



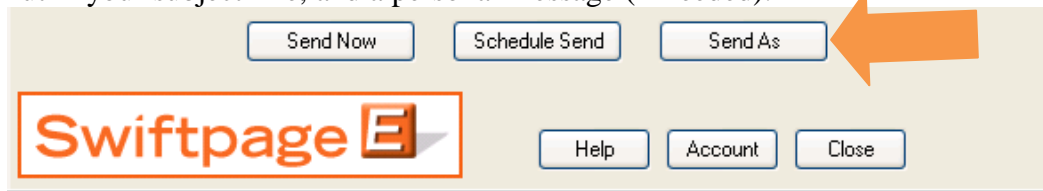
## Quick Start Guide to:

### Using the Send As Feature in Swiftpage for ACT!

The Send As feature allows you to send emails on behalf of other users on your Swiftpage account. **Note:** the Send As feature is only available with a Team-level account, and any person you want to send on behalf of must also be a user on your Swiftpage account.

Here are the steps for using the Send As feature in Swiftpage for ACT!:

1. Click on the Swiftpage E in ACT!.
2. Select the contact(s) you wish to send to—current contact, current Lookup, all contacts, selected Group, or selected Company.
3. Select your email template. **Note:** only read-only templates can be sent using the Send As feature. If you need to save your template as a read-only template, click on the Edit Template button, then click on the Template Library tab > Save As Read Only to save the template in Read-Only format. Then go back and repeat steps 1-3, choosing the new Read-Only template, which will have a y\_ prefix.
4. Put in your subject line, and a personal message (if needed).



5. Click on the Send As button. The following screen will appear:

**Swiftpage - Send As**

Choose Sender

☒ ACT! User ian doescher  
Swiftpage User: iandesh

☐ Record Manager of Contact

☐ Custom field Address 2

\*note\* Record Manager or custom field must map to a Swiftpage user or the logged-on user will be the sender.

Choose delivery time

☒ Now ☐ Schedule Select Date & Time

Enter Account Password:   
[Forgot Account password?](#)

Next Cancel

6. You have three choices for the sender on whose behalf you are sending:
  - a. Choose the ACT! user from the dropdown menu on whose behalf you would like to send the email. All ACT! users must be tied to Swiftpage user IDs in order for you to send on their behalf. In other words only ACT! users connected to Swiftpage user IDs will appear in this dropdown list.
  - b. Choose the “Record Manager of Contact” to send on behalf of the record manager for each ACT! contact to whom you are sending. **Note:** if you send on behalf of the Record Manager, make sure all of your Record Managers are connected to active Swiftpage users on your account. Otherwise, the email will appear to be from the user who is doing the Send As.
  - c. Choose “Custom Field.” If your ACT! database has a custom field tied to particular ACT! user names, you can use that Custom Field setting here in a similar manner to the Record Manager. (For instance, you might have a field in your ACT! database called “Account Executive” that, for each contact, contains the name of one of your ACT! users.) The same rules apply for the Custom Field setting as it does for the Record Manager option: the ACT! user in the custom field must be connected to a Swiftpage user on your account.
7. Choose your delivery time: either now or scheduled for the future.
8. Enter your account password, and click Next. After the information is uploaded, you will see the following screen:

Swiftpage User	Emails
iandesh	1

\*Note\* This is a summary of how many emails will be sent, per Swiftpage User, based on the selected sender option.

You can give this send a custom name for viewing in reports and building call lists. If you leave it blank the subject will be used.

Name

This custom name will be written into ACT history after Tag= (i.e. Tag=Newsletter)

Here, you have a final chance to click Abort Send before the send is queued. If you click Continue, your email will be sent, and you are finished!

**Further notes about using Send As:** when you send on behalf of other users, your user will need to have the send limit on the account allocated to it, not the users on whose behalf you send. (For example, if Jim is sending on behalf of Jane and Sue, Jim’s user ID must have the sends allocated to it, not Jane or Sue’s.) However, once you send the email, each user will have access to the reports for the emails that were sent under their user ID. So, in the previous example, Jane and Sue will have access to reports showing which emails were sent as their user IDs, but Jim will not have access to such reports.

**Final note:** when you perform a Send As through Swiftpage for ACT! or SalesLogix, users must be on a shared network or server in order for Swiftpage to communicate with all users correctly and for the Send As to be successful.