

Applied Business Applications

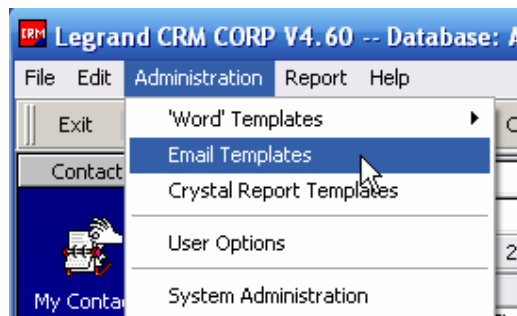
Shop 2, 424 Roberts Road
Subiaco
WESTERN AUSTRALIA 6008

Telephone: (08) 9381 6800
Fax: (08) 9381 9044
Email: info@busapps.com.au
Web: www.busapps.com.au
ABN: 65 097 283 504

Legrand CRM Email Mail Merge Instructions

Managing & Editing Templates

Email templates are editable from within Legrand via the Administration menu. To edit, select *Administration* then *Email Templates*.



Users will then be prompted as to whether or not they wish to edit an existing template. Select whichever is appropriate.



Email templates can include any combination of font types, colours & sizes as well as images. More advanced HTML style templates are also possible e.g. using tables. Vertically any type of formatting is possible provided the files remain as HTML (webpage) file types.

The mail merge functions for email operate in the same fashion as the MS Word mail merges from Legrand. In other words, the same fields codes are used e.g. [#First Name#] and [#<Link Companies>Name#]. To include database fields in your email templates simply use these codes anywhere within your email.

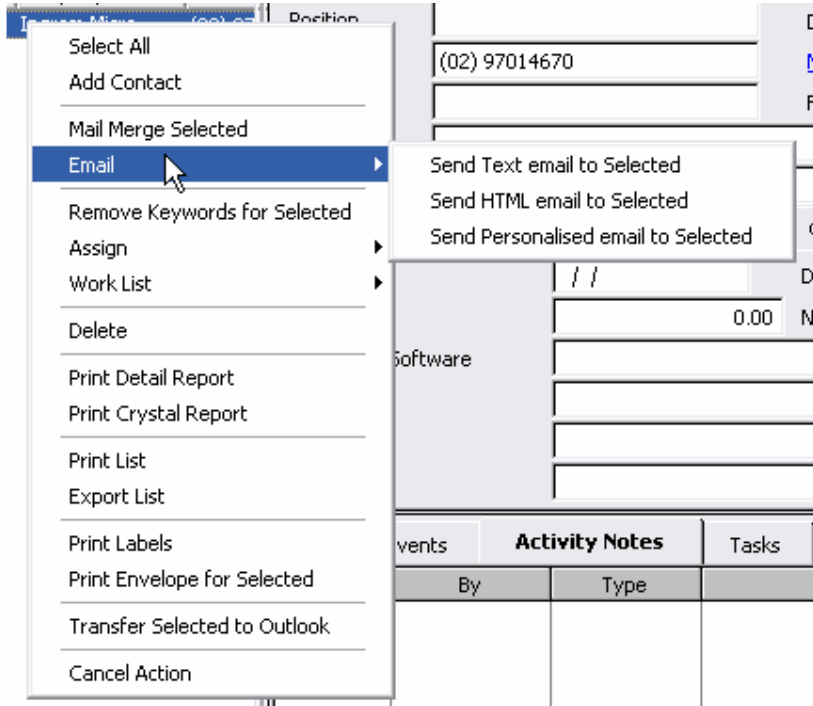




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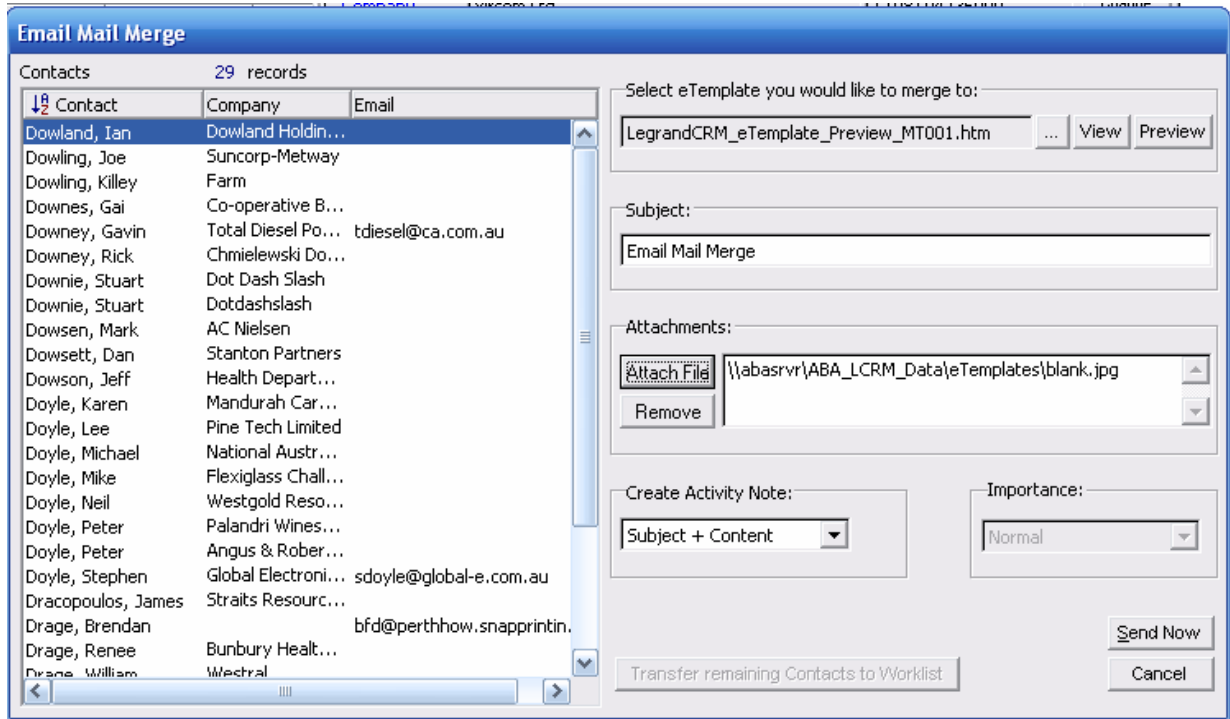
Running an email mail merge

Once a template has been created to run a email mail merge find a list of targets (email recipients), right click then select *Email – Send Personalised email to selected*.



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A list of email recipients will be displayed within the new window. Users can now select the template they wish to utilise, specify a subject for the outgoing email, attach documents, determine the recording on the email (activity note creation) and set the importance of the email.



To test the template, select the *Preview* button once a template has been selected. This should display the template including the data fields relevant to the selected contact.



Mail Merge & Email Template Codes

Contact Field	Mail-merge code	Linked Company Field	Mail-merge code
ContactID	[#Contact ID#]	CompanyID	[#<Link Companies>Company ID#]
Firstname#	[#First Name#]	Company name	[#<Link Companies>Name#]
Lastname	[#Last Name#]		
Title	[#Title#]	Company Type	[#<Link Companies>TypeLU#]
Position	[#position#]	Company Industry	[#<Link Companies>Industry#]
Phone1	[#contact_phone#]	Company Phone	[#<Link Companies>Phone#]
Phone2	[#contact_phone2#]	Company Fax	[#<Link Companies>Fax#]
Cell/Mobile	[#mobile#]		
Contact Fax	[#contact_fax#]		
Email1	[#email#]		
Email2	[#email2#]		
Account Manager	[#Acct_Manager#]		
Note/Comment	[#Contact_Note#]		
Birth date	[#Birth Date#]	Company UserDate1	[#<Link Companies>UserDate1#]
Contact Userdate	[#UserDate1#]	Company UserDate2	[#<Link Companies>UserDate2#]
Contact UserNumber1	[#Number1#]	Company UserNumber1	[#<Link Companies>Number1#]
Contact UserNumber2	[#Number2#]	Company UserNumber2	[#<Link Companies>Number2#]
Contact User1	[#User1#]	Company User1	[#<Link Companies>User1#]
Contact User2	[#User2#]	Company User2	[#<Link Companies>User2#]
Contact User3	[#User3#]	Company User3	[#<Link Companies>User3#]
Contact User4	[#User4#]	Company User4	[#<Link Companies>User4#]
Contact User5	[#User5#]	Company User5	[#<Link Companies>User5#]
Contact User6	[#User6#]	Company User6	[#<Link Companies>User6#]
Contact User7	[#User7#]	Company User7	[#<Link Companies>User7#]
Contact User8	[#User8#]	Company User8	[#<Link Companies>User8#]
Contact User9	[#User9#]	Company User9	[#<Link Companies>User9#]
Contact User10	[#User10#]	Company User10	[#<Link Companies>User10#]
Contact User11	[#User11#]	Company User11	[#<Link Companies>User11#]
Contact User12	[#User12#]	Company User12	[#<Link Companies>User12#]
Contact User13	[#User13#]	Company User13	[#<Link Companies>User13#]
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Contact User15	[#User15#]	Company User15	[#<Link Companies>User15#]
Contact User16	[#User16#]	Company User16	[#<Link Companies>User16#]
		Company User17	[#<Link Companies>User17#]

Home Street	[#Home_Street#]		
Home City	[#Home_City#]		
Home State	[#Home_State#]		
Home Zip code	[#Home_Code#]		
Home Country	[#Home_Country#]		
Date Created	[#Date Created#]	Date Created	[#<Link Companies>Date Created#]
Date Last Modified	[#Date Last Changed#]	Date Last Modified	[#<Link Companies>Date Last Changed#]