



## Sage E-marketing for Sage CRM

### Quick Start Guide to:

### Editing the Email Footer

This Quick Start Guide details the steps of changing your email footer information for Sage E-marketing for Sage CRM 7.1.

1. Open Sage CRM 7.1.
2. Click Administration.
3. Select E-mail and Documents

**Administration**  
Welcome to the Administration home page. Simply select the broad administration area you want to work on, then drill down to related options and more details on that admin area.

 <b>Users</b> Add new users to the system and change details of existing users.	 <b>Customization</b> Customize standard fields and screen areas, work with component manager, and change system translations.
 <b>Advanced Customization</b> Carry out advanced customization on the system by setting up key attribute profiles, workflows, escalation rules, and changing system menus.	 <b>Data Management</b> Perform data uploads, create products, and add new currencies.
 <b>E-mail and Documents</b> Create your own E-mail templates and document templates, configure the system for E-mail and document handling, configure integration between Sage CRM and Exchange, and subscribe to E-marketing services.	 <b>System</b> Specify and change standard system settings for performance, logging, the database, self service, system behavior, and locks, as well as refresh metadata and work with SLAs.

4. Click E-marketing Configuration.

**Email**  
You have reached the E-mail and Documents home page. Simply select the E-mail and Documents option you want to work on and then complete the administration task.

 <b>E-mail Templates</b> Design your own E-mail templates, which can be used by single users or groups of users.	 <b>E-mail Aliases</b> Set up E-mail aliases from which authorized users and groups of users can send E-mails.
 <b>E-mail Configuration</b> Configure the system to handle E-mails sent out from CRM.	 <b>E-mail Management Server Options</b> Configure the system to file inbound E-mails according to a set of predefined rules.
 <b>Advanced Email Management Server Options</b> Configure Advanced Email Management Server Options.	 <b>E-mail Status</b> Display the status outbound and inbound E-mails.
 <b>E-marketing Configuration</b> Subscribe to E-marketing services and manage user accounts	

**Documents**  
Select the Documents option you want to work on and then complete the administration task.

 <b>Document Templates</b> Upload document templates to the server.	 <b>Documents &amp; Reports Configuration</b> Configure the system for document handling.
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5. Click Edit Users.

**Add a User to the Account**  
 Create a new E-marketing user

**View Plan Options / Upgrade**  
 Opens up a window to Sage E-marketing for Sage CRM so you can modify your account options

**Edit Users**  
 Activate/De-activate user accounts, allocate daily e-mail send limits

**Cancel the Account**  
 Stops all usage and charges

**Edit Account Details**  
 Edit account password here

6. Click on the User Name that you would like to edit.

Account Limits

E-mail send limit assigned: 50	E-mail send limit not assigned: 0
E-Marketing users active: 1	E-Marketing licenses not in use: 4
Drip Marketing users active: 1	Drip licenses not in use: 4

Continue   
 Help

1 E-marketing user found

User Name ^	Full Name	E-mail Address	Allowance	E-marketing User	Drip Marketing User	E-mail Verified
<a href="#">qa_rs_020812_spe_crm</a>	System Administrator	<a href="#">@swiftpage.com</a>	50	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

7. Click Change.

**User Details**

**Full Name:** System Administrator      **Job Title:** ACCPAC CRM System Admin      **Phone:** 3039781000  
**E-mail Address:** [sample@swiftpage.com](#)      **Password:** \*\*\*\*\*  
**E-mail Signature Line:**      **User Name:** qa\_rs\_020812\_spe\_crm

**Contact Details**

**Company Name:** Swiftpage      **Address:** 383 Inverness Pkwy      **Address (optional):**  
**City:** Englewood      **State:** CO      **Postal/ZIP Code:** 80112  
**Country:** United States      **Web Site:**

**E-mail Details**

**Company Name:** Swiftpage      **Address:** 383 Inverness Pkwy      **Address (optional):**  
**City:** Englewood      **State:** CO      **Postal/ZIP Code:** 80112  
**Country:** United States      **Web Site:**

**Account Details**

**Allowance:** 50      **Drip Marketing User:**       **E-marketing User:**

Change   
 Continue   
 Resend Verification E-mail   
 Help

8. Enter the new information in the Contact Details fields. Click Save.

User Details		
<b>Full Name:</b> System Administrator *	<b>Job Title:</b> ACCPAC CRM System Admin	<b>Phone:</b> 3039781000 *
<b>E-mail Address:</b> sample@swiftpage.com *	<b>Password:</b> ***** *	
<b>E-mail Signature Line:</b> 	<b>User Name:</b> qa_rs_020812_spe_crm*	

 Save  
 Cancel  
 Help

  

Contact Details		
<b>Company Name:</b> Swiftpage *	<b>Address:</b> 383 Inverness Pkwy *	<b>Address (optional):</b> 
<b>City:</b> Englewood *	<b>State:</b> CO	<b>Postal/ZIP Code:</b> 80112
<b>Country:</b> United States *	<b>Web Site:</b> 	

  

E-mail Details		
<b>Company Name:</b> Swiftpage *	<b>Address:</b> 383 Inverness Pkwy *	<b>Address (optional):</b> 
<b>City:</b> Englewood *	<b>State:</b> CO	<b>Postal/ZIP Code:</b> 80112
<b>Country:</b> United States *	<b>Web Site:</b> 	

  

Account Details		
<b>Allowance:</b> 50	<b>Drip Marketing User:</b> <input checked="" type="checkbox"/>	<b>E-marketing User:</b> <input checked="" type="checkbox"/>