

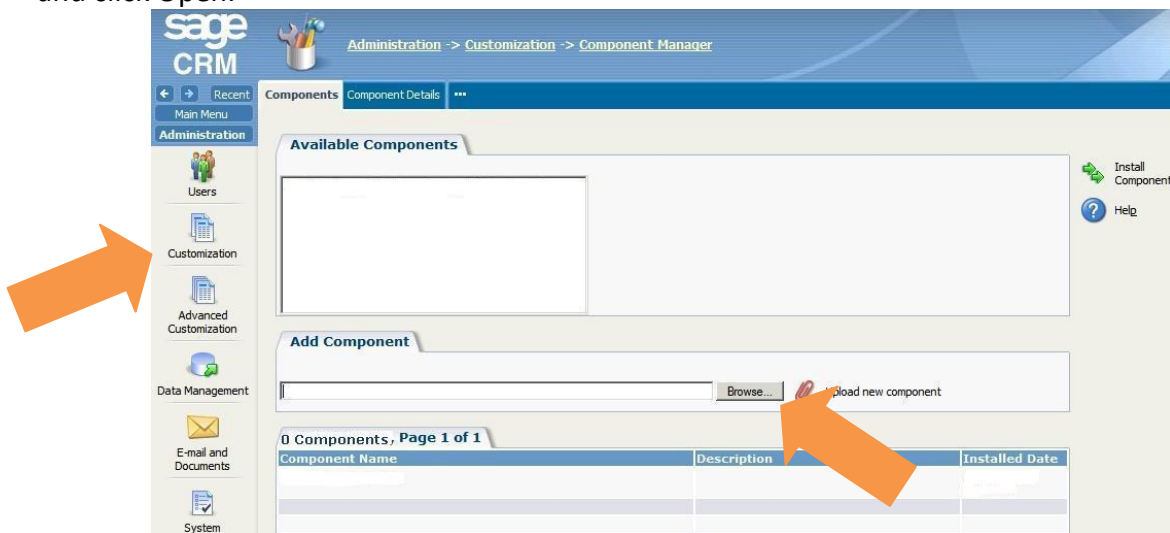
Quick Start Guide To:

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

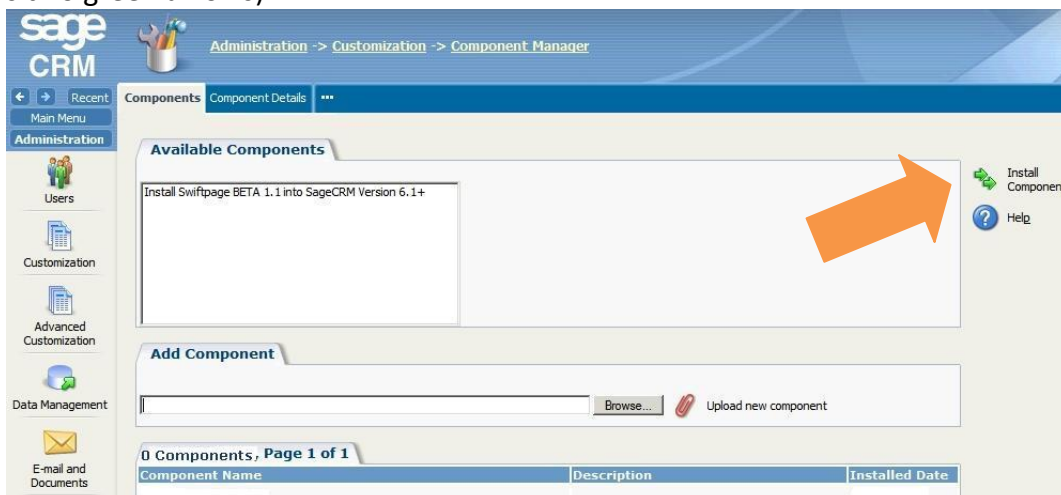
This Quick Start Guide provides instructions for installing Swiftpage for Sage CRM, setting up a new or existing Swiftpage account, and mapping Sage CRM users to Swiftpage user IDs.

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](#).
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.



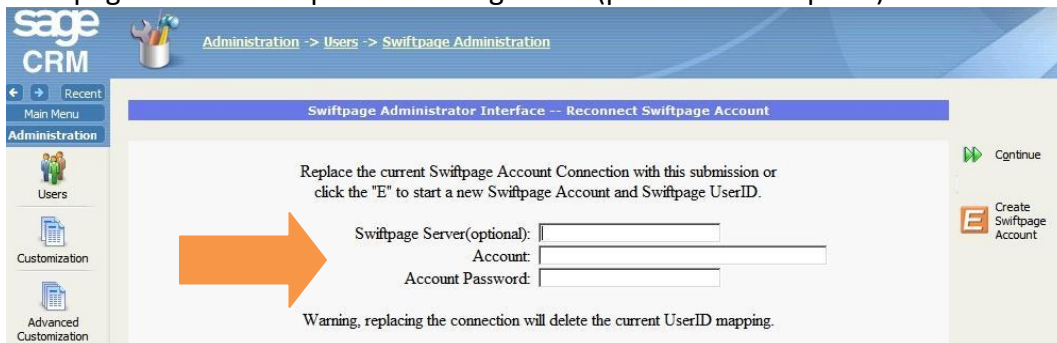
6. The Swiftpage for Sage CRM component will now be listed among your Available Components. Click on the Install Component button on the right-hand side of the screen to complete the installation (the icon has two green arrows).



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 (see below).

sage CRM Administration -> Users -> Swiftpage Administration

Swiftpage Administrator Interface
Swiftpage Server=swiftpagedemo.com, Account=ian2ian

Use Swiftpage History and Score Records Use Communication Records

CRM Users - Map to Swiftpage UserIDs

CRM-ID	Name	Log On	Map CRM-ID	to Swiftpage UserID	Limit
1	Administrator, System	Admin	30	ian	
2	Finch, John	FinchJ			
8	O'Neill, Simon	ONeillS			
3	Johnson, Peter	JohnsonP			
7	Dolan, William	DolanW			
4	Maye, Susan	MayeS			
5	Ward, Kylie	WardK			
6	McGraw, Tim	McGrawT			
9	Ebden, Matthew	EbdenM			
10	Muller, Hans	MullerH			
11	Parcells, Wayne	parcellsw			
12	Little, Brian	littleb			
13	Morriss, Steve	MorrissS			
16	Montana, Dave	montanad			
14	Walsh, Damien	walshd			
15	Rogers, Graham	rogersg			
17	Jones, Fred	jonesf			
18	Simmons, Trish	simmonst			

Apply Changes
Add a Swiftpage UserID
Swiftpage Account Manager
Change Swiftpage Account
Help

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!