

Quick Start Guide To:

Accessing Call Lists and Online Reports and from Swiftpage for Sage CRM

This Quick Start Guide provides instructions for accessing Swiftpage's Call Lists and online reports within Swiftpage for Sage CRM.

To access Call Lists in Swiftpage for Sage CRM:

1. Click on the My CRM button on the left-hand side of the Sage CRM screen.
2. Click on the Swiftpage tab.
3. Click on the Call List button on the right-hand side of the screen.
4. Swiftpage's online Call List dashboard will now launch. Once you are done creating your Call Lists, you may close the browser window and return to Sage CRM.

To access Online Reports in Swiftpage for Sage CRM:

1. Click on the My CRM button on the left-hand side of the Sage CRM screen.
2. Click on the Swiftpage tab.
3. Click on the Reports button on the right-hand side of the screen.
4. Swiftpage's online reports menu will now launch. Once you are done viewing your reports, you may close the browser window and return to Sage CRM.

