



Sage E-marketing for ACT!

Smart Tasks - Automate Key Activities

In this help document, you will learn the following:

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- 2) [Accessing Smart Tasks](#)
- 3) [Manage Smart Tasks and View Status of Smart Tasks](#)
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What are Smart Tasks?

Smart Tasks are a series of common and connected steps, such as a workflow, that automatically perform key tasks or actions for contacts or opportunities. You organize the connected steps of the workflow using a template.

Let Sage ACT! Smart Tasks handle the things you need to get done every day. Think of this as a personal assistant that puts activities on your calendar and sends emails for you so your customers get the service they expect. Amp up the emails you send by using professionally designed email marketing templates that complement your Smart Tasks.

Smart Tasks allow you to schedule e-mails, Sage E-marketing for ACT! e-mails, and run drip marketing campaigns as steps in the workflow that automatically reach targeted contacts and add these contacts to drip marketing campaigns. In addition, Smart Tasks can be run automatically based upon completion of the previous step. Activity series steps are based on an anchor date and not upon completion of the previous step.

Automate key activities

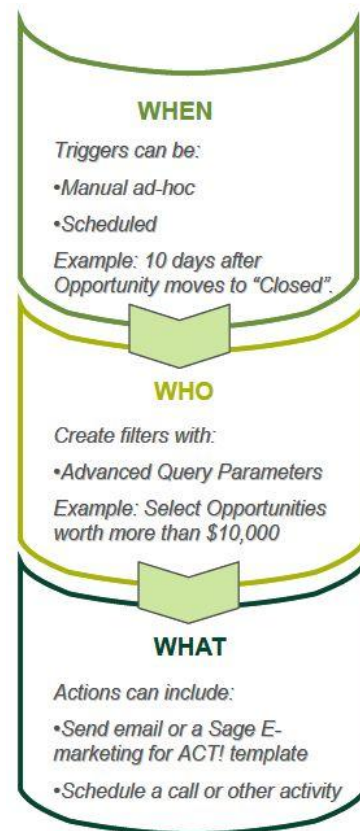
Smart Tasks handle your marketing and sales to-dos with automated workflow. Get started with one of many sample Smart Task templates and accompanying email templates for the most common activities. These Smart Task templates will set in motion the most basic or advanced processes, including reminders of your best customer's birthday, customers that haven't heard from you in a while, or welcoming a new customer.

And, best of all, you have total control over the timing, contact lists, and opportunities for each and every Smart Task. Apply Smart Tasks right out-of-the-box, make changes to fit your specific needs, or create your own.

Take communications to the next level

Since Smart Tasks are fully integrated with Sage E-marketing for ACT!, you get access to templates that allow you to send cheery birthday greetings and welcome new customers, among others. You can edit those emails to include additional content, graphics, and links.

Track the interest level of emails you send that are associated with Smart Tasks, like sales opportunity follow-ups, by viewing which customers are opening what you've sent.



Smart Task Benefits:

- Automate key activities with Smart Tasks to help handle everyday details, such as sending emails for you or putting activities on your calendar.
- 10 pre-loaded Smart Tasks for common activities with accompanying email marketing templates
- Apply right out-of-the-box or simply edit to personalize
- Suitable for general productivity or sales efforts
- Easy-to-use and intuitive visual designer* lets anyone create or manage Smart Tasks—unlike complicated designers in market
- Control the timing, contact lists, and opportunities for each Smart Task

Prerequisites for Smart Tasks

To use a Smart Task that has an E-mail step, you must have e-mail set up. If a Smart Task has an E-marketing e-mail step or Add to Drip Marketing step, you must have a Sage E-marketing for ACT! account.

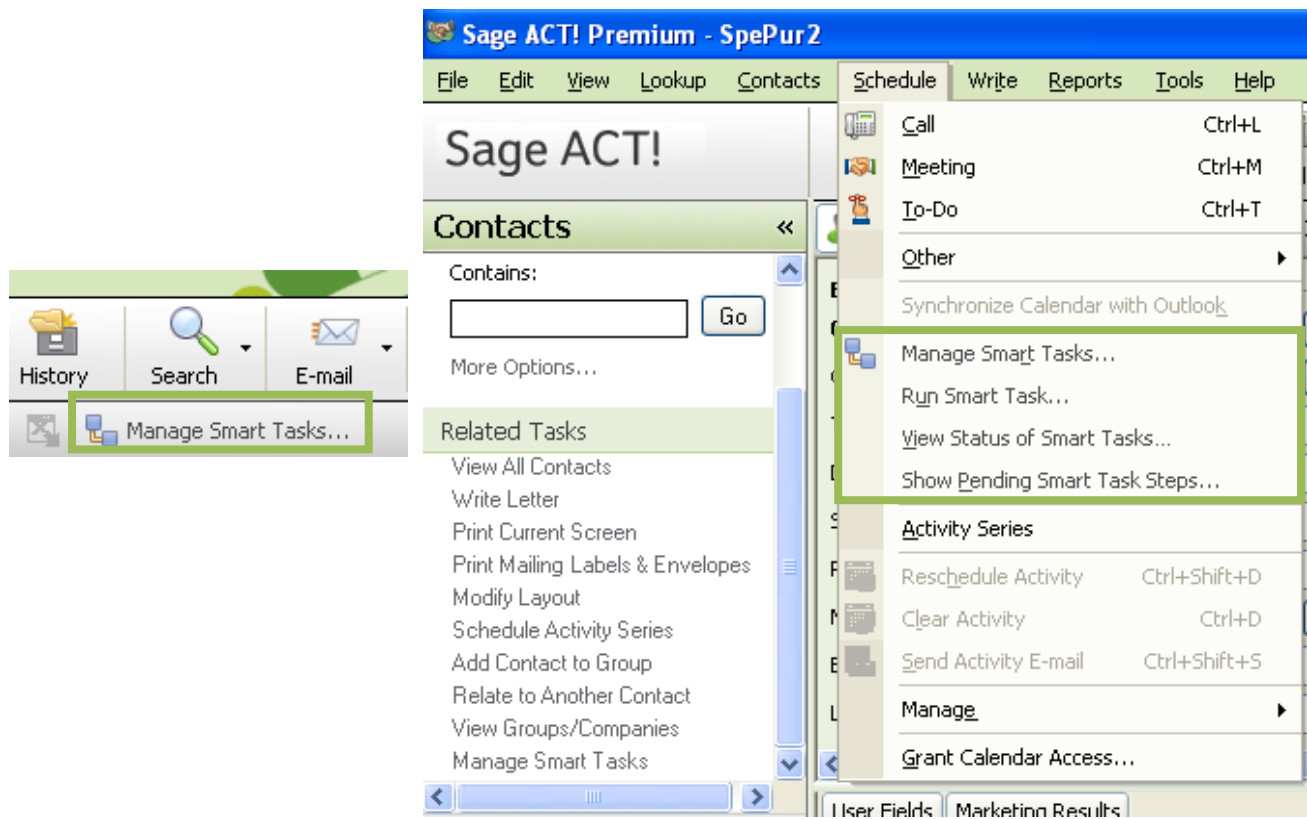
[Click here to view the Smart Tasks Feature Tour](#)

Accessing Smart Tasks

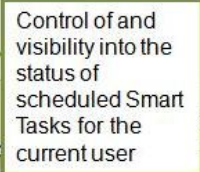
There are several ways to access Smart Tasks. You can manage and run Smart Tasks:

- From the Schedule menu, click Manage Smart Tasks.
- On the Contact Detail or Contact List view, in the Related Tasks area, click Manage Smart Tasks.
- On the Opportunity Detail or Opportunity List view, in the Related Tasks area, click Manage Smart Tasks.

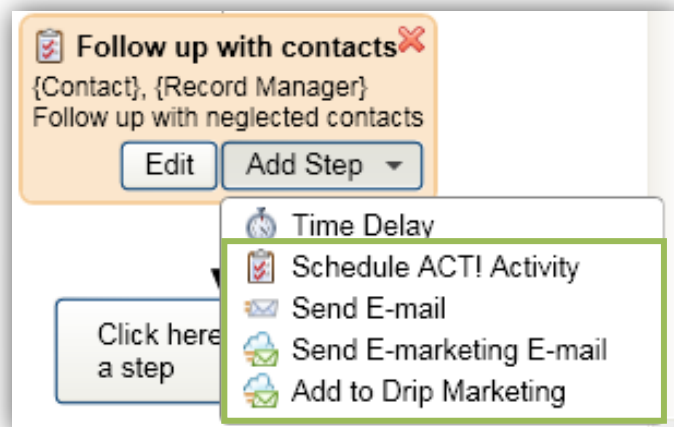
Tip: For easy access, you can also add the Manage Smart Tasks command to the Contact and Opportunity view toolbars.



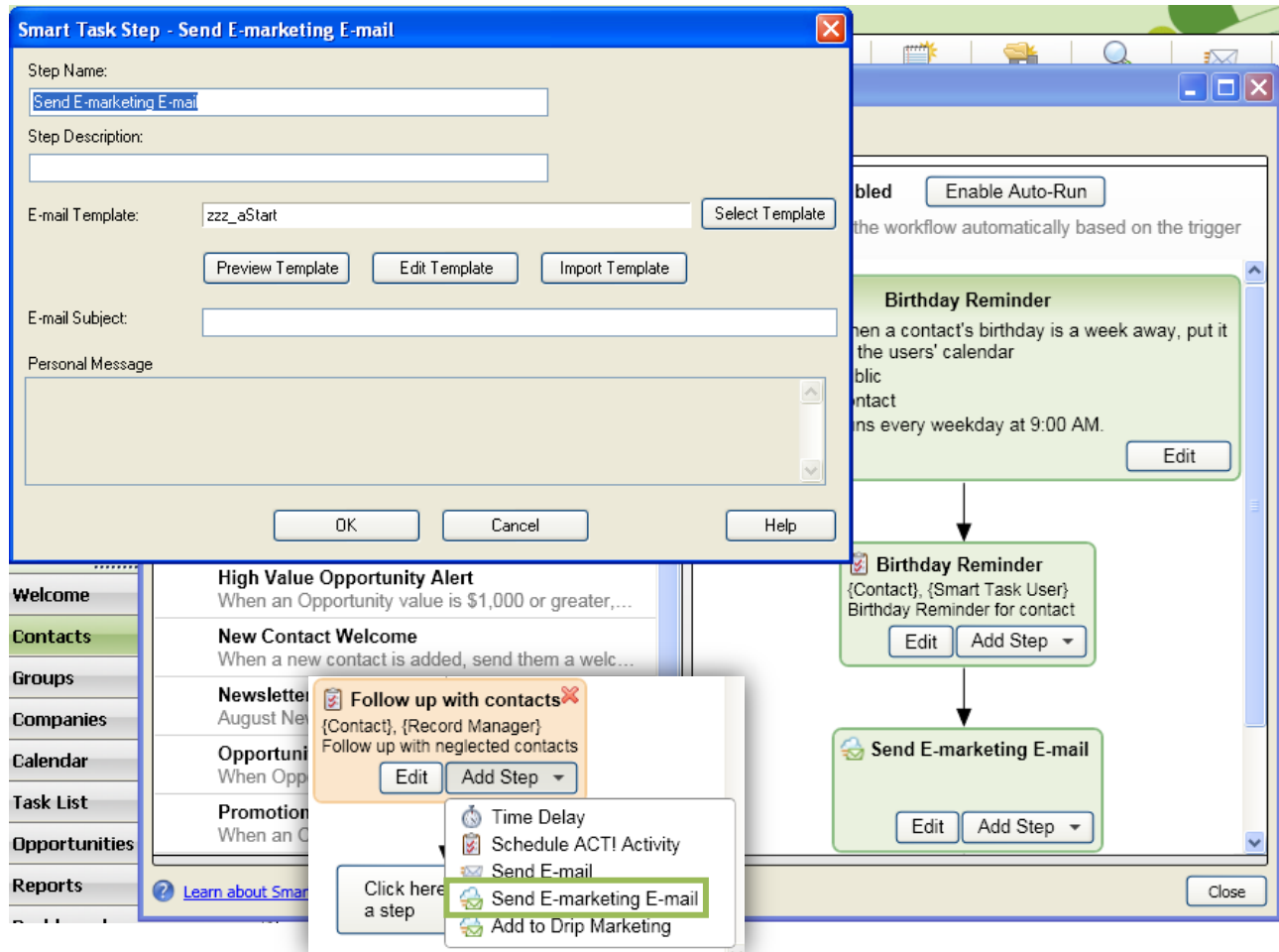
- Add, edit, delete, and duplicate Smart Tasks templates
- Add, edit, delete, and move Smart Task steps
- View and manage the status of a Smart Task



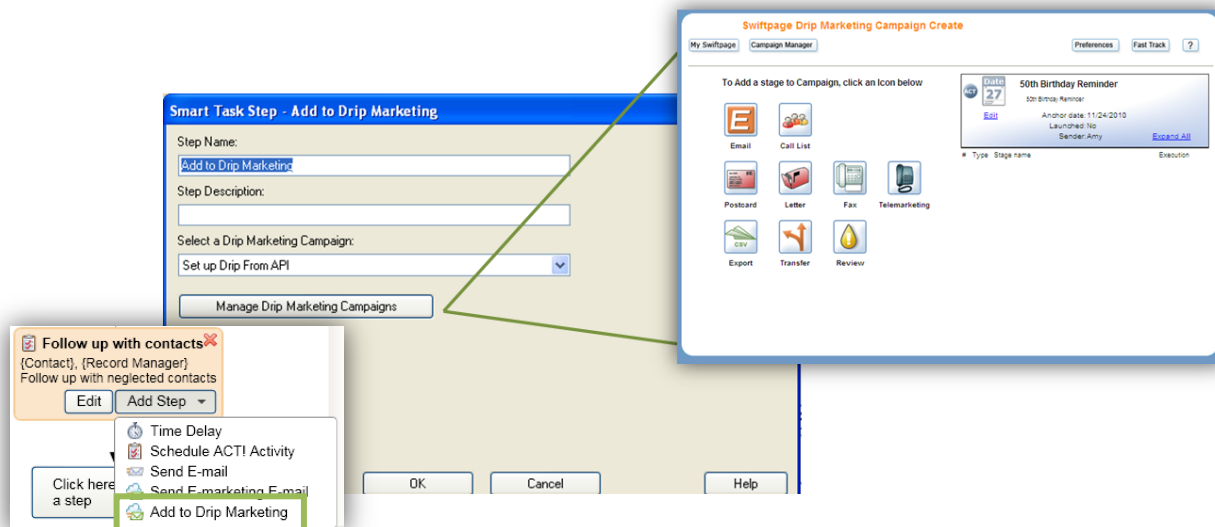
Schedule ACT! Activity - The Schedule Activity dialog box opens with the information that was set when the step was created. Make any changes and click OK to schedule the activity. For more information, see [Scheduling Activities](#).



Send E-marketing E-mail - The dialog box opens with the information that was set when the step was created. Make any changes and Select a template for the e-mail. Preview the template if needed and type or change the subject for the e-mail. Click OK.

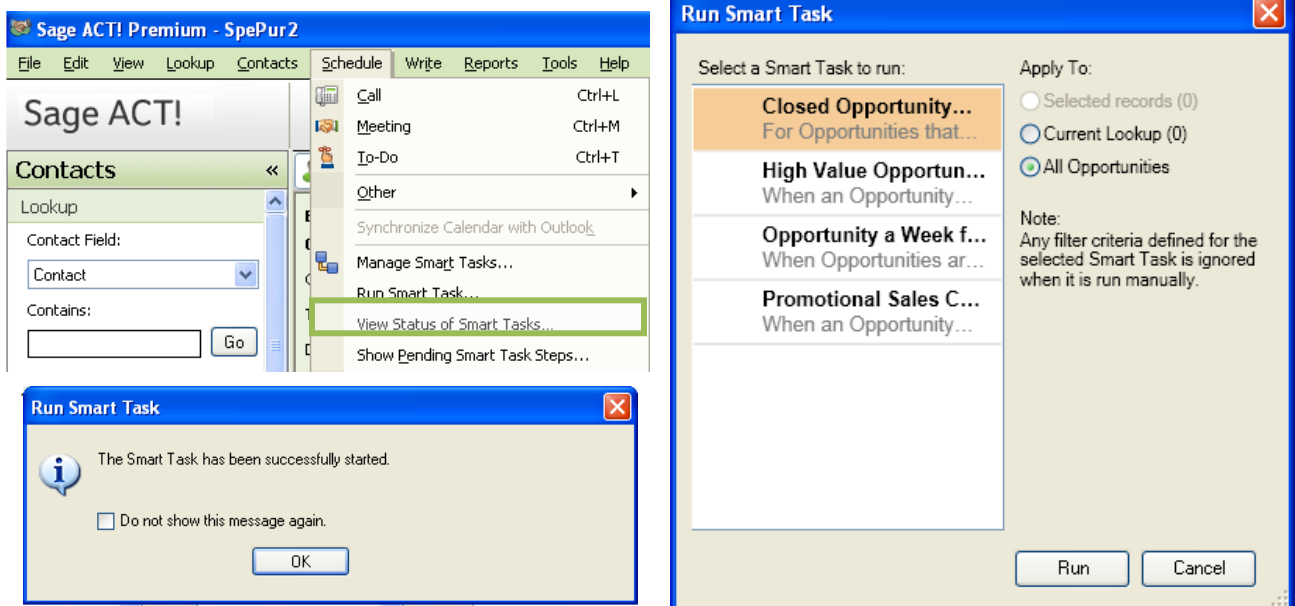


Add to Drip Marketing - The dialog box opens with the information that was set when the step was created. Type a description for the step. From the list, select a campaign. (Optional) If the campaign you want is not in the list, click Manage Drip Marketing Campaigns to go to the Swiftpage™ web site to manage campaigns. Click OK and Return to Managing Smart Tasks. Note: Your Drip Marketing Campaign must be launched prior to adding.



Running Smart Tasks

You can use the Run Smart Task dialog box to run a Smart Task for one or more records. Each user (if there are multiple users in the database) can select a template to run.



Show Pending Smart Task Steps

The Pending Smart Task Steps dialog box opens whether the step was started manually or was triggered automatically within a running Smart Task. If you do not want to run or delete all of the pending Smart Task steps at this time, you can set a reminder and close the dialog box.

You can preview a step before it runs if the Smart Tasks template creator specified that the step should display before running.

