



Sage E-marketing for ACT!

Quick Start Guide to:

Purchasing or Upgrading Your Sage E-marketing for ACT! Account

This Quick Start Guide details the steps to purchasing or upgrading your Sage E-marketing for ACT! account.

1. Click the Sage E-marketing for ACT! Manage Account link.

The image shows a grid of five service integration cards for Sage E-marketing for ACT!:

- Sage Business Info Services for ACT!**: Connect to a powerful database of company and contact information with Sage Business Info Services for ACT! and supercharge your sales efforts. Includes links for [Sign Up Now](#) and [Learn More](#).
- Sage E-marketing for ACT!**: Put email to work for you. Connect to Sage E-marketing for ACT! now. Includes links for [Manage Account](#), [Open E-marketing](#), and [Contact Support](#). A green arrow points to this card from the left.
- Sage ACT! Connect**: Sage ACT! Connect makes it easy to stay in touch with your business, because it delivers Sage ACT! contact and calendar details to your smartphone or tablet, including iPhone® and iPad®. Includes link for [30-Day Free Trial](#) and [Learn More](#).
- Google Integration**: Connect Sage ACT! to your Google Gmail, Contact and Calendar accounts to synchronize Contacts and Calendars and automatically create history records in Sage ACT! from Gmail emails. Includes links for [Set Up Now](#) and [Learn More](#).
- Outlook Synchronization**: Connect Sage ACT! to Microsoft Outlook to synchronize Contacts and Calendars between both Sage ACT! and Microsoft Outlook. Includes links for [Set Up Now](#) and [Learn More](#).

2. Click Purchase/Upgrade Services.

The screenshot shows the 'Manage Your Connected Services Account' window with the 'E-marketing' tab selected. The 'Sage E-marketing for ACT! Subscription Information' section displays the following details:

Status:	Trial
Email Service Level:	Team
Drip Marketing Service Level:	Platinum
Send Limit:	50

Below this information is a 'Purchase/Upgrade Services' button, which is highlighted with a green arrow pointing to it from the left.

The 'Sage E-marketing for ACT! Options' section includes the following checked options:

- Save in History
- Use a secure connection (https)
- Do not ask about creating database fields.
- Display Icon in Toolbar
- Display Marketing Results Tab
- Display Tips in Marketing Results Tab

At the bottom of the window, there are 'OK' and 'Cancel' buttons. The footer text reads: 'Copyright (c) 2002-2011 Summit 5 LLC Sage Connected Services Version: 14.0.500.0'.

3. Select the Purchase the Service radio button and click Submit.

Sage Connected Services

**Account Management
Main Menu**

Account Name is: **qa_rs_060412_spe**

Select an Account Management Activity

- Purchase the Service**
(features, maximum users and send limits)
- Enter a Credit Authorization Number**
(provided by Sage Corporate Sales)
- Reallocate the Service among Existing Users**
- Add a User to the Account**
- Cancel the Account**
(stops all usage and charges)
- Provide your Reseller's Name**
- Delete a User from the Account**
(1 UserIDs in account)

4. Select a base package and any desired add-ons. Click Submit.

Sage Connected Services

Account Name: qa_rs_060412_spe

Your account has not yet been purchased.
You currently have 1 Free Users
and the Free level of Drip Marketing with up to 1 Active Users.

Determine the Service level to Purchase
All prices are in United States Dollars(USD)
[Click here to see the features of the Base Packages.](#)

1. Select a Base Package: (prices shown are monthly)
 Entry (\$14.95) Basic (\$29.95)
 Pro (\$44.95) Team (\$59.95, 2 users)

2. Email Users (requires Pro or Team) \$5.99 per additional user (1 included in base package)

3. Daily Send Limit (requires Basic, Pro or Team) \$4.99 per additional 1000 (1000 included in base package)
[Click here to see features of Drip Marketing](#)

4. Select a Level of Drip Marketing: (in addition to the Base Package)
 Free (Limited Usage) Silver (\$29.95) Gold (\$99.95)
 Platinum (\$149.95)

5. Drip Users (requires Pro or Team) \$9.99 per additional user (1 included in base package)

6. Sage Business Info Services, Reference Users \$24.95 per user

7. Sage Business Info Services, Reference+Leads Users \$54.95 per user with 400 leads each

8. Additional Leads (requires Reference+Leads) \$49.95 per each additional 400 leads

9. Billing Period Monthly Quarterly Yearly (10% discount)

\$44.95 per month for up to 1 users sharing a send limit of 1000 and using the Free level of Drip Marketing with up to 1 users.

Save \$53.94 by selecting Yearly billing.

Next screen will validate purchase and process credit card information.

You may make changes to this account at any time, you will be billed for the largest capacity purchased during each billing period.

5. Enter your credit card details and click Purchase to finish purchasing your account.

Sage Connected Services

Account Name: qa_rs_060412_spe

Service Level will be Pro with up to 1000 emails per day from up to 1 active users, and Free level of Drip Marketing with 1 active users.

If you click Purchase your credit card will be charged \$44.95 each month starting today.

Your Name: Sample

Your Email Address: Sample@spsend.com

Credit Card Billing Address

Credit Name: Sample
(As it appears on the credit card)

Address 1: 383 Inverness Pkwy

Address 2 (optional):

City: Englewood

State: CO Zip: 80112

Country: United States

Credit Card Entry

Visa Master Card American Express
(CVV is a 3 or 4 digit code usually on the back of your card)

Card Number: CVV:

Exp. Date: MM/YY

Optional Data Entry

Special Promotion:



Purchase

Main Menu

Next screen is Manage the purchased service levels.