



SWIFT DIGITAL FOR

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**SALESFORCE CRM**

## SWIFT DIGITAL COMMUNICATION PLATFORM

- ▶ Build on a SPAM-Free Environment
- ▶ With 99% deliverability rate
- ▶ Full Email marketing with Trigger functions
- ▶ Full online event management
- ▶ Surveys
- ▶ SMS
- ▶ Landing Pages

# SWIFT DIGITAL HUB OF MODULES



## SWIFT DIGITAL FOR SALESFORCE CRM

- ▶ Integrates core subscription and unsubscription data
- ▶ Sync both ways on Contacts and Leads data
- ▶ Log all activities with emails, events, sms and surveys
- ▶ Integrates with Campaign module of Salesforce

# SWIFT DIGITAL PROFILE 360 PROVIDES DATA SYNC TO CRM

Profile 360

Welcome Engagement Scoring Subscriber Profile Report Queue Conversion Tracking

Enter an email address to view a subscriber profile:

▼ ENGAGEMENT SCORE

30

Swift Score Members (Paul Hodgson)

▼ SUBSCRIPTION DETAILS

First Name Derek

Last Name Drake

Subscribed 21 Jun 2016 12:35 pm. Uploaded by unknown

Last Active 19 Mar 2017 09:50 pm from Composer document sent - Event Invitation

▼ PERSONAL DETAILS

Company GoBernard

▼ MAIL GROUPS

- Members
- Membership Renewal
- Monthly Newsletter
- Newsletter

▼ ACTIVITY BY MODULE

Date Range Jan 01, 2015 - Mar 31, 2017

EMAIL	EVENT	SURVEY	SMS	WEB ANALYTICS
Sent <span style="float: right;">10</span>	Invited <span style="float: right;">1</span>	Invited <span style="float: right;">2</span>	Sent <span style="float: right;">2</span>	Goal reached <span style="float: right;">0</span>
Opened <span style="float: right;">5</span>	Registered <span style="float: right;">1</span>	Submitted <span style="float: right;">1</span>	Replied <span style="float: right;">1</span>	Shared <span style="float: right;">3</span>
Clicked <span style="float: right;">8</span>	Attended <span style="float: right;">1</span>	Opened <span style="float: right;">0</span>	Stopped <span style="float: right;">0</span>	Website visited <span style="float: right;">3</span>
Forwarded <span style="float: right;">0</span>	Cancelled <span style="float: right;">0</span>			
	Waitlisted <span style="float: right;">0</span>			
	Declined <span style="float: right;">0</span>			
	Paid <span style="float: right;">0</span>			

▼ ACTIVITY

Show 10 entries Keyword Search:

Activity	Module	Date/Time
Composer document sent - Event Invitation	CO	Mar 19, 2017 09:50:40 PM
Composer document sent - Composer Invite	CO	Sep 10, 2016 04:17:08 PM
Composer document clicked - Account Information . Text: . URL: https://www.linkedin.com/shareArticle?mini=true&url=http://industry-super.e-newsletter.com.au/pub/pubType/EO/pubID/zzzz576b44c6489f5163/	CO	Jun 23, 2016 12:26:43 PM
Shared - LinkedIn: Account Information	WA	Jun 23, 2016 12:26:43 PM
Composer document clicked - Account Information . Text: . URL: https://twitter.com/intent/tweet?original_referer=https://suite.swiftdigital.com.au/process/token/576b485ab5fde4916159/interface.html&url=http://industry-super.e-newsletter.com.au/pub/pubType/EO/pubID/zzzz576b44c6489f5163/	CO	Jun 23, 2016 12:26:41 PM
Shared - Twitter: Account Information	WA	Jun 23, 2016 12:26:41 PM
Composer document clicked - Account Information . Text: . URL: https://www.facebook.com/sharer/sharer.php?redirect_uri=http://industry-super.e-newsletter.com.au/pub/pubType/EO/pubID/zzzz576b44c6489f5163/?facebook=completed&u=http://industry-super.e-newsletter.com.au/pub/pubType/EO/pubID/zzzz576b44c6489f5163/	CO	Jun 23, 2016 12:26:39 PM
Shared - Facebook: Account Information	WA	Jun 23, 2016 12:26:39 PM
Composer document opened - Account Information	CO	Jun 23, 2016 12:26:36 PM
Composer document sent - Account Information	CO	Jun 23, 2016 12:25:34 PM

Showing 1 to 10 of 38 entries Previous 1 2 3 4 Next

# CHOOSE FIELDS AND MAILGROUP TO SHARE WITH SALESFORCE CRM

The Suite's REST API is used by the Salesforce and MS Dynamics plugins. The end point is <https://suite.swiftdigital.com.au/server/includes/restapi/v1/index.php>. Detailed documentation can be found at <https://suite.swiftdigital.com.au/server/includes/restapi/v1/documentation/dist/index.html>.

## AUTHENTICATION

Your API keys are tied to your Suite account and act as identifiers to the Suite of the external system which are making the connections.

Delete Add Application

Application	Call source	User	Created on	Created by	Calls	Enabled
<input type="checkbox"/> Salesforce	SF	Salesforce Integration	09 Sep 2016, 01:04pm	Paul Hodgson	4319	<input checked="" type="checkbox"/>

## SUITE FIELDS

Decide which Suite fields to expose to the API. By default, new custom fields that you create will not be exposed.

Search

Field	Replacement code	Type	Category
<input type="checkbox"/> Member	MEMBER	Single Choice	Custom
<input checked="" type="checkbox"/> First Name	first_name	Text	Standard
<input checked="" type="checkbox"/> Last Name	last_name	Text	Standard
<input checked="" type="checkbox"/> Email	email	Text	Standard
<input checked="" type="checkbox"/> Mobile	mobile	Text	Standard
<input checked="" type="checkbox"/> Country	country	Text	Standard
<input checked="" type="checkbox"/> Title	title	Text	Standard
<input checked="" type="checkbox"/> Company	COMPANY	Text	Custom
<input checked="" type="checkbox"/> Membership renewal	MEMBERSHIP_RENEWAL	Date	Custom
<input checked="" type="checkbox"/> Birthday	BIRTHDAY	Date	Custom

## MAIL GROUPS

Decide which people to expose to the API by selecting the Mail Groups they belong to. By default, new mail groups that you create in the Suite will not be exposed.

Search

Mail Group	Folder	Test	Members
<input type="checkbox"/> Prospective Members	Default		
<input type="checkbox"/> Eky - Test	Default		2
<input checked="" type="checkbox"/> Members	Default		5
<input checked="" type="checkbox"/> Monthly Newsletter	Default		25
<input checked="" type="checkbox"/> Membership Renewal	Default		6
<input checked="" type="checkbox"/> Tradeshow	Default		3
<input checked="" type="checkbox"/> Weekly Tips	Default		3
<input checked="" type="checkbox"/> Newsletter	Default		5
<input checked="" type="checkbox"/> Christmas Campaign	Default		5
<input checked="" type="checkbox"/> Marketing Automation Launch Party	Default		83
<input checked="" type="checkbox"/> Launch Event	Default		6
<input checked="" type="checkbox"/> SF-SD-JSON-Integration	Default		5

## PROFILE 360

Decide which shared Profile 360 Score to expose to the API.

Score

# CREATE NEW MAILGROUPS FROM SALESFORCE

Mail Groups  
Home

Help for this Page ?

View: All Mail Groups  Edit | Create New View

**Recent Mail Groups**

Mail Group	Folder
<a href="#">Monthly Newsletter</a>	Default
<a href="#">1 SF Campaign 06 May</a>	Default
<a href="#">Members</a>	Default

# ACTIVITIES LISTED AT PER LEAD AND PER CONTACT VIEW

## LEADS AND CONTACT VIEWS

### ▼ Email Activities

Date (Sent Date)	Email Name	Sent	Opened	Clicked	Forwarded
10-09-2016	Composer Invite	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
19-03-2017	Event Invitation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23-06-2016	Upgrade Offer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### ▼ Event Activities

Date (Invited Date)	Event Name	Invited	Registered	Paid	Attended	Cancelled	Waitlisted	Declined
22-06-2016	Let's Do Lunch 22 Jan 2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Let's Lunch Reminder	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### ▼ Survey Activities

Date (Invited Date)	Survey Name	Invited	Opened	Submitted
22-06-2016	Let Us Know	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

### ▼ SMS Activities

Date (Sent Date)	SMS Name	Sent	Replied	Stopped
23-06-2016	Renewal Notifications	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

### ▼ Web Analytics

Activity Date (Latest)	Activity	Artefact Name	Activity Count
23-06-2016	Upgrade Offer	Upgrade Offer	3
23-06-2016	Upgrade Offer	Upgrade Offer	3



## SUBSCRIPTION & ACTIVITIES SUMMARY UPDATES

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### ▼ Subscription Details

Subscribed To Email	<input checked="" type="checkbox"/> <a href="#">Unsubscribe</a>	Unsubscribed From Email Time
Subscribed To SMS	<input checked="" type="checkbox"/> <a href="#">Unsubscribe</a>	Unsubscribed From SMS Time
Bounced	<input type="checkbox"/>	Bounced Time
Subscription Details	21 Jun 2016 12:35 pm. Uploaded by unknown	Last Activity 19 Mar 2017 09:50 pm from Composer document sent - Event Invitation


### ▼ Profile 360

Swift Score 30


### ▼ Swift Activities

Activity Type	Activity Count
Email Clicked	8
Email Opened	5
Email Sent	10
Event Attended	1
Event Invitation Sent	1
Event Registered	1
Survey Invitation Sent	2

## VIEW MAILGROUP RELATIONSHIPS

 **Campaign History** Add to Campaign Campaign History Help ?

Action	Campaign Name	Start Date	Type	Status	Responded	Member Status Updated
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">View</a>	<a href="#">Do lunch</a>		Other	Sent	<input type="checkbox"/>	5/06/2017 1:56 PM

 **Members** Add to Mail Group Members Help ?

Action	Swift Mail Group	Members	Folder Name
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Members</a>	7	Default
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Monthly Newsletter</a>	25	Default
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Membership Renewal</a>	6	Default
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Tradeshow</a>	5	Default
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Weekly Tips</a>	6	Default
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Newsletter</a>	6	Default
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Christmas Campaign</a>	7	Default
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Launch Event</a>	7	Default

### IN MULTIPLE WAYS

- ▶ From a contact or lead
- ▶ From a list view
- ▶ From a campaign
- ▶ From Swift Digital

# INTEGRATE SALESFORCE CAMPAIGN WITH CAMPAIGNS IN SWIFT DIGITAL

## Campaign Campaign 1

[Customize Page](#) | [Edit Layout](#) | [Printable View](#) | [Help for this Page](#) ?

[« Back to List: Leads](#)

[Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Google Docs & Attachments \[0\]](#) | [Opportunities \[0\]](#) | [Campaign Members \[4\]](#)

### Campaign Detail

[Edit](#) [Delete](#) [Clone](#) [Manage Members](#) [Advanced Setup](#) [Assign Members to Mail Group](#)

Campaign Owner	<a href="#">Paul Hodgson [Change]</a>	Leads in Campaign	0
Parent Campaign	<a href="#">Do lunch</a>	Converted Leads in Campaign	0
Campaign Name	<a href="#">Campaign 1 [View Hierarchy]</a>	Contacts in Campaign	4
Active	<input checked="" type="checkbox"/>	Opportunities in Campaign	0
Type	Advertisement	Won Opportunities in Campaign	0
Status	Planned	Value Opportunities in Campaign	\$0
Start Date		Value Won Opportunities in Campaign	\$0
Time		Leads in Hierarchy	0
Venue		Opportunities in Hierarchy	0
Expected Revenue in Campaign		Won Opportunities in Hierarchy	0
Budgeted Cost in Campaign			
Actual Cost in Campaign			
Expected Response (%)	0.00%		
Actual Cost in Hierarchy	\$0		

### Other Information

[Save](#) [Reset](#) [Clear](#)

Swift Activity Type

Created By [Paul Hodgson](#), 5/06/2017 10:05 PM

Last Modified By [Paul Hodgson](#), 23/06/2017 2:48 PM

Description

### Campaign Members

[Manage Members](#)

[Campaign Members Help](#) ?

Action	Type	Lead/Contact Owner Full Name	Status	First Name	Last Name	Title	Company	Phone	Email
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	<a href="#">Paul Hodgson</a>	Registered	<a href="#">Naushaa</a>	<a href="#">Guptaa</a>				<a href="mailto:testing.tekno1@gmail.com">testing.tekno1@gmail.com</a> <a href="#">[M Gmail]</a>
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	<a href="#">Paul Hodgson</a>	Attended	<a href="#">Calvin</a>	<a href="#">Chan</a>	Special projects	Swift Digital		<a href="mailto:calvin.c@swiftdigital.com.au">calvin.c@swiftdigital.com.au</a> <a href="#">[M Gmail]</a>
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	<a href="#">Paul Hodgson</a>	Registered	<a href="#">Poochee</a>	<a href="#">Yuen</a>	MD	Swift Digital		<a href="mailto:pc.yuen@swiftdigital.com.au">pc.yuen@swiftdigital.com.au</a> <a href="#">[M Gmail]</a>
<a href="#">Edit</a>   <a href="#">Remove</a>	<a href="#">Contact</a>	<a href="#">Paul Hodgson</a>	Sent	<a href="#">Paul</a>	<a href="#">Hodgson</a>	Marketing Automation Sales	Swift Digital		<a href="mailto:paul@swiftdigital.com.au">paul@swiftdigital.com.au</a> <a href="#">[M Gmail]</a>

[^ Back To Top](#)

Always show me [fewer](#) ▲ / ▼ [more](#) records per related list

# REPORTING IS PROVIDED AS PART OF THE INSTALLATION

## SALESFORCE REPORTING ENABLED

### Report Options:

Summarize information by:

Activity Type

Show

All swift activities

### Time Frame

Date Field

Activity Date

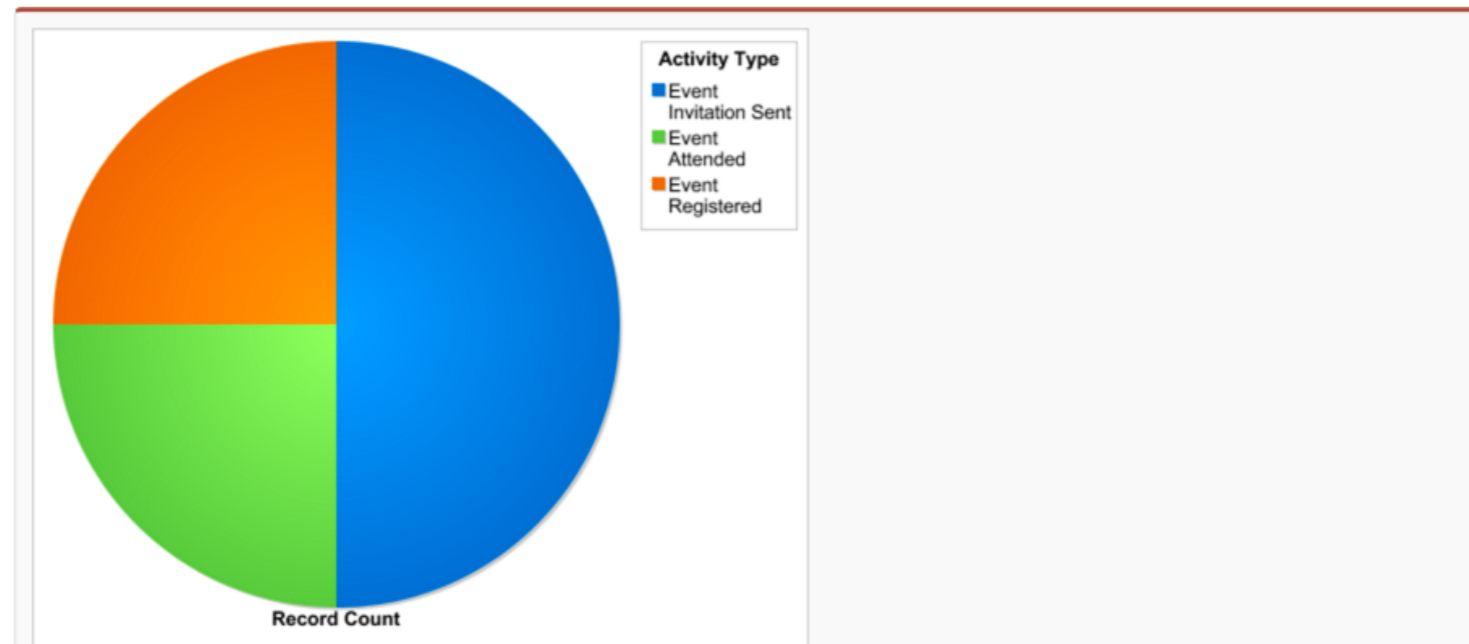
Range

Custom

From

To

Run Report Hide Details Customize Save Save As Delete Printable View Export Details Subscribe



Edit Large | Medium | Small

Filtered By: [Edit](#)

Artefact equals Let's Do Lunch 22 Jan 2016 [Clear](#)

Grouped By: Activity Type

Sorted By: Activity Type

Activity Date	Name	Phone	Email	Company	Swift Activity: Activity Type	Artefact	Score
<input type="checkbox"/> Activity Type: Event Invitation Sent (2 records)							
22/06/2016 10:51 AM	Evin Elliot	0466110373	<a href="mailto:evin.e@gobernard.info">evin.e@gobernard.info</a>	GoBernard	<a href="#">Event Invitation Sent</a>	Let's Do Lunch 22 Jan 2016	0
22/06/2016 10:51 AM	Derek Drake	0411866033	<a href="mailto:derek.d@gobernard.com">derek.d@gobernard.com</a>	Go Bernard	<a href="#">Event Invitation Sent</a>	Let's Do Lunch 22 Jan 2016	0
<input type="checkbox"/> Activity Type: Event Attended (1 record)							
23/06/2016 12:23 PM	Derek Drake	0411866033	<a href="mailto:derek.d@gobernard.com">derek.d@gobernard.com</a>	Go Bernard	<a href="#">Event Attended</a>	Let's Do Lunch 22 Jan 2016	2
<input type="checkbox"/> Activity Type: Event Registered (1 record)							
22/06/2016 12:11 PM	Derek Drake	0411866033	<a href="mailto:derek.d@gobernard.com">derek.d@gobernard.com</a>	Go Bernard	<a href="#">Event Registered</a>	Let's Do Lunch 22 Jan 2016	1

# SWIFT DIGITAL PROVIDES A HUB FOR ALL YOUR ACTIVITIES

- ▶ Your mail lists data can be used for all activities such as events, emails, surveys, sms and triggers
- ▶ Activities are personalised to each person in your mail lists
- ▶ You can generate a score that calculates all the interaction and attribute it to a lead or contact
- ▶ You can manage your subscription list using one system
- ▶ You only need to integrate one Swift Digital account to achieve a 360 view of your leads and contacts



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