

Fast•Class File

Client Data System

Volume 41: E-Z Mail

Note: Before E-Z Mail can be installed; Microsoft Outlook or Lotus Notes must be installed on your system.

Install E-Z Mail by using the E-Z Mail installation on the original CDS installation disk, or use the following links to download the installation from the CDS Training and Support Web pages. Make sure that the E-Z Mail installation matches the version of CDS that you are using.

To download E-Z Mail for CDS version 4.1.x –
<http://www.ezdata.com/support/downloads/EZMail.zip>

To download E-Z Mail for CDS version 4.2.x
<http://www.ezdata.com/support/downloads/42EZMAIL.zip>

After download the appropriate .zip file, extract the folder and click on the SETUP.EXE file.

Using E-Z Mail –

After E-Z Mail is installed, a new **E-Z Mail** button will appear on the toolbar.

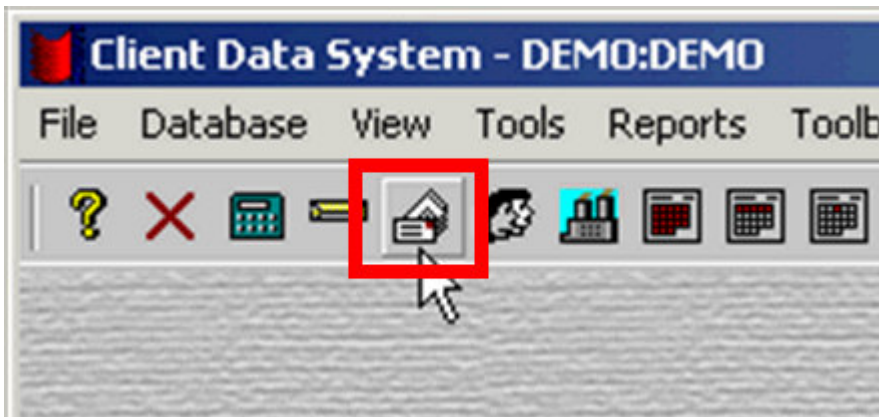


Figure 1: The E-Z Mail button.

- To open the E-Z Mail utility, click on the **E-Z Mail** button in the toolbar.
- The **Search Mail** window will open.

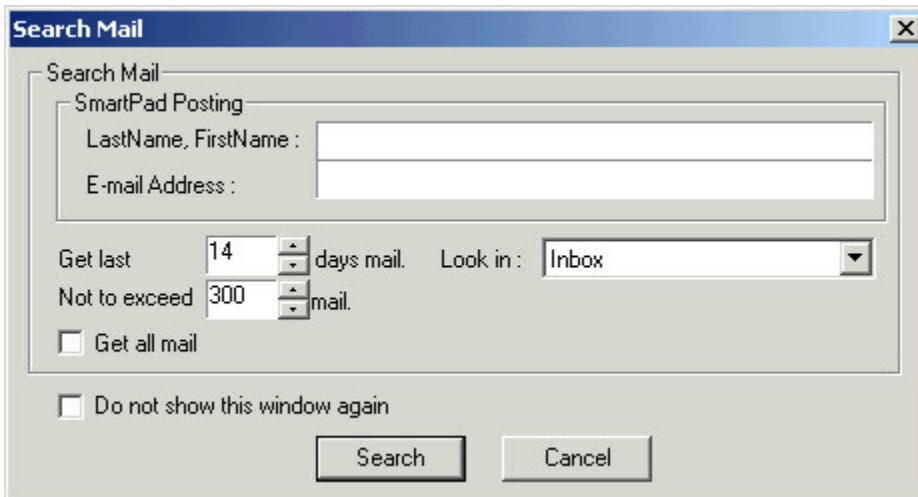


Figure 2: The Search Mail window.

- Use the **Search Mail** window to search for e-mails in Outlook or Notes from a specific sender by name or e-mail address – or – perform a general search for a limited number of e-mails received over a specified number of previous days. The **Search Mail** window will also allow you to search for e-mails in a specific e-mail folder or bring in all mail.
- When finished entering search criteria, click **Search**.
- If you are using Outlook, an **Access Permission** window will be displayed.



Figure 3: The Microsoft Outlook permission window.

- Allow access and select an amount of time. The longer access is allowed, the more flexibility you will have when using E-Z Mail.
- E-Z Mail will open displaying all the e-mails meeting the search criteria defined in the **Search Mail** window. E-mails will appear in E-Z Mail the same way they will appear in Outlook or Notes.

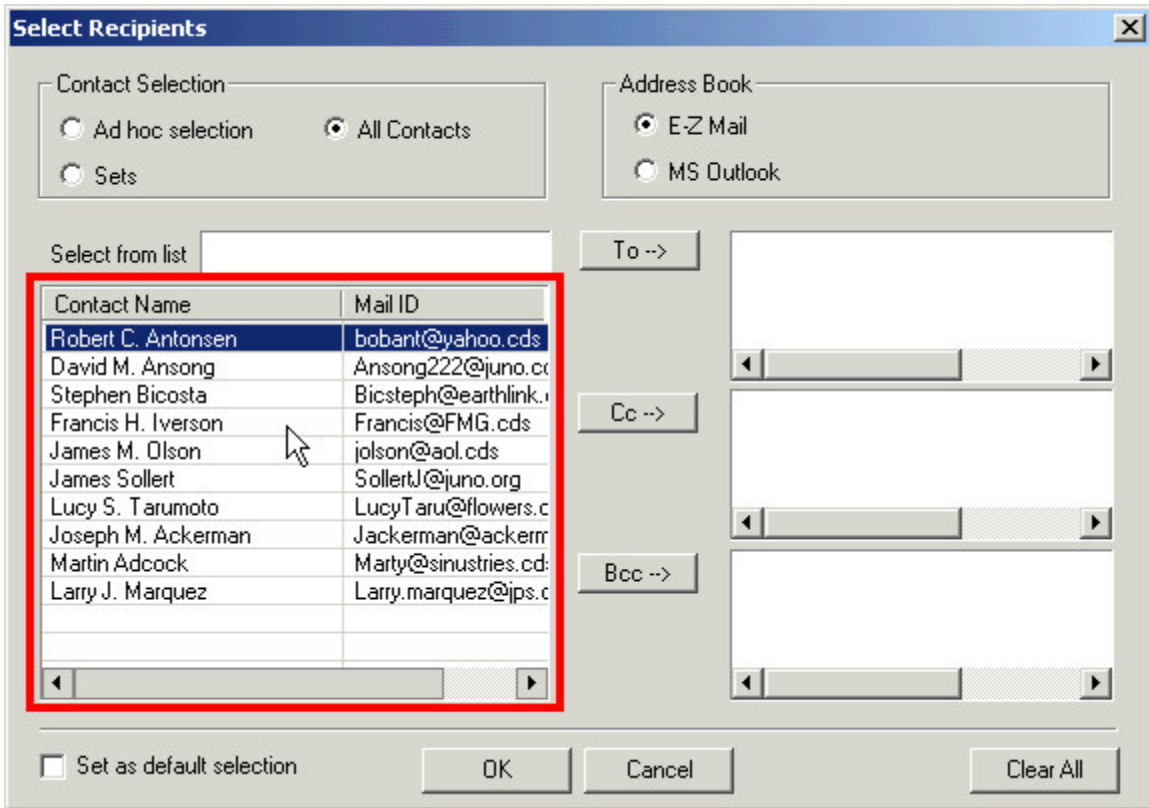


Figure 5: The Select Recipients window Potential Recipients section highlighted.

- Select the desired contact then click on the appropriate button to address e-mail correspondence; To, Cc, or Bcc.
- After selecting recipients, click **OK**.
- Compose e-mail
- To send e-mail and post a copy to the selected contact's SmartPad, click the small arrow to the right of the **Send** button and select **Send and Post**.
- Select **With Attachment** or **Without Attachment** depending on the content of the e-mail.
- Outlook users will see a **Microsoft Send Permission** window. Click **Yes**.



Figure 6: The Microsoft Send Permission window.

- E-Z Mail will open the **Contacts for posting** window.
- Selected recipients will be listed.

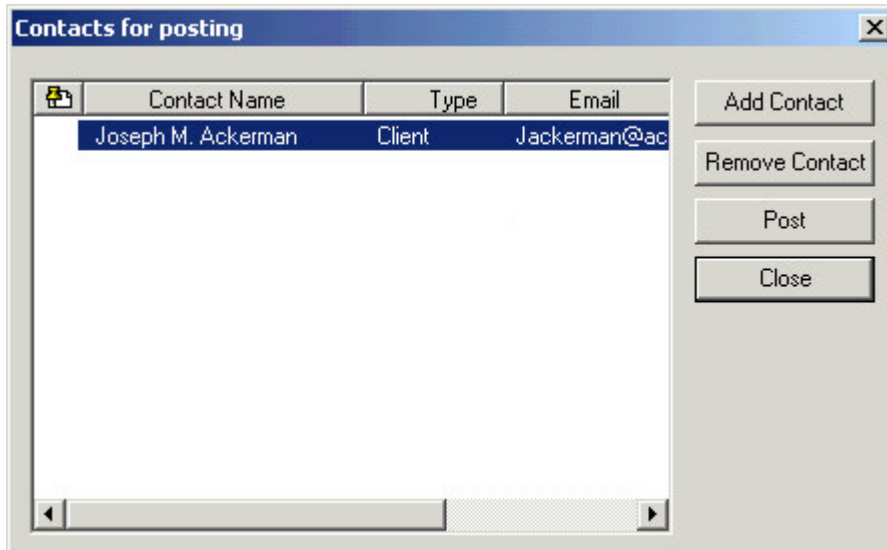


Figure 7: The Contact for posting window.

- The e-mail can be posted to additional contacts by clicking the **Add Contact** button and searching for contacts based on name or e-mail address.
- After contacts have been selected for posting, click **Post**.
- When the **Post** button becomes inactive, the post will be finished.
- Click **Close**.
- The e-mail will be sent and a record of the e-mail will be posted the SmartPad records of selected individuals.

E-mails can also be sent via E-Z Mail by clicking on the E-Mail button in the **Personal Detail** tab of a contact record.

To Post a received E-mail to the SmartPad record of contact in CDS –

- Select an e-mail in the E-Z Mail inbox.
- Click the small button on the right of the **Posting** button in the toolbar to select a post with or without an attachment.
- E-Z Mail will open the **Contacts for posting** window displaying all contacts in CDS with an e-mail address matching those associated with the selected e-mail.
- The e-mail can be posted to additional contacts by clicking the **Add Contact** button and searching for contacts based on name or e-mail address.
- After contacts have been selected for posting, click **Post**.
- When the **Post** button becomes inactive, the post will be finished.
- Click **Close**.
- A record of the e-mail will be posted the SmartPad records of the selected individuals.

To send a form letter as e-mail –

- Prepare to send a form letter to a selected contact. (For more information of creating and sending form letters, see the Letters, Labels and E-mail course)
- In the **Form Letter** or **Mass Correspondence** option window, select the E-mail or E-mail as attachment option.

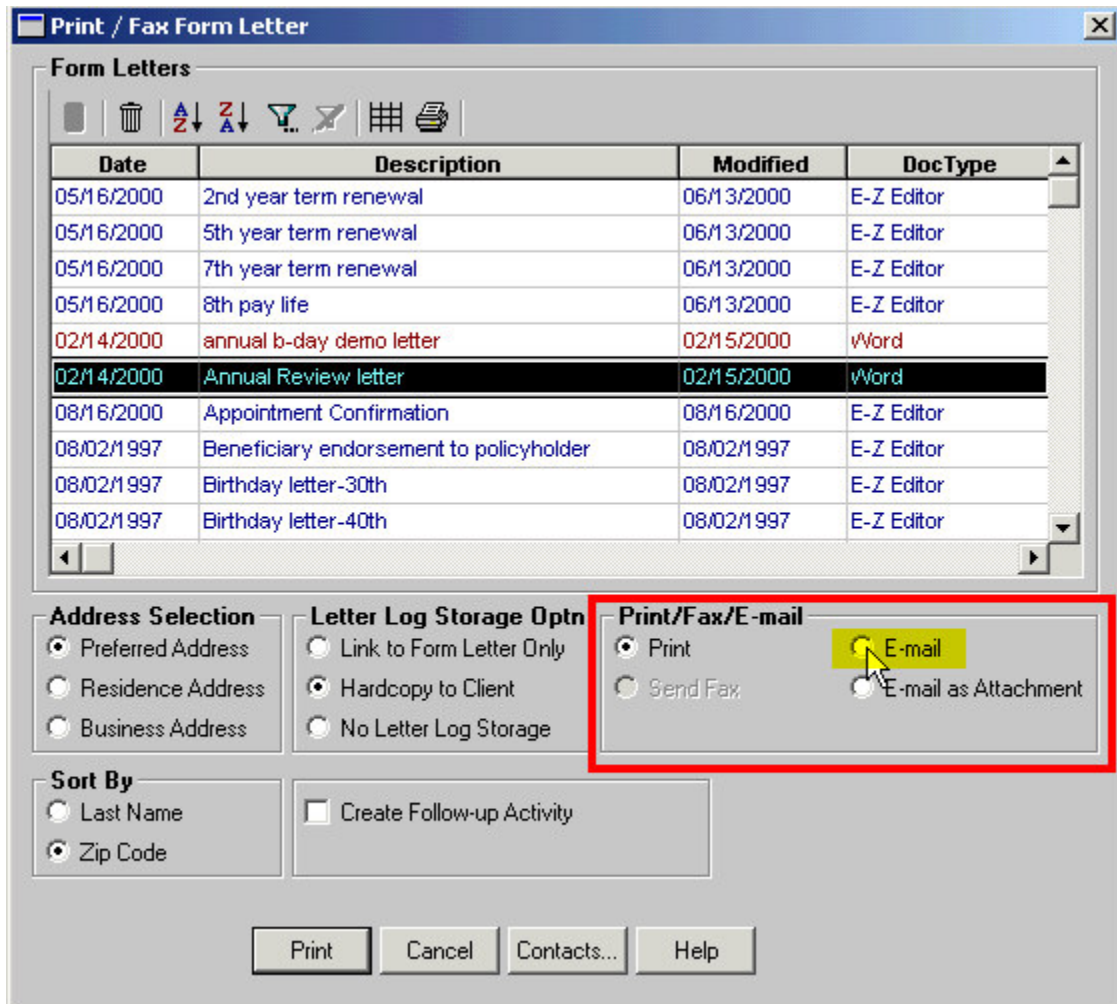


Figure 8: The Form Letter window (E-mail option highlighted).

- The **Print** button will turn into an **E-mail** button. Click **E-mail**.
- The form letter will be sent as an e-mail to the selected recipient(s)

Note: To ensure Letter Log post, select the **Hardcopy to Client** option in the **Letter Log Storage Optn** section.