



## Sage E-marketing for Sage CRM







### Quick Start Guide to:

## Purchasing or Upgrading Your Sage E-marketing for Sage CRM 7.1 Account

This Quick Start Guide details the steps to purchasing or upgrading your Sage E-marketing for Sage CRM 7.1 account.








1. Open Sage CRM 7.1.
2. Click Administration.
3. Select E-mail and Documents.

**Administration**  
Welcome to the Administration home page. Simply select the broad administration area you want to work on, then drill down to related options and more details on that admin area.



 <b>Users</b> Add new users to the system and change details of existing users.	 <b>Customization</b> Customize standard fields and screen areas, work with component manager, and change system translations.
 <b>Advanced Customization</b> Carry out advanced customization on the system by setting up key attribute profiles, workflows, escalation rules, and changing system menus.	 <b>Data Management</b> Perform data uploads, create products, and add new currencies.
 <b>E-mail and Documents</b> Create your own E-mail templates and document templates, configure the system for E-mail and document handling, configure integration between Sage CRM and Exchange, and subscribe to E-marketing services.	 <b>System</b> Specify and change standard system settings for performance, logging, the database, self service, system behavior, and locks, as well as refresh metadata and work with SLAs.

4. Click E-marketing Configuration.







**Email**  
You have reached the E-mail and Documents home page. Simply select the E-mail and Documents option you want to work on and then complete the administration task.

 <b>E-mail Templates</b> Design your own E-mail templates, which can be used by single users or groups of users.	 <b>E-mail Aliases</b> Set up E-mail aliases from which authorized users and groups of users can send E-mails.
 <b>E-mail Configuration</b> Configure the system to handle E-mails sent out from CRM.	 <b>E-mail Management Server Options</b> Configure the system to file inbound E-mails according to a set of predefined rules.
 <b>Advanced Email Management Server Options</b> Configure Advanced Email Management Server Options.	 <b>E-mail Status</b> Display the status outbound and inbound E-mails.
 <b>E-marketing Configuration</b> Subscribe to E-marketing services and manage user accounts	

**Documents**  
Select the Documents option you want to work on and then complete the administration task.

 <b>Document Templates</b> Upload document templates to the server.	 <b>Documents &amp; Reports Configuration</b> Configure the system for document handling.
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5. Select View Plan Options/Upgrade.

 <b>Add a User to the Account</b> Create a new E-marketing user		 <b>View Plan Options / Upgrade</b> Opens up a window to Sage E-marketing for Sage CRM so you can modify your account options
 <b>Edit Users</b> Activate/De-activate user accounts, allocate daily e-mail send limits		 <b>Cancel the Account</b> Stops all usage and charges
 <b>Edit Account Details</b> Edit account password here		

6. Enter the desired level of service and click Submit.



Account Name: [qa\\_rs\\_060412\\_spe\\_CRM](#)

Your account has not yet been purchased.  
You currently have 1 Free Users  
and the Free level of Drip Marketing with up to 2 Active Users.

**Account Details**

All prices are in United States Dollars(USD)

- 1. **Select a Base Package:**  
(prices shown are monthly)  Team (\$99.95)
- 2. **Email Users**  \$7.99 per additional user (2 included in base package)
- 3. **Daily Send Limit**  \$4.99 per additional 1000 (2000 included in base package)
- 4. **Select a Level of Drip Marketing:\***  
(in addition to the Base Package)  Silver (included in base package)
- 5. **Drip Users**  \$9.99 per additional user (2 included in base package)
- 6. **Billing Period**  Monthly  Quarterly  Yearly (10% discount)

**Compute New Price**

\$99.95 per month for up to 2 users sharing a send limit of 2000 and using the Silver level of Drip Marketing with up to 2 users.

Save \$119.94 by selecting Yearly billing.

 **Submit**

Next screen will validate purchase and process credit card information.

7. Enter your credit card details and click Purchase to finish purchasing your account.

Account Name: [qa\\_rs\\_060412\\_spe\\_CRM](#)

Your Sage E-marketing for Sage CRM account consists of 2000 emails per day, 2 active users, and Silver level of Drip Marketing with 2 active users.

If you click Purchase your credit card will be charged \$99.95 each month starting today.

Your Name:   
Your Email Address:

Credit Card Billing Address

Credit Name:   
(As it appears on the credit card)  
Address 1:   
Address 2 (optional):   
City:   
State:  Zip:   
Country:

Credit Card Entry

Visa  Master Card  American Express  
(CVV is a 3 or 4 digit code usually on the back of your card)  
Card Number:  CVV:   
Exp. Date: MM/YY

Optional Data Entry

Special Promotion:   
Reseller:

