

Swiftpage

Quick Start Guide to:

Assigning a Call List

This Quick Start Guide provides the steps to assigning a call list to a Swiftpage User ID (**note:** this feature is available with the Team service level).

1. Go to www.swiftpageconnect.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 Call List.



The screenshot shows the Swiftpage Connect portal interface. At the top left is the Swiftpage logo. Below it is the 'Connect' header. The main menu consists of several buttons: Template Editor, Reports, Call List (highlighted with an orange arrow), Drip Marketing, Leads, Send Email, List Manager, Surveys, and Social Sharing. Below the menu is a 'Resource center' section with buttons for Live Demos, Feature Tours, Consultants, Swiftpage Support, Deliverability, and Education Center. On the right side, there is a 'My Swiftpage' section with account details: Account Name (rs_121211_spe), UserID (rs_121211_spe), Service Level (Team), Drip Marketing Service Level (Free), and Send Limit (100). Below this is an 'Account Management' section with buttons for Edit User Profile, Manage Account, and Upgrade Account. At the bottom right is a 'Support Information' section with contact details: Monday-Friday, 5:00am - 8:00pm EST; Phone: 1 (877) 228-9377; For international customers +1-303-978-1000; Email: support@swiftpage.com.

4. Select a call list.

Swiftpage Call List Dashboard

Home Create Call List ?

Each Call List is a ranked list of who your most interested contacts are based on their interaction with your email campaigns.

Call Lists	Assigned By					Total	Updated	
All sends in last 14 days	0	0	0	n/a	0	0		Update
Sample Call List	1	1	2	n/a	4	02/03/12 04:01 PM		Update Delete Edit Assignments
SampleSwiftpageCallList	1	2	3	n/a	6	06/22/07 01:12 PM		Update Delete Edit Assignments

Note - Click [Update] to sync your Call List with the most recent data

5. Click List Management.

Swiftpage Call List

This is a ranked list of your most interested contacts based on their interaction with included campaigns.
 Call List: **Sample Call List** Sender: **rs_011612_spe_2** Rows: **4 of 4**

#	Action	Strength	First Name	Last Name	Phone	Company	Email Address	Score	Sent	Opens	Clicks		
1	Edit		Ryan	Sullivan	3039781000	Swiftpage	rsullivan@swiftpage.com	20	2	2	0	Select	Details
2	Edit		Ryan	GMail			rsullivansp@gmail.com	20	2	2	0	Select	Details
3	Edit		Ryan	Hotmail			rsullivansp@hotmail.com	20	2	2	0	Select	Details
4	Edit		Ryan	Yahoo			rsullivansp@yahoo.com	20	2	2	0	Select	Details

View modes: Hide 'Actioned' Hide 'Assigned' Show Assign column

Rows per page: 15 Page: 1 of 1 Goto page: Go

[Dashboard](#) [List Management](#) [View current assignments](#)

6. Filter the call list by choosing from the drop down menu options and entering a score range in the provided fields. Click Apply new filters.

Swiftpage Call List

List Management

Call List: **Sample Call List** Total rows: 4 Current filtered view: 4

Current Filters

Action: All Strength: All Scores: -1 to 9999 Rows: 1 to 9999

[Apply new filters](#)

Assignments: 0

Assignments

Email options: rs_011612_spe_2

hint Selecting multiple Users will cause the resulting Call List to be evenly distributed.
 Note You must upgrade your account to Assign Users.

[Assign current filters](#)

Email options

[Email List as attachment](#) To: rsullivan@swiftpage.com

[Send follow-up email to List](#) Sends email to all contacts in current filtered view.

[Dashboard](#) [Return to Call List](#)

7. Click List Management.

8. Select the User ID you would like to assign the list to. Click Assign current filters.

Swiftpage Call List

List Management

Call List: **Sample Call List** Total rows: 4 Current filtered view: 2

Current Filters

Action: All Strength: Hot & Warm Scores: -1 to 9999 Rows: 1 to 9999

Apply new filters

Assignments: 0

Email options: rs_011612_spe_2

hint Selecting multiple Users will cause the resulting Call List to be evenly distributed.
note Only Active and Unassigned Users are shown.

Assign current filters

Email options

Email List as attachment To: rsullivan@swiftpage.com

Send follow-up email to List Sends email to all contacts in current filtered view.

Dashboard Return to Call List

9. The Assignments section now displays the filters assigned to each User ID.

Swiftpage Call List

List Management

Call List: **Sample Call List** Total rows: 4 Current filtered view: 2

Current Filters

Action: All Strength: Hot & Warm Scores: -1 to 9999 Rows: 1 to 9999

Apply new filters

Assignments: 1 Page: 1

Assignee	Recipients	Action	Strength	Score Range	Rows
<input type="checkbox"/> rs_011612_spe_2	2	All	Warm	-1 - 9999	1 - 9999

Delete selected Delete All

Email options

hint Selecting multiple Users will cause the resulting Call List to be evenly distributed.
note Only Active and Unassigned Users are shown.

Assign current filters

Email options

Email List as attachment To: rsullivan@swiftpage.com

Send follow-up email to List Sends email to all contacts in current filtered view.

Dashboard Return to Call List