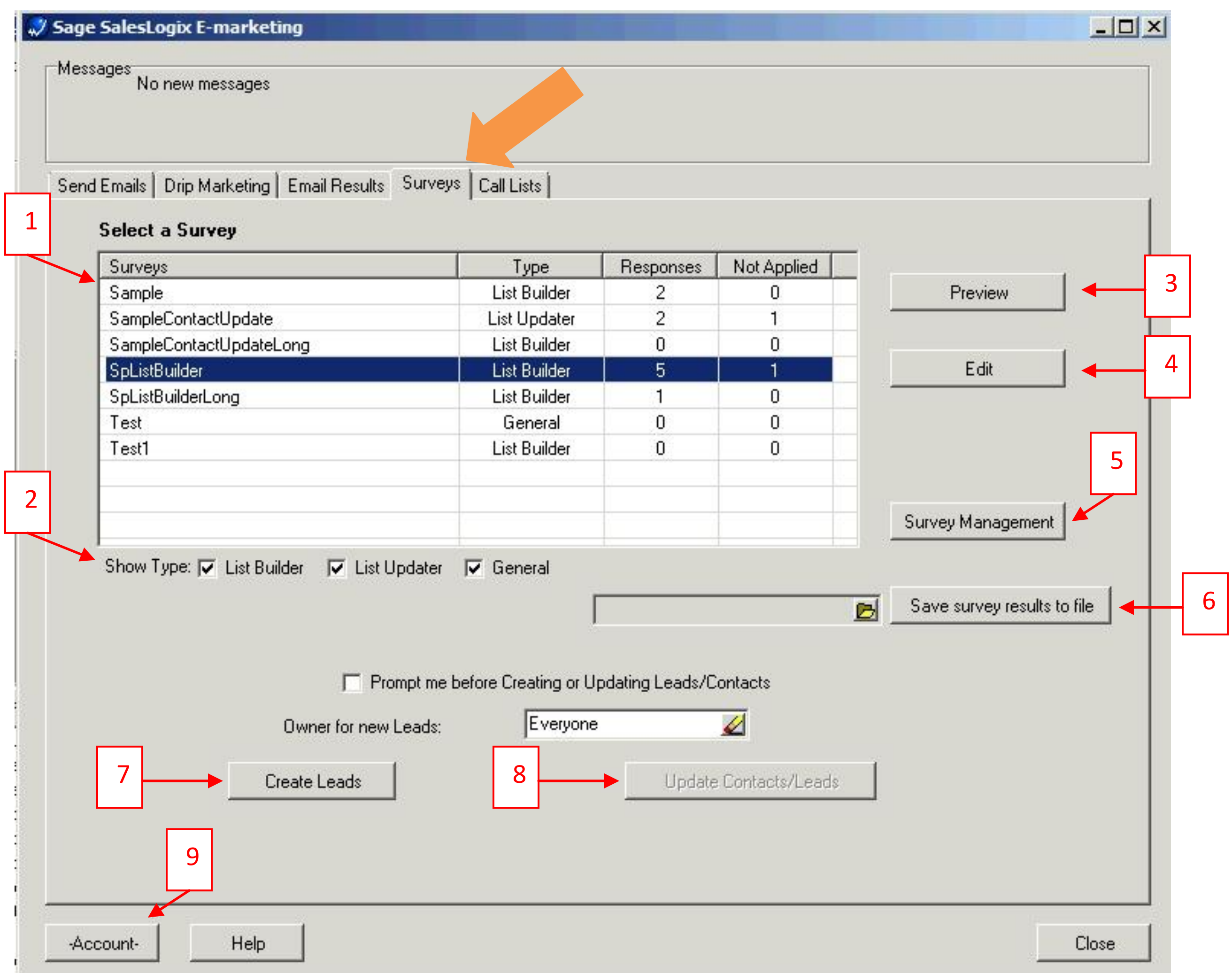
Sage SalesLogix E-marketing Quick Start Guide To:

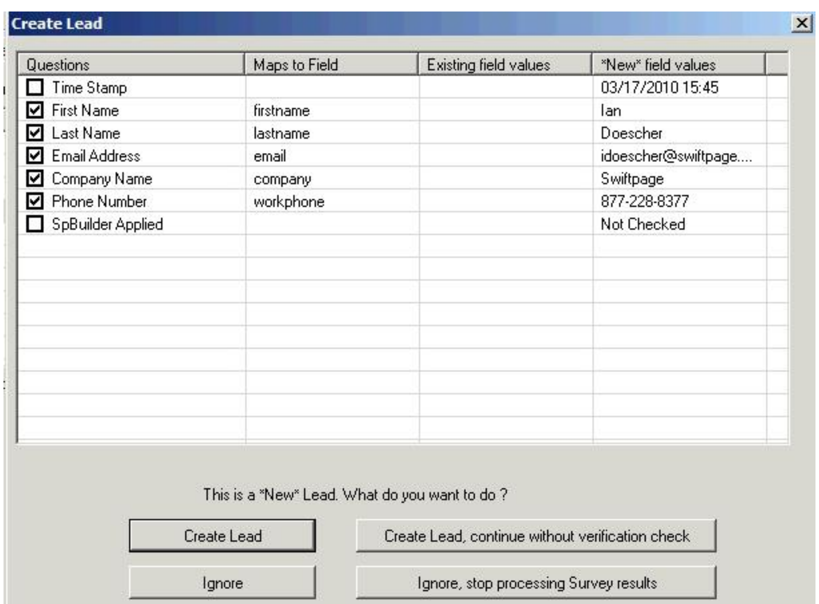
Viewing and Updating Survey Responses in Sage SalesLogix Client

This page explains the features of the Sage SalesLogix E-Marketing Surveys tab.

From SalesLogix, click on the E-marketing button at the top and then select the Survey Responses tab at the top:



1. All of your surveys will appear at the top of the screen, along with their type, the number of total responses the survey has received, and finally the number of responses that have not yet been applied to your Sage SalesLogix database.
2. Filter the survey view by selecting checkboxes to display particular types of surveys. **Note about List Builder and List Updater surveys:** a List Builder survey is a survey that can be used to gather new targets that will be added to your Sage SalesLogix database. A List Updater survey is a survey that can be used to update target information that already exists in your Sage SalesLogix database.
3. The Preview button opens a web page displaying the highlighted survey as it will appear to your customers.
4. The Edit button opens a web page showing the Survey Editor for the highlighted survey, so you can make changes to the survey.
5. The Survey Management button opens a web page with the general Survey Management screen, where you can create new surveys or manage and edit existing surveys.
6. Save survey results to file: this button will export your survey responses in Excel format (CSV). To export responses, follow these steps: first, click on the file folder icon, enter a file name and choose a location for the file, and click Save. The file location and file name will then appear in the window next to the file folder icon. Finally, click Export Responses. A confirmation message will show you that the CSV file has been created.
7. If you have highlighted a List Builder survey with some “not applied” surveys (i.e. survey responses still waiting to be written to the Sage SalesLogix database), click Create Leads to turn those List Builder survey responses into either Sage SalesLogix Leads. **Note:** you can define the owner for the new leads by using the “Owner for new leads” window. Also, select the “Prompt me before Creating or Updating Leads/Contacts” checkbox to review the Leads before they are created. If you choose not to select this box, the Leads will be automatically created. If you do select it, the following screen appears:



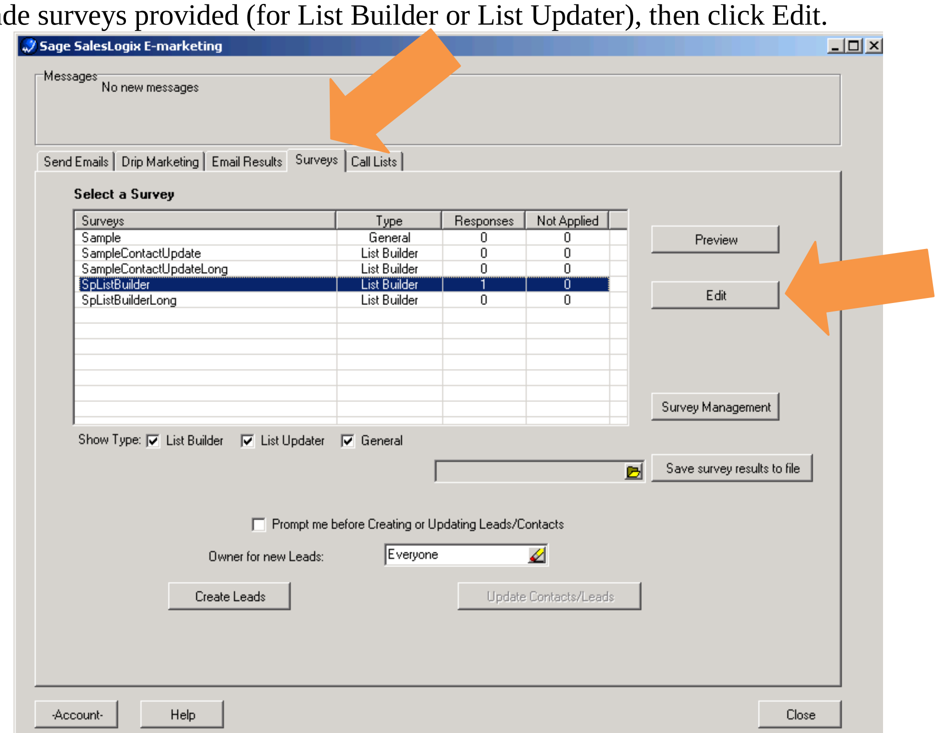
At this point, you can create or ignore the new leads/contacts as you wish.

8. If you have highlighted a List Updater survey with some “not applied” surveys (i.e. survey responses still waiting to be written to the Sage SalesLogix database), click Update Contacts/Leads to update your Sage SalesLogix targets using the List Updater survey responses. **Note:** select the “Prompt me before Creating or Updating Leads/Contacts” checkbox to review the Leads or Contacts before they are updated. If you choose not to select this box, the Leads or Contacts will be automatically updated. If you do select it, you will be taken to a confirmation screen (similar to the one shown above) showing the targets to be updated and giving you the option to update or ignore them as desired.
9. The Account button allows you to adjust certain options on your Sage SalesLogix E-Marketing account.

List Builder and List Updater Surveys in Sage SalesLogix

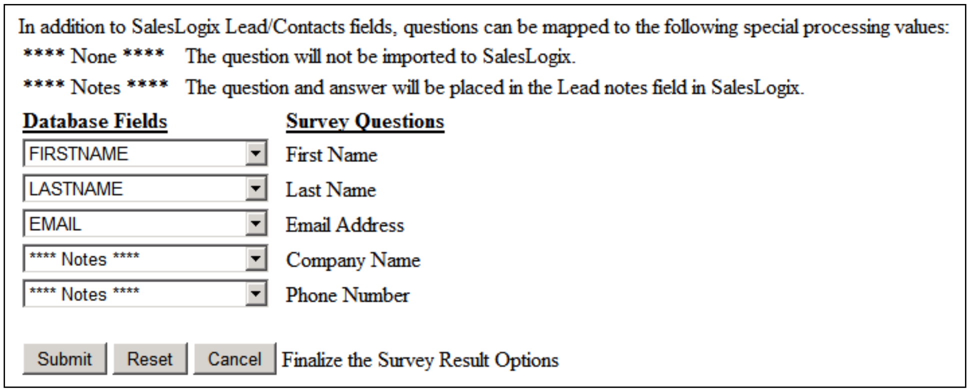
A List Builder survey is used to gather new contacts that will be added to your Sage SalesLogix database. A List Updater survey is used to update information that already exists in your Sage SalesLogix database. Follow these steps to create these surveys:

1. From Sage SalesLogix, click the E-marketing tab, then click the Surveys tab. Select one of the pre-made surveys provided (for List Builder or List Updater), then click Edit.



2. Create a survey, asking for basic contact information (List Builder) or whatever 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 use and edit one of the existing List Builder or List Updater surveys already provided (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 Sage SalesLogix database. Match up questions with the fields as appropriate (you can also simply have the answers written to the Notes tab in Sage SalesLogix if you do not have an appropriate Sage 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:

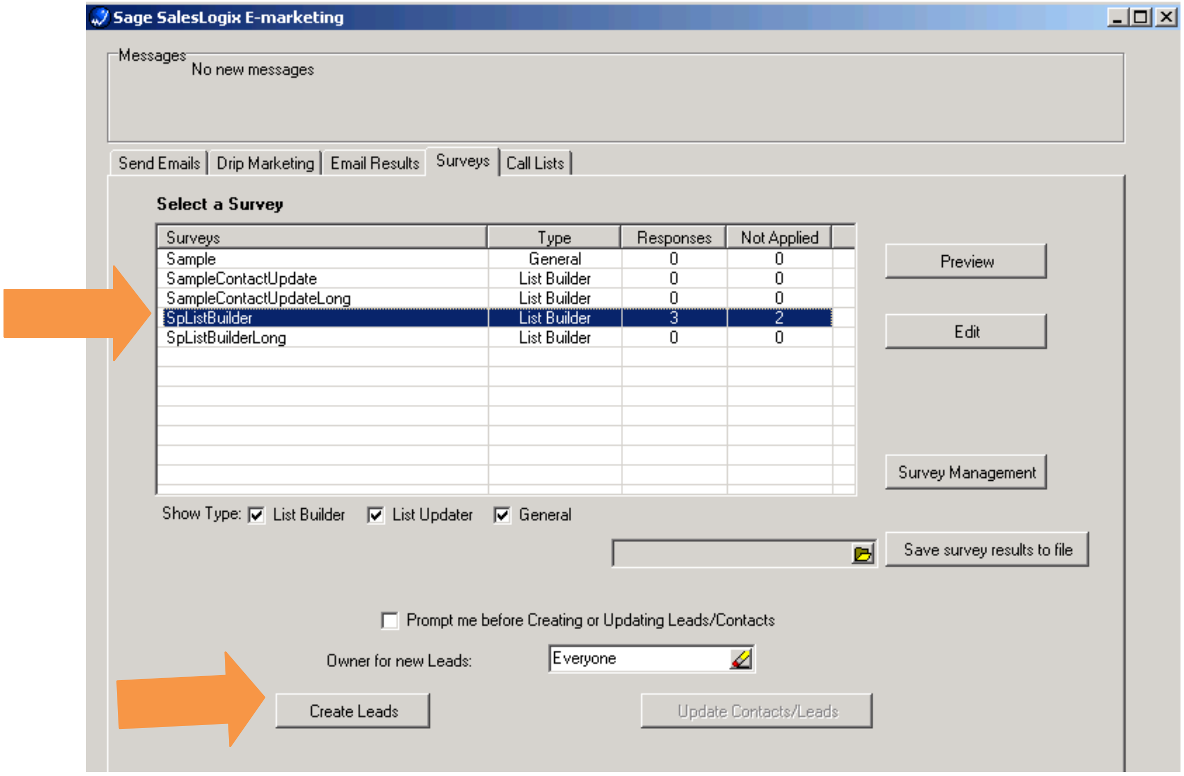
**** None **** The question will not be imported to SalesLogix.

**** 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 Sage SalesLogix E-marketing email to your contacts from Sage 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 Sage SalesLogix E-marketing, there are no required fields. However, if you link to the List Updater survey from 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 Sage SalesLogix contacts.
5. After you have launched the List Builder or List Updater survey, click on the E-marketing button, then click the Surveys tab.
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 Sage 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 three Responses to your survey, and two Not Applied:



7. Highlight the survey and click on the Create Leads button. (See step 7 in the previous section.)
8. The List Builder survey has successfully added contacts to your Sage SalesLogix database (or the List Updater has updated your Sage SalesLogix contacts). Simply repeat the process of adding new Not Applied contacts as more people fill out your surveys, and your Sage SalesLogix database will continue to be updated.