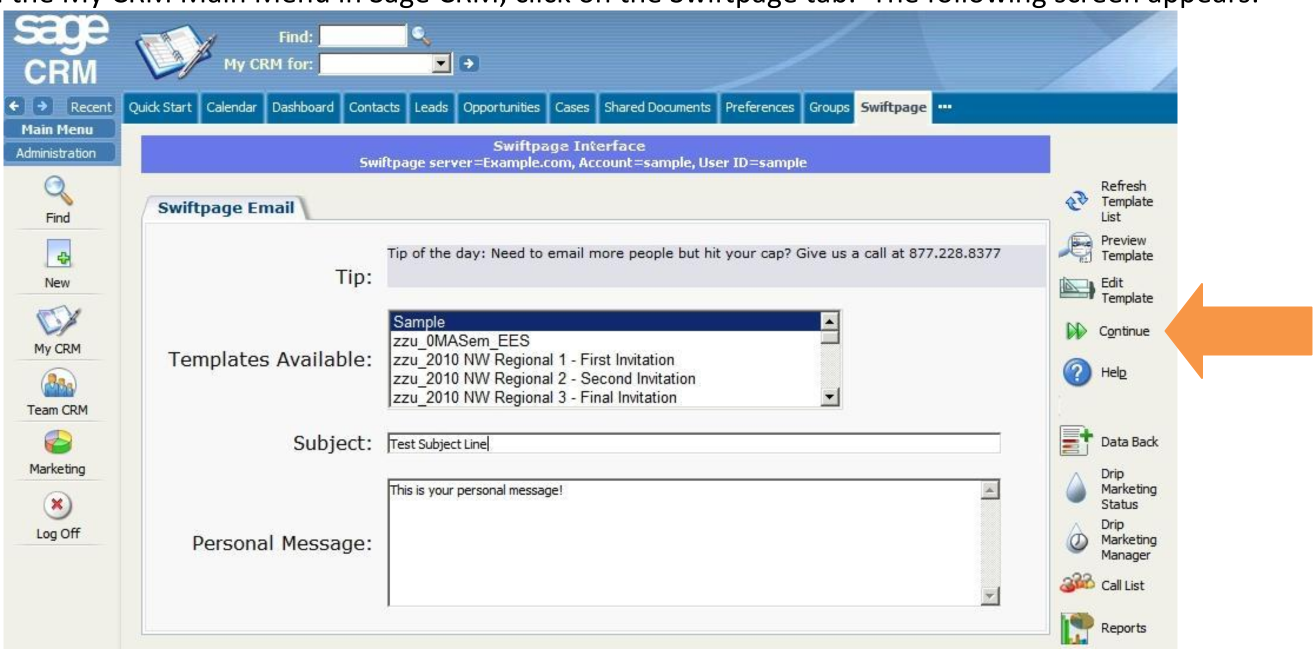
Quick Start Guide To:

How to Send an Email in Swiftpage for Sage CRM

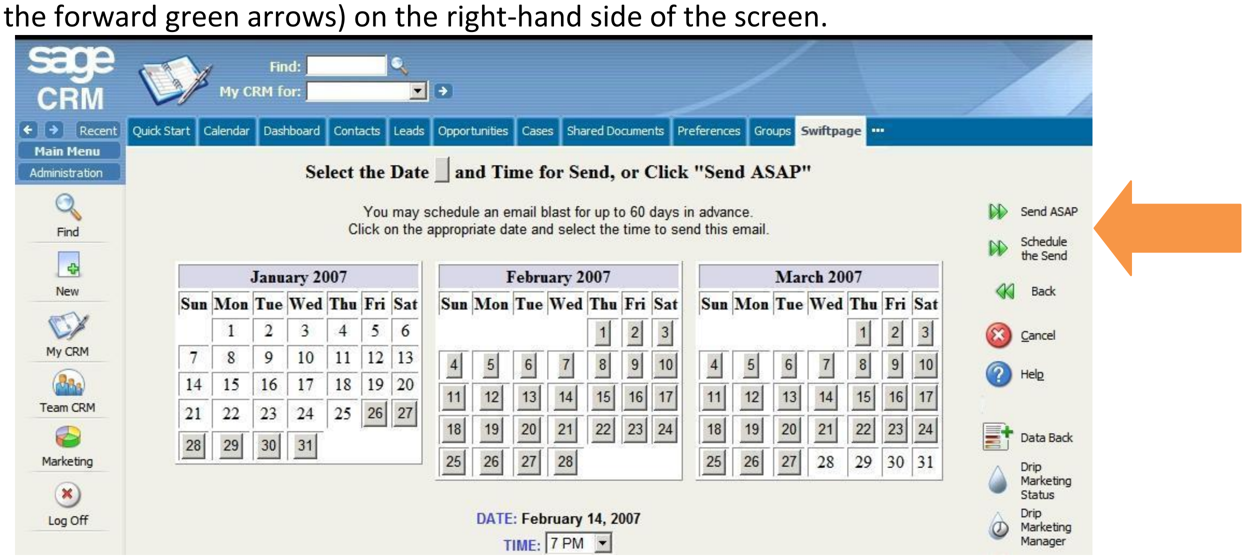
In Swiftpage for Sage CRM, individual emails and emails to larger groups are sent in different ways. This Quick Start Guide offers instructions for how to send both individual emails and email blasts within Swiftpage for Sage CRM.

To send an email blast (i.e. to more than one individual):

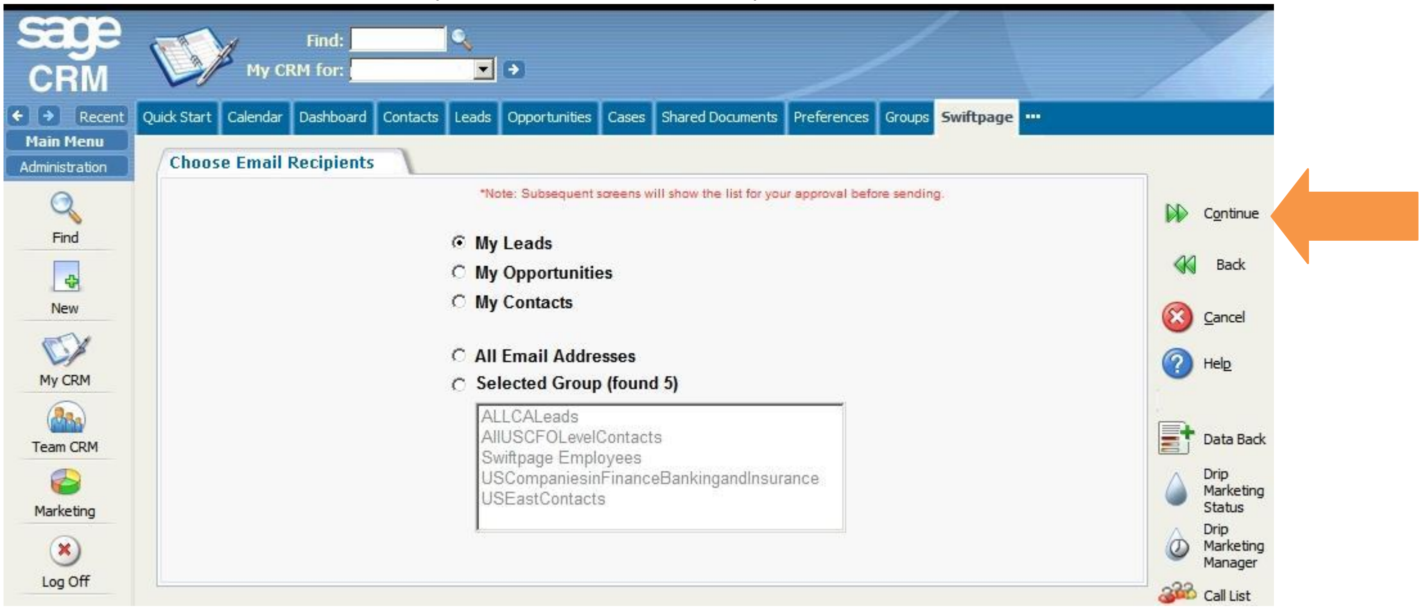
1. On the My CRM Main Menu in Sage CRM, click on the Swiftpage tab. The following screen appears:



2. Select the template you wish to send, enter your subject line and enter a Personal Message (if applicable). **Note:** you may use the Refresh Template List, Preview Template or Edit Template button to perform any of those functions from this screen. Refreshing the Template List is helpful if you have just edited a template that is not showing on your template list yet.
3. Once you have selected your template and entered your subject line, click on the Continue button (with the forward green arrows) on the right-hand side of the screen.



4. Select the Date and Time you want to send the email. To schedule the send in advance, click on the date you want to send the email (shown on the calendar view), then select the time from the dropdown menu and click on the "Schedule the Send" button (with the forward green arrows). Or, to send the email blast immediately, skip the date selection and click on the "Send ASAP" button (also with forward green arrows). **Note:** at any time during the send process, you can click on the Cancel or Back buttons to cancel the send process or return to the previous screen.

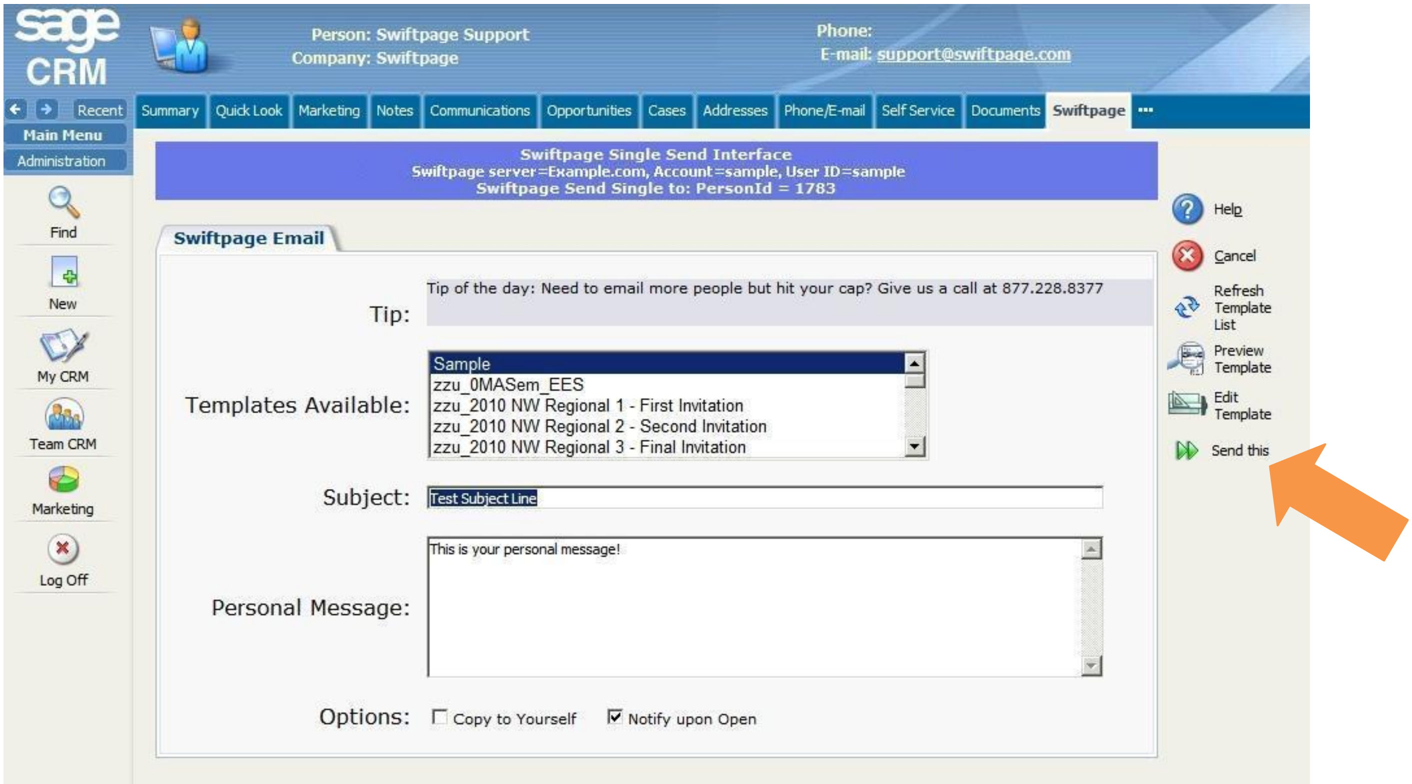


5. Choose the recipients who should receive your email. You can select from several choices: My Leads, My Opportunities, My Contacts, All Email Addresses or Selected Group (which will prompt you to select a group from the list). Select your contacts and then click the Continue button (with the forward green arrows).

6. You can now review your send. You will see your entire list of contacts, the time of sending, your template, subject line and personal message (if applicable). If everything looks correct, click on the orange E "Send Email" button.
7. You are finished! You will see a confirmation screen telling you how many emails were sent along with a verification that the History and Communication records were written.

To send an individual email:

1. On the My CRM Main Menu in Sage CRM, click on the Contacts tab.
2. Find the contact that you wish to send an email and click on their name to be taken to the Sage CRM Person Summary screen.
3. Once you are there, click on the Swiftpage tab.
4. The contact's Swiftpage History will be shown. Click on the Send Single button on the right-hand side (the envelopes icon).



5. The Send to Single screen will appear. Select the template you wish to send, enter your subject line and enter a Personal Message (if applicable). Choose the Copy to Yourself checkbox if you wish to receive a copy of the email and choose the Notify upon Open checkbox if you wish to receive an email when the contact opens your email to them. **Note:** you may use the Refresh Template List, Preview Template or Edit Template button to perform any of those functions from this screen. Refreshing the Template List is helpful if you have just edited a template that is not showing on your template list yet.
6. Once you have selected your template and entered your subject line, click on the Send This button (with the forward green arrows) on the right-hand side of the screen.
7. You are finished! You will see a confirmation screen verifying that the History and Communication records were written.