



Sage SalesLogix E-marketing Quick Start Guide To:

How to Add New Users

This Quick Start Guide explains how to add users in Sage SalesLogix Web Client.

Note: The first thing to understand regarding users in Sage SalesLogix E-marketing for Web is that only one SalesLogix user can be mapped to any one Sage SalesLogix E-marketing User ID. In other words, two SalesLogix users cannot access the same E-marketing user ID. To add users, follow these steps:

1. In SalesLogix, click on Options in the upper right hand corner and then select the E-Marketing Tab . The following screen will appear:

Sage SalesLogix

Recently Viewed ▾ New ▾ Schedule ▾ Tools ▾ Reminders (5)

Sales

- Welcome
- Accounts
- Contacts
- Leads
- Opportunities
- Sales Orders
- Activities
- Calendar
- What's New
- Library
- Reports
- Processes
- E-marketing

Options

General/Search | Group | Activity/Alarms | Calendar | Change Password | Opportunities | **E-marketing**

Account
SalesLogix User: **Administrator**
E-marketing Server: **www.Swiftpage5.com**
E-marketing Account: **SwiftpageforWeb**
E-marketing User: **SLX**

[Manage Account](#)

General

- Use HTTPS for all communication with E-marketing servers (* if unchecked, HTTP will be used)
- Show the email history tab in the Contact/Lead detail view

Sending Email Blasts

- Default to creating email history records per target per email blast
- Default to creating SalesLogix history records per target per email blast

Email send block size: (* number of targets to include per upload to E-marketing server)

- Click on the “Manage Account” button. You will be prompted to enter your account password. Enter it, click Login and the next screen will appear:

The screenshot shows a window titled "Manage Swiftpage Account" with a close button in the top right corner. The window is divided into two main sections: "Account details" and "Options".

Account details:

- Send Limit: 50
- Unassigned Send Limit: 0
- Total Seats: 1
- Authorized Seats: 1
- Trial Seats: 0
- Inactive Seats: 0
- Assigned Seats: 1
- Seats mapped to SLX users: 1/1

Options:

- Map SalesLogix User to Swiftpage User
- Map Swiftpage Mail Merge Fields
- Add Swiftpage UserID (highlighted with an orange arrow)
- Purchase/Change Seats

At the bottom left, it says "Interface version: 7.5.2.16". At the bottom right, there is a "Close" button.

- Click on the Add SalesLogix User ID button. A window will open where you can create a New Swiftpage User. To start, Select a SalesLogix user from the drop-down menu on the left. Then fill in all the fields and create a new User ID.

The screenshot shows a window titled "Add Swiftpage User" with a close button in the top right corner. The window is divided into two main sections: "Select a SalesLogix user to start..." and "Swiftpage User information".

Select a SalesLogix user to start...:

- A drop-down menu with a blue arrow pointing down.

Swiftpage User information:

Account: SwiftpageforWeb

- Username:
- User ID:
- Password:
- Verify Password:
- Title:
- Phone:
- Email:
- Email From, Name:
- Web Address:
- Timezone:
- SLX Timezone: Mountain Standard Time

At the bottom left, it says "Interface version: 7.5.2.16". At the bottom right, there is a "Close" button.

- Click Add User when you are finished and you are done!