Swiftpage E

Quick Start Guide to:

Sending an Email in Swiftpage for SalesLogix

This Quick Start Guide takes you through the steps of sending an email through Swiftpage for SalesLogix, including features such as Scheduled Send and Send As.

1. Click on the Swiftpage E in SalesLogix. The following screen will appear:

Here, select your template, and type in your subject line and personal message (if applicable). Then, select your contacts by groups, leads, account, or campaigns. When you have selected the contacts you want to send your email to, click on one of the following buttons:

- Send Now: to send the email immediately (skip below to Step 4)

- Scheduled Send: to schedule the email to go out up to 60 days in advance (skip below to Step 3)

- Send As: to send an email on behalf of another SalesLogix user on your Swiftpage account (below, Step 2)

2. Once you click the Send As button, you'll see this window:

Here, you can choose a SalesLogix user to send on behalf of, a Swiftpage user, or the Account Manager of your contact or lead. **Note:** anyone on whose behalf you send must be tied to a Swiftpage user ID, or you will become the default sender for that email. Then, choose your delivery time, now (skip to Step 4) or Schedule (proceed to Step 3). Finally, enter your Swiftpage account password in the box provided and click Next.

3. When scheduling a send, this window will appear:
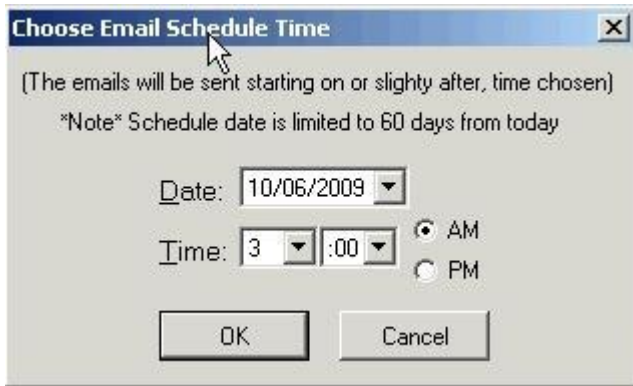
Set the date and time you wish for your email to be sent, then click OK.

4. The final sending screen will appear, and will look like this:
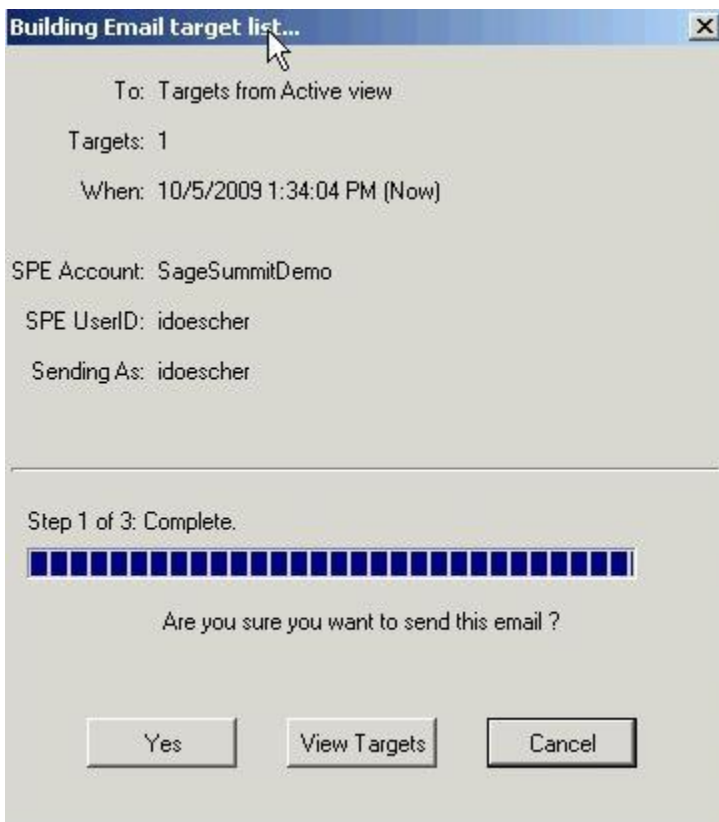
The number of "targets" (or emails to be sent) will be shown, as will the date and time the email is to be sent. Finally, the Swiftpage account and user doing the sending and the user on whose behalf the email will be sent are shown. To view a list of your targets, click on "View Targets." If you are ready to send your email, click Yes.

5. The confirmation screen will appear, looking like this:

You can enter a query tag here or choose an existing one, to track your send within SalesLogix campaigns. You can also select which records to update (Notes/History and/or Initialize score history). **Note:** for optimum Swiftpage functionality, we recommend updating both sets of records. When you are finished with your selection, click on Update History or Skip History.

6. You are done! You have successfully sent an email through Swiftpage for SalesLogix.