



## Sage E-marketing for Sage CRM

### Quick Start Guide To:

#### Publishing & Distributing Templates

**Publishing (Sharing Template with Users in Your Account)**

**Distributing (Sharing Templates with Users in Different Accounts)**

1. Log into the My Sage E-marketing for Sage CRM portal via this link: <http://swiftpage.com/logineditor.htm>.
2. Go to Template Editor > Publish/Distribute Tab

Global Templates | Local Templates | Import Template | **Publish/Distribute** | Landing Pages

Select a Local Template:  Show Template prefix Refresh

- cfg\_ms\_bales\_wrong
- cfg\_ms\_bales
- DCMaryland
- EMP\_justlink
- PlainText\_Test 2
- Sample 1
- Sample
- SurveyBk Sample 1
- SurveyLand Test 6
- Test 1
- Test 3
- Test 4
- Test 5

Show:  All  Read-only  Advanced  Basic

Preview

Give template to other Users in your Swiftpage Account

Publish

Give template to other Users in other Swiftpage Account(s)

Distribute

Templates queued to be Published

Templates queued to be Distributed

3. Listed in this window are all of your Sage E-marketing for Sage CRM Local Templates. Read-only templates are in red, basic templates are in blue and advanced templates (usually imported templates) are in green. You can filter them using the radio buttons at the bottom of the screen. From this screen, you can perform the following functions:

- Click the Refresh button to show the most up-to-date list at any point.
- Highlight a template and click the Preview button to view that template.

**To Publish:**

1. Highlight a template and click Publish to send the template to another user in your Sage E-marketing for Sage CRM account. You will see the screen below when you click this button. Choose the checkbox to publish either as an editable template or a read-only template. Then select the user(s) to whom you wish to publish the template and click Publish to Selected. (Click Publish to All to send the template to all valid users.) You will be asked to confirm the choice and when you say OK, you will receive a confirmation screen.

**Publish Template**

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Select valid Users in your Account to receive  
Template: **Sample 1**

awebb
ctaylor
cvostrejs
dleach
dogdon
dspevak
Google
jburgess
rogdon
Sales

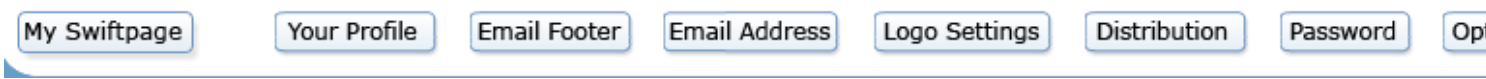
Template will be published as: z\_idoescher\_Sample 1

**To Distribute:**

1. Click on Home > Edit User Profile button, and then click on the Distribution button at the top.



**Swiftpage Profile Components**



2. In the “Distribute To” column on the left, put in the account name and user ID of the person to whom you wish to distribute your template.

**Template Distribution**

Swiftpage Templates can be Distributed to or from your Swiftpage account. Simply fill in the Account and UserID of the people you want to Distribute to or from

Template Distribution Control			
Distribute TO:		Receive FROM:	
Account	UserID	Account	UserID
test	testuser	test	testuser

3. Click Submit at the bottom of the page.
4. The person you are distributing to will need to repeat steps 1-4, but at step 3 they will need to put \*your\* account name and user ID into the “Receive From” column on the right, since they are receiving the email template from you. **Note:** template distribution will not work correctly unless you have listed the recipient’s account name and user ID in the “Distribute to” column on your account, and they have listed your account name and user ID in the “Receive from” column on their account. All account names and user IDs must be spelled correctly, with no spaces.
5. Once the distribution lists have been set up, go to the online editor. Go back to Home > click on the “Template Editor” button > Publish/Distribute tab
6. Highlight a template and click Distribute to send the template to another user in your Sage E-marketing for Sage CRM account. (**Note:** to Distribute templates, you should first set up your distribution list in the “Edit User Profile” section of Home.) You will see the screen below when you click this button. Select the account/user combination(s) to whom you wish to distribute the template and click Distribute to Selected. (Click Distribute to All to send the template to all valid users.) You will be asked to confirm the choice and when you say OK, you will receive a confirmation screen. (If needed, you can also add an account and user ID to your distribution list by clicking the Add User button.)

## Distribute Template

**\*Note\*** The selected Users must add your Swiftpage Account and UserID to their 'Receive From' list in their distribution list.

Select Users in other Swiftpage Accounts to receive  
Template: **Test 4**

2weeksinc@landesh

Distribute to All

Distribute to Selected

Add User

Template will be distributed as: zz\_Test 4

Cancel