Sage Connected Services for ACT – 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 Write menu, click Manage ACT! Services.
• 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.
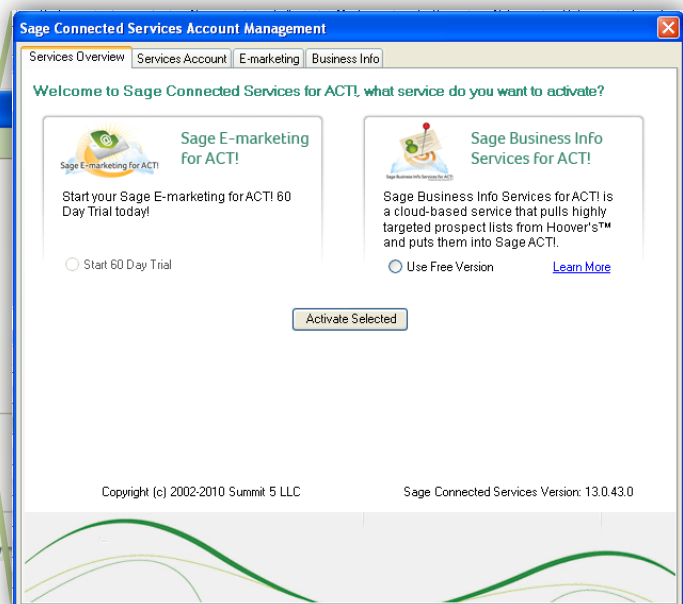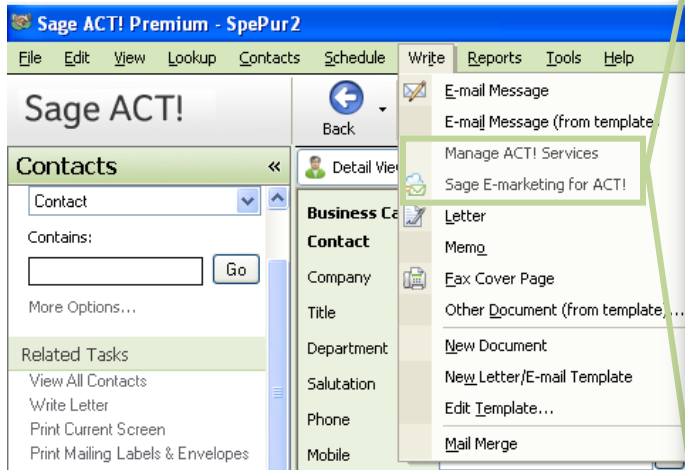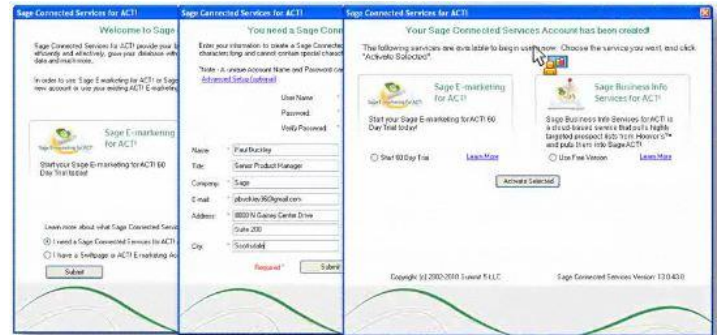
Set Up a New Account

1. Select I need a Sage Connected Services for ACT! Account and Click Submit.
2. Complete the required fields including valid login and contact information.

Connect Existing Swiftpage or ACT! E-marketing account:

1. Select I have a Swiftpage Account or ACT! E-marketing Account and Click Submit.
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

Manage the Services Account

Depending on the task, select the appropriate tab from The Sage Connected Services dialog box:
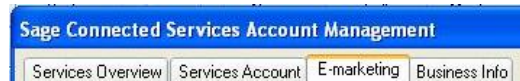
1. Services Overview - Shows available services.
2. Services Account - Lets you manage the Sage Connected Services account, add, remove, convert users, and purchase and upgrade services.
   - "Unconnected ACT! User:" - List of all of the ACT! users in this ACT! database that are not connected to a Swiftpage 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"
3. E-marketing - Shows details of the Sage E-marketing for ACT! account, preferences, and offers purchase/upgrade options.
4. Business Info - Shows details of the Sage Business Info Services for ACT! account and offers purchase/upgrade options.
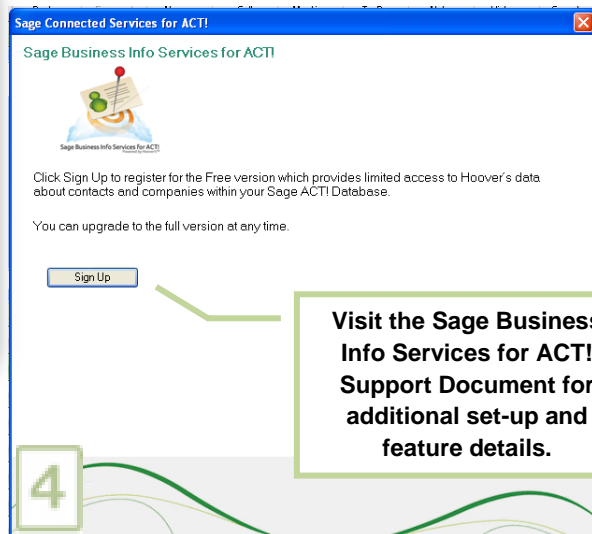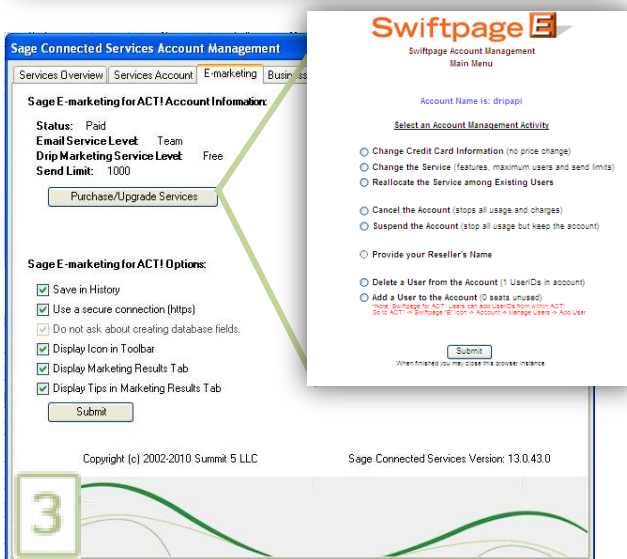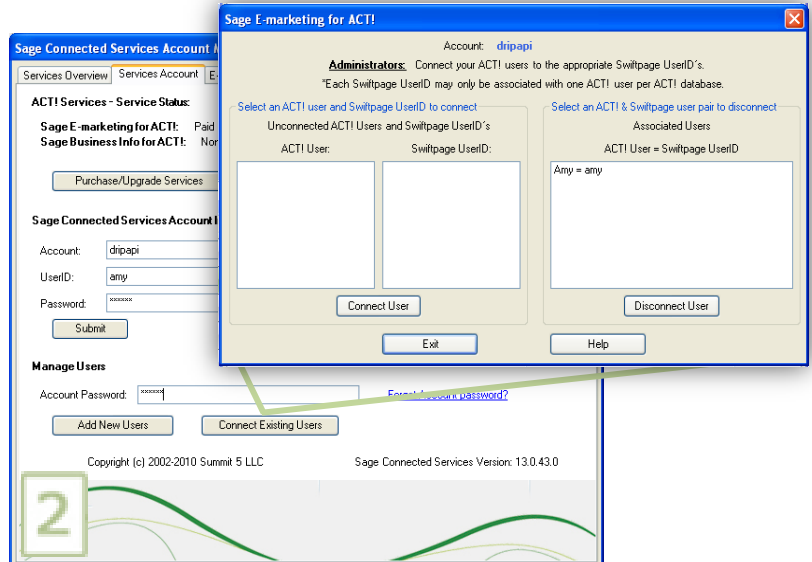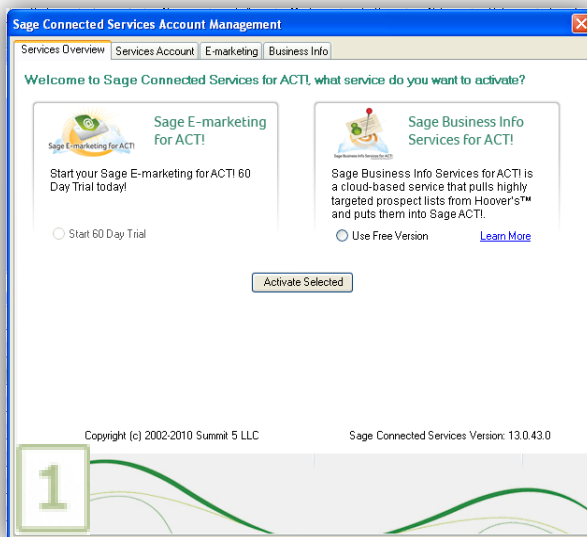
Visit the Sage Business Info Services for ACT! Support Document for additional set-up and feature details.