




Sage E-marketing for ACT!

Email Tab - Create and Send an e-mail blast

In this help document, you will learn the following:

- 1) [Create an e-mail blast](#)
- 2) [Details of sending an e-mail blast](#)
- 3) [Send an e-mail blast](#)
- 4) [Send As feature](#)
- 5) [Schedule Send Feature](#)

Create an e-mail blast

1. On the ACT! Toolbar, click the Sage E-marketing for ACT! icon. 
2. Click **Edit Template**, you will be taken online
3. Choose a template from the template library
4. Add copy
5. Add imagery
6. Add Action items

Send to Get Opened

Now you've created a great E-mail, you want to make sure your contact opens it. One of the best things you can do to increase your E-mail open rate is to segment your E-mail contact lists based on contact preferences. Make sure you're only sending E-mail related to things he or she may be interested in. If you send too many unrelated E-mail messages your contacts are more likely to opt-out or ignore them all together.

Subject Line

The subject line is your contact's first glimpse into your E-mail, make it count. Consider using your company or product name to gain credibility with your contact. Also make sure to entice the contact to read further but be sure not to stray from the content of the E-mail. You also need to be aware of spam filters which are much more likely to block E-mail messages with subject lines that use all caps, any special characters, buzz words or are longer than 45 characters. Your subject line is the first impression of your E-mail, so make it count.

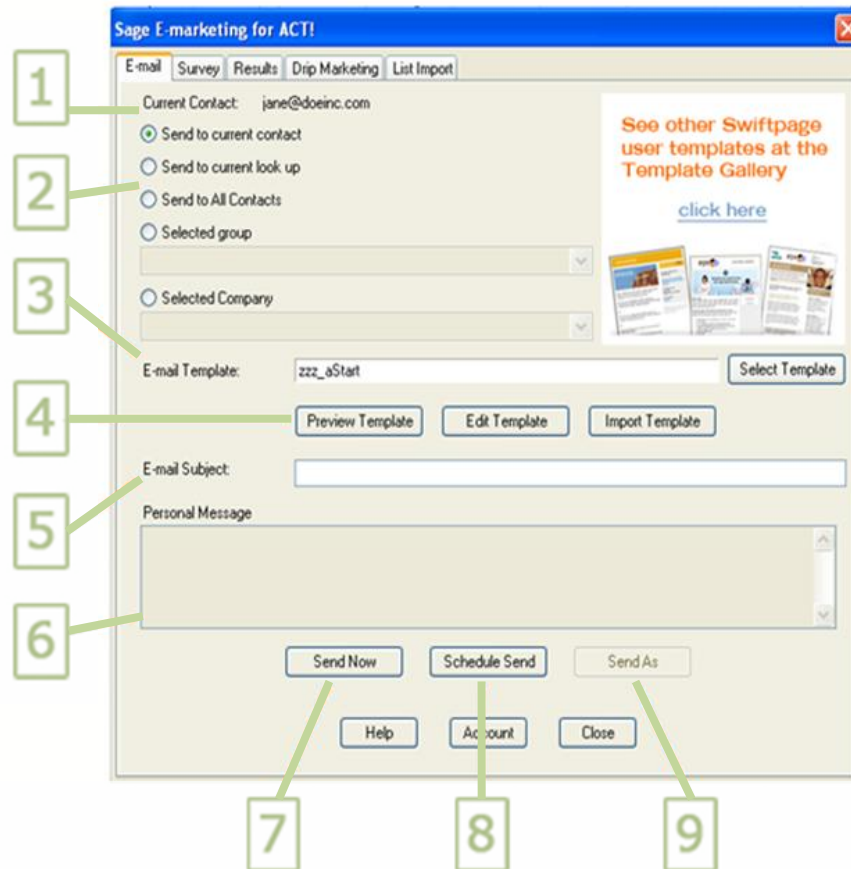
Test

Test the message and layout of your E-mail by sending it to yourself and a few friends. Have your marketing department create E-mails that communicate a message consistent with that of the company and have it sent for a specific sales person to ensure it is more likely to be opened by your contact. What was memorable? What was the call to action? What did you click? Once you've tested you E-mail internally, be sure to do a [Spam check](#).

Advanced Tip

Use the 'Send As' feature to your advantage. Have your marketing department create E-mail that communicates a message consistent with that of the company and have it sent from a specific sales person to ensure it is more likely to be opened by your contact.


The following picture shows Sage E-marketing for ACT!, numbered with corresponding explanations.

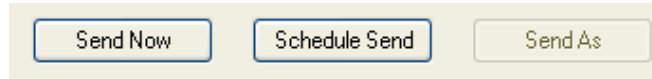


1. **Current Contact:** Shows your current contact within your ACT! Database.
2. **Options of who to send your E-mail to:**
 - **Send to Current Contact:** Send to contact listed.
 - **Send to Current Lookup:** If you do a "Lookup" within your ACT! database, this will send an E-mail to everyone in that lookup.
 - **Send to All Contacts:** Sends to all of the contacts in your ACT! database. Note that this is limited by the number of people your account plan permits.
 - **Selected Group:** Sends an E-mail to a group within ACT!.
 - **Selected Company:** Sends an E-mail to a company that you have saved within ACT!.
3. **E-mail Template:** From your personal template library, choose the template you want to use.
4. **Preview, Edit and Import Template buttons:** Allow you to preview, edit and import E-mail templates online. Click these buttons to access each part of the online interface.
5. **E-mail Subject:** Type in the subject text you want to include with this E-mail.
6. **Personal Message:** Provides the option to type in a Personal Message if the selected template has a [[SpePersonalMessage]] tag. Preview shows the user the template with the personal message inserted.
7. **Send Now:** Sends your selected template to the selected contact(s) right now.
8. **Schedule Send:** Enables you to schedule your E-mail blast to go out on a specific later date and time.
9. **Send As:** Allows you to send your E-mail as a different user, as long as that user is in your ACT! database.

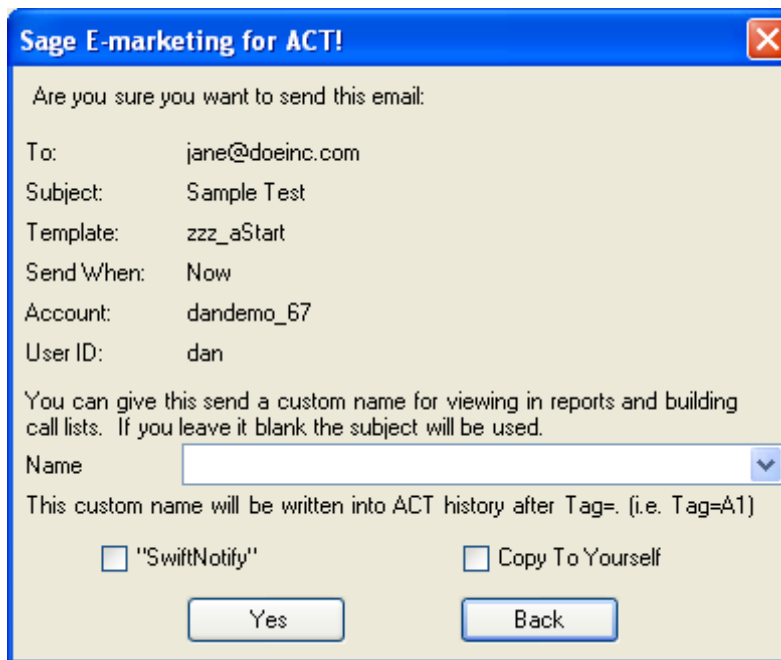
Account: The "Account" button gives you access to your Sage E-marketing for ACT! Account Information. Click here to upgrade your account, or to add an additional UserID. To add a UserID, you must have another ACT! user in your database. (See image below)

Now Do It! Send an E-mail Blast

1. Go back to ACT!
2. Click on the Sage E-marketing for ACT! icon on your toolbar 
3. Select who you want to send to
4. Choose a template
5. Enter a subject line (enter a Personal Message if applicable)
6. Select a sending option (Send Now, [Schedule Send](#), or [Send As](#))



If you choose Send Now and the email will go out immediately, you can choose Schedule Send for the email to go out at a specific date and time up to two months out, or you can choose to Send As another user in your account, which is also an ACT! User.

A screenshot of a dialog box titled "Sage E-marketing for ACT!". The dialog box has a blue title bar with a close button (X) on the right. The main content area is white and contains the following text:

Are you sure you want to send this email:

To: jane@doeinc.com
Subject: Sample Test
Template: zzz_aStart
Send When: Now
Account: dandemo_67
User ID: dan

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=A1)

"SwiftNotify" Copy To Yourself

Yes Back

When sending an e-mail to 14 or fewer contacts you are given the option to **"Swift-notify"**. Checking the box Swift-notify will send a notification e-mail to your email address whenever a contact opens your e-mail. Campaign details and open details (open date and time) are provided. When sending to 15 or greater email lists, you will not receive "Swift-notify" emails to prevent your inbox from being cluttered.

The **Copy To Yourself** box will send you a copy of the email that you are sending out for email sends of 15 people or less.

A screenshot of a confirmation dialog box titled "Sage E-marketing for ACT!". The dialog box has a blue title bar with a close button (X) on the right. The main content area is white and contains the following text:

Status: Your Email Blast has been sent. Addresses submitted = 1, sent to = 1

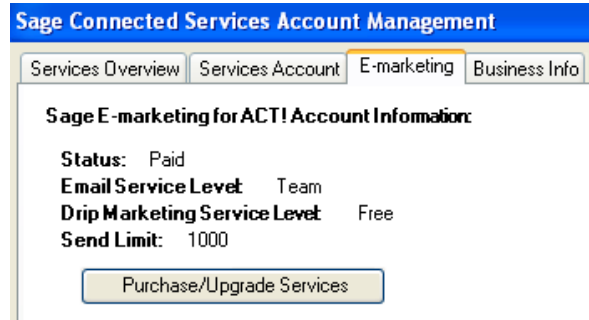
OK

You will receive a confirmation screen after the final send, when you click Send Email.

Send As Feature

Lets you know how many E-mails are being Sent As specific users. The "Name" field near the bottom allows you to give your E-mail blast a title to view later. The Name field allows you to send similar E-mail blasts to different groups of people and is primarily used after you send your E-mail for creating call lists.

When using the Send As feature to send on behalf of another user on your account, the person who actually performs the send is counted for those sends. For example, if John creates an email blast and sends as Mary, John's daily send limit is counted against for that day. Mary's send limit is not counted against. Note: the Send As feature is only available for Team level accounts.



Choose Sender Options:

1. Select the ACT! user you would like to "Send As" from the drop down menu, or choose to send as the ACT! "Record Manager", or as a Custom Field you have created.

Please note: You may "Send As" any ACT! database user that is also setup as a user on your account. If you have other ACT! database users, but they do not show up in the drop down menu, then they will need to be added to your account. If you have other users, but they do not appear in this drop down, then each user will need a corresponding ACT! database profile.

2. Choose your delivery time, then enter your Account Password, (the Account Manager should have the Account password).

The screenshot shows the 'Sage E-marketing for ACT!' dialog box with the 'Choose Sender' section active. It contains the following elements:

- A radio button selected for 'ACT! User' with a dropdown menu showing 'Amy'. Below it, it says 'Swiftpage User: Amy2'.
- An unselected radio button for 'Record Manager of Contact'.
- An unselected radio button for 'Custom field' with a dropdown menu showing 'Address 2'.
- A note: '*note* Record Manager or custom field must map to a Swiftpage user or the logged-on user will be the sender.'
- A 'Choose delivery time' section with a radio button selected for 'Now', an unselected radio button for 'Schedule', and a 'Select Date & Time' button.
- An 'Enter Account Password:' field with a text input box and a link for 'Forgot Account password?'.
- 'Next' and 'Cancel' buttons at the bottom.

The screenshot shows the 'Send As - Summary' dialog box. It features a table with the following data:

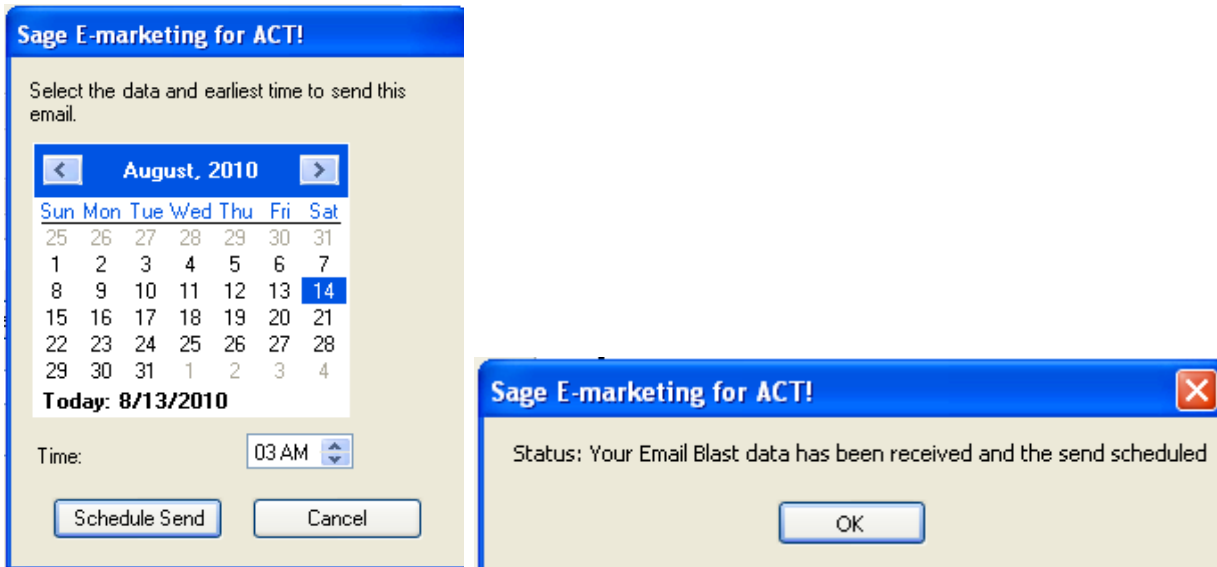
Swiftpage User	Emails
Amy2	1

Below the table, there is a note: '*Note* This is a summary of how many emails will be sent, per Swiftpage User, based on the selected sender option.' Below the note, there is a text input field for a custom name, a dropdown menu, and a note: 'This custom name will be written into ACT history after Tag= (i.e. Tag=Newsletter)'. At the bottom, there are 'Continue' and 'Abort Send' buttons.

Schedule Send Feature

Schedule Send enables you to schedule your E-mail blast to go out on a specific later date and time. The Scheduled Send feature allows you to schedule a send up to 60 days in advance. (Note: the Scheduled Send feature is only available with Pro and Team level accounts.) With the Drip Marketing service, you can schedule emails to be sent an indefinite time into the future (i.e. there is no limit).

Select the Date and Time you want to send the email. To schedule the send in advance, click on the date you want to send the email (shown on the calendar view), then select the time from the dropdown menu and click on the "Schedule the Send" button

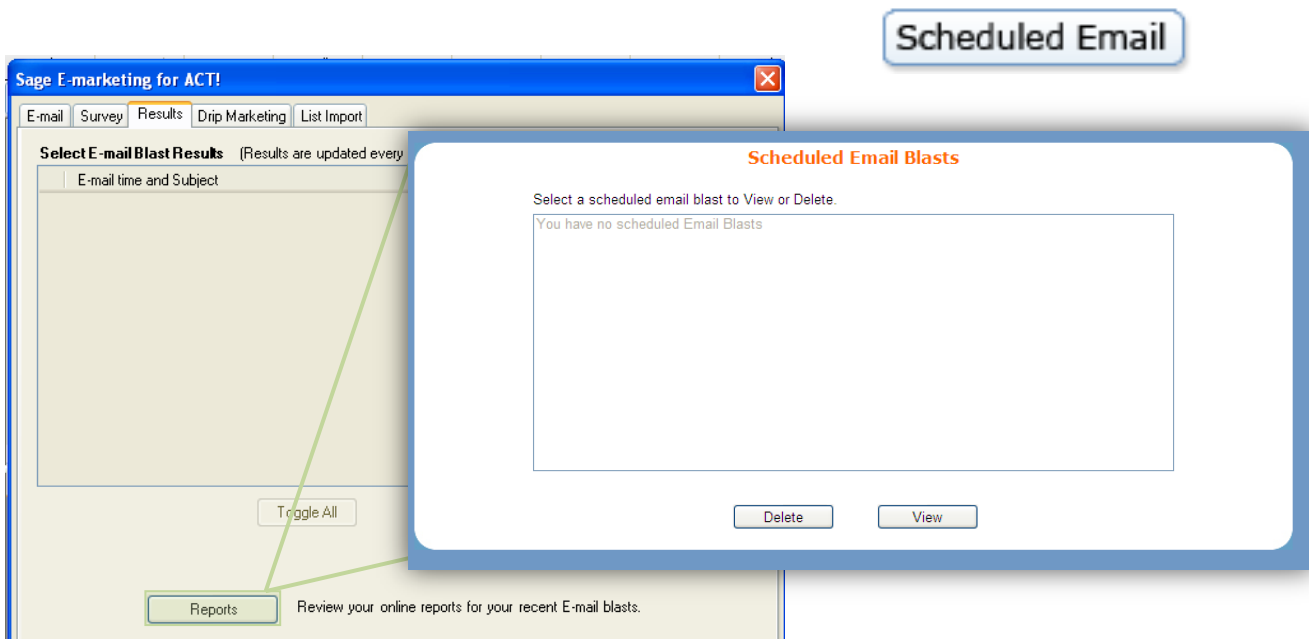


The screenshot shows two windows from the Sage E-marketing for ACT! software. The left window is titled "Sage E-marketing for ACT!" and contains the "Schedule Send" dialog. It prompts the user to "Select the date and earliest time to send this email." Below this is a calendar for August 2010, with the date 14 (Friday) selected. Underneath the calendar is a "Time:" field with a dropdown menu set to "03 AM". At the bottom of the dialog are two buttons: "Schedule Send" and "Cancel".

The right window is also titled "Sage E-marketing for ACT!" and displays a status message: "Status: Your Email Blast data has been received and the send scheduled". It has a close button (X) in the top right corner and an "OK" button at the bottom center.

Cancel a Scheduled Send

To cancel or review scheduled campaigns, click on the Results Tab Reports button. Then click on the Scheduled Email button at the top of the screen. There, you can view and delete scheduled email blasts.



The screenshot shows the Sage E-marketing for ACT! interface with a "Scheduled Email" dialog box open. The dialog box is titled "Scheduled Email Blasts" and contains the text: "Select a scheduled email blast to View or Delete." Below this text is a large empty rectangular box. At the bottom of the dialog box are two buttons: "Delete" and "View".

In the background, the main application window is visible. It has a menu bar with "E-mail", "Survey", "Results", "Drip Marketing", and "List Import". Below the menu bar is a section titled "Select E-mail Blast Results" with a sub-section "E-mail time and Subject". A "Toggle All" button is located below this section. At the bottom of the main window is a "Reports" button with the text "Review your online reports for your recent E-mail blasts." A green line points from the "Reports" button to the "Scheduled Email Blasts" dialog box.