



SWIFTPAGE README for SALESLOGIX

There are 2 required bundles for Swiftpage for SalesLogix.

1. **The Swiftpage Manager Bundle** allows an administrator to manage their Swiftpage Account. This bundle enables the admin to create and map SalesLogix users to Swiftpage users and change account settings. This should only be released to clients with administrator status.

For Instructions on Installing read the Swiftpage Manager for SalesLogix - Install Guide

2. **The Swiftpage Bundle** is the main bundle which needs to be released to every client that will be using Swiftpage for SalesLogix.

For Instructions on Installing read the Swiftpage for SalesLogix - Install Guide

For testing only: If you want to test Swiftpage for SalesLogix on a test server you can email ctaylor@swiftpage.com for a testing server license. Please be aware that the testing server might not reflect the production environments true functionality since it is a test environment.

HOW TO SETUP YOUR SWIFTPAGE ACCOUNT

Download Swiftpage for SalesLogix from our website.

<http://www.swiftpage.com/site/downloadplugin.htm>

Install all 3 Swiftpage Bundles. (SalesLogix Administrator)

- 1) Swiftpage Bundle – Release to everyone who will be using Swiftpage.
- 2) Swiftpage Manager Bundle - Release to Admin

Release Menus and Toolbars. (SalesLogix Administrator)

- 1) Release Menu and Toolbars for Swiftpage Plug-in Bundle
 - 2) Release Menu for Swiftpage Manager Bundle
- * Read Install Guides on both bundles for directions.

Manage Swiftpage Account: (SalesLogix Client)

For a New Account:

- 1) Select Tools → Manage → Swiftpage Email Account
- 2) Select Create New Swiftpage Account
- 3) Create an Account and press Submit

To use an Existing Account:

- 1) Select Tools → Manage → Swiftpage Email Account
- 2) Select Manage Swiftpage Account
- 3) Enter in your Account and Account Password

Add More Users to your Account (SalesLogix Client)

- 1) Select Tools → Manage → Swiftpage Email Account
- 2) Select Manage Swiftpage Account
- 3) Select Add Swiftpage UserID
- 4) Select the SalesLogix User and fill in the User Information

Map SalesLogix Users for Swiftpage (SalesLogix Client)

- 1) Select Tools → Manage → Swiftpage Email Account
- 2) Select Manage Swiftpage Account
- 3) Select Map SalesLogix User to Swiftpage User
- 4) Map your users to SalesLogix users.

Now all your Users of Swiftpage are setup and ready to send. Each user can access Swiftpage by clicking on the Orange E from their Menu Bar.

For Swiftpage help and support, visit our Support Page at:
<http://swiftpage.com/support/index.htm>

Swiftpage

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