



## Sage SalesLogix E-marketing Quick Start Guide To:

### Call Lists

This Quick Start Guide takes you through generating a Call List in Sage SalesLogix Client:

1. Click on the E-Marketing button at the top of SalesLogix. Click on the Call Lists tab at the top:

The screenshot shows the Sage SalesLogix E-marketing software interface. At the top, there is a navigation bar with tabs for "Send Emails", "Drip Marketing", "Email Results", "Surveys", and "Call Lists". The "Call Lists" tab is selected and highlighted with an orange arrow. Below the navigation bar, there is a "Filter for email history records" section with radio buttons for "Contacts" (selected) and "Leads". There are also dropdown menus for "Campaigns" and "Email Tag". Below this is a "Filters" section with checkboxes for "Emails sent by" (set to "Webb, Amy"), "Assigned To" (set to "Webb, Amy"), "Score update within last 14 days", and "Status" (set to "Bounced"). A "Generate Call List" button is located below the filters. At the bottom, there is a table with columns: Name, Account, Phone, Score, Status, Clicks, Opens, Assigned To, and Email Tag. The table is currently empty, and the "Records shown" count is 0. There are also buttons for "Create Call list group...", "Export...", "Account", "Help", and "Close" at the bottom of the window.

Name	Account	Phone	Score	Status	Clicks	Opens	Assigned To	Email Tag
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2. Within the Sage SalesLogix E-marketing Call list, you have the ability to filter the list. The filter options are listed below:

**Emails history Records** - filter based on the type of record (Contacts, Leads, Campaigns or Email Tag).

**Emails sent by** – filters based on which SalesLogix user sent the email.

**Assigned to** - will generate a call list based on which SalesLogix user a contact is assigned to.

**Score update within last \_\_ days** - this filter allows the user to create a call list based on the score of a contact that had been updated within the selected time frame.

**Status** - there are multiple options for filtering by status. These options are as follows: bounced, clicked, duplicate, failed, invalid opened, opted-out, suppressed and unopened. This allows a SalesLogix user to easily create a call list based on the data within SalesLogix.

**Score** – set will create a call list based on the scores of a contact within an email blast or Drip Marketing campaign.

3. Now, click on the Generate Call List button to create your Sage SalesLogix E-marketing Call List. Here, you will see a list of contacts being listed with the highest score at the top, based on the criteria you have set for filters:

Send Emails | Drip Marketing | Email Results | Surveys | Call Lists

Filter for email history records

Contacts All Contacts
  Campaigns
  Leads
  Email Tag

Filters

Emails sent by Webb, Amy
  Score update within last 60 days
  Score > 0

Assigned To Webb, Amy
  Status Bounced

Generate Call List

Contacts | Leads

Create Call list group... Export... Records shown: 11

Name	Account	Phone	Score	Status	Clicks	Opens	Assigned To	Email Tag
lapczynski, marlene	test	(222) 222-2222	100	Clicked	3	1		
lap, mar	test	(111) 111-1111	75	Clicked	2	1		
lapczynski, marlene	test	(222) 222-2222	61	Clicked	3	1		
lap, mar	test	(111) 111-1111	41	Clicked	2	1		
Anthony, Carmelo	NBA AllStar Co.		10	Opened	0	1		
lap, mar	test	(111) 111-1111	0	UnOpened	0	0		test
lap, mar	test	(111) 111-1111	0	UnOpened	0	0		
lapczynski, marlene	test	(222) 222-2222	0	UnOpened	0	0		test
lapczynski, marlene	test	(222) 222-2222	0	UnOpened	0	0		
Test, tester	test	(111) 111-1111	0	UnOpened	0	0		

-Account- Help Close

- The Call List page allows you to view your contacts information and interaction details with the email. Double click on the top contact to be taken to his/her information.

There is also an option for creating a Call List group based on the contacts that are in the generated call list. Also, the call list that is created can be exported to an Excel spreadsheet (.csv file).