



Sage E-marketing for ACT!

Sage Connected Services for ACT! 2012 – Set Up an Account

In this help document, you will learn the following:

- 1) [Getting Started](#)
- 2) [Set Up New Account](#)
- 3) [Connect Existing Swiftpage or ACT! E-marketing account](#)
- 4) [Manage the Services Account](#)

Getting Started

Managing Sage Connected Services Sage Connected Services includes:

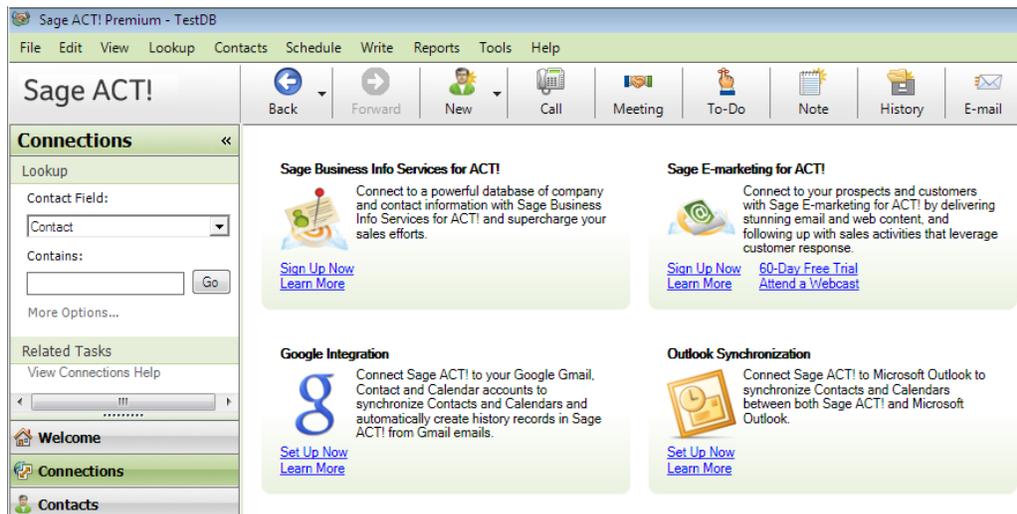
- Sage Business Info Services for ACT!
- Sage E-marketing for ACT!

To access and manage your Sage Connected Services, you must have:

- An Internet connection.
- Your Internet browser configured to accept cookies.
- An e-mail address in your Sage ACT! My Record.
- A Sage Connected Services account. If you have a Swiftpage™ or ACT! E-marketing account, you can use it as your Sage Connected Services account.

Open Sage Connected Services by doing one of the following:

- From the Connections menu, click Manage Account or Sign Up Now.
- Click the Sage Business Info Services for ACT! icon or the Sage E-marketing for ACT! icon located on the Contact, Group or Company view toolbar.



The screenshot shows the Sage ACT! Premium software interface. The top menu bar includes File, Edit, View, Lookup, Contacts, Schedule, Write, Reports, Tools, and Help. Below the menu bar is a toolbar with icons for Back, Forward, New, Call, Meeting, To-Do, Note, History, and E-mail. The main window is divided into several sections:

- Connections:** A sidebar on the left with a 'Lookup' section containing a 'Contact Field' dropdown menu (set to 'Contact') and a 'Contains' field with a 'Go' button. Below this are 'Related Tasks' and 'View Connections Help'.
- Connections List:** A list of connection options in the main area:
 - 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!:** Connect to your prospects and customers with Sage E-marketing for ACT! by delivering stunning email and web content, and following up with sales activities that leverage customer response. Includes links for 'Sign Up Now', '60-Day Free Trial', and 'Attend a Webcast'.
 - 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'.
- Navigation:** A sidebar on the left with 'Welcome', 'Connections', and 'Contacts' buttons.

Set Up a New Account

1. Select Create a New Sage Connected Services Account and Click Next.
2. Complete the required fields including valid login and contact information.

Create an Account

Fill out the form below to create your Sage Connected Services account.

User ID: * Amy
Password: *
Verify Password: *

[Advanced Setup \(optional\)](#)
You can use Advance Setup to specify an account name and an account password

Name: * Amy Webb
Title:
Company: * Swiftpage
E-mail: * rsullivan@swiftpage.com
Address: * 383 Inverness Pkwy
City: * Englewood
*Required

State: * CO
ZIP Code: * 80112
Country: * USA
Time Zone: * (UTC -07:00) Mountain Tim
Phone: * (303) 978-1000
Web Site:
Reseller's Name:

Next Cancel

Sage E-marketing for ACT!

Start using your free trial of Sage E-marketing for ACT! today! Quickly create a new account or sign in using an existing account.

Create a new Sage Connected Services account
 Sign in using my Sage Connected Services, ACT! E-marketing, or Swiftpage account

Next Cancel

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Sage Connected Services Version:14.0.500.0

Sage Connected Services

Enter your information to create a Sage Connected Services Account and User. Passwords must be at least 6 characters long and cannot contain special characters.

Account Name: * Amy
Password: *
Verify Password: *

*Required Submit Cancel

Connect Existing Swiftpage or ACT! E-marketing account:

1. Select Sign in using my Sage Connected Services, ACT! E-marketing, or Swiftpage account and click Next.
2. Enter your account, user id, and password, and then click Submit.
3. You must accept the License Agreement for activation to occur.
4. Confirmation Screen Appears

Sage E-marketing for ACT!

Start using your free trial of Sage E-marketing for ACT! today! Quickly create a new account or sign in using an existing account.

Create a new Sage Connected Services account
 Sign in using my Sage Connected Services, ACT! E-marketing, or Swiftpage account

Next Cancel

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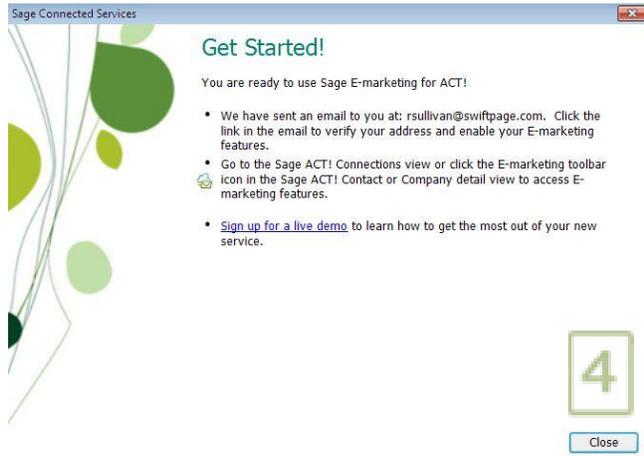
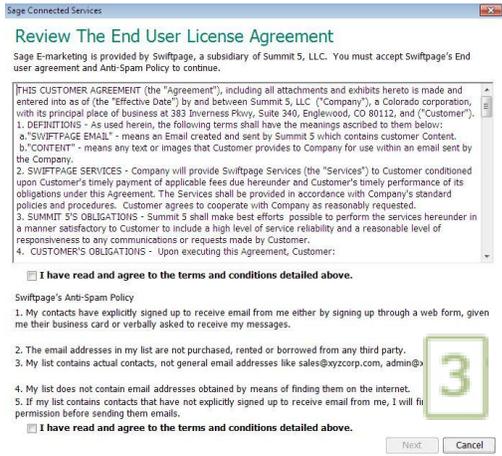
Sage Connected Services

Sign in

Your Swiftpage or Sage E-marketing for ACT! account information will be used as your Sage Connected Services Account.

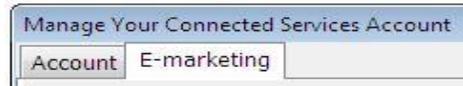
Account:
User ID:
Password:

Next Cancel



Manage the Services Account

Depending on the task, select the appropriate tab from The Sage Connected Services dialog box:



1. **Account** - Lets you manage the Sage Connected Services account, add, remove, convert users, and purchase and upgrade services.
 - "Unconnected ACT! User:" - List of all ACT! users in this ACT! database that are not connected to a Swiftpage UserID.
 - "Swiftpage UserID:" - List of all of the "Active" and "Unconnected"* Swiftpage UserID's in this Sage E-marketing for ACT! Account.
 - "Connect User" button - To connect an ACT! user to a Swiftpage UserID simply select the ACT! user and the Swiftpage UserID and then click "Connect User".
 - "Disconnect User" button - To disconnect an ACT! user from a Swiftpage UserID simply select the connected pair from the "Associated Users" list, and then click "Disconnect User".
 - "Associated Users" list - List of the entire ACT! users in this ACT! database that are connected to Swiftpage UserID's in this ACT! E-marketing Account. The connected users are shown in the following format - "ACT! User = Swiftpage UserID"
2. **E-marketing** - Shows details of the Sage E-marketing for ACT! account, preferences, and offers purchase/upgrade options.

