



**Client Data System**\* E-mail Posting for Microsoft Office Outlook Australian Edition - User Guide



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# 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 SmartPad<sup>TM</sup>. This feature supports Microsoft Outlook 2003.

## Installing CDS E-Mail Posting for Microsoft Office Outlook

1. During the installation of CDS 6.0, the following dialog box displays.

Select the appropriate synchronization option(s) and then click Next to continue:

- Client Data System Synchronization for Microsoft Office Outlook 2003
- Client Data System Synchronization for Lotus Notes 6.0
- O None of the above
- 2. By default, the Microsoft Office Outlook 2003 for Client Data System option will be selected. Click the **Next** button to proceed.

Select the appropriate synchronization option(s) and then click Next to continue:

🔽 Client Data System E-Mail Posting for Microsoft Office Outlook 2003

🧮 Client Data System Calendar/Contact Synchronization for Microsoft Office Outlook 2003

- 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.

)utlook E-Mai	l Interface			
Subject :				
Date/Time :				
Keywords				M 🏔 🕅
Contacts for I	Posting ( CDS )			
Source	Contact Name	E-mail Addre	ess	
-Contact E-ma	il (s) not found in CDS			Record count: 0
Source	Contact Name	E-mail Addre	ess	
⊂Contacts ( Po	sted )			Record count: 0
Posted By	Posted To	E-mail Address	Posted On	Keywords
		Post Cancel		Record count: 0

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

- 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, posting details include the name of the CDS user that posted the e-mail, the CDS contact records that the e-mail was posted to, the associated e-mail, the date and time of the posting, and keyword(s) associated with the message.

## 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-Ma	il Interface			
Subject :	Thank you - no interest			
Date/Time :	Tue 12/27/2005 00:00 PM		_	
Keywords			_	🗰 🏫 🏂
Contacts for	Posting ( CDS )			Add/Search Contacts
Source	Contact Name	E-mail Ad	dress	
То	Test, E-Z Data	ezdatate:	st@ez-data.com	
From	Test, E-Z Data	ezdatate:	st@ez-data.com	
- Contact E-ma	ail (s) not found in CDS			Record count: 2
Source	Contact Name	E-mail Ad	dress	
⊢Contacts ( Po	osted )			Record count: 0
Posted By	Posted To	E-mail Address	Posted On	Keywords
		Post Cancel		Record count: 0

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

Find Contact Informat	tion	×
Last Name <,First Name>	a	
Options © Contact	C Business	
Enter the search informa	ition and click OK.	
<u>(ОК</u>	Cancel	
Find Business Informa	ation	×
Find Business Informa Business Name	ation	×
Business Name	a © Business	

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.

Outlook E-Ma	il Interface				×
Subject :	Thank you - no interest				
Date/Time :	Tue 12/27/2005 00:00 PM				
Keywords				👬 🏟 🕅	
Contacts for	Posting ( CDS )				-
Source	Contact Name	E-mail Add	dress		
🗖 То	Test, E-Z Data	ezdatates	t@ez-data.com		
From	Test, E-Z Data	ezdatates	t@ez-data.com		
CDS CDS	Ackerman , Joseph	jackermar	n@jma.com		
CDS CDS	ABC Manufacturing	support@	abcmanu.com		
Contact E-ma	ail (s) not found in CDS			Record count: 4	_
Source	Contact Name	E-mail Add	dress		Т
/-				Record count: 0	
Contacts ( Po		1			-
Posted By	Posted To	E-mail Address	Posted On	Keywords	
1					
		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>m</u>
Contact Name	Relation
Ackerman, Kathleen	Wife
🗖 Ackerman, Kenneth	Son
🗹 Ackerman, Marianne	Daughter
Halverson, Joe	Associate
Record count: 4	
Can	cel

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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-Ma	il Interface			
Subject :	Thank you - no interest			
Date/Time :	Tue 12/27/2005 00:00 PM		_	
Keywords			_	M 🏟 🕅
Contacts for	Posting ( CDS )			
Source	Contact Name	E-mail .	Address	
<b>□</b> To	Test, E-Z Data	ezdata	test@ez-data.com	
From	Test, E-Z Data	ezdata	test@ez-data.com	
CDS 🖸	Ackerman , Joseph	jackerr	nan@jma.com	
CDS 🗹	ABC Manufacturing	suppor	t@abcmanu.com	
Key Rela	tion Ackerman, Kathleen			
-Contact E-ma	ail (s) not found in CDS			Record count: 5
Source	Contact Name	E-mail	Address	
Contacts ( Po	osted )			Record count: 0
Posted By	Posted To	E-mail Address	Posted On	Keywords
		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 Interfa	ace					×
				ŵ	田	
🔺 Last Name	First Name	Middle	E-mail Address	Туре		^
Ackerman	Joseph	М.	joe_ackerman@eznet			
🗖 Ackerman	Kathleen					
Ackerman	Marianne					
Adcock	Martin		martin.adcock@eztes			
Alexander	Sherman					-
Anderson	Phillip					
Ansong	David	М.	david.ansong@geem			
Anthony	Brian					$\mathbf{\Sigma}$
<u> &lt;</u>			]		>	
Record count: 11						_
	ОК	Cancel Add Co	ontact			

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

Quick Add - Conta	ict 🛛	×
Please enter contact (	details :	
Last Name		]
Middle Name		
First Name		
Туре	<b>•</b>	
E-mail		
Business Name		
Occup		
	OK Cancel	

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

Outlook E-Mail Interfa	ice					×
					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.				
<					>	<b>×</b>
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	ice					×
					ŵ	Ħ
🔺 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.

Q	uick Add - Busin	ess 🛛 🔀
1	Please enter busines:	; details :
	Bus, Name	
	Туре	
	Bus. Structure	
	E-mail	
	NAICS #	
	Industry Grp	<b>_</b>
	Category	<b>_</b>
		OK Cancel

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

Outlook E-Mail Interfac	:e			×
				<b>@</b> 🏢
🔺 Bus, Name	Туре	Bus. Structure	E-mail Address	NAICS # Industry Grp
✓ Prime Tech Group, Inc.		Partnership	support@primetechgroup.com	Technology
Record count: 1				
		OK Cance	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 easily identify whether a message 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.

To find out more detailed information about a posted message:

1. In MS Outlook, select a message and then click the **CDS Post** button to display the Posting dialog box.

Outlook E-Ma	il Interface					×
Subject :	Thank you - no interest					
Date/Time :	Tue 12/27/2005 00:00 PM					
Keywords					j 🚧 🏨 🍂	•
Contacts for	Posting ( CDS )					
Source	Contact Name	E	-mail Addro	ess		
Пто	Test, E-Z Data	e:	zdatatest(	@ez-data.com		
From	Test, E-Z Data	e:	zdatatest(	@ez-data.com		
Contact E-ma	ail (s) not found in CDS	E	-mail Addri	ess	Record count:	2
Contacts ( Po	osted )				Record count:	0
Posted By	Posted To	E-mail Address		Posted On	Keywords	
DEMO DEMO	Ackerman, Kathleen Ackerman, Joseph	jackerman@jma.com	1	13/02/2006 16:12 13/02/2006 16:11		
		Post			Record count:	2

2. The Contacts (Posted) pane displays the following information: who the message was posted by, who the message was posted to, the e-mail address of the contact which the message was posted to, what date/time the message was posted, and the keyword of the posted message. This is especially helpful in a network CDS environment when multiple CDS users have been identified as e-mail recipients.

## 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 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 12/12/2005 11:19 AM	
Hi Everyone Just a remin See you all t Thanks!	der that our weekly meeting for this week has been postponed. We will meet next Thursday at 3:00pm.	
	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.

🔲 Update	d Issue Log	×
From:	ezdatatest@ez-data.com	
To:	joseph_ackerman@eztest.com	
Cc:	marianne.ackerman@eztest.com;carol.dawson@eztest.com	
BCc:		_
Subject: Keywords:	Updated Issue Log	-
Sent:	Tue 12/12/2005 11:30 AM	-
Hi All, Attached is	the updated Issue Log. Please review and provide any feedback.	â
Thanks!		
		~
Mail Attach		
Issue Log.d	oc 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.

- 1. In CDS, open a Contact record and then click the SmartPad icon.
- 2. 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 **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 Mail Setup Mail Format Spelling						
	Security	Other	CDS E-mail Post	ing Options			
	Select CDS E-mail Posting Options Post E-mail body to SmartPad When a message is being sent from either Outlook or CDS: Manually post message to CDS contact record						
	<ul> <li>Prompt to post message to SmartPad when sending from</li> <li>Outlook with a valid CDS Session.</li> <li>Automatically post message to CDS contact records following confirmation.</li> </ul>						
	O Automatically post message to CDS contact records without confirmation.						
			K Cancel				

- 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	Security Other CDS E-mail Posting Options						
🔲 Post E-mail boo	Select CDS E-mail Posting Options						
When a message is	s being sent from eithe	er Outlook or CDS:					
C Manually post r	message to CDS conta	act record					
Cutlook	to post message to Sn with a valid CDS Ses	nartPad when sending fro sion.	om				
<ul> <li>Automatically p</li> </ul>	ost message to CDS o	contact records following	confirmation.				
C Automatically p	ost message to CDS o	contact records without o	confirmation.				
Match CDS cor following fields:	ntact records with Out	look e-mail address in th	e				
	From	🔽 To					
	🔽 Co	F Bcc					
		OK Cancel	Apply				

- Manually Post the Message to the CDS Contact Record: In MS 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 MS 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 MS 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 MS Outlook e-mail address in the specified To, Cc, From and Bcc fields.
- Automatically Post Message to CDS Contact Record(s) without Confirmation: In MS Outlook, compose a message and then click the Send button to automatically post to all of the matching CDS Contact records with an MS 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 Posting	g Options	$\times$
Post this message to	) Contact(s) in (	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-Mai	l Interface					×
Subject :	Meeting with Client					
Date/Time :	Thu 01/05/2006 00:24 PM					
Keywords					M 🏟 🕅	
Contacts for F	Posting ( CDS )					
Source	Contact Name		E-mail Add	lress		
ГО	Ackerman, Marianne		marianne_	ackerman@eznet.com		
From	Test, Ezdata		ezdatates	t@ez-data.com		
Contact E-ma	il (s) not found in CDS				Record count: 2	:
Source	Contact Name		E-mail Add	lress		
					Record count: 0	
Contacts ( Po:	sted )					
Posted By	Posted To	E-mail Address		Posted On	Keywords	
		Post	ancel		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	i 🔷 🟹 🐼 🛄 🚍				
Date	Description	Modified	DocType	HIPAA	~
02/08/1997	2nd year term renewal	04/02/2002	E-Z Editor		
02/08/1997	3rd year term renewal	02/08/1997	E-Z Editor		
02/08/1997	4th year term renewal	02/08/1997	E-Z Editor		
02/08/1997	5th year term renewal	02/08/1997	E-Z Editor		
02/08/1997	6th year term renewal	02/08/1997	E-Z Editor		
02/08/1997	7th year term renewal	02/08/1997	E-Z Editor		×
Subject: 2r	nd year term renewal				
Attachments	•				
				C	
				Add (Images / I	Documents)
				Brow	se
				View Atta	achment
				Remove A	ttachment
Address Sele		E-mail Op	tions		
Preferred	Address O Link to Form Letter Only	⊙ <u>E</u> -mail			
<u>R</u> esidence	Address 💿 Hardcopy to Client	🔘 E-mail	as <u>A</u> ttachment	:	
O Business A	Address 🛛 🔿 No Letter Log Storage	Save o	onies of mess:	ages in Sent Items f	older
				-	
Sort By		·	st a delivery re	eceipt	
O Last Name	Create Follow-up Activity	/ Reque	st a read recei	ipt	
<ul> <li>Zip Code</li> </ul>		Import	ance: High		
	E-mail Cancel		icts	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 Select Contact List.

Select Contact
Selected Contact List           Adams, Joshua           Anderson, Phillip           Ansong, David
Set Filter Eind 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	)		
$\heartsuit$ × > $\overline{?}$	Ø 🌷	* 🖶 🏢	
Contact	Date	Description	^
Ackerman, Joseph	01/05/2000	2nd Year Term Renewal Letter	
Ackerman, Joseph	12/04/1999	College Funding Letter	
Antille, Eugene	10/04/1999	8 Pay Life Letter	
Antille, Eugene	09/04/1999	Performance Bar Graph	
Ackerman, Joseph	03/04/2005	Header logo	
			~
< U			>

- 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 Form Letter							
Letters							
Date	Descriptio	on	Modified	DocType	HIPAA	^	
08/02/1997	2nd year term renewal	08/02/1997	E-Z Editor				
08/02/1997	3rd year term renewal		08/02/1997	E-Z Editor			
08/02/1997	4th year term renewal		08/02/1997	E-Z Editor			
08/02/1997	5th year term renewal		08/02/1997	E-Z Editor			
	6th year term renewal		08/02/1997	E-Z Editor			
08/02/1997	7th year term renewal		08/02/1997	E-Z Editor		►	
Attachments          2nd Year Term Renewal Letter       Add (Images / Documents)         Browse							
					View Att.		
						ttachment	
Address Selection       Letter Log Storage Optn       E-mail Options            ● Preferred Address           ● Link to Form Letter Only           ● E-mail as Attachment             ● Business Address           ● Hardcopy to Client           ● E-mail as Attachment             ● Business Address           ● No Letter Log Storage           ● E-mail as Attachment             Sort By           □ Create Follow-up Activity           Request a delivery receipt             Cast Name           Create Follow-up Activity           Request a read receipt             Zip Code           Print One Per Family           Importance: High							
E-mail Cancel Contacts Help							

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- 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 8 🔳	P				
Date		Description		Modified	<b>DocType</b>	HIPAA	~
08/02/1997	2nd year ter	m renewal	0	8/02/1997	E-Z Editor		
08/02/1997	3rd year ter	n renewal	0	8/02/1997	E-Z Editor		
08/02/1997	4th year terr	n renewal	0	8/02/1997	E-Z Editor		
08/02/1997	5th year terr		0	8/02/1997	E-Z Editor		
	6th year teri			08/02/1997	E-Z Editor		
08/02/1997	7th year ten	n renewal	0	08/02/1997	E-Z Editor		×
Subject: 7t	h year term i	renewal					
Attachments							
						Add (Images / I	Documents)
						Brow:	se
						View Atta	achment
						Remove Al	hashmanh
						Remove A	
Address Sele		Letter Log Storage Op		E-mail Opt	tions		
• Preferred	Address	O Link to Form Letter	Only	<u>○E</u> -mail			
O <u>R</u> esidence	Address	<ul> <li>Hardcopy to Client</li> </ul>		💿 E-mail a	as <u>A</u> ttachmeni	t HTML	~
O <u>B</u> usiness A	Address	O No Letter Log Stora	age	Save co	opies of mess	ag Adobe PDF Files	
Sort By					st a delivery r	HTML	
CLast Name		Create Follow-up A	ctivity			Toyt	
💽 Zip Code			,		st a read rece	Word for Window	s
Importance: High							
		E-mail C	ancel		cts	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. From the E-mail Options section, select the **E-mail as Attachment** option to display a dropdown 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.

Microso	ft 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 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

When a user from one database sends an internal message to a user of another database, that message is sent as an 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.
- 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.
- 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.
- 5. The selected recipient user will receive this message as an e-mail.

## Sending CDS Activities as Online Invitations

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

🇳 Activity	Detail						×
Last Nm,First Type/Sub Keywords Due Date	Adams, Robert Appointment Internal	Priority Status Assigned To	Normal Active DEMO Ientative	V V Tracked	Created By Created On Participants	DEMO 24/02/2006	
Subject Place	Weekly Meeting Boardroom		Send E-mail Ir	nvitations	User	Name	III
Start Time End Time Reminder	Fri         24/ 2 /2006         01:30 PM           Fri         24/ 2 /2006         02:30 PM            5 minutes		🗌 All day event				
Reason Follow-up							~
	ОК	ancel Option	ns) <u>R</u> ecurring)	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)							
V	S 🗙 🔄 🛄 🚍							
	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, the **Send E-mail Invitations** option will be automatically enabled.
- 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.



- 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.

Openin	ng Mail Attachment 🛛 🔀
2	You should only open attachments from a trustworthy source.
	Attachment: CDS_Contact_Robert_Adams_D3.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.

💵 Mr. Robert Adams	s - Contact				
Eile Edit View Ir	nsert Format <u>T</u> ools <u>A</u> ctions <u>H</u> elp				
🗄 🛃 Save and Close 🛛 👔	🛃 🌒   🔻 🚸 🔁 🔕 •   🍝 • 👳 •	a 🚡 📮 🖬 Arial	Ŧ	10 - A B U = E	日津津
General Details	Activities Certificates All Fields				
Full <u>N</u> ame	Mr. Robert Adams		E-mail	adams@TWSTranspec.com.au	
<u>]</u> ob title:	Director	0	Display as:	Mr. Robert Adams (adams@TWSTra	anspec.com.au)
Company:	T W S Transpec Pty Ltd		Web page address:		
File as:	Adams, Robert 💌		IM address <u>:</u>		
Phone numbers					
Business	0392672444				
Home	0368920457				
Business Fax 💌					
Mobile					
Addresses					
Business	1145 Sanctuary PKWY				
This is the mailing	Geelong VIC 3220				
address					
					~
Contacts		Categories			Private 🗌

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