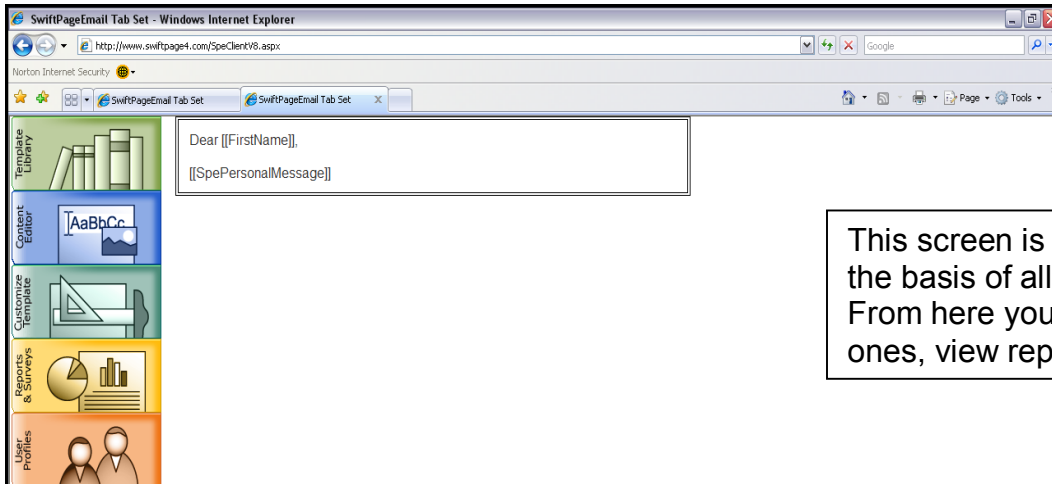


Swiftpage Online Editor

Through the Swiftpage Online Editor you are able to create, edit and share templates, view reports, create and edit surveys and much more.

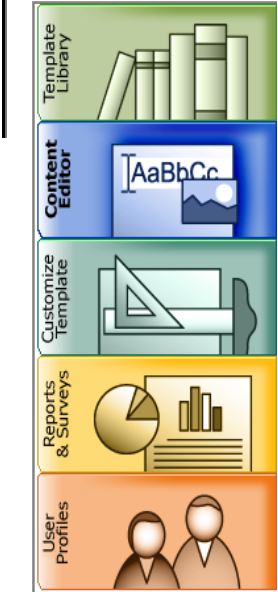
Step 1- Log In

Log in to the online editor via icon in whichever application desired. If you are in ACT, use the orange E icon. If you are in another program like SalesLogix or Outlook, an orange S icon will appear instead. After a similar screen as that seen below appears, click on the *Edit* button and the inset screen will appear.



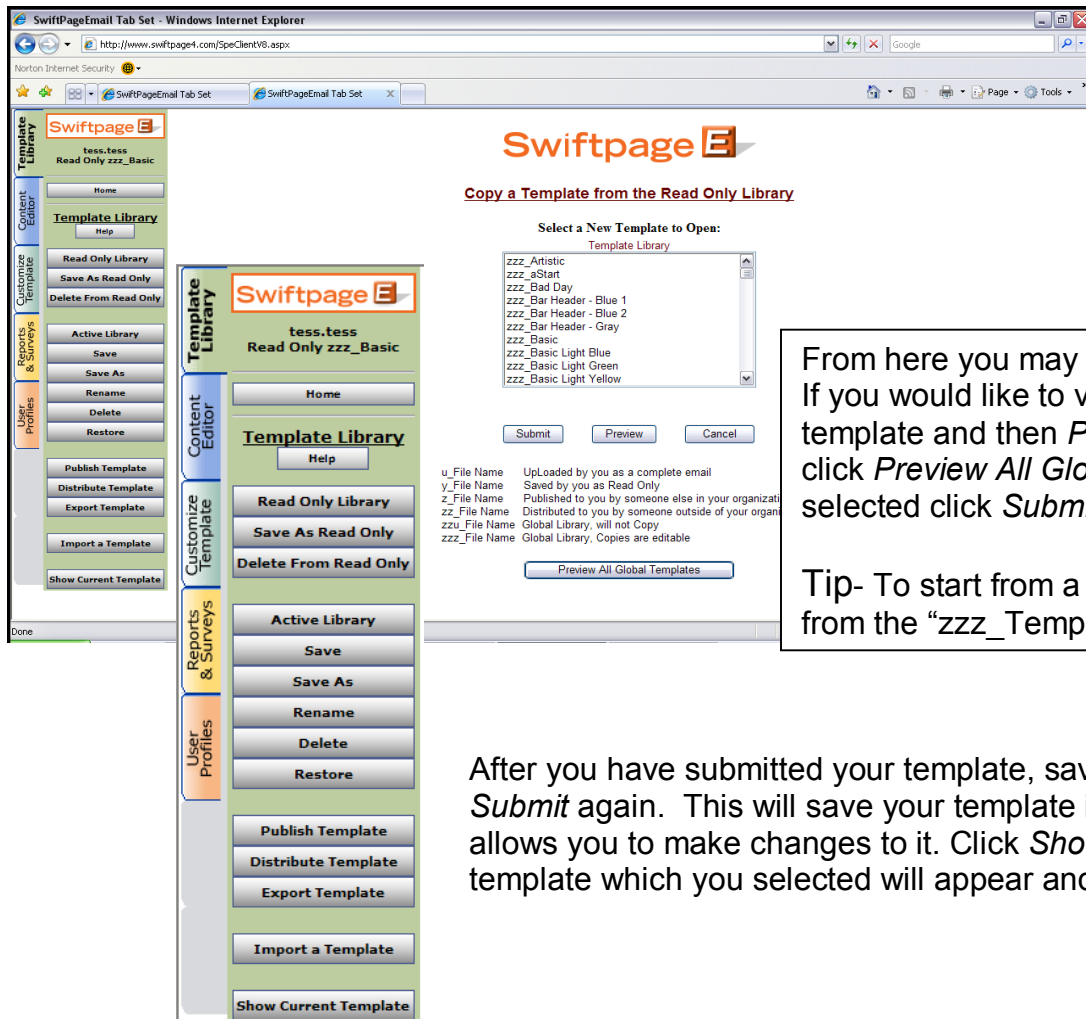
This screen is called the *Online Editor*. It is the basis of all operations regarding emails. From here you create emails, edit existing ones, view reports and surveys.

Summary of Tab Set
Template Library- presents all of Swiftpage's templates and allows you to share already made ones, or import additional ones.
Content Editor- allows you to edit and add text, add images or PDFs and links.
Customize Template- allows further customization of your template with colors, windows and more.
Reports & Surveys- allows you to view the open, click-through data as well as create and edit surveys.
User Profiles- presents you with the basic information about your account.



Step 2- Select Template

The first step in creating an email template is selecting an existing one from the green *Template Library* tab. The screen below will appear, click *Read Only Library* under the **Template Library** heading.



From here you may select a new template to open. If you would like to view a single template, click the template and then *Preview*. To view all templates, click *Preview All Global Templates*. After you have selected click *Submit*.

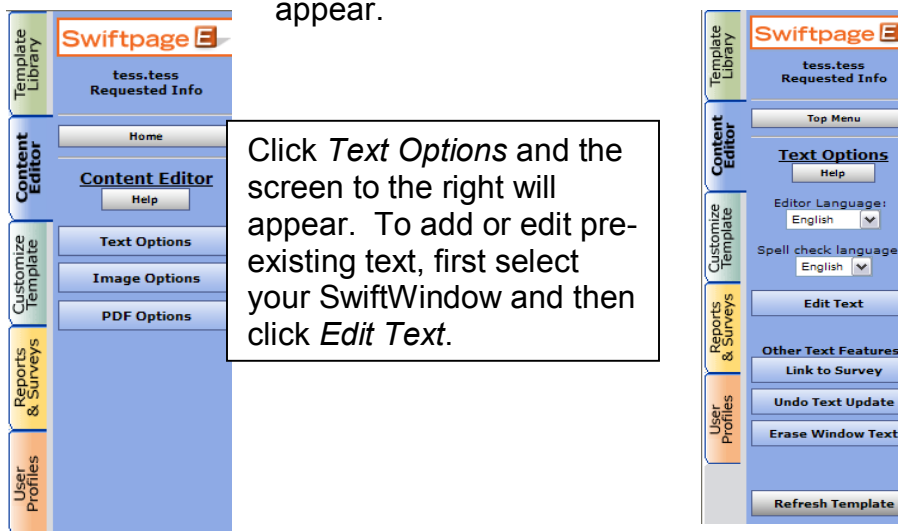
Tip- To start from a blank template, choose one from the “zzz_Template Blank” group.

After you have submitted your template, save click *Save As* and then *Submit* again. This will save your template into the *Active Library* which allows you to make changes to it. Click *Show Current Template* and the template which you selected will appear and is ready for composition.

Tip: SwiftWindows are the boxes that, when the cursor is moved over, turn to a green border. When you are ready to edit a SwiftWindow, click on it and the green border will change to blue. You have unlimited SwiftWindows per template and thus unlimited text. However, only one image and one PDF can be held in each SwiftWindow.

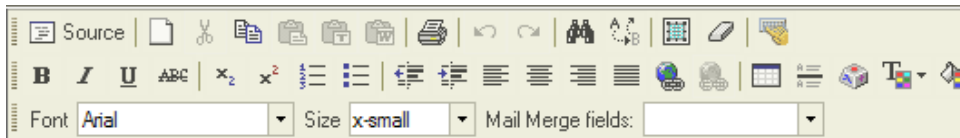
Step 3- Add/Edit Text

To add text to the email, click the blue *Content Editor* tab, and the tab on the far left will appear.

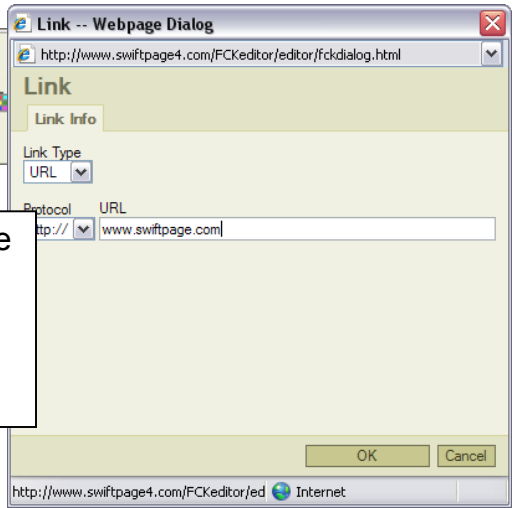


Click *Text Options* and the screen to the right will appear. To add or edit pre-existing text, first select your SwiftWindow and then click *Edit Text*.

After selecting to *Edit Text*, the toolbar below will appear within a greater screen. The function of each button is similar to that of any Word program.



To **add a link**, highlight words, click on the Link button which is the globe and the chain link, and the inset screen will appear. Type a URL into the box entitled *URL* and then click *OK*.

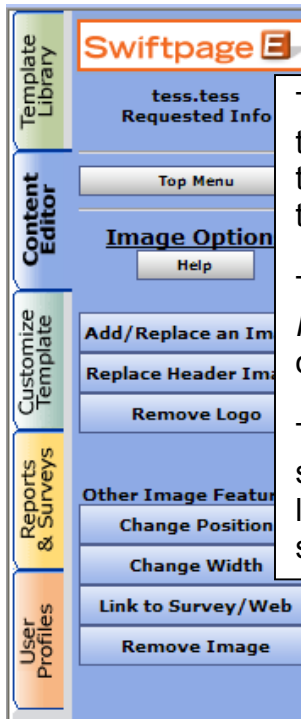


Another important text feature is the **Mail Merge** fields menu on the text toolbar. This feature is used to further personalize your emails. After you insert a specific tag within your email, upon sending out your email, the tag will grab that specific field from your database and insert it appropriately. This is a useful tool when sending out campaigns so that recipients feel more like individuals and less like just another number.

You may also insert the `SpePersonalMessage` mail merge tag anywhere within your email template. When you go to send this email template out, Swiftpage will recognize this mail merge tag and enable you to insert text on-the-fly from whichever program you are using with Swiftpage.

Step 4- To Add an Image

If you would like to add an image, return to top menu by clicking on the *Top Menu* button and select *Image Options*. The screen below will appear.



To **add an image**, select the window in which you would like it to appear and click *Add/Replace an Image* and then *Browse* through your library, find a picture, designate its position and then click *Submit*.

To **add or replace a header image**, click *Replace Header Image*, choose an image from either the *Header Image Library*, or *Upload a Header* from your own library and click *Submit*.

To **link your image** to a URL, click *Link to Survey/Web* and select if you would like to link it to a survey, URL or remove a link. If opting to add a link, type in the address and click submit.

Step 5- Customize Template

Under the green *Customize Template* tab, you have the ability to change the column width, size, color, and general appearance.

Select the *Customize Template* tab and the screen to the right will appear.

To select **column width** select the *Set Column Width* tab and enter the desired pixel size for the left column. The right column will adjust itself accordingly. Hit the *Submit* button.

Hint- to make your template appear as a single column, type 580 in for the width.

To adjust the **background colors** select the *Background Colors* tab. Select the color by simply clicking on the color, the region that you wish to color under the *Select background area to color* drop-down and then click *Submit*.

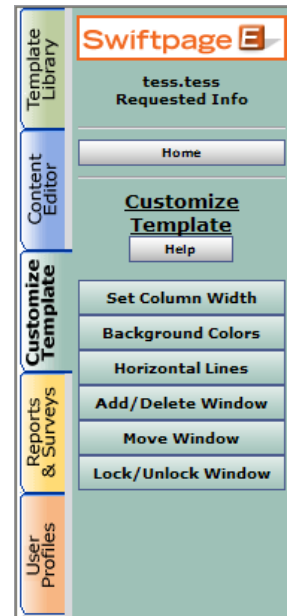
To add **horizontal lines**, select the *Horizontal Lines* tab. Click on the SwiftWindow that you would like your line to appear adjacent to. Click on *Add Line Above*, and the line will appear. To remove the line, select the window that has the line in it and click *Remove Line Above*.

To **add, delete or duplicate SwiftWindows**, return to the blue *Content Editor* tab.

-To **Add**: Click *Add/Delete Window* and then choose where you would like to add the window. Click on the SwiftWindow above and then click the *Add Window Below* button.

-To **Delete**: Click *Add/Delete Window* and then select the window that you wish to discard. Click the SwiftWindow above and then click *Delete Window Below* button.

-To **Duplicate**: Click *Add/Delete Window* and then select the window that you wish to duplicate. Click the *Duplicate Window* button.



Step 6- Save Template

After completing your template, it is necessary to save it before closing the window. To do this, return to the green *Template Library* tab and click *Save*. Congratulations, you are now ready to send your email template.