New Features Overview

For Administrators

Technical Details

26 July 2004

The online application now includes a powerful email tool complete with mail merge and email history logging for each contact. This document explains the security parameters associated with the new functionality as well as detailed instructions for creating mail merge templates for your users. Please see the User Update for details on the basic functionality.

Sending Email

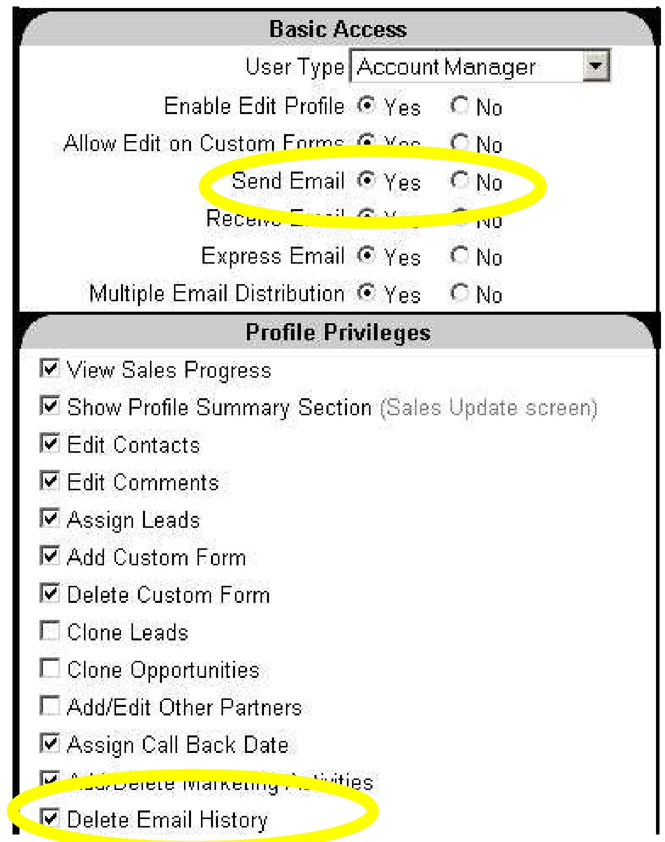

Figure 1: Email Privileges in Logon Management

<u>Action required to add Send Email function to a user account</u>

To provide your users with the capability to send email and/or delete entries in a contact's email history, you must turn on the relevant privileges in their Logon Profile. In Administration > Logon Management, go to the initial screen for each logon and you will see the following new privileges (**See Figure 1**):

- **Send Email** (listed in the Basic Access section). To provide users with the ability to send emails from the Profile or Sales Update screens, check this box and Submit the change. Users with the Send Email permission will also have an **Email Signature** box displayed on their User Settings page.

- **Delete Email History** (listed in the Profile Privileges section). To provide users with the ability to delete entries from a contact's Email History, check this box and Submit the change.

Mail Merge

About mail merge template security

In addition to the security parameters discussed above, note that users must have **View Library** permission (listed in the Other Privileges section) turned on in order to have access to the **Add Merge Documents** area of the **Send Email** interface.

The **ability to add, move and delete template folders and documents** is controlled by the general Library privileges (in the Other Privileges section). Users with permission to create **Private Folders** may also designate a template folder as Private, in which case only those users given access to that folder in the Internal page of the Logon Profile will see that template folder displayed.

To create a template folder

To be used in the **Send Email** function, **Mail Merge Templates** must be stored in specially defined **Template Folders** in the online **Library**. To create a template folder, go the Library and click on **New Folder**. Click Yes for the "**Is template folder?**" setting. You can also designate the template folder as **Private** if you wish; however, note that you will need to add access to this folder on the Internal page of the Logon Profile for all users to whom you wish to grant access to the merge documents in that Private folder. Template folders are identified by the small document icon to the right of the folder name (**See Figure 2**). Note that template folders can only be defined at the root level. Template folders can be renamed and deleted just like any other Library folder.

Figure 2: Library Containing Private and Public Template Folders

Creating mail merge templates

- ☑ Only those fields included in the Valid Merge Fields list can be incorporated into a mail merge template.
- ☑ You must follow proper Microsoft Word protocol to create a working Merge Template.

To provide your users with templates for mail merges, you need to first create a **Mail Merge Template Document** in Microsoft Word and then upload it to a template folder in the Library (see preceding section). Begin by downloading the file of available merge fields by going to any contact, clicking on the Send Email icon and then clicking on the gray **View Merge Fields** tab (**See Figure 3**).

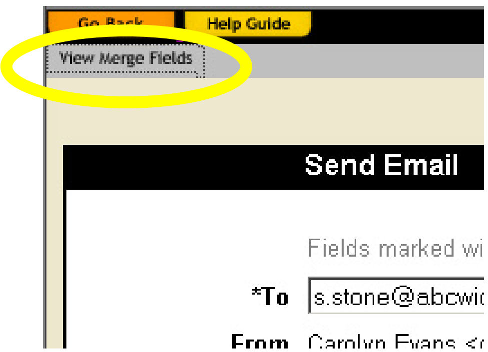

Figure 3: View Merge Fields Tab on Send Email Screen

This pop-up displays a list of **Standard Fields**, which are the **merge codes that must be used in the Word template**. For easy translation into the terms in use in the workgroup you are working in, it also displays the **Custom Equivalent** for each field, which is the Custom Field tag that corresponds to that standard field (**See Figure 4**).

Click on the **Download Merge Fields** gray tab to save a copy of the merge fields schema to your local computer. The file must be saved in **comma separated (.csv) file format**. Be sure to make a note of where you have saved the file.


Close | Print | Download Merge Fields

View Field List

Standard Field	Custom Equivalent
CurrentDate	[System date]
ContactPrefix	Prefix
ContactFirstName	F Name
ContactLastName	L Name
ContactTitle	Title
Company	Company
ContactAddress1	Address 1
ContactAddress2	Address 2
ContactAddress3	Address 3
ContactCity	City
ContactState	State
ContactZip	Zip
ContactCountryCode	Country
ContactCountryName	Country Name
ContactPhone	Phone
ContactAltPhone	Alt Phone
ContactMobile	Cell/Mobile
ContactFax	Fax

Figure 4: View Field List Pop-Up

Create the Word document

Next, open a new Microsoft Word document and add the standard text you wish to include in the merge template. Alternately, you can open an existing Word document you wish to use as the basis for the Merge template and edit the text.

Insert merge fields

In Word, go to **Tools>Letters and Mailings>Show Mail Merge Toolbar**. In the merge toolbar (**see Figure 5**), click on the Open Data Source icon and browse for the .csv document you saved in the earlier step. Click OK when the file is displayed in a pop-up.

Place your cursor in the location in the Word document where you wish to insert data from the online database and then click on the **Insert Merge Fields** icon in the Merge Toolbar. This displays the names for all available merge fields using the Standard Field names (**see Figure 6**). Highlight the field you wish to use and click **Insert**. Repeat for as many fields as you wish to add and then click **Close**. Repeat in other places throughout the document as needed.

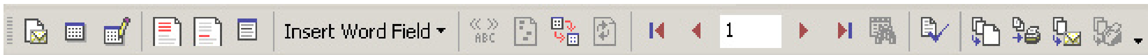

Figure 5: Microsoft Word Merge Toolbar

Upload new template to Library

Save the document to your local computer. In the online system, go to the **Library**, open the **Template Folder** you created in the earlier steps of the process and then use the **Upload File** button to **Browse** for the Microsoft Word template document you created on your local system and upload it to the template folder. Your users with Send Email and View Library privileges will now have the template available for use in the Send Email interface.

Figure 6: Insert Merge Field List in Microsoft Word