# How to Use Swiftpage for SageCRM

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# Basics of the Swiftpage for SageCRM Integration

The Swiftpage for SageCRM integration allows you to perform the following important marketing and sales functions:

1. **Email Marketing:** Swiftpage for SageCRM gives you the tools to create beautiful email templates, send directly from your database to your leads, contacts and groups and track who opened and clicked your messages. You can Send Now or Schedule Send.

2. **Email Tracking:** When you send your email blast with Swiftpage you can track who opened, clicked, bounced, suppressed and more. You can also view graphical and detailed data about your send, and export your send reports to others for further analysis.

3. **Surveys and Web Forms:** With Swiftpage's survey tool, you can gather valuable new contacts or become more informed on your contacts with Swiftpage General Surveys. Set up an **Autoresponder** email to automatically be sent to your respondents when they complete your surveys. With the Drip Marketing Autoloader you can automatically load contacts into a Drip Marketing Campaign to receive a series of marketing communications.

4. **Call List:** After you send an email blast to your contacts, your recipients open and click on the email message. Meanwhile Swiftpage creates a ranked list of the most interested contacts based on those interactions. You can then filter and assign Call Lists to other members of your team to follow up.

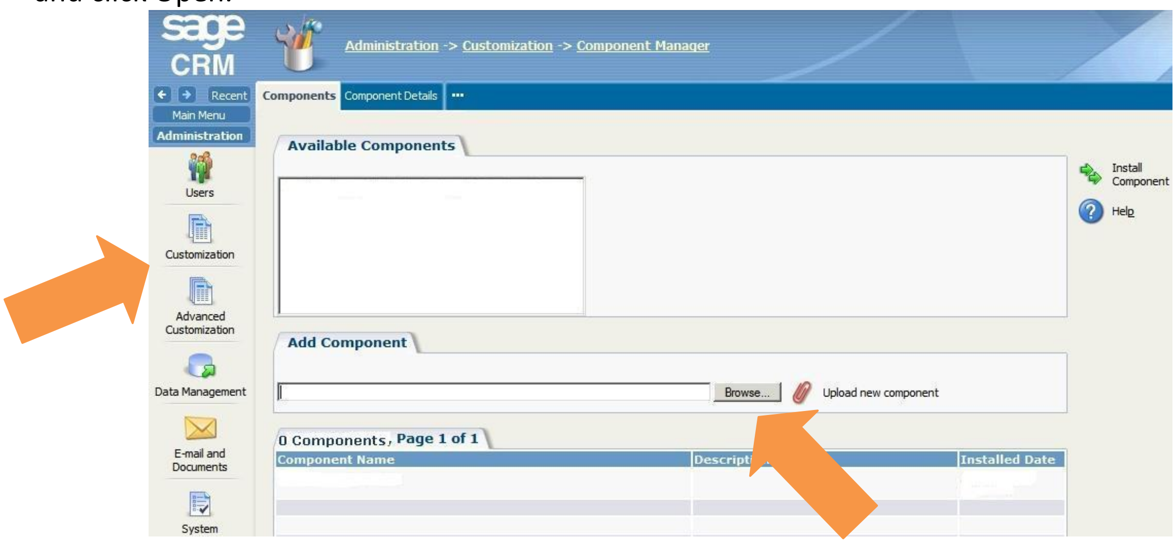
5. **Drip Marketing:** Swiftpage Drip Marketing gives you the ability to create a sequence of messages that are automatically delivered to your SageCRM contacts at the right time. Swiftpage Drip Marketing uses intelligent technology to send messages to contacts based on their interactions with previous messages and based on data in your SageCRM database environment.

# How to Install Swiftpage for Sage CRM and Set Up Your Account

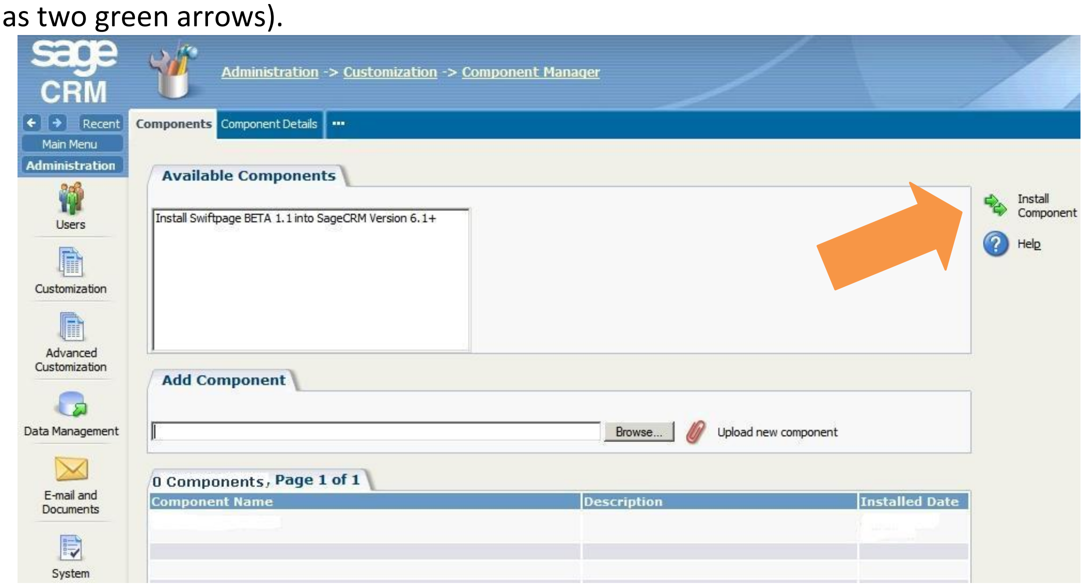
Follow these instructions to install Swiftpage for Sage CRM, set up a new or existing Swiftpage account, and map Sage CRM users to Swiftpage user IDs.

**To install Swiftpage for Sage CRM:**

1. Go to the Swiftpage web site (www.swiftpage.com) and click on "Try Swiftpage Free." Then click on Swiftpage for SageCRM, and fill out the form requesting to receive the installation file. **Note:** you must establish a Swiftpage account before filling out this form. You can create an account [here](here).
2. You will receive an email back from Swiftpage with instructions for downloading the Swiftpage for Sage CRM .zip installation file. Save the .zip file to your computer.
3. In Sage CRM, click on the Customization button on the left-hand side of the Sage CRM screen.
4. On the Customization menu, click on the Component Manager option.
5. Click on the Browse button to find the Swiftpage for Sage CRM .zip installation file on your computer, and click Open.




6. The Swiftpage for Sage CRM component will now be listed among your Available Components. Click on the Install Component button on the right-hand side of the screen to complete the installation (the icon has two green arrows).



7. Swiftpage for Sage CRM is now installed, and should be listed under the Components list. You are finished, and ready to set up your account!

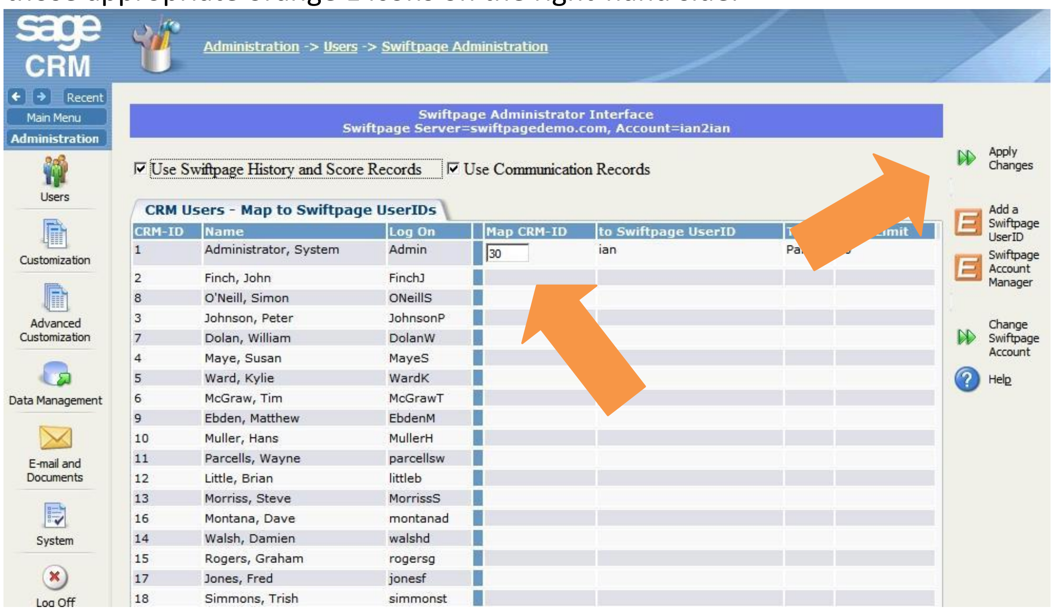
**To set up your account in Swiftpage for Sage CRM:**

1. Click on the Users button on the left-hand side of the Sage CRM screen.
2. Click on the Swiftpage Administration screen.
3. You will be prompted to enter an Account Name and Account Password. **Note:** you can ignore the Swiftpage Server field.
   - If you already have a Swiftpage account, enter your account name and password, and click on the Continue button (green arrows icon).
   - If you do not yet have a Swiftpage account, click on the Create Swiftpage Account button (orange E icon). You will be taken to Swiftpage's web site, where you can create a new Swiftpage account. Once you have created the account, enter the information into the Swiftpage account setup screen in Sage CRM (previous bullet point).


4. Your Swiftpage account is now connected to your Sage CRM software. You may now continue to the process of mapping Sage CRM users to Swiftpage user IDs.

**To map Sage CRM users to Swiftpage user IDs:**

1. Click on the Users button on the left-hand side of the Sage CRM screen.
2. Click on the Swiftpage Administration screen.
3. Your user mapping screen will appear. Sage CRM users are listed on the left-hand side, each with a number next to their name. Swiftpage user IDs from your Swiftpage account are listed on the right-hand side, with a box to fill in next to their name. Input the number of the Sage CRM user you wish to associate with the Swiftpage user ID into the box, and repeat for multiple Swiftpage user IDs. (For instance, if Michelle Jones appears on the left column with a 13 next to her name, and you wish to associate her with Swiftpage user ID Michelle, put “13” in the box next to the Swiftpage user ID Michelle. When you have put all of the appropriate Sage CRM user numbers in the box, click on the Apply Changes button on the right-hand side of the screen (green arrows icon). **Note:** if you wish to add Swiftpage users or visit your Account Manager online to make account-level changes, you may click on those appropriate orange E icons on the right-hand side.



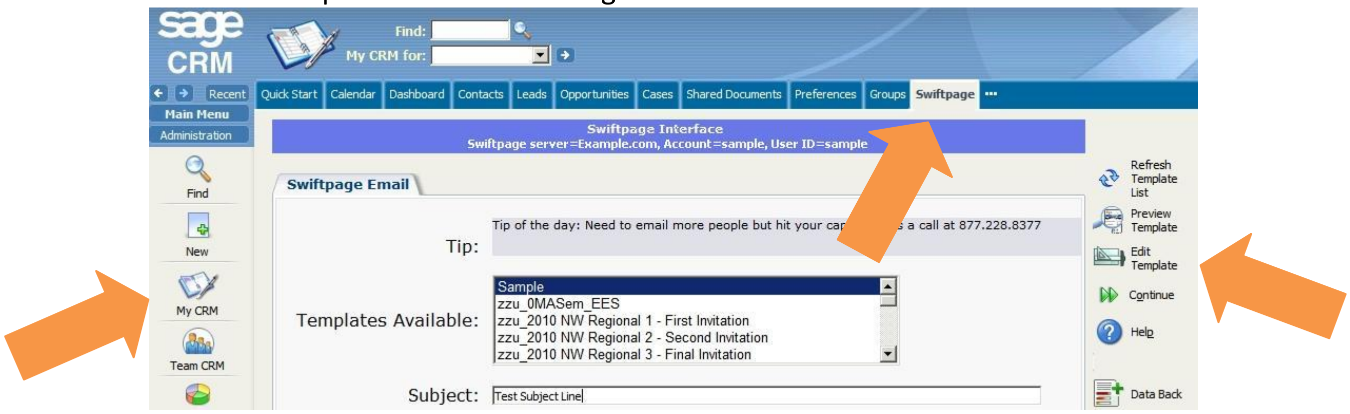

4. You are finished! Your Sage CRM users are now mapped to your Swiftpage user IDs—the numbers for each Sage CRM user should now appear in the boxes next to appropriate Swiftpage user ID. You are now all set up to begin working with Swiftpage for Sage CRM!

# Accessing Swiftpage's Online Editor in Swiftpage for Sage CRM

Follow these instructions to access Swiftpage's online editor within Swiftpage for Sage CRM.

**To access the Online Editor 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 Edit Template button on the right-hand side of the screen.




4. Swiftpage's online editor will now launch. Once you are done editing your template, close the editor browser window and return to Sage CRM to send your email or perform other Swiftpage functions. If new templates do not show up immediately after creating them in your online editor, click on the Refresh Template List in Swiftpage for Sage CRM to show all new templates.

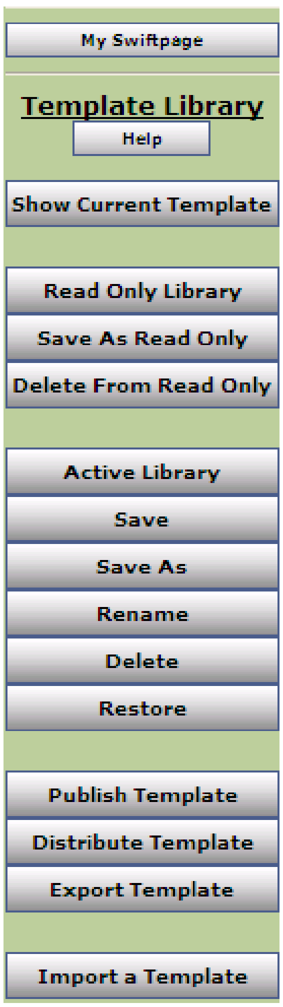

# Using the Swiftpage Online Editor

When you first enter the Swiftpage online editor, you will see three tabs on the left-hand side of the screen, Template Library, Content Editor, and Customize Template. **Note:** if you are using Swiftpage's beta editor, you may only see two tabs, Content Editor and Customize Template. The Template Library functions are handled by the Template Manager in the beta editor.

Generally speaking, you will use the Template Library to manage your template as a document—saving it, renaming it, deleting it and so on. You will primarily use the Content Editor tab when editing your template's images and text. And the Customize Template tab is primarily used for the structure your template, including column widths, colors, adding windows, and so on. The following sections explain the functions of each of these three tabs.

# Template Library Functions

When you click on the Template Library tab, you will be presented with the buttons shown and described below. **Tip:** to start creating a Swiftpage template, click on the Read Only Library button (see #4, below).




1. My Swiftpage: takes you back to the My Swiftpage portal, where you can access Surveys, Reports, and more.
2. Help: accesses Swiftpage online help.
3. Show Current Template: displays the most current version of your Swiftpage template. Swiftpage only allows one template to be open at a time, so the "current template" is always the one that is open.
4. Read Only Library: this button accesses the Swiftpage Read Only Library. The Read Only Library consists of templates created by Swiftpage that cannot (in their read-only state) be modified. However, they can each be copied as an Active template so that you can modify them. Begin by visiting Swiftpage's online template gallery to find a template you want to work with. Then, enter the Swiftpage online editor, click on the Template Library tab, and click on the Read Only Library button. Choose the template you want from the list of templates, then click Submit. Next, click on Show Current Template. Finally, click on the Content Editor tab, and click on the Make Editable Copy button. You will be asked to give the template a new name. Type in the name and click Submit, then click on Show Current Template. Now you have a completely editable copy of the template that was found in the Read Only library.
5. Save As Read Only: this function is used to save your Active Templates as read-only, so they cannot be modified. You will need to save templates as Read Only if you are planning to send them using the Send As function (available with the Swiftpage Team service level). Once you save a template as Read Only, a copy of the template is saved in the Read Only library.
6. Delete from Read Only: use this button to delete a template from the Read Only Library. **Note:** you cannot delete Swiftpage's prepopulated templates (with a zzz prefix) from the Read Only library. You may only delete Read Only templates you have created.

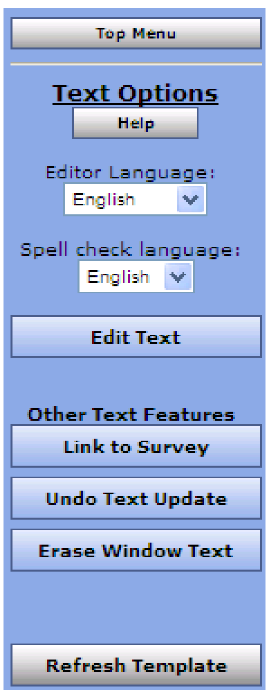
7. Active Library: this button accesses your Active Library, which consists of fully editable templates that you have copied from the Read Only Library. Use this button to switch between templates.
8. Save: this button saves your template. Normally, Swiftpage will save your template as you go, but clicking this button before you exit Swiftpage guarantees that your work is saved.
9. Save As: click this button to make a copy of the current template under a new name. If you like the design of one of your templates and want to edit the text—but want to keep the original template as well—use the Save As button to make an exact copy of the template for editing.
10. Rename: use this button to rename the current active template.
11. Delete: this button will give you the option to delete a template from your active library.
12. Restore: when you click this button, you restore the template to the last time it was saved. The point of the last save may be the last time you clicked the Save button on the Template Library tab, or it may be the last time Swiftpage automatically saved the template. In some cases, using the Restore button can help you recover lost information. In other cases, if you have done more work since the template was last saved, you may lose work by clicking Restore. The Restore button is, generally, therefore only used in the case of broken templates (i.e. templates in which code or other programming has caused the template to function or appear incorrectly).
13. Publish Template: the Publish Template function is used to send a template from one Swiftpage user to another within the same Swiftpage account. Click this button and you will be presented with a list of users on your account. Highlight the user you want to send the template to—or hold down the control key to highlight several—and then click Submit. The template will then be published to the other user(s)'s Read Only Library.
14. Distribute Template: the Distribute Template function is used to send a template from one Swiftpage account to a user in a separate Swiftpage account. To use this function, you must first set up your distribution list. (**Note:** To do this, go to My Swiftpage > Your User Profile > Distribution List, put in the account name and user of anyone you want to receive templates from or send templates to, and then click Submit. In order to receive templates from you, users in other accounts must add you to their Distribution List as well.) When you click on Distribute Template, you will see a list of the accounts and users to whom you can send a template. Highlight the account/user combination you want to send the template to—or hold down the control key to highlight several—and then click Submit. The template will then be published to the other user's Read Only Library on the separate Swiftpage account.
15. Export Template: this button will export your template in .html format and email it to any address you desire. The export function is used primarily for two reasons: to create a file backup of your Swiftpage template, and to create web pages out of your Swiftpage templates.
16. Import a Template: use this button to import templates designed outside of Swiftpage, in HTML editors like Dreamweaver or Frontpage. Once you click this button, you will be asked to browse for your .html file to import. Once the file is imported you will have a chance to review it and verify it before it is placed in your Read Only Library. In the Swiftpage Basic Online Editor, you cannot edit imported templates.

# Content Editor Functions

When you click on the Content Editor tab, you will be presented with the buttons shown and described below.


1. My Swiftpage: takes you back to the My Swiftpage portal, where you can access Surveys, Reports, and more.
2. Help: accesses Swiftpage online help.
3. Text Options, Image Options and PDF Options: each of these buttons expands a larger menu with more options. Generally speaking, Text Options allows you to add and edit text, Image options allows you to add and edit images, and PDF options allows you to add PDF documents and link them to your template. See below for further details. **Note:** each of these options require that you first select one of the windows in your template by clicking on it. When you scroll over windows in your template, a green border appears around them. When you click on a window to select it, the border turns into a solid blue border.

## The Text Options Menu




1. Top Menu: returns to the original Content Editor menu.
2. Help: accesses Swiftpage online help.
3. Editor/Spell check language: allows you to select the language for various aspects of the online editor.
4. Edit Text: opens a text editing window that allows you to edit text in the selected window of your template. See below for a complete description of the text editing toolbar.
5. Link to Survey: click this button to link a specific line of text in your window to one of your Swiftpage surveys.
6. Undo Text Update: if you have just edited text in one of your template windows, click this button to undo those edits.
7. Erase Window Text: this button erases all text within the selected window of your template.
8. Refresh Template: click this button to view the most up-to-date version of your Swiftpage template.

## The Text Editing Toolbar

When you click the Edit Text button on the Text Options tab, you will see a screen for typing text with the following options. **Note:** always click Submit after typing text to make your changes take effect.


**First Row:**

1. Source: allows you to edit the HTML source code.
2. Clears text: clears all text
3. Cut text
4. Copy text
5. Paste
6. Paste as plain text
7. Paste from Microsoft Word
8. Print
9. Undo
10. Redo
11. Find
12. Replace
13. Select all
14. Remove format

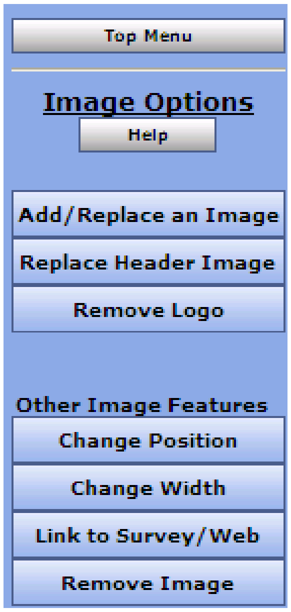
**Second Row:**

15. Bold text
16. Italic text
17. Underline text
18. Strikethrough text
19. Subscript
20. Superscript
21. Insert/remove number list
22. Insert/remove bulleted list
23. Decrease indent
24. Increase indent
25. Left alignment
26. Center alignment
27. Right alignment
28. Justified alignment
29. Insert/edit hyperlink
30. Remove hyperlink
31. Insert/edit table
32. Insert horizontal line
33. Insert special character
34. Text color
35. Text background color

**Third Row:**

36. Text font
37. Text size
38. Mail merge fields for email personalization
39. SpeProfile mail merge fields for personalization

## The Image Options Menu



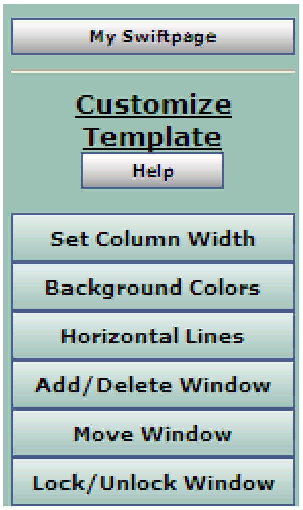

1. Top Menu: returns to the original Content Editor menu.
2. Help: accesses Swiftpage online help.
3. Add/Replace an Image: use this button to insert an image into the selected window of your template, or to replace the image currently there. When you click this button, you will be asked to browse for the image to upload. You can then choose where to position the template within the window: Top positions the image in the center at the top, with text below it. Left or Right positions the image next to the text. Bottom positions the image in the center at the bottom of the window, with text above it. **Note:** template windows are limited to one image each.
4. Replace Header Image: the 600-pixel-wide image at the top of most Swiftpage templates is called the Header image. Click this button to replace the header image. You can select to replace the header with your own image that you upload, or with an image from the Swiftpage Header Library. All Header images should be 600 pixels wide—wider images will be truncated.
5. Remove Logo: if you are using a Swiftpage template that includes a logo, and you have uploaded a logo to the “Your User Profile” section of My Swiftpage, click this button to remove it permanently from the current template. **Note:** removing a logo cannot be undone.
6. Change Position: as mentioned above (number 3), images can be positioned at the Top, Left, Right or Bottom. Click the Change Position button to move the image from one position to another.
7. Change Width: changes the width of the picture (the height of the picture will adjust automatically, so the image does not skew). You will be asked how many pixels wide you want the image to be. (Remember, for reference, that the whole template is 600 pixels wide.
8. Link to Survey/Web: click this button to link the image in the selected window to a web URL.
9. Remove Image: this button will remove the image from the selected window.

## The PDF Options Menu


1. Back/Top Menu: both buttons return to the original Content Editor menu.
2. Help: accesses Swiftpage online help.
3. Upload a PDF: click this button to begin the process of adding a PDF and linking it to text or an image within the selected window. You will be asked to browse for your PDF document on your computer. **Note:** PDFs uploaded to Swiftpage cannot be larger than 4MB in file size, and you are limited to one PDF document per window in your template.
4. Link Text to PDF: after uploading your PDF document, click this button to link text from the selected window to your PDF. You will be asked to copy and paste or retype the text into a window. That text will then be linked to the PDF.
5. Link Image to PDF: after uploading your PDF document, this button will link the image in the selected window to your PDF.

# Customize Template Functions

When you click on the Customize Template tab, you will be presented with the buttons shown and described below.



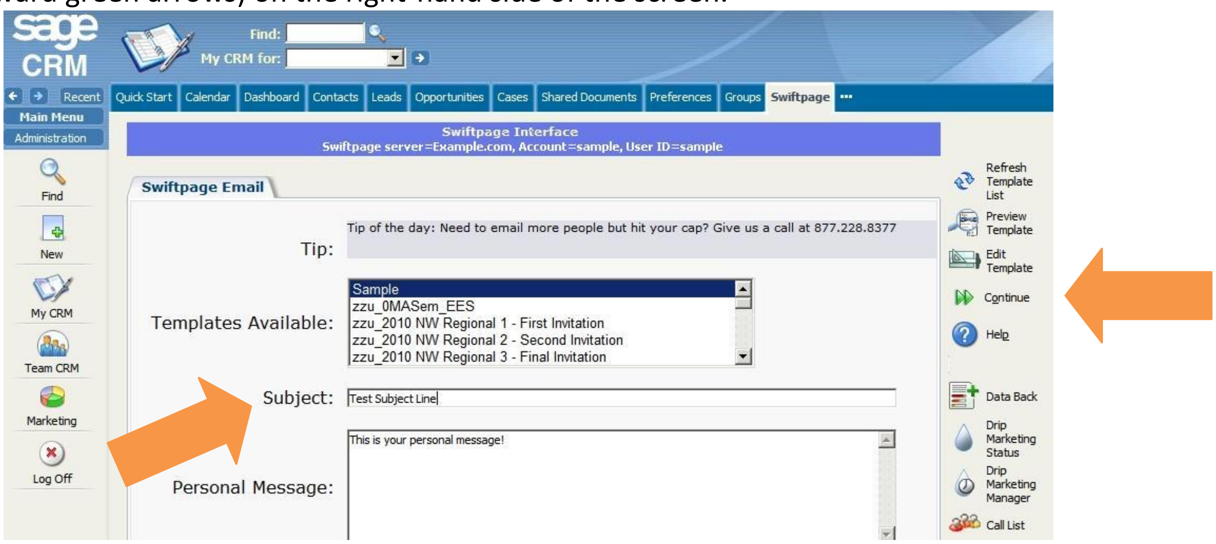

1. My Swiftpage: takes you back to the My Swiftpage portal, where you can access Surveys, Reports, and more.
2. Help: accesses Swiftpage online help.
3. Set Column Width: every Swiftpage template is 600 pixels wide, and every Swiftpage template has two columns. (In some Swiftpage templates, the left-hand column is made as wide as possible, making the template appear as a one-column template rather than two.) The Set Column Width button allows you to establish the width of the left-hand column, and the right-hand column will adjust automatically. So, for instance, if you set the left column width at 400 pixels, the right column will be about 200 pixels wide (slightly smaller because of the automatic space Swiftpage puts between columns), so you will have a left-hand column that is about double the size of the right. If you set the left column at 300 pixels, the right column will also be about 300 pixels, and the columns will appear to be an equal width. You can test different widths to get the look you want.
4. Background Colors: click this button to change the background color of your template, a column of your template, or a single window. When you click the button, you can select a color (or type in an RGB code), select which portion of the email you wish to color (whole template, column or window), and click Submit to apply the color.
5. Horizontal Lines: use this button to insert horizontal lines between windows in your template.
6. Add/Delete Window: this button gives you three options: (1) add a window below the current window, (2) delete the selected window, or (3) duplicate the selected window (duplicate windows appear immediately below the original). **Note:** you cannot delete the topmost window in a column—you have to move it down to do that. (See Move Window, below.)
7. Move Window: this window allows you to move the selected window up or down within its column. You cannot move a window from one column to another.
8. Lock/Unlock Window: use this function to lock a window so no changes can be made to it, if you so desire.

# How to Send an Email in Swiftpage for Sage CRM

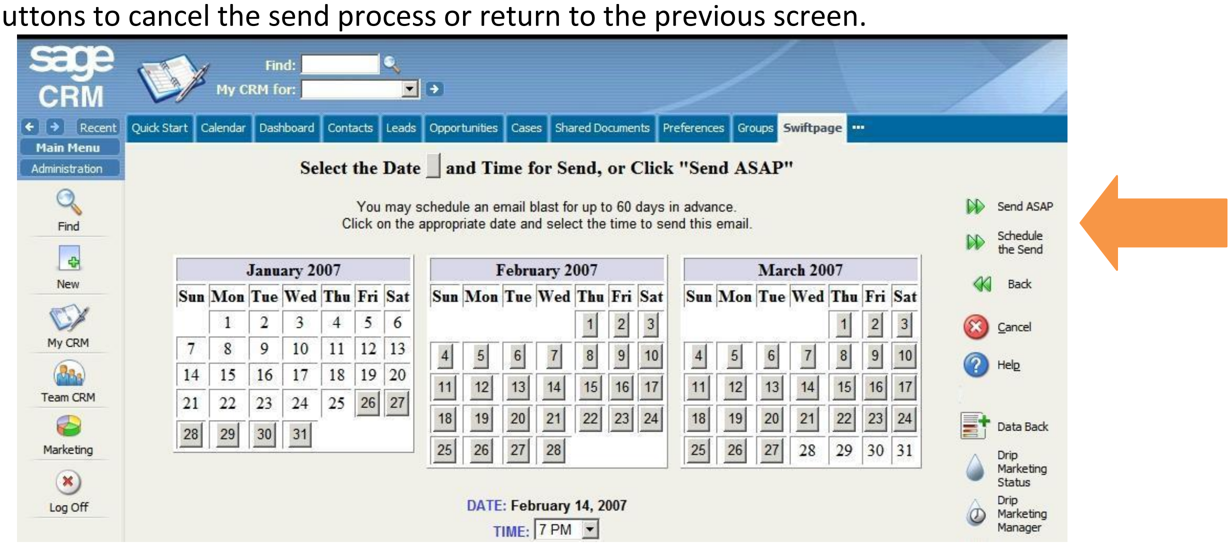
In Swiftpage for Sage CRM, individual emails and emails to larger groups are sent in different ways. Follow these instructions to send both individual emails and email blasts within Swiftpage for Sage CRM.

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

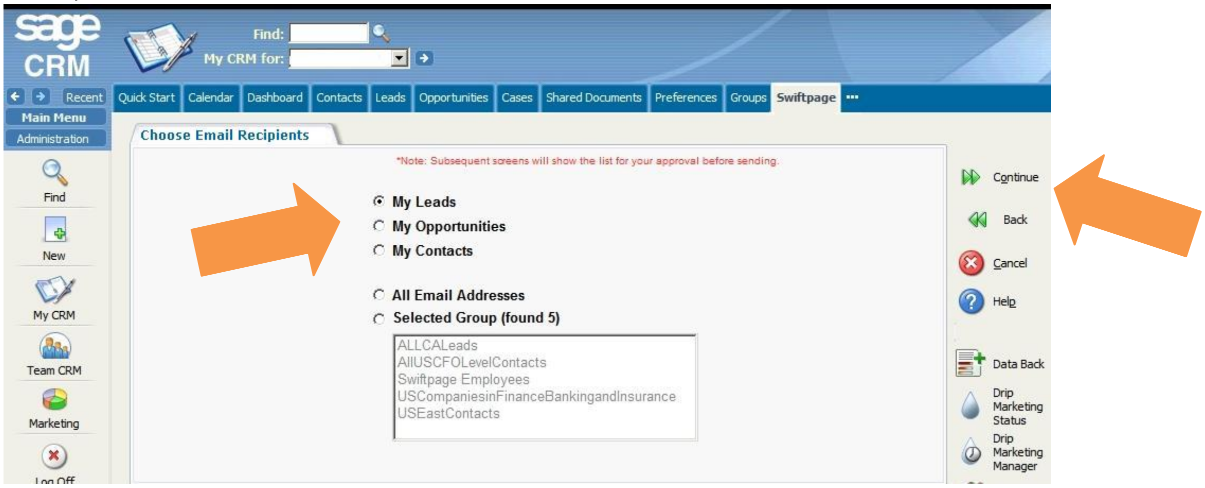
1. On the My CRM Main Menu in Sage CRM, click on the Swiftpage tab.
2. Select the template you wish to send, enter your subject line, and enter a Personal Message (if applicable). **Note:** you may use the Refresh Template List, Preview Template, or Edit Template button to perform any of those functions 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, 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, then click the Continue button (with the forward green arrows).

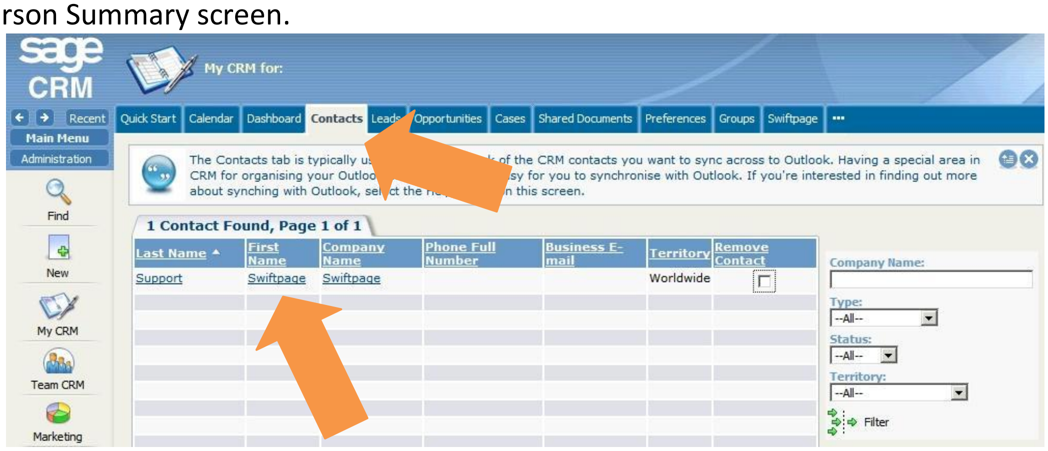



6. You can now review your send. You will see your entire list of contacts, the time of sending, your template, subject line, and personal message (if applicable). If everything looks correct, click on the orange E "Send Email" button.

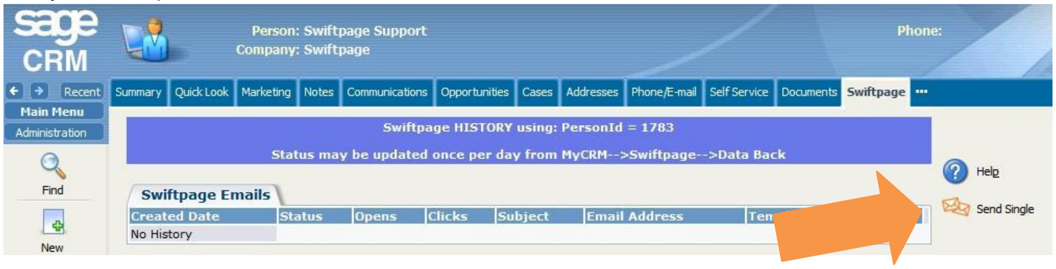

7. You are finished! You will see a confirmation screen telling you how many emails were sent, and verifying that the History and Communication records were written.

**To send an individual email:**

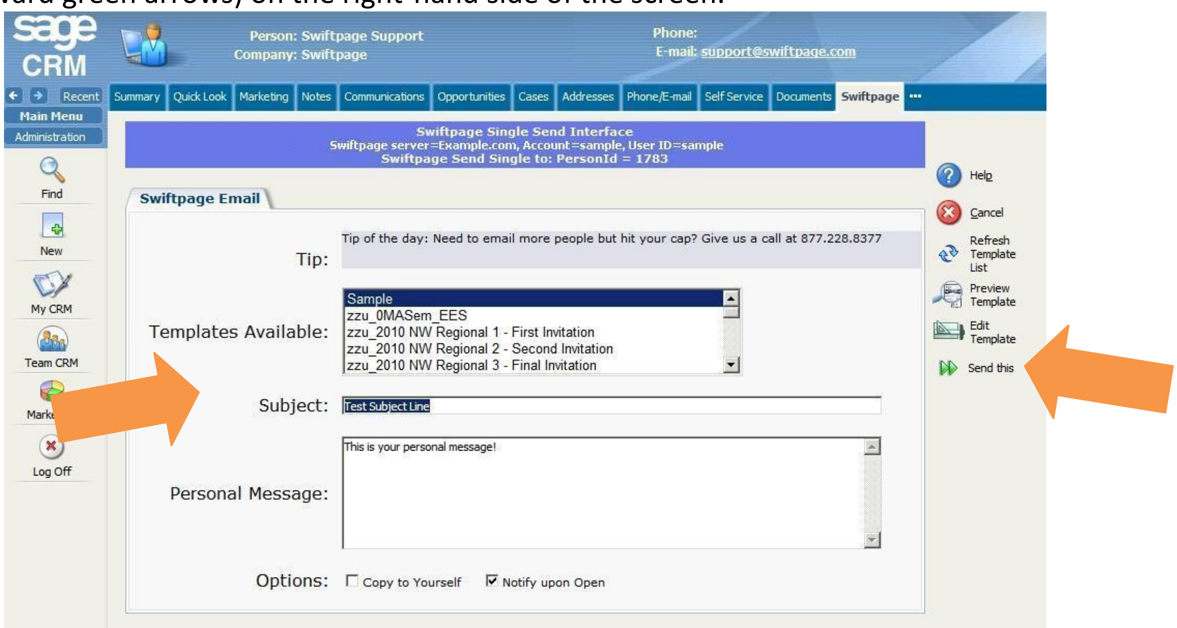
1. On the My CRM Main Menu in Sage CRM, click on the Contacts tab.
2. Find the contact to whom you wish to send an email, and click on their name to be taken to the Sage CRM Person Summary screen.



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, entered your subject line, click on the Send This button (with the forward green arrows) on the right-hand side of the screen.



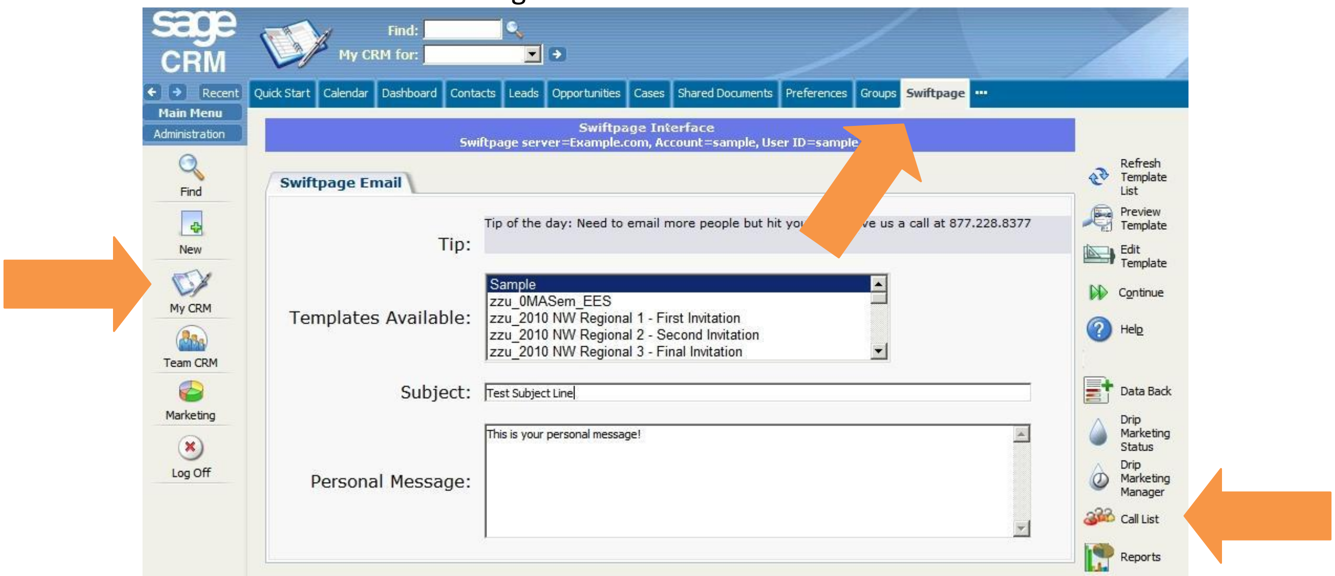

7. You are finished! You will see a confirmation screen verifying that the History and Communication records were written.

# Accessing Call Lists and Reports in Swiftpage for Sage CRM

Follow these instructions to access Swiftpage's Call Lists and online reports within Swiftpage for Sage CRM.

**To access Call Lists in Swiftpage for Sage CRM:**

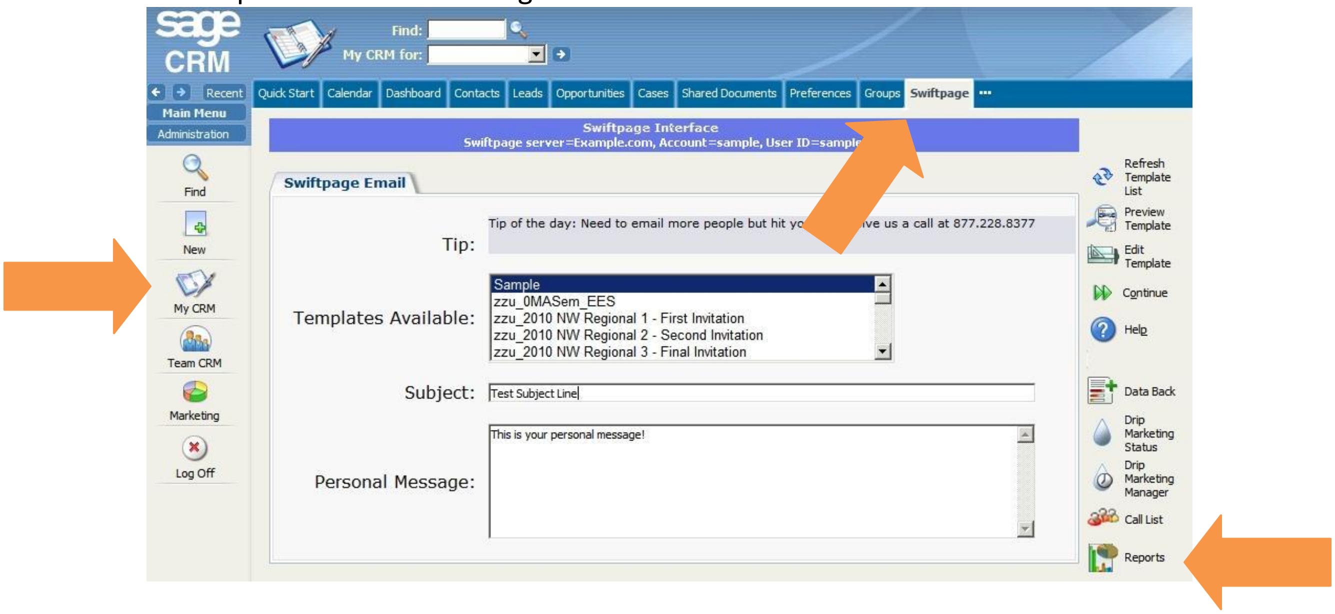
1. Click on the My CRM button on the left-hand side of the Sage CRM screen.
2. Click on the Swiftpage tab.
3. Click on the Call List button on the right-hand side of the screen.




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.



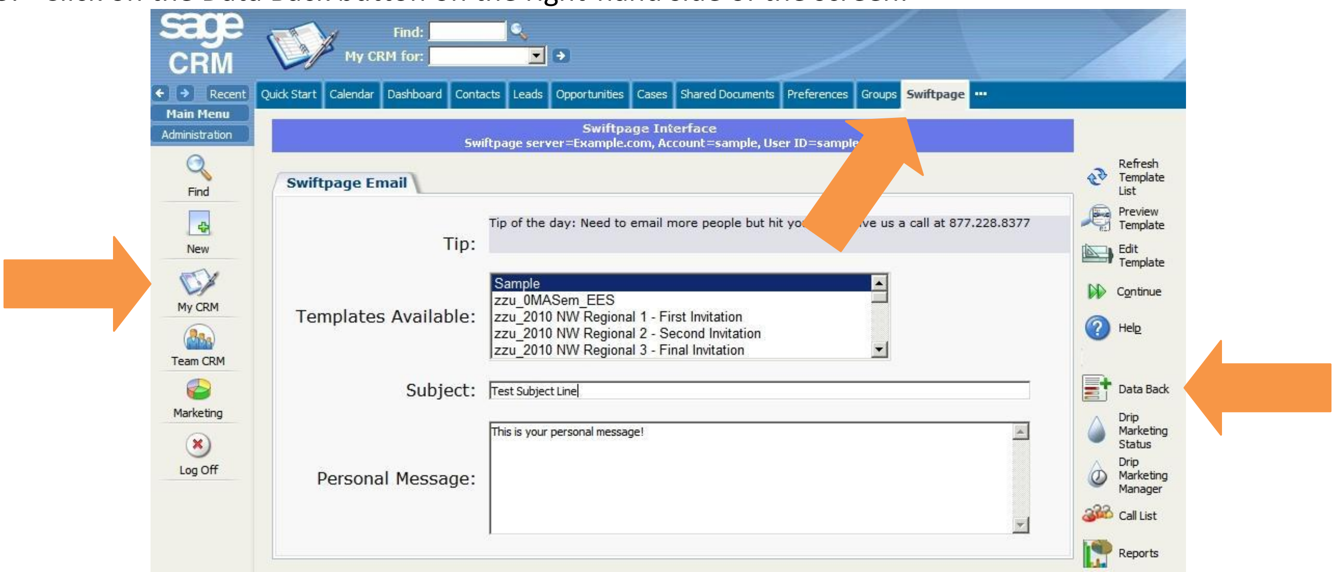

4. Swiftpage's online reports menu will now launch. Once you are done viewing your reports, you may close the browser window and return to Sage CRM.

# Retrieving Email Blast Results in Swiftpage for Sage CRM

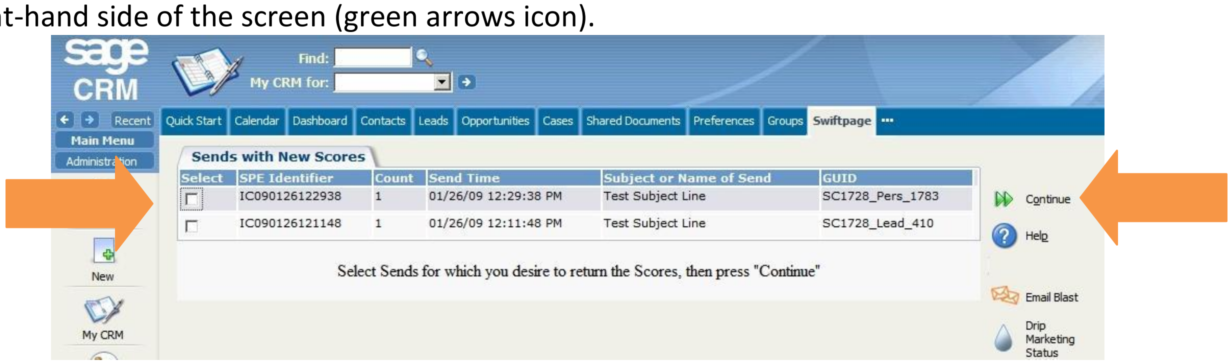
Follow these instructions to bring email blast results back into your Sage CRM database after sending out an email.  These results (open and click information) are written into the Swiftpage History field for each of your Sage CRM contacts.  **Note:** results only become available the next day after sending out an email.

**To retrieve email blast results 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 Data Back button on the right-hand side of the screen.




4. A screen will appear, showing you all email blasts that have results to bring back into Sage CRM.  Check the boxes next to the emails you wish to retrieve results for, and then click the Continue button on the right-hand side of the screen (green arrows icon).



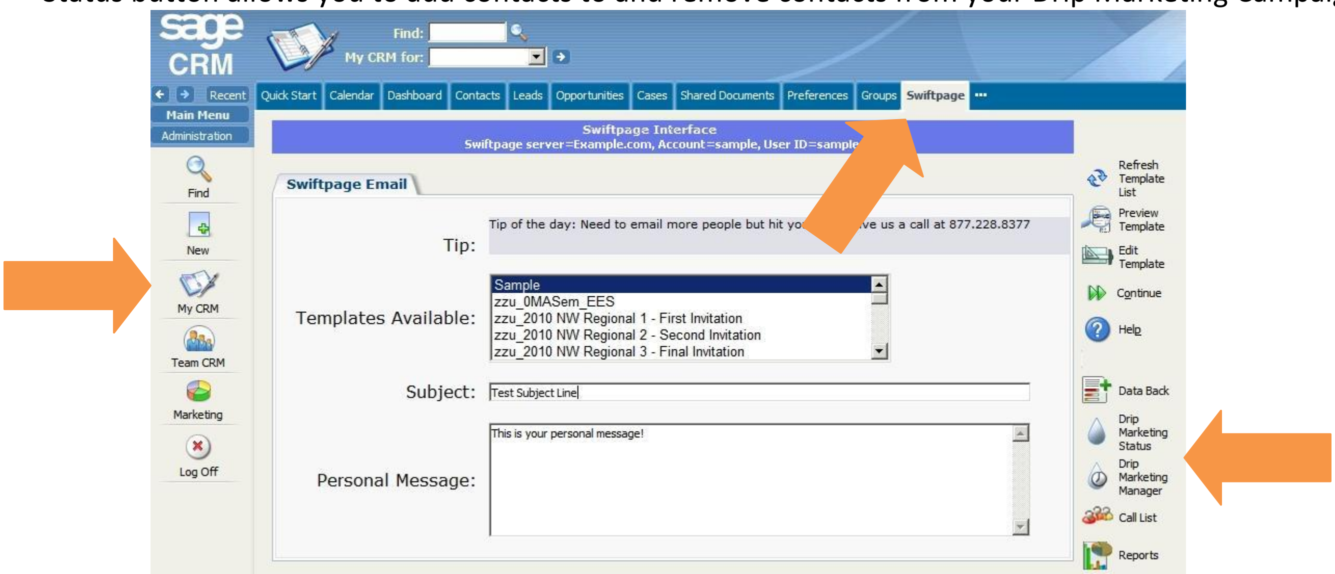

5. A confirmation screen will appear that shows you how many results were written into your Sage CRM database.  Click on the Email Blast button on the right-hand side of the screen to return to the main Swiftpage menu.
6. If you want to, you can verify that the results have been written into your contacts' records by clicking on the contacts tab, selecting a contact who had some result, and then clicking on the Swiftpage tab (from within the Person Summary screen).  There, you will see the new history note that has been written into their record.

# Accessing and Using Drip Marketing in Swiftpage for Sage CRM

Follow these instructions to access and use Drip Marketing within Swiftpage for Sage CRM.

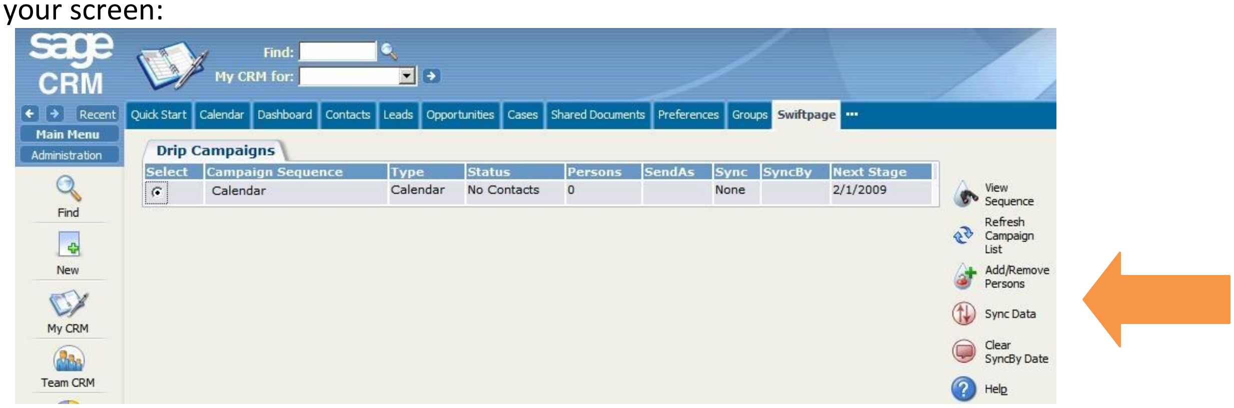
**To access Drip Marketing in Swiftpage for Sage CRM:**

1. Click on the My CRM button on the left-hand side of the Sage CRM screen.
2. Click on the Swiftpage tab.
3. You have two options here: clicking on the Drip Marketing Manager button will take you to the Drip Marketing Campaign Manager online, where you can create Campaigns (see our Drip Marketing help section for help on the Campaign Manager). Or, you can click on the Drip Marketing Status button to see further information on your Drip Marketing Campaigns within Sage CRM. The Drip Marketing Status button allows you to add contacts to and remove contacts from your Drip Marketing Campaigns.



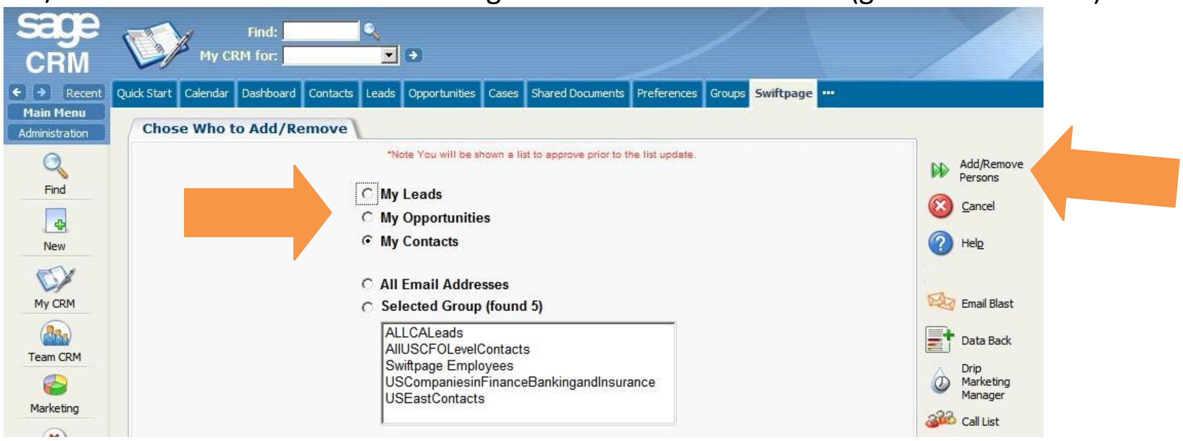

4.

5. When you click on the Drip Marketing Status button, you will see a series of buttons on the right-hand side of your screen:



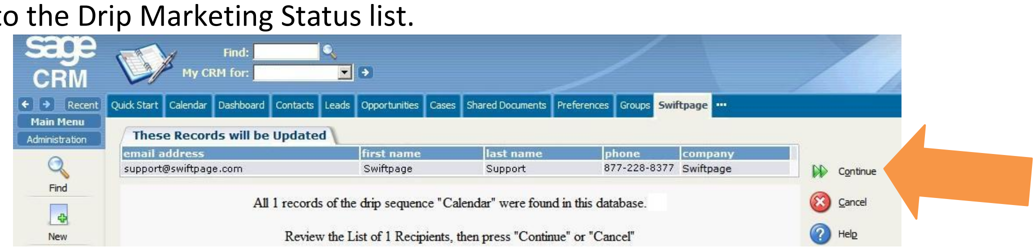

- View Sequence: click here to return to the initial Drip Marketing Status screen.
- Refresh Campaign List: this button refreshes your list of Campaigns, in case newly added Campaigns are not yet displayed.

- Add/Remove Persons: click here to add contacts to or remove contacts from your Drip Marketing Campaign. You will be given the choice of My Leads, My Opportunities, My Contacts, All Email Addresses, or a Selected Group. Choose your option, then click on the Add/Remove Persons button on the right-hand side of the screen (green arrows icon).

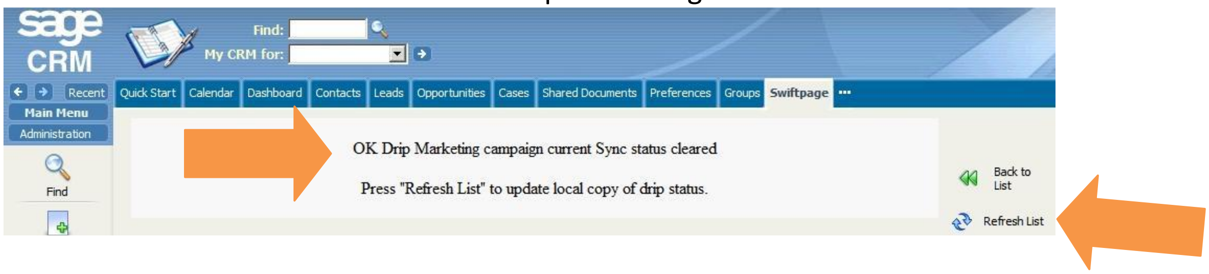



You will see a confirmation screen showing the contacts to be added or removed. Review the list, then select the appropriate radio button at the bottom (either "Add" or "Remove"). Then, click on the Update Sequence button on the right-hand side (Drip icon with arrow). You will receive a confirmation screen stating the number of contacts now in your Drip Marketing Campaign. You have now successfully added contacts to or remove contacts from your Drip Marketing Campaign. Click on the Drip Marketing Status button, and then the Refresh Campaign List button, and your new contact total will be shown.


- Sync Data: use this button to sync your Sage CRM contacts with your Drip Marketing contacts. When you click the Sync Data button, you will see a message saying that Sage CRM is retrieving contacts from Swiftpage and that the process may take a moment. Then all records from the Drip Campaign found in your Sage CRM database will be shown—these are the contacts whose information will be updated (the Drip contact information will be updated with what is currently in Sage CRM). Click the Continue button on the right-hand side to move forward with the Sync (or press Cancel if you do not wish to Sync). After clicking Continue, you will receive a confirmation screen saying that your contacts have been updated, and prompting you to click on the Refresh List button on the right-hand side of the screen. Click there, and you will be back to the Drip Marketing Status list.



- Clear SyncBy Date: if you have a “Sync By” date as part of an Alert Stage in your Drip Marketing Campaign Sequence, pressing this button will allow you to remove it. Click on it, and you will receive a confirmation screen saying that the Sync By date has been cleared. You can then click on Refresh List to be taken back to the Drip Marketing Status screen.



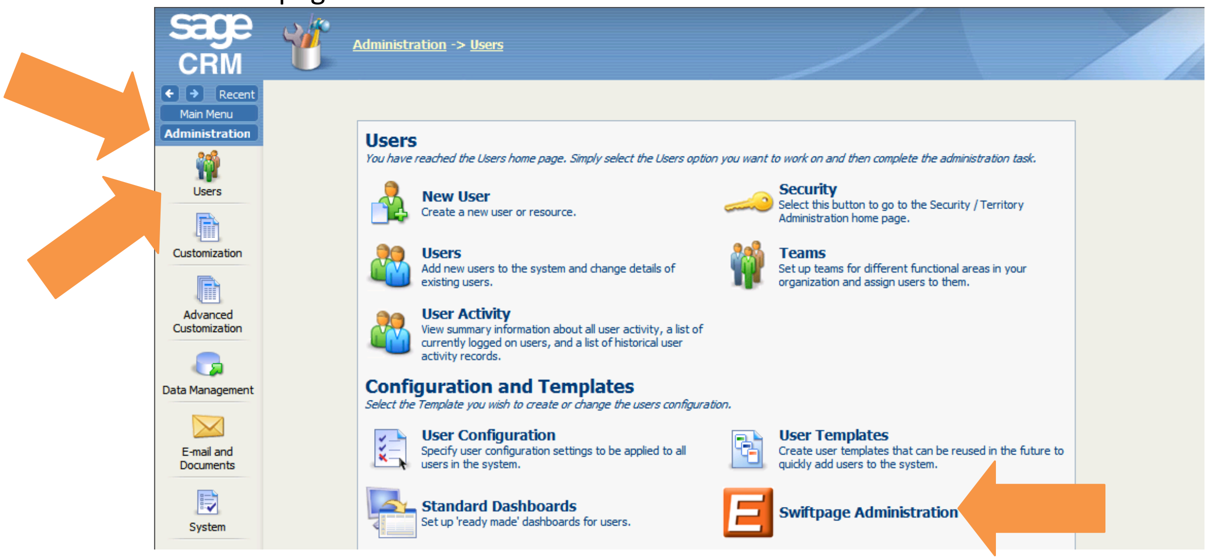

- Help: this button will launch Swiftpage’s online help to guide you through Drip Marketing in Swiftpage for Sage CRM.
- **Note:** Other buttons, including Email Blast, Data Back, Drip Marketing Manager, Call List, Edit Template and Reports serve the functions they do from the normal Swiftpage for Sage CRM main menu. Visit our Swiftpage for Sage CRM support area to learn more abou the functions of these buttons.

6. That’s it! You should now know how to review Drip Marketing Campaigns in Swiftpage for Sage CRM, add contacts to or remove contacts from Drip Marketing Campaigns, and perform other functions like Syncing Data or Clearing a “Sync By” Stage.

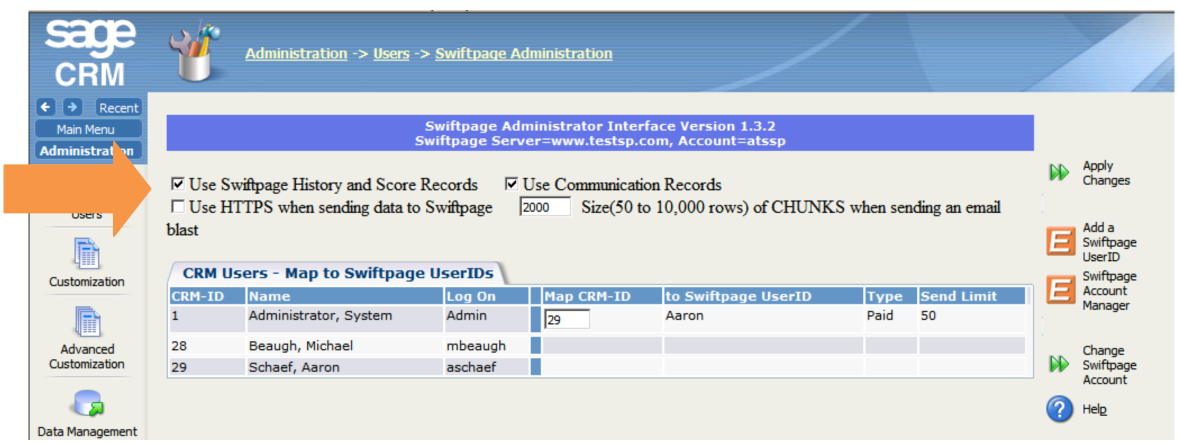
# Changing Administrative Settings in Swiftpage for Sage CRM

**To adjust administrative settings in Swiftpage for Sage CRM:**

1. Click on the Administration button on the left-hand side of the Sage CRM screen.
2. Click on the Users button.
3. Click on the Swiftpage Administration button toward the bottom of the screen.




4. A screen will appear, showing you the administrative options. Each option is described below, along with the default setting for each option upon installation of Swiftpage for SageCRM.




- Use Swiftpage History and Score Records: check this box to have Swiftpage for SageCRM write the results of your email blast results into SageCRM contact History records. **Default setting:** on.
- Use Communication Records: check this box to have Swiftpage for SageCRM write the results of your email blast results into SageCRM contact Communication records. **Default setting:** on.
- Use HTTPS when sending data to Swiftpage: if you prefer to have your contacts' information sent to Swiftpage over a secure connection, check this box. **Default setting:** off.
- xxxx Size (50 to 10,000 rows) of CHUNKS when sending an email blast: this option allows you to determine the number of names SageCRM sends to Swiftpage at once, when sending an email blast. If you have a slower Internet connection or an especially large database, for instance, you may want to

set this number lower.  If sending at a higher chunk number does not work, you can try sending in smaller chunks.  **Default setting:** 2000.

5. After adjusting your settings as needed, click on the Apply Changes button on the right-hand side of the screen, and you are finished!