



Client Data System[®]

E-mail Posting for Microsoft Office Outlook User Guide



Copyright 1998-2006, E-Z Data, Inc.

All Rights Reserved

No part of this documentation may be copied, reproduced, or translated in any form without the prior written consent of E-Z Data, Inc.

All product names are trademarks of their respective manufacturers or organizations.



918 E. Green Street Pasadena, CA 91106

Web: <u>http://www.ez-data.com</u> Telephone: (626) 585-3505 Fax: (626) 440-9097 U.S. toll-free fax: (800) 779-3123

Table of Contents

Introduction 1
Installing CDS E-Mail Posting for Microsoft Office Outlook 1
SmartPad Postings from MS Outlook 1
Posting a Message from the Microsoft Outlook Folder 1
Posting a Message to Additional Contacts
Posting a Message to a Key Relation
Posting a Message to a Newly Added Contact
Posting a Message to a Newly Added Business Record
Indication of Posted Message(s) in Outlook 8
Viewing a Posted Message from the SmartPad9
Reply, Reply All and Forward Options for Posted Message(s)
CDS E-mail Posting Options
Composing a Message from MS Outlook
Form Letters 14
E-mailing a Form Letter as an E-mail14
E-mailing a Form Letter with an Attachment 15
E-mailing a Form Letter as an Attachment17
E-mail Options
Sending Internal Messages as E-mail 19
Sending CDS Activities as Online Invitations
Exporting CDS Contact Information in the vCard (.vcf) Format

Introduction

Client Data System E-Mail Posting for Microsoft Office Outlook is an add-on feature that interfaces Client Data System® with Microsoft® Office® Outlook®. This feature enables the CDS user to have a seamless interface with MS Outlook and enables the user to use MS Outlook as an e-mail client. Use MS Outlook to compose mail and post those messages to the CDS SmartPadTM. This feature supports Microsoft Outlook 2003.

Installing CDS E-Mail Posting for Microsoft Office Outlook

1. During the installation of CDS 6.0, the E-mail and Calendar Synchronization Installation dialog box displays.



2. By default, the Microsoft Office Outlook 2003 for Client Data System option will be selected. Click the **Next** button to proceed.



- 3. Select the **Microsoft Office Outlook 2003 E-mail Posting for Client Data System** option and then click the **Next** button to display the InstallShield Wizard Complete dialog box.
- 4. Click the **Finish** button. When the CDS Outlook E-mail Posting is installed, the CDS Post button is added in MS Outlook.

SmartPad Postings from MS Outlook

The CDS Post button enables the user to post e-mail messages from MS Outlook to CDS.

Posting a Message from the Microsoft Outlook Folder

1. Select the message to be posted to CDS and then click the CDS Post button.

2. The posting dialog box displays the specified message information.

Outlook E-Mail Inte	erface		
Subject :			
Date/Time :			
Keywords			
Contacts for Postin	g (CDS)		
Source	Contact Name	E-mail Ado	dress
			Record count: 0
Contact E-mail (s) n	ot found in CDS		
Source	Contact Name	E-mail Ad	dress
			Record count: 0
\Box Contacts (Posted)			
Contact Name		E-mail Address	
			Record count: 0
		Post Cancel	

- Subject of the message.
- Date/Time of the message.
- Keywords.
- List of CDS Contacts associated with the message.
- List of Contacts not found in CDS.
- List of Contacts that the message was posted to.
- In the Contacts for Posting (CDS) section, contacts from CDS whose e-mail address matches with the e-mail address in the To, Cc, or Bcc field of the selected mail are listed.
- In the Contact E-mail not found in CDS section, contacts whose e-mail addresses are present in the To, Cc, or Bcc field of the selected mail are listed. No matching contacts in CDS with that e-mail address are listed.
- In the Contacts (Posted) section, contacts from CDS to whom the selected mail has been posted are displayed.

Posting a Message to Additional Contacts

1. To post the message to CDS contact records that are not listed in the posting dialog box, click the **Add/Search Contacts** button to open the Find Contact Information dialog box.

Outlook E-M	lail Interface		
Subject :	Thank you - no interest		
Date/Time :	Tue 12/27/2005 00:00 Pl	M	
Keywords			# 🛤 M
Contacts f	or Posting (CDS)		Add/Search Contacts
Source	Contact Name	E-mail Address	
∎то	Test, Ezdata	ezdatatest@ez-data.com	
From	Test, Ezdata	ezdatatest@ez-data.com	
Contact E-	mail (s) not found in CDS		Record count: 2
Source	Contact Name	E-mail Address	
			Record count: 0
Contacts (Posted)		
Contact N	lame	E-mail Address	
		Post Cancel	Record count: 0

2. The Find Contact Information dialog box is used to search for Individual or Business records.

Find Contact Information	Find Business Information
Last Name <,First Name>	Business Name
Options Contact C Business	Options C Contact C Business
Enter the search information and click OK.	Enter the search information and click OK.
Cancel	Cancel

3. Enter the search criteria and then click the **OK** button to open a dialog box listing all of the records that meet the criteria. Select the appropriate record(s) and then click the **OK** button. The selected record(s) display in the posting dialog box. For the additional selected record(s) in the Contacts for Posting (CDS) section of the posting dialog box, CDS will display in the Source column.

Dutlook E-Mai	l Interface			
Subject :	Thank you - no interest			
Date/Time :	Tue 12/27/2005 00:00 PM		_	
Keywords			_	🛤 🏟 M
Contacts for F	Posting (CDS)			
Source	Contact Name	E-mail Ad	ldress	
∎то	Test, Ezdata	ezdatate	st@ez-data.com	
From	Test, Ezdata	ezdatate	st@ez-data.com	
CDS	Ackerman , Joseph	joe_acke	rman@eznet.com	
CDS	ABC Manufacturing			
Contact E-ma	il (s) not found in CDS	E-mail Ad	dress	Record count: 4
Contacts (Po	sted)			Record count: 0
Contact Nam	ie	E-mail Address		
		Post Cancel		Record count: 0

Posting a Message to a Key Relation

- 1. To post the message to a key relation of a CDS Contact, select the Contact from the Contacts for Posting (CDS) list and then click the **Key Relation**(s) button.
- 2. The Key Relation(s) dialog box opens, listing all of the key relations for the Contact in CDS. To select the key relations to whom to post the message, click the associated checkbox for the appropriate key relations and then click the **OK** button.

Key Relation(s) for Ackerman ,	Joseph	×			
	<u>ê</u>				
Contact Name	Relation				
Ackerman, Kathleen	Wife				
🗖 Ackerman, Kenneth	Son				
🗹 Ackerman, Marianne	Daughter				
Halverson, Joe	Associate				
Record count: 4					
Can	cel				

3. Click the **Post** button from the posting dialog box to post the message to the selected contacts from the Contacts for Posting (CDS) list as well as for the selected key relations.

Outlook E-Mai	l Interface			
Subject :	Thank you - no interest			
Date/Time :	Tue 12/27/2005 00:00 PM			
Keywords				🚧 🏨 M
Contacts for I	Posting (CDS)			
Source	Contact Name	E-mail Ad	dress	
∎то	Test, Ezdata	ezdatates	st@ez-data.com	
From F	Test, Ezdata	ezdatates	st@ez-data.com	
CDS 🗹	Ackerman , Joseph	joe_acker	man@eznet.com	
⊡ CDS	ABC Manufacturing			
Key Relat	ion Ackerman, Marianne			
Contact E-ma	il (s) not found in CDS			Record count: 5
Source	Contact Name	E-mail Ad	dress	
				Record count: 0
Contacts (Po	sted)			
Contact Nam	ie	E-mail Address		
		Post Cancel		Record count: 0

Posting a Message to a Newly Added Contact

Use the Outlook E-mail Interface application to create new CDS Contacts from the posting dialog box and post messages to that Contact's SmartPad.

- 1. In MS Outlook, select a message and then click the **CDS Post** button.
- 2. From the posting dialog box, click the **Add/Search Contacts** button to open the Find Contact Information dialog box.

3. Enter the search criteria and then click the **OK** button to display a dialog box of contact record(s) matching the search criteria.

Outlook E-Mail Inter	face					×
				ŵ	Ħ	
🔺 Last Name	First Name	Middle	E-mail Address	Туре		^
Ackerman	Joseph	Μ.	joe_ackerman@eznet			
Ackerman	Kathleen					
Ackerman	Marianne					
Adcock	Martin		martin.adcock@eztes			
Alexander	Sherman					
Anderson	Phillip					
Ansong	David	М.	david.ansong@geem			
Anthony	Brian					~
<u> <</u>					>	
Record count: 11						
	OK	Cancel	ontact			

4. Click the **Add Contact** button to display the Quick Add – Contact dialog box.

Quick Add - Contact 🛛 🔀
Please enter contact details :
Last Name
Middle Name
First Name
Туре
E-mail
Business Name
Occupation
Cancel

5. Enter all the required Contact information and then click the **OK** button.

Outlook E-Mail Interfa	ace					\mathbf{X}
					ŵ	Ⅲ
🔺 Last Name	First Name	Middle	E-mail Address	Туре		^
Anderson	Phillip					
Ansong	David	м.	david.ansong@geem			
Anthony	Brian					_
Antille	Eugene					
Antonsen	Robert	с.				
🗖 Aschtouni	William	L.				
🗹 Adams	Joshua	S.				
					/	
Record count: 12						_
	OK	Cancel Add	Contact			

6. Click the **OK** button to display the newly added contact record in the posting dialog box.

Posting a Message to a Newly Added Business Record

- 1. In MS Outlook, select a message and then click the **CDS Post** button.
- 2. From the posting dialog box, click the **Add/Search Contacts** button to display the Find Contact Information dialog box.
- 3. Select the **Business** option to change the title of the dialog box to Find Business Information.
- 4. Enter the search criteria and then click the **OK** button to display a dialog box with contact record(s) matching the search criteria.

Outlook E-Mail Interfa	ce				
					🏟 🏢
🔺 Bus. Name	Туре	Class	E-mail Address	NAICS #	
ABC Manufacturing		Company		1234	Pla
Ace Building		Company		5413	Cc
<					>
Record count: 2					
	ОК	Cancel	Add Business		

5. Click the Add Business button to display the Quick Add – Business dialog box.

Quick Add - Busin	ness	X
Please enter busines	s details :	
Bus. Name		
Туре		•
Class		•
E-mail		
NAICS #		
Industry		•
Category		•
	Cancel	

6. Enter all the required information for the Business and then click the **OK** button.

Outlook E-Mail Interface					X
				m 🏢	
🔺 Bus. Name	Туре	Class	E-mail Address	NAICS #	
ABC Manufacturing		Company		1234	
Ace Building		Company		5413	
Prime Tech Group, Inc.					
<					>
Record count: 3					_
	(OK	Cancel	Add Business		

7. Click the **OK** button to display the newly added contact record in the posting dialog box.

Indication of Posted Message(s) in Outlook

In MS Outlook, without having to go to the posting dialog box of a message, the user can identify whether it has been posted to a Contact's record in CDS.

- 1. In MS Outlook, select the folder from where you want to post an e-mail message (i.e., Inbox, Sent Items).
- 2. On the View menu, point to the Current View and then select the Customize Current View option.
- 3. From the View Summary dialog box, click the Fields option.
- 4. From the Select Available Fields From dialog box, select the User-defined fields in Inbox option.
- 5. If you have already posted a message from this folder, the **Posted** field name displays on the Available Fields list.
- 6. Select the **Posted** field from the list and then click the **Add** button.
- 7. The field can also be positioned in the view by using the Up and Down buttons.

8. In the selected folder view, a checkbox displays in the Posted column for all of the messages that have already been posted to contacts in CDS.

Viewing a Posted Message from the SmartPad

Once the user has posted a message to a Contact record in CDS, he or she can view the posted message from the Contact's SmartPad.

- 1. In order to view the content of the message, select the message and then click the **View Posted E-mail Message** button.
- 2. If the user posted an e-mail, the Type column of the Contact's SmartPad spreadsheet will display E-mail. Click the **View Posted E-mail Message** button to display the e-mail in the following format.

🔲 Weekly	Meeting	×
From:	ezdatatest@ez-data.com	
To:	carol.dawson@eztest.com	
Cc:	joseph_ackerman@eztest.com;marianne.ackerman@eztest.com	
BCc:		
Subject:	Weekly Meeting	
Keywords:	Meeting	
Sent:	Tue 12/20/2005 11:19 AM	
Hi Everyone),	^
Just a remin	der that our weekly meeting for this week has been postponed. We will meet next Thursday at 3:00pm.	
See you all t	then.	
Thanks!		
		~
	Print Reply Reply All Forward Close	

3. If the user posted an e-mail address with an attachment, the Type column of the Contact's SmartPad spreadsheet will read E-mail with Attachment. By clicking the **View Posted E-mail Message** button, the mail will be displayed in the following format.

🔲 Up date	ed Issue Log	×
From:	ezdatatest@ez-data.com	
To:	joseph_ackerman@eztest.com	
Cc:	marianne.ackerman@eztest.com;carol.dawson@eztest.com	
BCc:		
Subject:	Updated Issue Log	
Keywords:		
Sent:	Tue 12/20/2005 11:30 AM	
Hi All,		^
Attached is	the updated Issue Log. Please review and provide any feedback.	
L		
Thanks!		
		<u> </u>
Mail Attach	Intents	
[ssue Log.o	loc View File	
	Print Reply Reply All Forward Close	

4. The Mail Attachments section displays the attachment(s). In order to see the content of the attachment file, highlight the attachment and then click the **View File** button.

Reply, Reply All and Forward Options for Posted Message(s)

Once a message has been posted to a Contact's SmartPad, the user can choose to **Reply, Reply All** or **Forward** the message.

In CDS, open a Contact record and then click the **SmartPad** icon. From the SmartPad, select an entry type as either **E-mail** or **E-mail With Attachment** and then click the **View Posted E-mail Message** button. By doing this, the user is able to view the content of the message. The format of the message displays exactly as it does in MS Outlook.

- Click the **Reply** button to open the message in the MS Outlook compose UI with the **To** and the **Subject** fields filled as per the posted mail.
- Click the **Reply All** button to open the message in the MS Outlook compose UI with the **To**, **Cc** and **Subject** fields filled as per the posted mail.
- Click the **Forward** button to open the message in MS Outlook with only the **Subject** field filled as per the posted mail.

CDS E-mail Posting Options

There are several e-mail posting options available when sending mail from MS Outlook.

- 1. In MS Outlook, click the **Tools** menu to open an additional list of options.
- 2. Select **Options** and then click the **CDS E-mail Posting Options** tab. By default, the following options are selected.

0	ptions			? 🔀
[Preferences Security	Mail Setup Other	Mail Format CDS E-mail Posti	Spelling ing Options
	Select CDS E-mail F	Posting Options dy to SmartPad s being sent from eithe	r Outlook or CDS:	
	 Manually post r Prompt 0 Outlook 	nessage to CDS conta to post message to Sm with a valid CDS Sest	act record nartPad when sending fr sion.	om
	C Automatically p	ost message to CDS o ost message to CDS o	contact records following	g confirmation. confirmation.
			DK Cancel	Apply

- When the **Post E-mail body to SmartPad** option is not selected, the subject of the posted message will be displayed in the Notes section of the SmartPad Summary. In this case, the user must open the SmartPad record in order to view the body of the e-mail.
- When the **Post E-mail body to SmartPad** option is selected, the body of the posted message will be displayed in the Notes section of the SmartPad Summary.

• When the user either selects the second or third option from the CDS E-mail Posting Options tab, an additional section displays. In this section, by default, the **To** and **Cc** checkboxes are selected. Upon the automatic posting of the message, it will match the CDS Contact Records with a MS Outlook e-mail address in the specified **To**, **Cc**, **From** and **Bcc** fields and then post the message to those contacts' SmartPad records.

Options			? 🔀
Preferences	Mail Setup	Mail Format	Spelling
Security	Other	CDS E-mail Posting	g Options
Select CDS E-mail F	Posting Options		
When a message is	s being sent from eithe	r Outlook or CDS:	
 Manually post r Prompt t Outlook Automatically p Automatically p Match CDS content 	nessage to CDS conta o post message to Sm with a valid CDS Sess ost message to CDS c ost message to CDS c ntact records with Out	act record artPad when sending from sion. contact records following of contact records without co look e-mail address in the	n confirmation. onfirmation.
Tollowing neids.	From	V. To	
		l • 10	
	Cc	Bcc	
		X Cancel	

- Manually Post the Message to the CDS Contact Record: In Outlook, compose a message and then click the Send button to send the message to the Sent Items folder. Open the Sent Items folder, select the message which was sent and then click the CDS Post button. The user can then specify which Contacts in CDS to post the message to.
- Manually Post the Message to the CDS Contact Record and Prompt to Post the Message to SmartPad when sending from Outlook with a valid CDS session: In Outlook, compose a message and then click the Send button to be prompted to post the message to a Contact in CDS. If Yes is selected, the posting dialog box will display where the user can specify to which Contacts in CDS to post the message.
- Automatically Post Message to CDS Record(s) Following Confirmation: In Outlook, compose a message and then click the Send button to be prompted to post the message to Contacts in CDS. If **Yes** is selected, it will automatically post the message to all of the matching CDS Contact records with an Outlook e-mail address in the specified **To**, **Cc**, **From** and **Bcc** fields.
- Automatically Post Message to CDS Contact Record(s) without Confirmation: In Outlook, compose a message and then click the Send button to automatically post to all of the matching CDS Contact records with an Outlook e-mail address in the specified **To**, **Cc**, **From** and **Bcc** fields.

Note that depending on the CDS E-mail Posting option selected, the outcome will be slightly different. The default CDS E-mail Posting option will be used throughout the user guide. The selection does not affect the posting from any of the MS Outlook mail folders.

Composing a Message from MS Outlook

Both message(s) that already exist in MS Outlook and newly composed message(s) can be posted.

1. Compose a message and then click the **Send** button. The following prompt will display if the default settings in the CDS E-mail Posting Options were selected.

CDS E-mail Postin	g Options	\mathbf{X}
Post this message to	o Contact(s) in C	DS?
<u>Y</u> es	No	

- 2. Click the **Yes** button.
- 3. A posting dialog box will open and display the composed message information (e.g., Subject and Date/Time) along with any matched CDS contact record(s).
- 4. If the message finds a match with any CDS contact records, a bold checkbox will display under the Source column. To post the message to this contact, select the checkbox and then click the **Post** button.

Outlook E-Ma	il Interface				×
Subject :	Meeting with Client				_
Date/Time :	Thu 01/05/2006 00:24 PM				
Keywords				👫 🏨 🕅	
Contacts for	Posting (CDS)				
Source	Contact Name	E-mail Add	iress		
🗹 То	Ackerman, Marianne	marianne_	_ackerman@eznet.com		
From	Test, Ezdata	ezdatates	t@ez-data.com		
Contact E-ma	ail (s) not found in CDS			Record count: 2	
Source	Contact Name	E-mail Add	lress		Ī
				Record count: 0	
Contacts (Po	osted)				
Contact Nar	ne	E-mail Address			I
		Post Cancel		Record count: 0	

Form Letters

The Outlook E-mail Interface application also enables the user to send form letters from CDS to the selected contacts directly through MS Outlook.

E-mailing a Form Letter as an E-mail

- 1. In CDS, click the **Reports** menu and then select the **E-mail Form Letters** option to open the Find Form Letter dialog box.
- 2. Click the **OK** button to display the E-mail Form Letter dialog box.

	E-mail Fo	rm Letter						
	Letters	\$	70					
	Date		Description	n	Modified	Doc Туре	HIPAA	<u> </u>
	08/02/1997	2nd year te	rm renewal		08/02/1997	E-Z Editor		-
	08/02/1997	3rd year ter	rm renewal		08/02/1997	E-Z Editor		
	08/02/1997	4th year ter	m renewal		08/02/1997	E-Z Editor		
	08/02/1997	5th year ter	m renewal		08/02/1997	E-Z Editor		
	08/02/1997	6th year ter	m renewal		08/02/1997	E-Z Editor		
	108/02/1997	/th year ter	m renewal		08/02/1997	E-Z Editor		<u>™</u>
:	Subject: 2r	nd year term	renewal					
	Attachments							
							Add (Images / I	Documents)
							Brow	se
							View Att	achment
							Remove A	ttachment
	Address Sele	ection	Letter Log S	torage Optn	E-mail Op	tions		
	Preferred	Address	Unk to Fo	rm Letter Only	(⊙ <u>E</u> -mail			
	<u>R</u> esidence	e Address	 Hardcopy 	to Client	🔵 E-mail	as <u>A</u> ttachment	:	
	O <u>B</u> usiness 4	Address	O No Letter	Log Storage	Save o	opies of messa	ages in Sent Items fo	older
	Sort By				Reque	st a delivery re	eceipt	
	🔘 Last Name	e	Create Fo	llow-up Activity	Reque	st a read recei	int	
	💽 Zip Code				Import	ance: High	P.	
			E-mail	Cancel		acts	Help	

- 3. Select the Form Letter to be e-mailed. By default, the Description of the selected Form Letter will display in the Subject field.
- 4. Click the **Contacts** button to display the Select Contact dialog box.

Select Contact	×
Contact Selection Using Set/Filter	
Ad hoc Contact Selection	
Select All Contacts	
OK Cancel <u>H</u> elp	

- Contact Selection Using Set/Filter: Specify a set or filter to e-mail the selected Form Letter to.
- Ad hoc Contact Selection: Specify contact(s) to e-mail the selected Form Letter to.
- Select All Contacts: Send the selected Form Letter to all contacts in the CDS database.

- When the Ad hoc Contact Selection option is selected, follow the following steps:
 - 1. Click the **Find** button to display the Find Contact Information dialog box.
 - 2. Click the **OK** button to display the Contact List.
 - 3. Select the Contact(s) to e-mail the Form Letter to and then click the **Ok**, **Select** button.
 - 4. The selected Contact(s) will display in the Selected Contact List.

Select Contact
Selected Contact List
🔀 Adams, Joshua
🖂 Anderson, Phillip
🛛 Ansong, David
Set Filter Find Suppress
OK Cancel <u>H</u> elp

- 5. Select each of the Contacts to e-mail the Form Letter to and then click the **OK** button.
- 6. In the E-mail Form Letter dialog box, click the **E-mail** button to e-mail the Form Letter to the selected Contact(s).

E-mailing a Form Letter with an Attachment

- 1. In CDS, click the **Reports** menu and then select the **E-mail Form Letters** option to open the Find Form Letter dialog box.
- 2. Click the **OK** button to open the E-mail Form Letter dialog box.
- 3. Click the Add (Images/Documents) option to display the Images/Documents spreadsheet.

Images/Documents (5)		×
\checkmark × \triangleright \forall	Ø 🅉	条 🚍 🏢	
Contact	Date	Description	^
Ackerman, Joseph	01/05/2000	2nd Year Term Renewal Letter	≣
Ackerman, Joseph	12/15/1999	College Funding Letter	-
Antille, Eugene	10/31/1999	8 Pay Life Letter	
Antille, Eugene	09/04/1999	Performance Bar Graph	
Ackerman, Joseph	03/25/2005	Header logo	
			v
<			

4. Select the image or document to be sent as an attachment along with the Form Letter and then click the **Ok**, **Select** button.

5. The selected image or document will display in the Attachments section.

E-mail Fo	rm Letter									
Letters	\$	7	Ø		-					
Date		Dese	ription			Modified	DocType	HIPA	A	<u>^</u>
08/02/1997	2nd year ter	rm rene	wal			08/02/1997	E-Z Editor			
08/02/1997	3rd year ter	m renev	wal			08/02/1997	E-Z Editor			
08/02/1997	4th year ten	m renev	val			08/02/1997	E-Z Editor			
08/02/1997	5th year ten	m renev	val			08/02/1997	E-Z Editor			
08/02/1997	6th year teri	m renev	val			08/02/1997	E-Z Editor			
108/02/1997	7th year teri	m renev	val			08/02/1997	E-Z Editor			×
Attachments	rm Renewal L	Letter	-					Add (I	mages / I	Documents)
									Brow View Att	achment
									emove A	ttachment
Address Selection Letter Log Storage Optn E-mail Options										
		E	mail	Ca	ncel		cts]	Help)	

- Click the **View Attachment** button to view the selected attachment.
- Click the **Remove Attachment** button to remove the selected attachment.
- Specify an attachment by clicking the **Browse** button.

E-mailing a Form Letter as an Attachment

- 1. In CDS, click the **Reports** menu and then select the **E-mail Form Letters** option to open the Find Form Letter dialog box.
- 2. Click the **OK** button to open the **E-mail Form Letter** dialog box.

_	E-mail Form Letter											
	Letters	\$ \$	7	Ø			N					
	Date		Des	cription	1		Modified	DocType		HIPAA		^
	08/02/1997	2nd year te	rm rene	wal		0	8/02/1997	E-Z Editor				
	08/02/1997	3rd year ter	m rene	wal		0	8/02/1997	E-Z Editor				
	08/02/1997	4th year ter	m renev	val		0	8/02/1997	E-Z Editor				
	08/02/1997	5th year ter	m renev	val		0	8/02/1997	E-Z Editor				
	08/02/1997	6th year ter	m renev	wal		0	8/02/1997	E-Z Editor				
	08/02/1997	7th year ter	m renev	wal		0	8/02/1997	E-Z Editor				×
Ì	Subject: 7t	h vear term	renewa	1								_
	Attachments											_
										Add (Images /	Documents)	
										Add (Images)	Documents)	
										Brow	/se	
										View Att	achment	
										Remove A	ttachment	
	Address Sele	ection	~Lette	r Log Sh	orage Oph	n —	∠E-mail On	tions	-			
	Preferred	Address	CLin	k to For	m Letter C	nly	OE-mail					
	Residence	Address	⊙на	rdcopy I	to Client		⊙E-mail ∂	as Attachmen	t HT	MI	~	
	 Business A	Address	O No	l etter l	og Storag	e			0.0	lobe DDE Eiler		
	<u> </u>		<u> </u>			-	Save c	opies or mess	ag Au HT	ML		
	Sort By						Reque	st a delivery r	rec Ric	:h Text		
	🔘 Last Name	•	Cr	eate Fol	low-up Acl	ivity	Reque	st a read rece	ipt	xt ard for Window		
	💽 Zip Code						Import	ance: High	000		<u>vs</u>	
	E-mail Cancel <u>C</u> ontacts <u>H</u> elp											

- 3. Select the Form Letter to be e-mailed. By default, the Description of the selected Form Letter will display in the Subject field.
- 4. From the E-mail Options section, select the **E-mail as Attachment** option to display a drop-down menu. By default, HTML will be selected.

5. Select the format in which the attachment should be sent and then click the **Contacts** button to display the Select Contact dialog box.



- 6. Select the applicable option and then click the **OK** button.
- 7. In the E-mail Form Letter dialog box, click the **E-mail** button to e-mail the Form Letter as an attachment to the selected Contact(s).

E-mail Options

Aside from being able to send a Form Letter as an E-mail or as an E-mail Attachment, there are several options when sending a Form Letter.



- Save copies of messages in Sent Items folder: Select this option to save a copy of the sent message to the MS Outlook Sent Items folder.
- **Request a delivery receipt:** Select this option to request a delivery receipt.
- **Request a read receipt:** Select this option to prompt the individual receiving the message with the following dialog box.

Microsoft Office Outlook						
⚠	ezdatatest@ez-data.com has requested a read receipt be sent when message '2nd year term renewal' has been read. Do you want to send a receipt?					
	Don't ask me about sending receipts again					
	Yes No					

Click the Yes button to send a receipt.

• **Importance: High:** Select this option to mark the message being sent with a priority of Importance: High.

Sending Internal Messages as E-mail

- 1. In CDS, click the **Messages** button to display the Messages Inbox tab.
- 2. Click the **New Message** button to display the Message Recipients dialog box.

Message Recipients						
□ DEMO-DEMO ⊠ ED-DEMO ⊠ EILEEN-DEMO □ MARK-DEMO □ MIKE-DEMO □ NANCY-DEMO □ NORMA-DEMO						
Select one or more users to whom you want to send this message. Blank selects all users.						
OK Cancel <u>H</u> elp						

3. From the Message Recipients dialog box, select the users to send the message to and then click the **OK** button to display the While You Were Out dialog box.

Note that selecting none of the users will send the message to all of the users listed in the Message Recipients dialog box.

WHILE	YOU WERE OUT						
To Regarding Company Phone No	ED-DEMO From DEMO Anderson, Phillip Date/Time 12/27/2005 12:34 PM Bottomline Advertising Agenc Priority Important Important (626) 322-1898# Important Important Important						
Telephoned Urgent Please Call Returned Your Call Will Call Again Wants to see you							
Please call Phillip. He wants to see you ASAP.							
Keywords Business Acknowledgement Requested Done							
Send Send Later SpellCheck Print Cancel Help							

4. Enter all the required information and then click the **Send** button. Note that the recipient user must have an e-mail address specified in the User Profile.

Sending CDS Activities as Online Invitations

1. In CDS, open the Activity Detail dialog box.

Activity I	Detail					×	
Last Nm,First Type/Sub Keywords Due Date Subject	Ackerman, Kathleen Meeting V	Priority Status Assigned To	Normal Active DEMO I Ientative	V V Tracked	Created By Created On 12/27/2005		
Place	Boardroom		Send E-mail In	vitations	UserName	^	
Start Time End Time Reminder Reason Follow-up	Tue 12/27/2005 ▼ 01:30 PM Tue 12/27/2005 ▼ 03:00 PM		🗌 All day event				
				~		~	
	OK Cancel Options Help						

2. Enter all the required information and then click the **Add Record** button in the Participants section to display the Database Users list.

🗖 Database Users (8)								
	UserName	Security Level	Status	Agent	^			
	DEMO	Highest	Active	Odell, Daniel				
	ED	Group	Active	Singer, Edward				
	EILEEN	Group	Active	Warnings, Eileen	≣			
	MARK	Lowest	Active	Paladian, Mark				
	MIKE	Lowest	Active	Russom, Mike				
	NANCY	Lowest	Active	Ridder, Nancy	_			
	NORMA	Lowest	Active	Peterson, Norma				
	DEMO2	Highest	Active					
					$\mathbf{\mathbf{z}}$			
<	ш			>				

- 3. Select the appropriate users and then click the **Ok**, **Select** button.
- 4. In the Activity Detail dialog box, select the **Send E-mail Invitations** option.
- 5. Click the **OK** button to display the Send E-mail Invitation dialog box.

Send E-Mail Invitation
Subject: Weekly Meeting Select Participants for Online Invitation DEMO (ezdatatest@ez-data.com) ED EILEEN
OK Add Mod Select All Cancel

6. Select the participants for the online invitation and then click the **OK** button. To send an online invitation to a participant, an e-mail address must be specified for that participant.

To add an e-mail address for a participant from the Send E-mail Invitation dialog box:

1. Select the Participant and then click the **Add** button to open the Add/Modify E-mail for Participant dialog box.

🗖 Add/Modify E-Mail for Participant 🛛 🛛 🕅							
EMail:	ed@eztest.com						
	OK Cancel						

- 2. Enter the e-mail address for the participant and then click the **OK** button.
- 3. The added e-mail address displays in the Send E-mail Invitation dialog box next to the Participant's name.

To modify an e-mail address for a participant from the Send E-mail Invitation dialog box:

- 1. Select the Participant and then click the **Modify** button to display the Add/Modify E-mail for Participant dialog box.
- 2. Modify the e-mail address and then click the **OK** button.
- 3. The modified e-mail address displays in the Send E-mail Invitation dialog box next to the Participant's name.

Exporting CDS Contact Information in the vCard (.vcf) Format

1. In CDS, from the Contact Summary, select a contact record and then click the **E-mail Contact as .vcf file** button.

Sum	mary	Personal	T Add'i	. Personal	⊺ Key F	Relations	Benefits	Letters/Documents Custom Fields
	-	🧯 🗂 i	ie 🔐 🖄] 🟹	Ø 👋		-	II 🖉 🧇 🗠 🚱 🎦
	Last Name	First Name	Occupation	Birth Date	Total Life		All Phones	All Addres E-mail Contact as .vcf fil
	Ackerman	Joseph	Physician/Surgeon	02/27/1960	14,400	Business (F	ref):	Business (Pref) : 144 Wilshire Blvd., Suite 250,
						(310)-839-3	839#3453.	Los Angeles, CA, 90007
						Fax: (310)-	839-3840.	Residence : 488 S. Oakland Avenue,
						Residence :	(626)-799-2951.	. Pasadena, CA, 91101

- 2. The Outlook Compose dialog box displays with the selected contact record as a .vcf attachment.
- 3. Enter the appropriate message recipient(s) and then click the **Send** button.

To import the Contact record into MS Outlook:

- 1. In MS Outlook, open the message with the .vcf attachment.
- 2. Double-click the attachment to display the Opening Mail Attachment dialog box.

Opening Mail Attachment 🛛 🔀								
2	You should only open attachments from a trustworthy source.							
Attachment: CDS_Contact_Joseph_Ackerman_2EE.vcf from Untitled - Message (HTML)								
	Would you like to open the file or save it to your computer?							
	Open Save Cancel							
	Always ask before opening this type of file							

3. Click the **Open** button to display the Contact record in vCard format.

💵 Dr. Joseph M. Ackerman, M.D Contact	
Eile Edit View Insert Format Tools Actions Help	
🚺 🔄 Save and Close 🔚 🎒 🕼 🔻 🤣 🍢 🖘 🔹 🖘	- 📑 Arial 💽 💽 💽 🗐 🗐 💽 🗐 🗐
General Details Activities Certificates All Fields	
Full Name Dr. Joseph M. Ackerman, M.D.	E-mail <u>ioe_ackerman@eznet.com</u>
Job title: Chief Of Staff	Display as: erman, M.D. (joe_ackerman@eznet.com)
Company: Joseph M. Ackerman, M.D., Inc.	Web page address: http://www.ez-data.com
File as: Ackerman, Joseph M. 💌	IM address:
Phone numbers	_
Business 31083938393453]
Home]
Business Fax]
Mobile]
Addresses	-
Business V 144 Wilshire Blvd., Suite 250	
This is the mailing	
add <u>r</u> ess	
Contacts	Categories Private

4. Click the **Save and Close** button to save the contact record in the default Outlook Contacts folder.