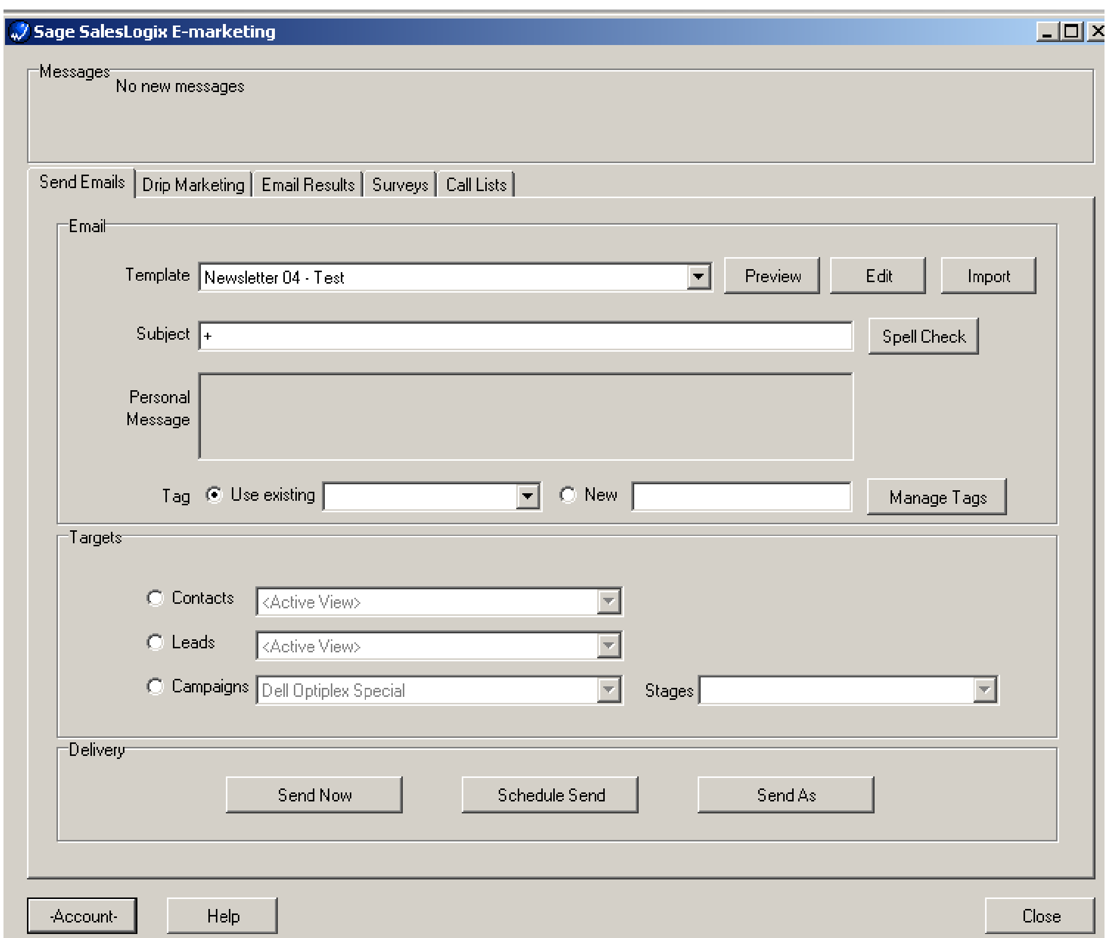
**Sage SalesLogix E-marketing Quick Start Guide to:**

## Sending an Email

This Quick Start Guide takes you through the steps of sending an email through Sage SalesLogix Client, including features such as Scheduled Send and Send As.

1. Click on the E-marketing icon in SalesLogix.  The following screen will appear:

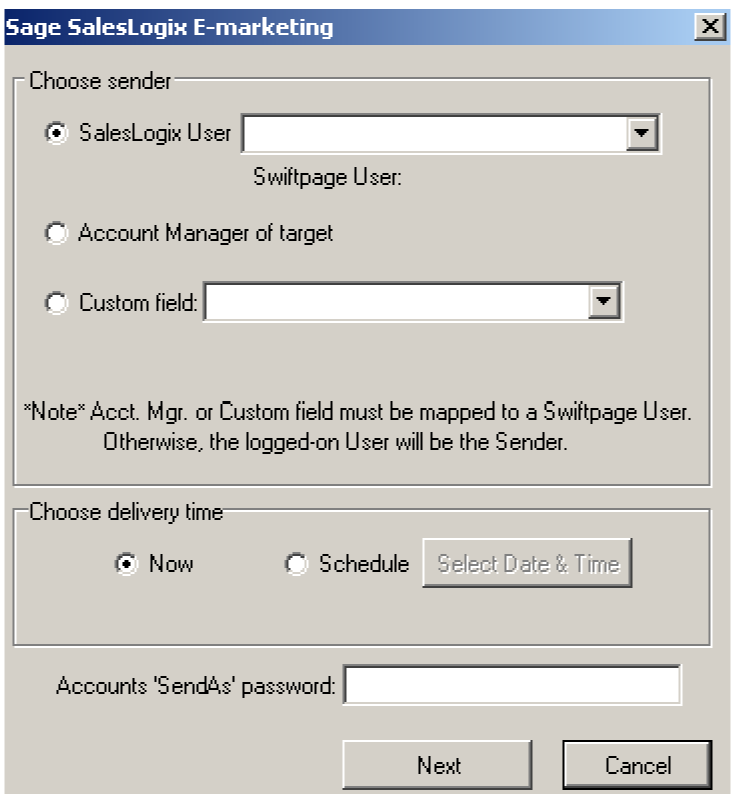


Under the Send Emails tab, you can select your template, Preview a template or click Edit to be taken to the Template Editor online. Type in your Subject Line and enter a Personal Message (if applicable). You can add a Tag to the send using an Existing tag or create a New one. You can manage your tags by clicking Manage Tags. Then, select your Targets by Contacts, Leads or Campaigns.  When you have selected the contacts you want to send your email to, select the Delivery type:

When you have selected the contacts you want to send your email to, click on one of the following buttons:

- Send Now: to send the email immediately (skip below to Step 4)
- Scheduled Send: to schedule the email to go out up to 60 days in advance (skip below to Step 3)
- Send As: to send an email on behalf of another SalesLogix user on your Sage SalesLogix E-marketing account (below, Step 2)

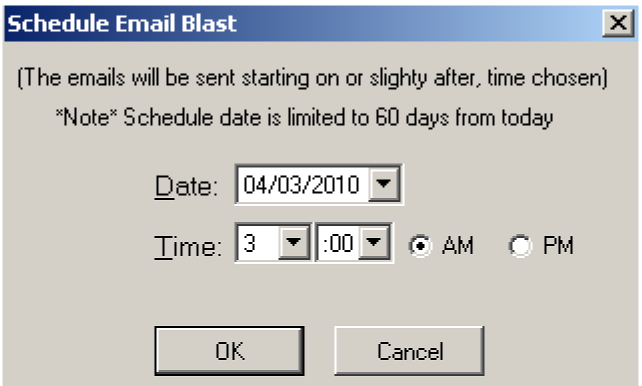
2. If you click the Send As button, you'll see this window:




Here, you can choose a SalesLogix user, Account Manager of target or a Custom Field to send on behalf of. **Note:** anyone on whose behalf you send must be tied to a Sage SalesLogix E-marketing user ID or you will become the default sender for that email.

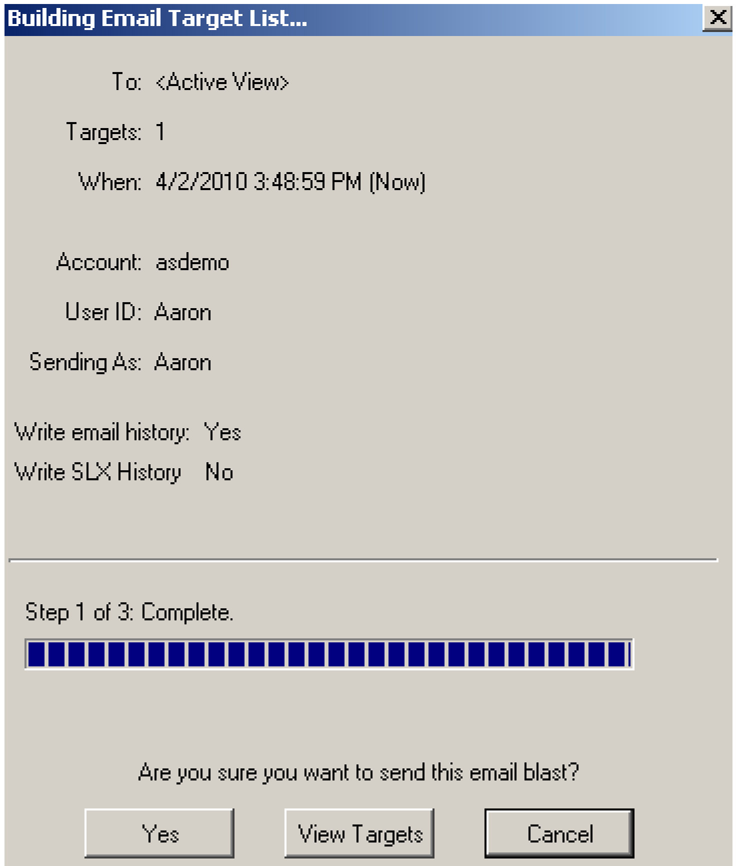
Then, choose your delivery time, now (skip to Step 4) or Schedule (proceed to Step 3). Finally, enter your Sage SalesLogix E-marketing account password in the box provided and click Next.

3. When scheduling a send, this window will appear:

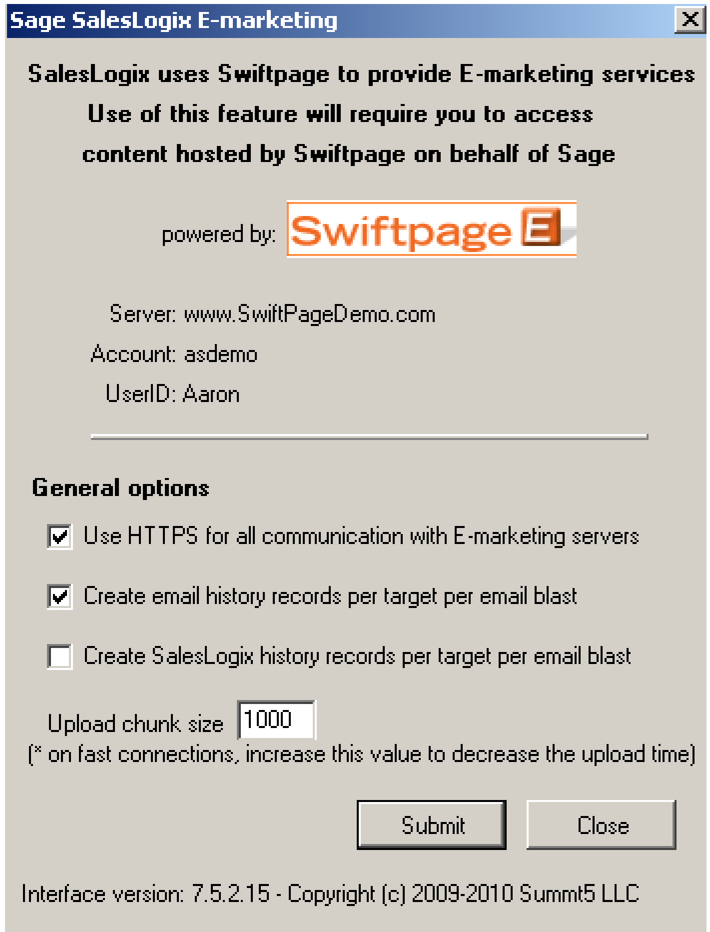



Set the date and time you wish for your email to be sent, then click OK.

4. The final sending screen will appear and will look like this:

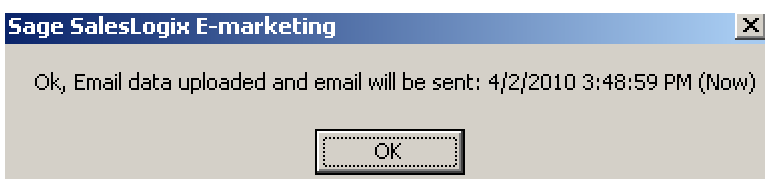



The number of "targets" (or emails to be sent) will be shown, as will the date and time the email is to be sent. The Sage SalesLogix E-marketing account, user ID doing the sending, and the user on whose behalf the email will be sent are shown. You will also see the current settings of History writing selected. To manage your History settings, click on the Account button from the Send Emails Tab window. You will see this screen:




To view a list of your targets, click on "View Targets." If you are ready to send your email, click Yes.

5. The confirmation screen will appear, looking like this:




6. You are done! You have successfully sent an email through Sage SalesLogix E-marketing.