



Sage SalesLogix E-marketing Quick Start Guide to:

Sending an Email

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

1. Click on the E-Marketing Button in SalesLogix. The following screen will appear:

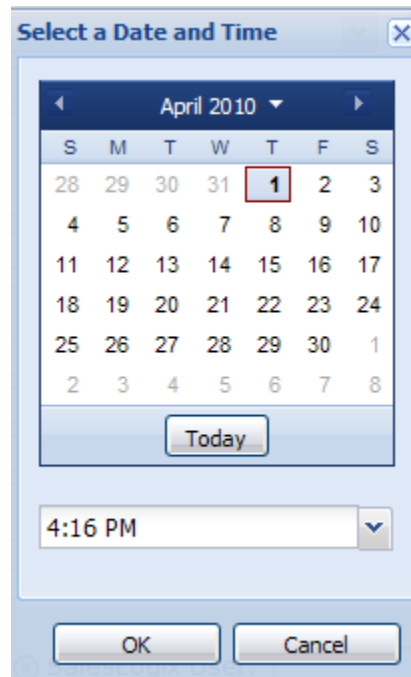
The screenshot displays the 'E-marketing' interface with the following sections:

- Navigation:** Send Email Blast (selected), Email Blast Results, Drip Marketing, Call Lists, Survey Responses.
- Account Info:** Account: **SwiftpageforWeb** User: **SLX**
- Help/Info:** Just learning the interface and dont have time to attend a webinar? No problem, simply download and watch a training video on your own time from Swiftpage University www.swiftpage.com/university.
- Email Section:**
 - Template: **zzz_aStart** (dropdown) [Preview] [Edit]
 - Subject: [Text Input]
 - Personal Message: [Text Area]
 - Tag: Use existing [dropdown] New [Text Input] [Manage Tags]
- Targets Section:**
 - Contacts [dropdown]
 - Leads [dropdown]
 - Campaign [dropdown] Stage: [dropdown]
- Delivery Section:**
 - Send ASAP Schedule Send [calendar icon]
- Send As Section:**
 - Swiftpage user: SLX
 - SalesLogix User: [dropdown] Swiftpage User: n/a
 - Targets' Account Manager
- History Section:**
 - Create email history records per target (*primary use is for email score tracking)
 - Create SalesLogix history records per target
- Buttons:** [Continue...]

You can select your template, Preview a template or click Edit to be taken to the Template Editor online. Type in your Subject Line and enter a Personal Message (if applicable). You can add a Tag to the send using an Existing tag or create a new one. You can manage your tags by clicking Manage Tags. Then, select your contacts by groups,

leads or campaign. When you have selected the contacts you want to send your email to, select the Delivery type:

- Send ASAP: 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
 - When scheduling a send, this window will appear:



Set the date and time you wish for your email to be sent and then click OK.

2. Now you will want to select who the email will appear to be sent as under Send As:

You can send as a Swiftpage User, SalesLogix User or Targets' Account Manager. **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.

3. Finally, under the History section, you can Create email history records per target (*primary use is for email score tracking) or Create SalesLogix history records per target.
4. Click Continue to verify the Email Blast and Send the email. A confirmation screen will appear:

E-marketing

Send Email Blast Email Blast Results Drip Marketing Call Lists Survey Responses

Account: **SwiftpageforWeb** User: **SLX**

Verify & Send

To: Duplicate Emails (Contact group)
Targets: 2
When: 4/2/2010 4:15 PM
Template: zzz_aStart
Subject: test
Sending as: SLX
Email Tag: (none)
Email History: Yes
SLX History: No

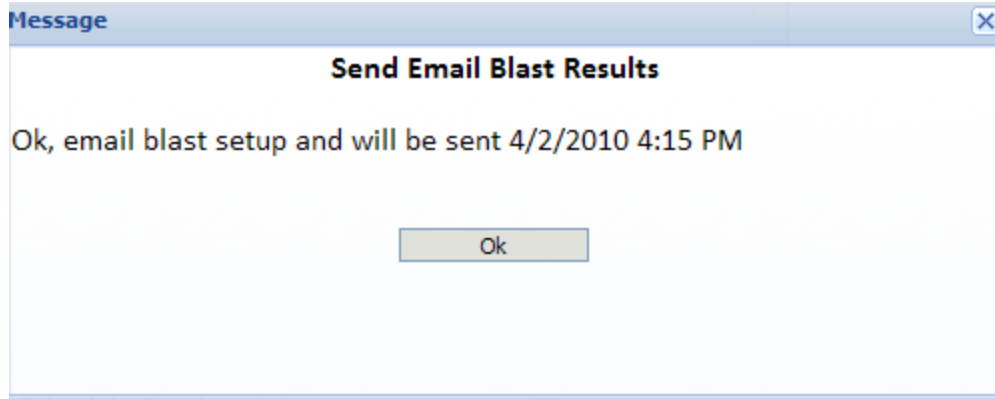
The email addresses from selected Group

David@PrecisionCompany.demo
David@PrecisionCompany.demo

Are you sure you want to send this email blast ?

This screen will show you the target selection, number of “targets” (or emails to be sent), the date and time the email is to be sent, Template and Subject line, the Sender, Email tag and the history records you chose to be written. A preview of the email addresses in the batch will also be shown. If you are ready to send your email, click Send.

5. The screen will appear, looking like this:



6. You are done! You have successfully sent an email through Sage SalesLogix E-marketing for Web.