

Sage E-marketing for ACT!

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:

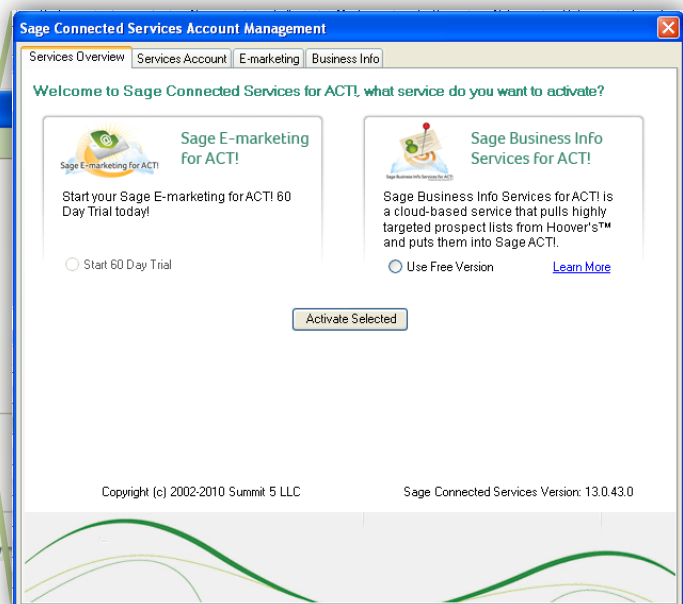
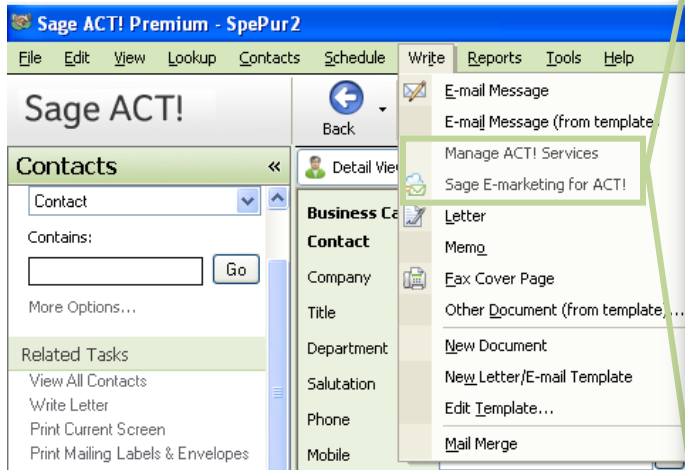
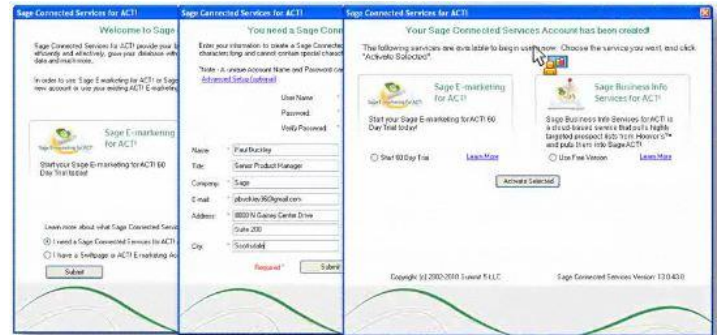
- Sage Business Info Services for ACT!
- Sage E-marketing for ACT!

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.

Sage Connected Services for ACT!

You need a Sage Connected Services for ACT! Account

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.

*Note - A unique Account Name and Password can be set in the Advanced Setup.
[Advanced Setup \(optional\)](#)

User Name: * JaneDoe
 Password: * [REDACTED]
 Verify Password: * [REDACTED]

Name: * Jane Doe State: * CO ZIP Code: * 80237
 Title: Country: * United States
 Company: * Doe Inc. Time Zone: * [UTC -07:00] Mountain Time (US & Canada)
 E-mail: * jane@doeinc.com Phone: * (303) 888-2545
 Address: * 585 Smith St. Web Site: Reseller:
 City: * Denver

Required * Submit Cancel

Sage Connected Services for ACT!

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: * JaneDoe
 Password: * [REDACTED]
 Verify Password: * [REDACTED]

Required * Submit Cancel

Sage Connected Services for ACT!

Welcome to Sage Connected Services for ACT!

Sage Connected Services for ACT! provide your business with tools to reach out to your customers more efficiently and effectively, grow your database with new leads, update current contact information with the latest data and much more...

In order to use Sage E-marketing for ACT! or Sage Business Info Services for ACT! you will need to create a new account or use your existing ACT! E-marketing or Swiftpage Account.

Sage E-marketing for ACT!
Start your Sage E-marketing for ACT! 60 Day Trial today!

Sage Business Info Services for ACT!
Sage Business Info Services for ACT! is a cloud-based service that pulls highly targeted prospect lists from Hoover's™ and puts them into Sage ACT!.

Learn more about what Sage Connected Services for ACT! can do for your business - [click here >>](#)

I need a Sage Connected Services for ACT! Account
 I have a Swiftpage or ACT! E-marketing Account (becomes your Sage Connected Services Account)

Submit

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

I need a Sage Connected Services for ACT! Account
 I have a Swiftpage or ACT! E-marketing Account (becomes your Sage Connected Services Account)

Submit

Sage Connected Services for ACT!

Enter your Swiftpage or ACT! E-marketing Account Information

Account: [REDACTED]
 UserID: [REDACTED]
 Password: [REDACTED]

Submit

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

Sage Connected Services for ACT!

Sage E-marketing for ACT! End User License Agreement

Sage E-marketing is provided by Swiftpage, a subsidiary of Summit 5, LLC. You must accept Swiftpage's End User agreement to continue.

THIS CUSTOMER AGREEMENT (the "Agreement"), including all attachments and exhibits hereto is made and entered into as of the "Effective Date" by and between Summit 5, LLC ("Company"), a Colorado corporation, with its principal place of business at 383 Inverness Pkwy, Suite 340, Englewood, CO 80112, and ("Customer")

1. DEFINITIONS - As used herein, the following terms shall have the meanings ascribed to them below:
 a. "SWIFTPAGE E-MAIL", means an Email created and sent by Summit 5 which contains customer Content.
 c. "CONTENT" - means any text or images that Customer provides to Company for use within an email sent by the Company.

2. SWIFTPAGE SERVICES - Company will provide Swiftpage Services (the "Services") to Customer conditioned upon Customer's timely payment of applicable fees due hereunder and Customer's timely performance of its obligations under this Agreement. The Services shall be provided in accordance with Company's standard policies and procedures. Customer agrees to cooperate with Company as reasonably requested.

3. SUMMIT 5'S OBLIGATIONS - Summit 5 shall make best efforts, possible to perform the services hereunder in a manner satisfactory to Customer to include a high level of service reliability and a reasonable level of responsiveness to any communications or requests made by Customer.

4. CUSTOMER'S OBLIGATIONS - Upon executing this Agreement, Customer:
 a. represents and warrants that it complies and will continue to comply, and assures that its officers, employees, agents, subcontractors, service providers, and suppliers comply, with any applicable laws or regulations;
 b. represents and warrants that any Content provided to Company or used in connection with the Services will not violate any third party rights including, but not limited to, intellectual property and privacy rights;

I DECLINE THIS AGREEMENT
 I ACCEPT THIS AGREEMENT

Continue

Sage Connected Services for ACT!

Congratulations! You have started your Sage E-marketing Trial!

Email Marketing, Drip Marketing and Online Survey features are now at your fingertips. Simply select the E-marketing Icon in the Contacts toolbar to access these features!

To utilize some of these features, we must verify that you have a valid email address. We have sent a verification email to you at: awebb@swiftpage.com

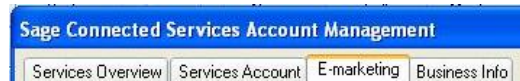
Check your inbox for this email, open the email, and click the link to verify your email address. Your features will be disabled until this step has been completed.

Go to E-marketing Activate other services

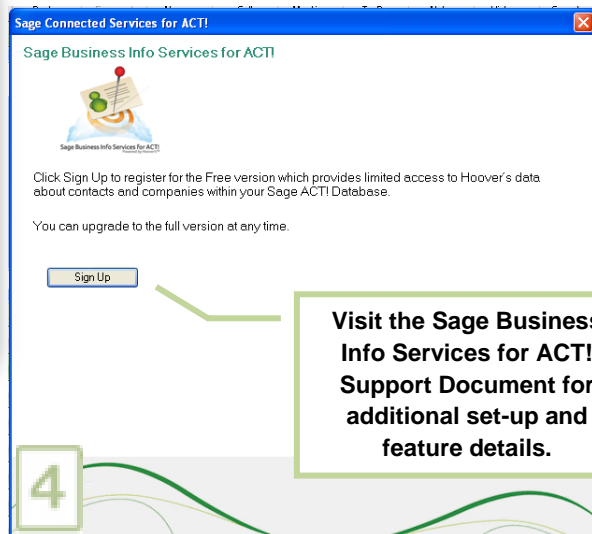
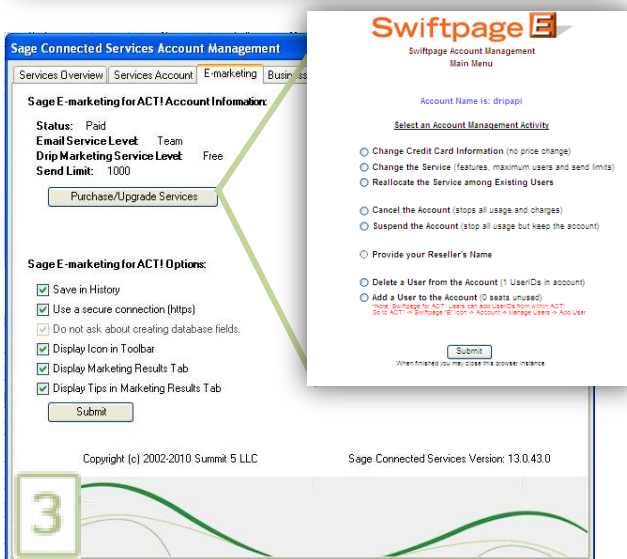
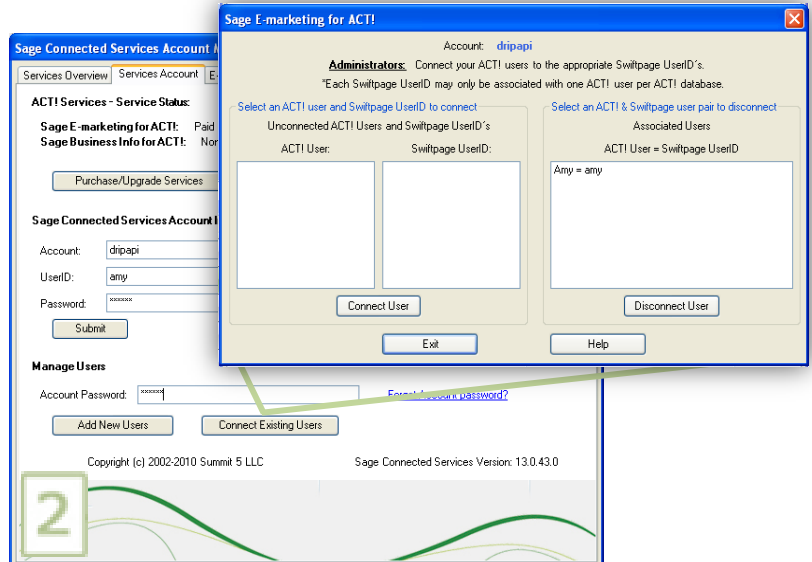
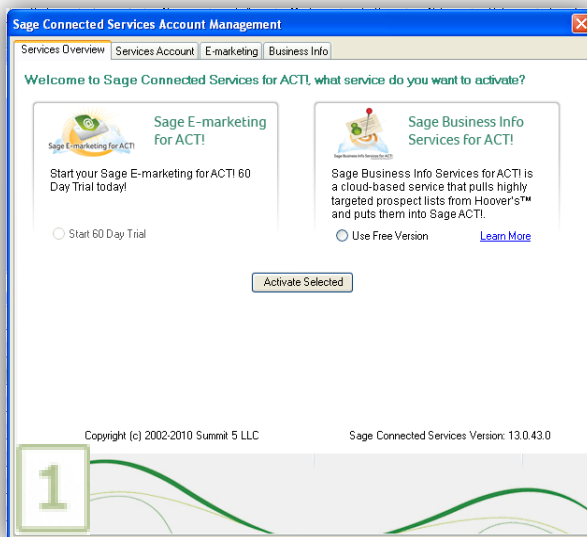
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Manage the Services Account

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.