



Training Course: Communication (E-mails)

Tuesday, January 14, 2009
10:00 – 11:00 am EST



Agenda



- **Overview of the Communication Tools**
- **Overview of E-mails**
- **Setups used in E-mails**
 - **Your Signature (MY RECORD)**
 - **HTML Templates**
- **Creating an E-mail from the Lookup, History or Contact TAB**
 - **Free Form Letters**
 - **Using E-mail Templates**
 - **Adding Attachments**
 - **Keeping track of sent e-mails**
- **Broadcast E-mails**
- **Creating your OWN e-mail template**
 - **To, CC, BCC**
 - **Templates**
 - **Subject**
 - **Writing the E-mail & the Tool Bar**
 - **Signatures**
 - **Adding Attachments**
 - **Saving it for the Public vs. Personal**
- **Questions & Answers**

Overview of the Communication Tools of WiredContact



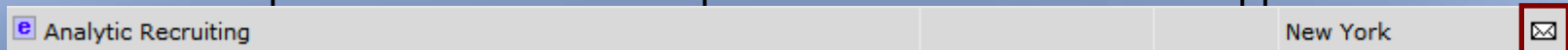
- **The WiredContact system provides a vast methods of communicating with your customers.**
 - Letters – Standard and Your Own Formats
 - E-mails – Standard and Your Own Formats
 - Letter Merges
 - Broadcast E-mails
 - Complete History of all communications which are sent out.
 - Today's conversation will focus on the E-mail process

Overview of E-mail



- You also have the ability to send e-mails out to your contact (s). There are 3 ways to start the e-mail.

- First method is from the **LOOKUP**. On the results of the Lookup results. Each line has an envelope. Click on the envelop and the e-mail screen will appear

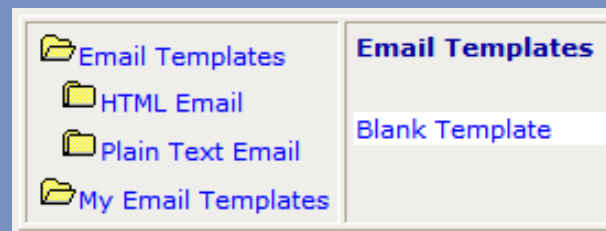


- Second & Third start by Opening the **Contact Screen**

- Second – Open the **History TAB** **History** and clicking on the envelope to forward an e-mail

Date/Time	Record Manager	Type	Subject	Regarding
3/9/2009 12:47 PM	Gail Stevens	E-mail Sent		To: gail.jasit@gmail.com From: Gail Stevens Hi : html template: WCE_Generic.htm

- Third is by opening the Contact screen and clicking on the **E-mail TAB** **Email** , this will bring up the following screen which also allows you to select set e-mail templates



- ** You have the ability to use a select templates, create your own templates or free form a e-mail.

Creating a Signature



- Navigate to MY RECORD 
- Edit User Settings 
- Click on Show Signatures

WiredContact Enterprise
User Settings Dialog

A PIN is an additional layer of security. Up to 12 characters. Can be reset by your administrator. Used to access this dialog.

PIN:

UserID: Gail Stevens **Active Edit On** **Active Edit Off**

Password:

Confirm Password:

Country Code +1 **Active List Edit:**


Timezone Offsett

Forget alarms older than 14 **days.** **Click to Show Edit** **Always Show Edit**

Start Page: lookup

[Show Reply Address List](#)

[Show Signatures](#)



[Import Text Data](#) [Import Data from Database](#)

Creating a Signature



- There are up to 6 “Pre-Defined” signatures which you can have. These can be used in the e-mail process.

A screenshot of a web-based interface for configuring email signatures. It features six text input fields arranged in two columns. The first field, labeled "Email Signature 1:", contains the text "Regards," followed by "Gail Stevens" and "WiredContact Training". The second field, "Email Signature 2:", contains "Gail Stevens" and "WiredContact Enterprise". The remaining four fields are empty. Each field has a small upward arrow on the left and a downward arrow on the right. At the bottom left of the interface, a button labeled "Hide Signatures" is circled in blue. At the bottom right, there is a small red "SAVE" icon.


When done updating the Signature, press SAVE 

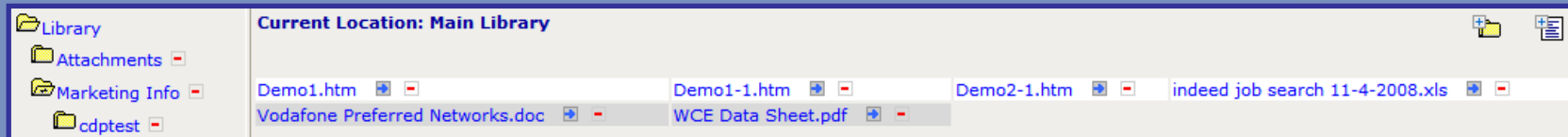
If you would like to add a graphic to your signature, first, have your system administrator save the image on the HTML template directory. Once this image has been saved enter the following in the signature box

[http://\[URLoftheWiredContactSite\]/HTMLTemplate/\[nameofimage\]](http://[URLoftheWiredContactSite]/HTMLTemplate/[nameofimage])


HTML Templates



- You have the capability to create your own HTML Templates and use them on e-mails. You must have the security to load them to your Library – see your system administrator regarding this.
 - Create the HTML file and save it on your computer.
 - If you have the security to download the information on the Wired System, perform the following steps (if not speak with your administrator).
 - Navigate to the Library 
 - Click on the Add File icon



- The following screen will then appear :

New file for  library\

Browse for a file name:

<input type="text"/>	Browse...
<input type="text"/>	Browse...
<input type="text"/>	Browse...
<input type="text"/>	Browse...
<input type="text"/>	Browse...

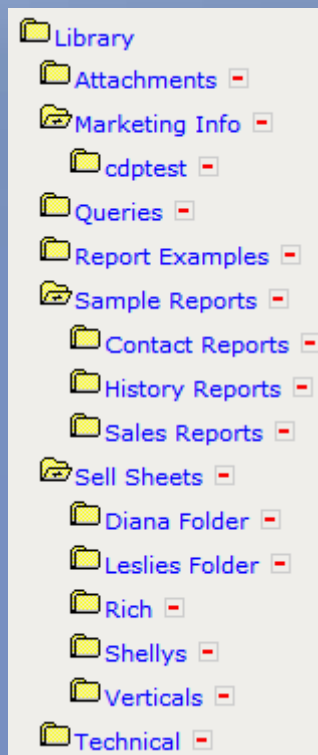
Browse for your file(s) and press update. The file is NOW available in the Wired System.

** If you wanted it saved in a different folder under Library , first select the folder an than perform these steps.

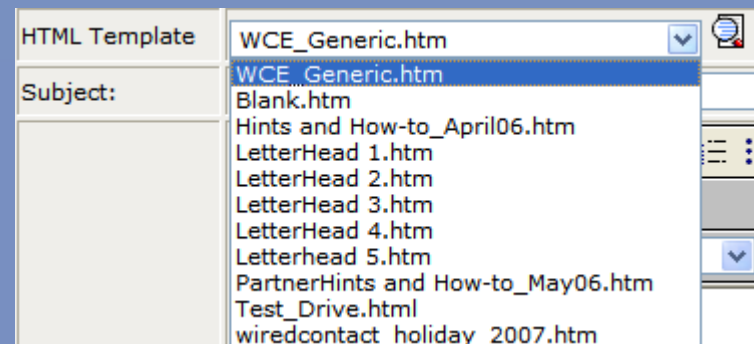
HTML Templates



- The last step is to save it to the Public E-mail Templates directory in the Main Library



Wendy – Does this folder just need to be added to this directory – or am I looking in the wrong place to add to here??



Creating an E-mail from Lookup



- Lookup the contact (s) and click on the envelope on the contact line you want to send out a free form e-mail.

Ambulance Speedtest, Inc. Beverly Hills 90210 CA Developer

- The following screen will then appear:

Send EMail to : Ambulance Speedtest, Inc.

From: Gail Stevens

To:

CC:

BCC:

HTML Template

Subject:

Message:

Sig 1 Sig 2
Sig 3 Sig 4
Sig 5 Sig 6

From MY RECORD setup

Send Message Record Subject Only Msg Priority: Like name Request Receipt

From – Already populated

To – Will default to the Contact (if it exists)

CC / BCC – Can be entered (use the binoculars to lookup a contact)

HTML Template – Use the dropdown to lookup a template and the hour glass to preview it

• Enter a **Subject, Message** and **Signature**

• Record Subject Only, Enter a Priority or Receipt

• Attach a file (optional) –Local Library Personal

Attach Files

Local File	Browse...	Local File	Browse...
Library File		Library File	
Library File		Library File	
Personal Library		Personal Library	
Personal Library		Personal Library	

Creating an E-mail from the History TAB



- Locate the Contact that you would like to forward an e-mail response.
- Click on the History TAB and find the letter

Date/Time	Record Manager Type	Subject	Regarding
 3/5/2009 1:01 PM	Gail Stevens	E-mail Sent Meeting Follow up with	<p>Subject: Meeting Follow up with To: gail.jasit@gmail.com From: Gail Stevens Dear :</p> <p>It was a pleasure meeting with you today. We look forward to working with Ambulance Speedtest, Inc..</p> <p>Should you have any questions or if I can be of further service, please feel free to call me at 212-443-4700.</p> <p>html template: WCE_Generic.htm</p> <p>Attachments: WCE Key Features.pdf</p>



- Click on the Envelope 
- The original letter which was sent out will be displayed.

Creating an E-mail from the History TAB



- Send out the letter as is, or you can modify the original letter and then send it.

Send Email to: Ambulance Speedtest, Inc.

From: Gail Stevens 3rd

To: [Empty field]

CC: [Empty field]

BCC: [Empty field]

HTML Template: WCE_Generic.htm

Subject: Fw: Meeting Follow up with

Message:

----- Original Message -----
Subject: Meeting follow up with
To: gail.jast@gmail.com
Sent: Thursday, March 05, 2009 1:01:33 PM
From: Gail Stevens <gail@yahoo.com>

Dear :

It was a pleasure meeting with you today. We look forward to working with Ambulance Speedtest, Inc.

Should you have any questions or if I can be of further service, please feel free to call me at 212-443-4700.

Regards,
Gail Stevens
WiredContact Training

Send Message Record Subject Only Msg Priority: **Like yours** Request Receipt

Attach Files

Local File	Browse...	Local File	Browse...
Library File	C:\inetpub\WiredE\Attachments	Library File	
Library File		Library File	
Personal Library		Personal Library	
Personal Library		Personal Library	

In this example you will be required to enter the TO.

The system leaves room to enter a message on the forwarded e-mail.

E-mail from the Contact TAB



- Click on the Contact you would like to send an e-mail to and then click on the E-mail TAB. **Emails** There are 4 options.

Setup by your System Administrator

<ul style="list-style-type: none">Email TemplatesHTML EmailPlain Text EmailMy Email Templates	Email Templates Blank Template
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Setup by your System Administrator - HTML

<ul style="list-style-type: none">Email Templates<u>HTML Email</u>Plain Text EmailMy Email Templates	Email Templates\HTML Email\ Blank HTML Email Lead Follow-Up Meeting Followup Sample HTML Email WiredContact Proposal New Features New Features 2 New Features-All Emails
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Setup by your System Administrator – Plain Text

<ul style="list-style-type: none">Email TemplatesHTML Email<u>Plain Text Email</u>My Email Templates	Email Templates\Plain Text Email\ Lead Followup Meeting Followup Sample Text Email WiredContact Proposal WiredContact New Features
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Setup by YOU

<ul style="list-style-type: none">Email TemplatesHTML EmailPlain Text Email<u>My Email Templates</u>	Email Templates
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E-mail from the Contact TAB



- Click on the folder which has the template you want to use or click on the E-mail Templates to select the Blank Template so you can free form the information as you need it.









- TO / CC / BCC** – To will default the contact name (if one exists) or you can use the binoculars to lookup a contact. 
- HTML Template** – Different forms can be attached to the e-mails.
- Subject** – Always enter a meaningful subject
- Message** – Type in your message. You can use the edit buttons to format your message (there will be more detail under the Create Template section).
- Signature** – Select a signature which was originally setup under MY RECORD
- Add Priority or Request Receipt**
- Attachment [Local, Library or Personal File]**
- SEND Message**

E-mail Attachments



- There are multiple places you can assign attachments from.

**** Local Library Personal ****

Attach Files			
Local File	<input type="text"/> Browse...	Local File	<input type="text"/> Browse...
Library File	<input type="text" value="c%3A%5Cinetpub%5Cwirede%"/> 	Library File	<input type="text"/> 
Library File	<input type="text"/> 	Library File	<input type="text"/> 
Personal Library	<input type="text"/> 	Personal Library	<input type="text"/> 
Personal Library	<input type="text"/> 	Personal Library	<input type="text"/> 


Local Files – Click on the Browse button and navigate to the file to be attached. (your computer desktop or documents)


Library File – Files found under the WiredContact Main Library (top). Click on the  icon and you will be brought to the WiredContact Library. Navigate through the folders and click on the file to be attached.

Personal Library – Files found under the WiredContact Personal Library (bottom). Follow the same directions as above.


Keeping Track of Sent E-mails



- History TAB is the key in the tracking of all activity on a Contact's account, including e-mails. If you go to the Contact Record and click on the History Tab 


Date/Time	Record Manager	Type	Subject	Regarding
 3/5/2009 1:01 PM	Gail Stevens	E-mail Sent	Meeting Follow up with	<p>Subject: Meeting Follow up with To: gail.jasit@gmail.com From: Gail Stevens Dear :</p> <p>It was a pleasure meeting with you today. We look forward to working with Ambulance Speedtest, Inc..</p> <p>Should you have any questions or if I can be of further service, please feel free to call me at 212-443-4700.</p> <p>html template: WCE_Generic.htm</p> <p>Attachments: WCE Key Features.pdf</p>



The History record provides all the details concerning the e-mail sent

- Date / Time
- Record Manager – Person who sent the e-mail
- Type – For e-mails will always be E-mail Sent
- Subject – Subject which appeared on the E-mail
- Regarding Contains the actual e-mail including Templates and Attachments
-  Click on this icon will bring up the e-mail as it was sent.

Broadcast E-mails



- You have the ability to send out an e-mail to multiple recipients.
- After opening an e-mail (whether it is free form or a template), click on the  Send to Multiple Recipients icon. The TO section will be modified to

To:	Current Lookup <input checked="" type="checkbox"/>	Copy Self <input checked="" type="checkbox"/>	Verify List
	Current Query <input type="checkbox"/>		
	Select Group	<input type="text"/>	 

Current Lookup – Sends to all the contact(s) presently on your Lookup. Click on the Verify List to review the contacts BEFORE sending the e-mail.

Copy Self – Sends a copy of the e-mail to you (e-mail address setup on My Record).

Current Query – Sends to all contact(s) presently on your Query Results. Click on the Verify List to review the contacts BEFORE sending the e-mail.

Select Group – Type a group name or use the binoculars to lookup a group name

Creating your own Template



- Select a contact and click on the E-mail Tab **Email**
- Under the E-mail Templates section, select the **Blank Template**

A screenshot of an email composition window. The window title is "Send EMail to : Ambulance Speedtest, Inc.". The "From:" field is filled with "Gail Stevens 3rd". The "To:", "CC:", and "BCC:" fields are empty. The "HTML Template" dropdown is set to "WCE_Generic.htm". The "Subject:" field is empty. Below the subject field is a rich text editor toolbar with various icons for text formatting, alignment, and insertion. The main message area contains the text "Hi:". At the bottom of the message area, there is a checkbox labeled "HTML" which is currently unchecked. Below the message area is a signature block with radio buttons for "Sig 1" through "Sig 6". The "Send Message" button is visible at the bottom left. At the bottom right, there are checkboxes for "Reorder Subject Only", "Msg Priority: Late warn", and "Request Receipt".

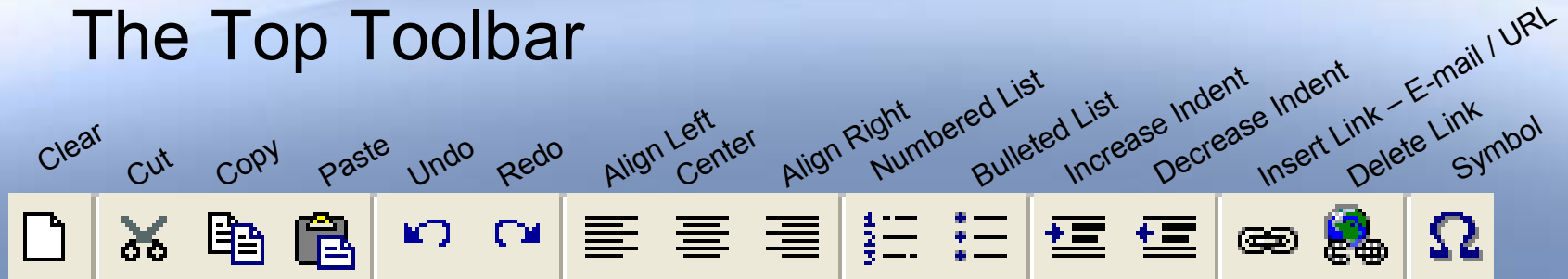
1. Enter the To, CC or BCC – Use the binoculars to lookup a contact.
2. HTML Template – optional
3. Subject – Recommended to always enter a subject
4. Message – Free form the information you want displayed here. Use the Tool Bar to format the message
5. Clicking on the HTML box will display the HTML coding

Lets review the formatting options . .

Creating your own template



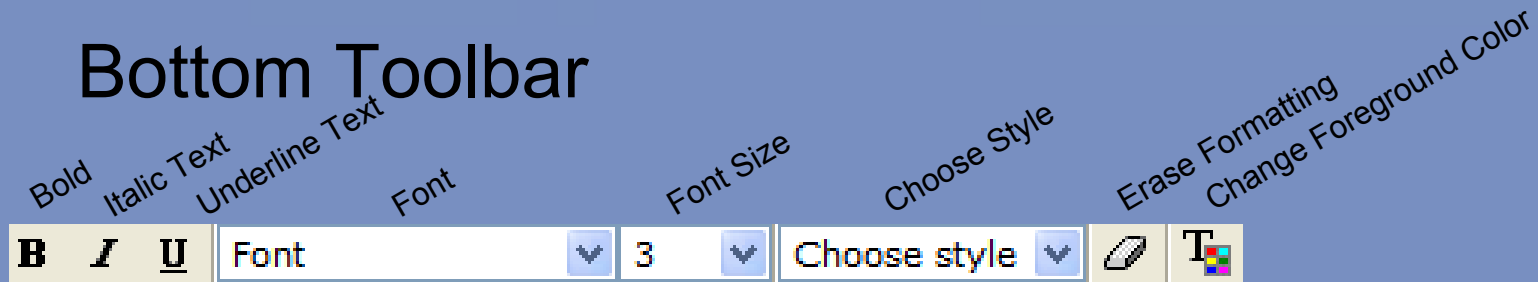
- The Top Toolbar



- Middle Toolbar



- Bottom Toolbar



Creating your own Template



Subject: _____

Message:

Hi [[field field=78]]:

Typing message here and inserting fields [[field field=email1]] as needed.

HTML

Sig 1 Sig 2
Sig 3 Sig 4
Sig 5 Sig 6

Gail Stevens
WiredContact Enterprise

Record Subject Only Msg Priority: **Luke warm** Request Receipt

Attach Files

Local File	<input type="text"/> Browse...	Local File	<input type="text"/> Browse...
Library File	<input type="text"/>	Library File	<input type="text"/>
Library File	<input type="text"/>	Library File	<input type="text"/>
Personal Library	<input type="text"/>	Personal Library	<input type="text"/>
Personal Library	<input type="text"/>	Personal Library	<input type="text"/>

6. Signatures – You can select a signature from your MY RECORD setups. Just check the box of the signature and it will display.

- 7. Check off the options**
- Record Subject Only Box
 - Msg Priority
 - Request Receipt

- 8. Attach Files** – 3 Types
- Local File
 - Library File
 - Personal Library

9. SAVE the Template by pressing the SAVE button

Creating your own Template



- When you press the SAVE button the following screen will appear:

A screenshot of a 'Save As' dialog box. The dialog box has a light beige background and a dark border. It contains the following text and fields:

- Save to:** My Email Templates\
My Email Templates\
- Select a folder below:**
 - My Email Templates
- New Folder:** [Empty text box]
- Save As:** Demo1.weml
- Display Name:** Demo 1 Template
- Buttons: cancel, Save

Your E-mail Template will be saved under the MY EMAIL TEMPLATE

New Folder – If you want to place a sub-folder under the MY EMAIL TEMPLATE and save your template here, just enter the Sub Folder name

Save As – Enter the internal name of the template (recommended to make the same to the display Name). It must end in .weml

Display Name - Enter the name that will display under the My Email Template so you can select it in the future.

Press the **SAVE** button

Questions & Answers



WIREDCONTACT