate SalesLogix field for each question). When you are finished mapping the fields, click Submit.

In addition to SalesLogix Lead/Contacts fields, questions can be mapped to the following special processing values:

**** None **** The question will not be imported to SalesLogix.

**** Notes **** The question and answer will be placed in the Lead notes field in SalesLogix.

Database Fields	Survey Questions
FIRSTNAME	First Name
LASTNAME	Last Name
EMAIL	Email Address
**** Notes ****	Company Name
**** Notes ****	Phone Number

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 SalesLogix 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 SalesLogix contacts.
5. After you have launched the List Builder or List Updater survey, click on the S button in SalesLogix, and then click on "Get Surveys and/or 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 (under Responses), as well as the number of records yet to be applied to the SalesLogix database (under Not Applied). So for example, a few days after you connect your web site to your List Builder survey, you might have four Responses to your survey and three Not Applied:

Swiftpage Survey Responses

Select a Survey

Surveys	Type	Responses	Not Applied
Sample	General	0	0
SampleContactUpdate	List Builder	0	0
SampleContactUpdateLong	List Builder	0	0
SpListBuilder	List Builder	4	3
SpListBuilderLong	List Builder	0	0

Survey Preview
Preview your surveys online

Survey Editor
View and/or modify surveys

Import Responses
Store survey and responses

Export Responses
Download results to CSV file

Show Type: List Builder List Updater General

Prompt me before Creating or Updating Leads/Contacts

Owner for New Leads/Contacts: Everyone

Create Leads Create Contacts Update Contacts/Leads Cancel

7. Highlight the survey and click on the Create Contacts button.
8. You will receive a verification screen and that's it! The List Builder survey has successfully added contacts to your SalesLogix database (or the List Updater has updated your SalesLogix contacts). Simply repeat the process of adding new Not Applied contacts as more people fill out your surveys and your SalesLogix database will continue to be updated.