ContactTracking.com
AFFORDABLE CRM SOFTWARE SOLUTIONS

New Features Overview

For Users

Product News

26 July 2004

The online application now includes a powerful email tool complete with mail merge and email history logging for each contact.

- ☑ Save time and ensure consistent messaging by using **mail merge templates** populated with data from your online database for personalized letters, memos, contracts and more.
- ☑ Build a complete interaction log across all touchpoints by keeping an **email history** for each contact that can be easy referenced across the organization.
- ☑ Further leverage the power of the online **Library** as a centralized web-based repository for materials commonly attached to customer emails, including marketing collateral, price sheets, presentations and customer references.

Sending Email

To send an email to a contact, click on the **Send Email icon** to the right of the contact name on the Profile or Sales Update screen (**See Figure 1**). In the Send Email window, add a **Subject** line for the email (required) as well as any additional recipients on the **Cc** and **Bcc** lines (optional). If the contact does not have an email entered, you will also need to fill in the **To** line with the intended recipient's email address. Enter the body of your email in the **Message** box (**See**

Contacts ADD

Contact	Title	Phone	Email
Sarah Stone	VP, Info Systems	716-555-1239	s.stone@abcwidgets.com
Bob Dunn	IT Manager	716-555-4321	b.dunn@abcwidgets.com
Ellen Palmer	Admin Asst.	716-555-1200	e.palmer@abcwidgets.com

Figure 1: Contacts with Send Email Icons on Sales Update and Profile Screens

Figure 2). At any time, you can return to the Profile or Sales Update screen by clicking on the orange Go Back tab or the Cancel button.

Note on access privileges: Your individual user security permissions control access to the Send Email function; if you do not see the Send Email icon displayed, you do not have access to this feature turned on. For questions about your access privileges, please contact your company Administrator.

Including file attachments

To include a file from the online Library or your local computer, click on the orange **Add** button in the **Attachments** section of the Send Email screen. In the **File Location** drop-down box, click on either **My Computer** or a **Library** folder. Note that you must have Library access privileges to see and attach documents from the Library.

If you choose My Computer, click the **Browse** button and locate the document you wish to attach from your local computer or network. Then click **Upload** to add it to the list of attachments. Be sure to wait until the system confirms that the file has been uploaded until proceeding (a red message saying "File uploaded successfully" will appear at the top of the window). Note that for larger documents, the upload process may take several minutes. Repeat for any additional attachments. Click **Done** when you are finished.

If you choose a **Library** folder, the contents of that folder will be displayed. Click on the **Attach** hyperlink to the right of the document you wish to attach and then click **Done** when you are finished.

If you wish to remove an attachment, click on the **Delete** hyperlink to the right of the attachment name in the Add Attachments pop-up window. If you add any attachments and then close the attachment pop-up instead of clicking on Done, when you return to the Send Email window, click

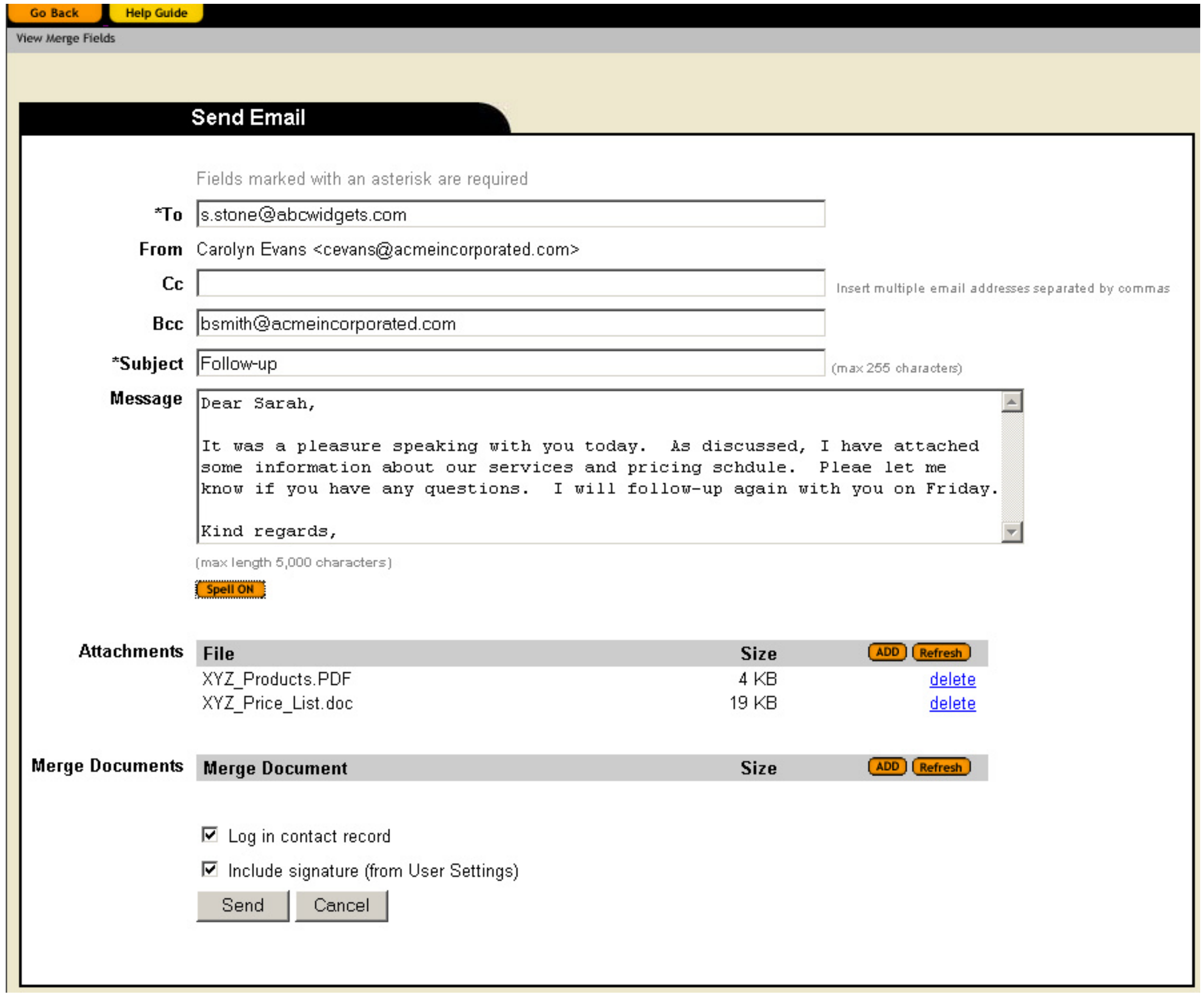

Figure 2: Send Email Window

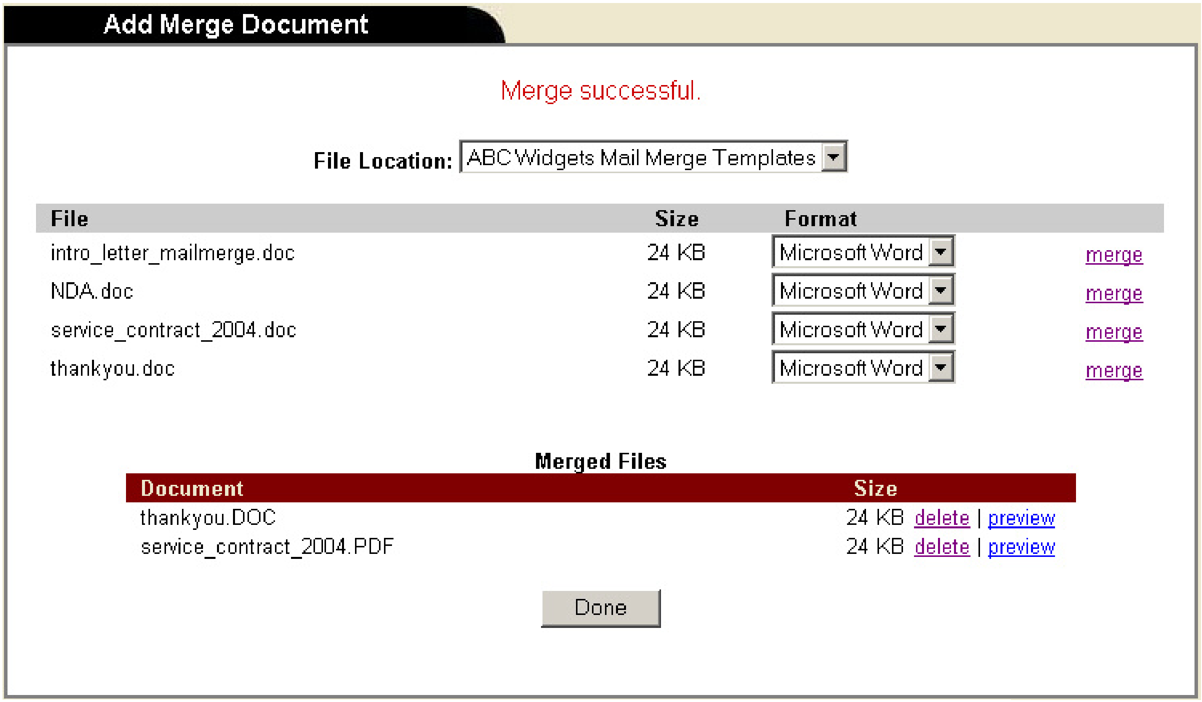

Figure 3: Add Merge Document Pop-Up Window

on the orange **Refresh** button in the Attachments section to update the list of files attached to the email message.

Including mail merge documents

Note on access privileges: Only those users with Library access will see the Merge Documents section displayed.

To attach a mail merge document to the email, start by clicking on the orange **Add** button in the **Merge Documents** section of the Send Email screen. In the **File Location** drop-down box in the **Add Merge Document** pop-up window (**See Figure 3**), click on the **Template folder** you wish to view; a list of available templates located in that folder will be displayed.

In the **Format** drop-down box, choose the format for the merged document (either Microsoft Word or PDF). Then click the **Merge** hyperlink to the right. Wait until the system confirms that the merged document has been attached until proceeding (a red message saying "Merge successful." will appear at the top of the window). Note that for larger documents, the upload process may take several minutes. Repeat for any additional merge documents. Click **Done**.

If you wish to remove a merged document, click on the **Delete** hyperlink to the right of the merged document name in the Add Merge Documents pop-up window. If you add any merge documents and then close the pop-up window instead of clicking on Done, when you return to the Send Email window, click on the orange **Refresh** button to update the list of merge documents attached to the email message.

Previewing and saving mail merge documents

To save the mail merge document in addition to (or instead of) attaching it to a mail message, click the **Preview** hyperlink to the right of the document you have merged in the Add Merge Document pop-up and then save it to your local computer or network. You may want to use this feature when you wish to:

- make additional changes or personalize the merged document before sending it (in this case you can save the merged document to your local system, make the necessary changes and then attach it as a file to the email as described above);
- fax or mail merged documents to a contact (instead of emailing them); or

- create a merge document with a certain contact's information but then email (or otherwise send) the document to someone other than the contact themselves.

For detailed information on **creating mail merge templates**, please contact your company Administrator.

Logging email and including your email signature

If you wish to record a **log** of the email message (including any file or mail merge documents attached) in the **Email History** for the contact, check the "**Log in contact record**" checkbox. To include your **Email Signature** at the bottom of your message, check the "**Include signature (from User Settings)**" checkbox. To add or change the email signature in your user profile, click on **User Settings** at the top of any page, enter the desired text in the Email Signature box and then click Submit.

Figure 4: Email History Section on Contact Detail Screen

Viewing and deleting email history

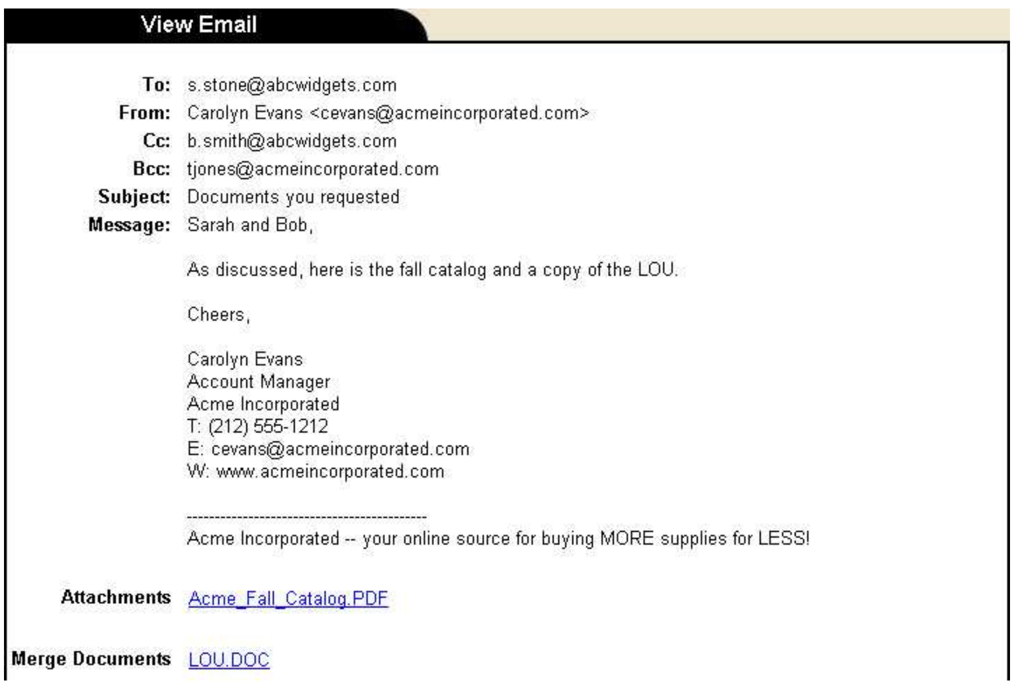

Figure 5: Message Detail View of Email History Entry for a Contact

When you compose the email, if you choose to log the email in the contact record, an **Email History icon** will appear to the left of the contact name on the Profile and Sales Update screen (**See Figure 1 on page 1**).

To view the contact's Email History, click on the contact name and scroll down to the Email History section at the bottom of the contact detail pop-up window (**See Figure 4**). To review the contents of an email, click on the **View** hyperlink to the right of the message to open a detail window that contains the recipients, message body and any file attachments or merged documents that were included (**See Figure 5**). To remove the contents of an email from a contact's Email History, click on the **Delete** hyperlink on the contact detail or the Delete button in the message detail.

Note on access privileges: Only those users with Delete Email privileges will see the Delete hyperlink displayed in the contact's Email History and the Delete button in the message detail.