



Quick Start Guide to:

Using the Sage E-marketing Portal

The Sage E-marketing portal is the one-stop center for accessing all Sage E-marketing functions. This Quick Start Guide explains all of the buttons you will find on the Sage E-marketing portal.

Sage E-marketing

- 1 **Template Editor**
- 2 **Reports**
- 3 **Call List**
- 4 **Drip Marketing**
- 5 **Send Email**
- 6 **List Manager**
- 7 **Surveys**
- 8 **Resource center**
 - ▶ Live Demos
 - ▶ Education Center
 - ▶ Consultants
 - ▶ Deliverability
 - ▶ How Do I?
- 9 **Account Information**
 - Account Name**: rs_010412_sp_act
 - UserID**: rs_010412_sp_act
 - Service Level**: Free
 - Drip Marketing Service Level**: Free
 - Send Limit**: 50
- 10 **Edit User Profile**
- 11 **Manage Account**
- 12 **Upgrade Account**
- 13 **Support Information**
 - Customer Support is available via [online chat](#) from 8:30am to 8:30pm ET, Monday-Friday

Important Note: Sage E-marketing is powered by Swiftpage™

Sage E-marketing Functions:

1. The Template Editor button launches the Sage E-marketing Template Manager. The Template Manager allows you to Edit, Import, or Publish and Distribute Templates. You can also Launch a Template as a landing page.
2. The Reports button displays reports for email blasts and individual sends. You may also view any scheduled sends, request your opt-out list, and generate account-wide reports.
3. The Call List button allows you to generate online Call Lists (ranked lists of your contacts based on how they interacted with your email blast). **Note:** this feature is available only with Pro and Team level accounts.
4. The Drip Marketing button takes you to the Drip Marketing Campaign Manager where you can create and manage your Drip Marketing Campaigns.
5. The Send Email button opens the Send an Email Blast section. You can elect to send now, schedule a blast for the future, send as another Sage E-marketing User ID, or send a test email. **Note:** this section is not connected to your ACT! database. The results of any blast sent through this section cannot be written to the contacts' histories within ACT!.
6. The List Manager button launches the List Manager database and allows you to import new contacts, manage your existing contacts, and create groups. **Note:** this section is not connected to your ACT! database.
7. The Surveys button grants you access to creating new surveys and viewing the results of pre-existing surveys.

Resource Center

8. The Resource Center window contains links to an assortment of helpful information. You can sign up for a live demo, peruse our list of certified consultants, or access documents to optimize your use of Sage E-marketing's features.

User Overview

9. The User Overview window displays your Sage E-marketing Account Name, User ID, Service Level, current Drip Marketing Service Level, and the Send Limit allocated to the current User.

Account Management

10. The Edit User Profile button allows you to change the company information used in [[SpeOwner]] mail merges, the postal address that appears in the footer of each email you send out, your logo, your template distribution list, your user password, and your notification settings.
11. The Manage Account button opens the Account Management menu. The menu provides a number of options such as upgrading your account, reallocating the service, and adding new Users.

Note: if your user password and your account password are different from one another, you may have to reenter your account password after hitting his button.

12. The Upgrade Account button opens a new window where you can upgrade your Sage E-marketing account (or purchase it for the first time). **Note:** if your user password and your account password are different from one another, you may have to reenter your account password after hitting his button.

Support Information

13. The Support Information window displays the hours and contact information for Sage E-marketing's Support department.