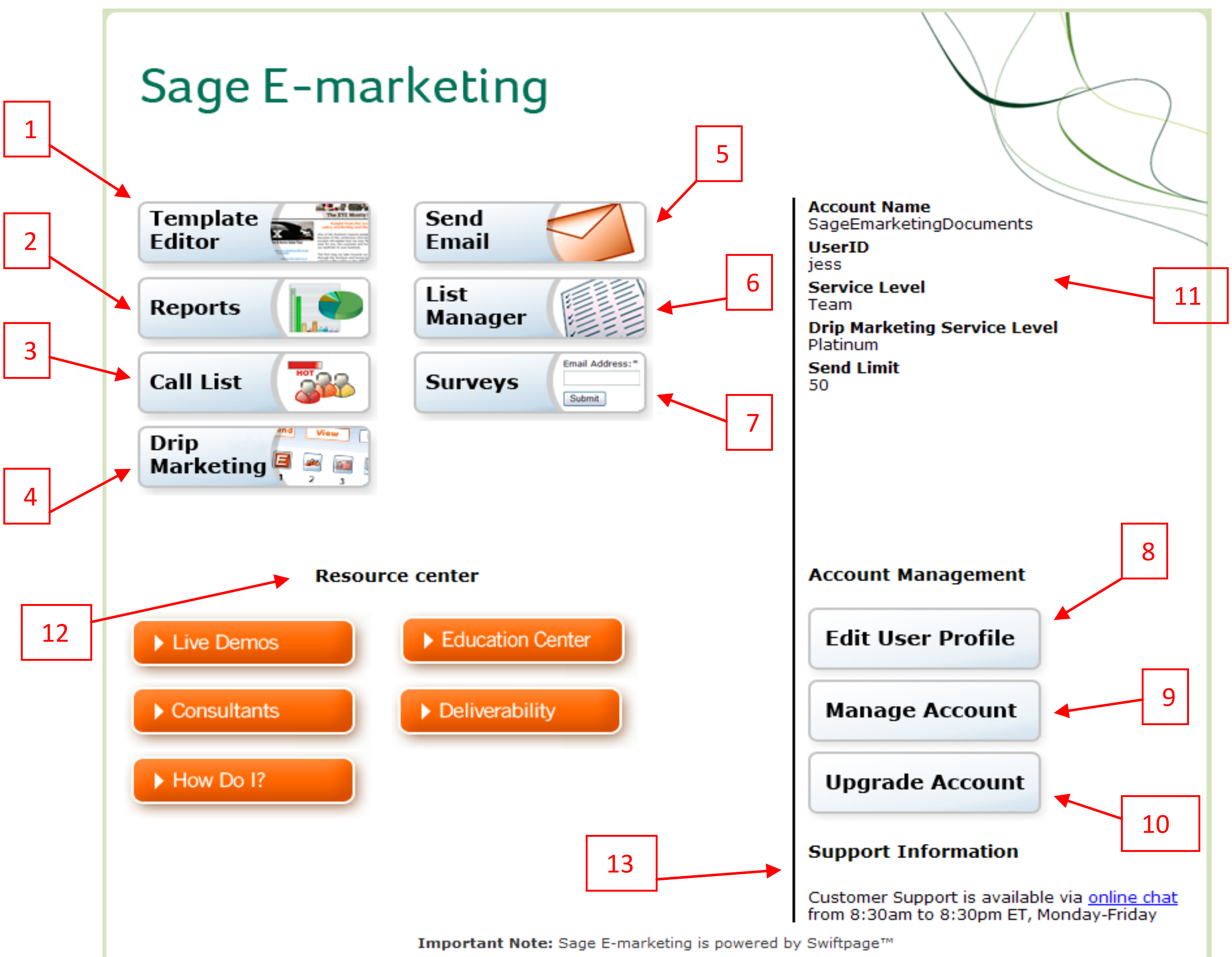
Quick Start Guide to:

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 Functions:

1. The Template Editor button launches the template editor, where you can edit your Sage E-marketing templates to get them ready to send.

2. The Reports button allows you to view your online 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 Campaign manager where you can create/manage your Drip Marketing Campaigns.

5. The Send Email button takes you to a screen that allows you to view and edit the CSV list of names that you have uploaded to Sage E-marketing's website, and send your email template to that list or to a single contact. **Note:** users of Sage E-marketing's integrations for ACT!, SalesLogix, SageCRM, and Excel generally will not use this section of Sage E-marketing because email blasts are sent and contact lists are maintained in each of those programs rather than online.

6. The List Manager button launches a section of the site in which you can upload a CSV list of names, view the list and edit it. **Note:** users of Sage E-marketing's integrations for ACT!, SalesLogix, SageCRM and Excel generally will not use this section of Sage E-marketing because contact lists are maintained in each of those programs rather than online.

7. The Surveys button allows you to create surveys, view survey results and define what will happen with a survey after it is filled out.

Account Management

8. The Your User Profile button takes you to a screen with several options: the ability 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 list for distributing templates to and from other Sage E-marketing's accounts, your user password, and your notification settings.

9. The Account Manager button launches the account management section of the Sage E-marketing web site. **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.

10. 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.

Other Features

11. The User Overview window shows you the current level of your account, including your account name and user ID.

12. The E-marketing Resource Center window offers helpful links to the Support section of Sage E-marketing’s website.

13. Finally, the Support Information window gives the hours and contact information for Sage E-marketing’s Support department and a link to the Support section of the Sage E-marketing website.