

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.



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.

Sage Connected Se	rvices		X	Sage Connected Services	
Create a	n Account				Sage E-marketing for ACT!
Fill out the form	below to create your Sage Connected	d Services account.			Start using your free trial of Sage E-marketing for ACT! today! Quickly create a new account or sign in using an existing account.
User ID:	* Amy	Advance	d Setup (optional)		
Password: Verify Password	*	You can account	use Advance Setup to specify an name and an account password		Create a new Sage Connected Services account
					Sign in using my Sage Connected Services, ACT! E-marketing, or Swiftpage account
Name:	* Amy Webb	State:	* CO		
Title:		ZIP Code:	* 80112		
Company:	* Swiftpage	Country:	* USA		
E-mail:	rsullivan@swiftpage.com	Time Zone:	* (UTC -07:00) Mountain Tim 💌		
Address:	383 Inverness Pkwy	Phone:	* (303) 978-1000		
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Account N	lame: Amy				

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

Cancel

Submit

Password: Verify Password:

"Required

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Copyright (c) 2002-2011 Summit 5 Sage Connected Services Version	5 LLC :14.0.500.0	Next Cancel	Next	Cancel



Manage the Services Account

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

Manage Y	our Connected !	Services Account
Account	E-marketing	

OK Cancel

- 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! Emarketing Account. The connected users are shown in the following format – "ACT! User = Swiftpage UserID"
- E-marketing Shows details of the Sage E-marketing for ACT! account, preferences, and offers purchase/upgrade options.

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