

## **Creating an Electronic Message**

This tutorial shows you how to create an electronic message in the Sales Correspondence Application.

**By creating an electronic message you can:**

Create an email and choose from over 150 sales templates.

Send your message to multiple contacts.

Send a series of automated or scheduled eMails.

Dashboard

Create the Message

Select 'Create the Message'.

 **CREATE**  
a new campaign

+ **AUTOMATED**

+ **SCHEDULED**

#### Download our tips

- 20 Tips on E-mail Etiquette
- Check List for eMail Construction
- Check List for Business Letters
- Common Mistakes

#### Helpful Resources

- Links to Useful Sites
- Articles on Effective Sales and Marketing

#### Browse Templates

- HTML Shells

DASHBOARD

Scheduled Messages Last 10 used Templates

Email Status:  Waiting  Completed

#### Scheduled One-Time Email Messages

No scheduled One-Time Emails Found.

#### Scheduled Campaigns

Campaign Name	Delivery Type	Created On	
Widget	Scheduled	2/5/2010 2:18:44 PM	<a href="#">Edit Campaign</a>
Test	Scheduled	2/10/2010 10:36:27 AM	<a href="#">Edit Campaign</a>

Begin by selecting the 'Create the Message' tab towards the top of the screen as pictured here.

Dashboard

Create the Message

Manage Campaigns

Track

MESSAGE TYPE

Please select the type of new message.

1. With "PRINTED DOCUMENT" type selected, you will be able to print the generated message as PDF file.
2. With "ELECTRONIC DOCUMENT" type selected, you will be able to email the generated message.

PRINTED DOCUMENT

ELECTRONIC DOCUMENT

Select 'Electronic Document'.

Then select the 'Electronic Document' button to begin creating an eMail.

Dashboard Create the Message Manage Campaigns Track

CREATE a new campaign

+ AUTOMATED

+ SCHEDULED

Or choose from existing templates.

Create New Template

You may create your own template.

Legend  
-Build Document -Delete

### 1. TEXT TEMPLATE

view a list of available templates by selecting a Document category and/or sub-category.

Categories: Sub-Categories:

Global Templates My Templates

No templates exist for selected document category and/or sub-category.

- Announcements
- Appointments - Setting / Follow
- Contracts
- Fulfillment
- Industry Specific Examples
- Problem Resolution
- Proposals / Orders
- Solicitation / Existing Customer
- Solicitation / Prospecting

20 Tips on E-mail Etiquette

Check List for eMail Construction

Check List for Business Letters

Common Mistakes

Helpful Resources

Links to Useful Sites

Articles on Effective Sales and Marketing

Browse Templates

HTML Shells

Within this screen you are able to create your own message by selecting 'Create New Template', or choose from existing sales templates.

Create New Template

Legend  
-Preview -Build Document -Delete

### 1. TEXT TEMPLATE

view a list of available templates by selecting a Document category and/or sub-category.

Categories:

- Announcements
- Appointments - Setting / Follow
- Contracts
- Fulfillment
- Industry Specific Examples
- Problem Resolution
- Proposals / Orders
- Solicitation / Existing Customer
- Solicitation / Prospecting

Sub-Categories:

- Change in Operating Hours
- Change in Product Configurati
- Discontinue Product or Service

Global Templates

My Templates

1. Select a Category.

2. Then select a Sub-category.

- First choose a category that best fits the message of your intended letter.
- Second, choose a sub-category that helps you even further.

Dashboard   Create the Message   Manage Campaigns   Track

Create New Template

Legend  
-Preview   -Build Document   -Delete

### 1. TEXT TEMPLATE

view a list of available templates by selecting a Document category and/or sub-category.

Categories:   Sub-Categories:

Announcements  
Appointments - S  
Contracts  
Fulfillment  
Industry Specific Examples  
Problem Resolution  
Proposals / Orders  
Solicitation / Existing Customer  
Solicitation / Prospecting

Global Templates   My Templates

Sample Name  
Change i   Product Name

Select to preview template.

Select to Build Document.

You are then able to choose a template that best fits the message you are trying to create. You may select to preview the template by clicking on the magnified glass icon, and select to build the document from that template by selecting the Build document icon.

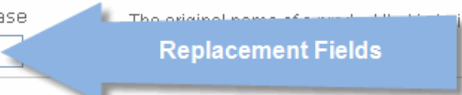
**Template Name: Change in Product Name**

[Edit Template](#)

[Clear Entry Data](#)

Please enter data for all the replacement fields defined in your selected template.

Replacement Fields	Data	Description
Original Product Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	The original name of product that is being changed.
New Product Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	What the name of the product is being changed to.
Expected Launch Date	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	The date when a campaign, product, event, etc. is set to be launched.
Sender Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	You or the sender's full name as it will appear in the correspondence
Sender Position or Title	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	The title of or position held by the sender.
Sender Phone Number	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	The Phone Number of the sender as it would appear in the correspondence
Sender Company Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Name of the Company to be included in the document as the Sender.



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[Next](#)

A set of replacement fields will then appear, along with description that helps you determine what needs to be typed into each replacement field.

### Template Name: Request for Clarification of Start Time

[[173\_Company Name]]  
[[174\_Company Street Address]]  
[[177\_Company City]], [[178\_Company State or Province]], [[179\_Company Postal Code]]  
[[180\_Document Date]]  
[[181\_Addressee Formal Name ]]  
[[182\_Addressee Company Name]]  
[[183\_Addressee Street Address]]  
[[184\_Addressee City]], [[185\_Addressee State or Province]] [[186\_Addressee Postal Code]]

Dear [[197\_Name by Which you Call Customer or Prospect]],

I appreciate hearing from you this morning about the proposed time tables. I realize there was some confusion from our end as to when production is actually scheduled to begin. Our production schedule allows for transition of the production line between customers. The timeline between customers varies based on the time needed to gather resources for production.

As of right now, the time it will take to prepare for production depends on when you accept and sign the contract. Accepting the contract immediately can assure that another order does not delay the start of your production. Based on our present production schedule, we estimate that a finish date will be approximately [[216\_Duration of Production Schedule]] from the time the contract is signed and in our

[Back to Document List](#) [Save As New Template](#) [Build Document from this Template](#)

Dashboard Create the Message Manage Campaigns Track

### Template Name: Test Sales Document

Please enter data for all the replacement fields defined in your selected template. [Edit Template](#) [Clear Entry Data](#)

Replacement Fields	Data	Description
Company Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Name of the Company to be included in the document
Company Street Address	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Street Address as it will appear in the letterhead or contact information.
Company City	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	City Name as it will appear in the letterhead or contact information.
Company State	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	State Name as it will appear in the letterhead or contact information.
Company Zip	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Zip Code as it will appear in the letterhead or contact information.
Document Date	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database	Date spelled out as it should appear at the top of the correspondence, e.g. May 15, 2008.

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These replacement fields correspond to the template that you have selected. For example, if you write your company name into the 'Company Name' replacement field, it will automatically appear in your letter once you are finished.

**Template Name: Change in Product Name**[Edit Template](#)[Clear Entry Data](#)

Please enter data for all the replacement fields defined in your selected template.

Replacement Fields	Data	Description
Original Product Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database <input type="text" value="Widget One"/>	The original name of a product that is being changed.
New Product Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database <input type="text" value="Widget Two"/>	What the name of the product is being changed to.
Expected Launch Date	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database <input type="text" value="May 5, 2011"/>	The date when a campaign, product, event, etc. is set to be launched.
Sender Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database <input type="text" value="John Smith"/>	Your or the sender's full name as it will appear in the correspondence.
Sender Position or Title	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database <input type="text" value="Marketing Director"/>	The title of or position held by the sender.
Sender Phone Number	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database <input type="text" value="404-555-6544"/>	The Phone Number of the sender as it would appear in the correspondence.
Sender Company Name	<input checked="" type="radio"/> Enter Data Manually <input type="radio"/> From Database <input type="text" value="Widget Inc."/>	Name of the Company to be included in the document as the Sender.

Fill out the replacement fields.

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Then click 'Next' to continue.

[Next](#)

Once you have finished completing the replacement fields, you may click 'Next' to continue.

### Is this message part of a campaign?

**No, Single Distribution**  
this is the only message sent.

**GO**

**Yes, Add to Existing Campaign**  
Add this message to an existing campaign.

Widget

**GO**

**Yes, Create New Campaign**  
Create a New Campaign and add this message as the first message.

**Campaign Name:**

**Deliver Type:**  
 Scheduled  Automated

**GO**

Send just one email.

Add to an existing campaign.

Or create a new Campaign.

Send a single or series of eMails at a specific time and date.

Send eMails based on factors in the CRM. For example, first sales transaction, birthday, etc.

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- Send just one email message.
- Add a message to an existing campaign.
- Or create a new Campaign.

Then select 'GO' to continue.

Add New Contact

### Contacts Groups

Available Contact Groups

- Group Name 1
- Group Name 2
- Group Name 3

Select a Group

Selected Contact Groups

- 

Use arrows to move into the Selected Contact area.

### Additional Contacts

Available Contacts

Contact Type: --All Contact Types--

- Beverly, Hills
- Beverly, Hills
- Beverly, Hills
- Beverly, Horse
- Beverly, Uncle
- Bob, bobob
- bob, finocchio
- brad, bucher
- Chad, Smith

Or Select Contact(s).

HINT: To select more than one contact, hold the 'Ctrl' key and select the contacts you would like to include.

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Selected Contacts

- Chad, Smith

Next

Then click 'Next' to continue.

You may then select to send the message to a specified group of contacts, several contacts, or just a single contact. Once you have selected a group of contacts, or a single contact, you may click 'Next' to continue.

The image shows a software interface with two main parts. On the left is a 'Replacement Fields' table with columns for 'Field Name', 'Data Source', and 'Description'. On the right is an 'Additional Contacts' window with 'Available Contacts' and 'Selected Contacts' lists.

Replacement Fields	Data	Description
Bender Company Name	<input type="radio"/> Enter Data <input checked="" type="radio"/> From Database	
	--Select a field from Contact-- --Select a field from Contact-- <b>Contact's first name</b>	
Address	Contact's last name Contact's Status Priority Rating Group Name Contact Source Contact Industry Legal Status Department Location	Contact's phone number as it will appear in the letterhead or contact information.
Bender Company City	Employee Position Account Executive Name Account Executive Phone Contact's Middle Name Suffix	CityName of company as it will appear in the letterhead.
Bender Company State or Province	Personal Title Job Title Company Name Profession	State or Province of Sender Company as it will appear in the letterhead.
Bender Company Postal Code		Postal Code of Sender Company as it will appear in the correspondence

Additional Contacts	
Available Contacts	Selected Contacts
Contact Type: --All Contact Types-- Beverly, russ Beverly, Hills Beverly, Horse Beverly, Uncle Bob, bobob bob, finocchio brad, bucher Chad, Smith Chad, Delta	Beverly, Hills

You are also able to add a contact as well as their information to the letter by selecting a contact, and choosing what specific information you would like to include by selecting from the 'Data Base' and including that information in the replacement fields.

**Dashboard**   **Create the Message**   **Manage Campaigns**   **Track**

**We can not find your company's SMTP info on file to email the document. Please click [Here](#)**

Email From: \_\_\_\_\_

To: **The contacts listed below will receive the email message**  
John, Doe;

CC:

Email Subject:

Email Message:

HTML Template:

- Butterfly 
- Blossom 
- Aloe Vera 
- Big Earth 
- Big Sea 
- Big Tech 

**If this message appears click 'Here' to set up your eMail address.**

If the message in red font appears at the top of your screen, be sure to add your SMTP information by clicking on 'Here'. You may also refer to the [Setting up your eMail Tutorial](#) for additional help with this process.

Email From: support@pal.com  
To: The contacts listed below will receive the email message  
Chad, Smith;

CC:

Email Subject:

Email Message:

- HTML Template:
- Butterfly 
  - Blossom 
  - Aloe Vera 
  - Big Earth 
  - Big Sea 
  - Big Tech 

Select to Edit message.

Add the Subject of the eMail that the recipient will see.

If you have already added your SMTP server information, you may begin by adding the subject name that will appear when the recipient receives the eMail, as well as view and edit the end message by selecting the 'Edit Message' button.

**Dashboard** **Create the Message** **Manage Campaigns** **Track**

Email From: support@pal.com

To: **The contacts listed below will receive the email message**  
Chad, Smith;

CC:

Email Subject:

Email Message:

HTML Template:


Butterfly  Blossom  Aloe Vera

Big Earth  Big Sea  Big Tech

Send it Now  
 Schedule the delivery at a later time

Send at   EST Time

Then you may select a HTML template that your message will appear in. Once you have chosen a template, you may preview the eMail, by selecting 'Preview Email'.



Scroll to view the whole document.

Announcement to our Sales Team:

We have just been informed by our Legal council that the original name Widget One that we had wanted has already been trademarked by a competitor. Because this name has already been taken, we will change the name of the line to Widget Seven. We have been assured that this name is still available, and we are working on the trademark right now.

This change does present a challenge for our initial marketing campaign. We intend to have our agency work the new name, Widget Seven, into the existing commercials. We are still trying to figure out how much this will cost, and exactly how long it will take. Our objective is to have the marketing campaign ready on or about March 1, 2010. I need you to please inform your direct reports and any agencies that you employ about these changes. Your objective is to identify any additional problems

Close

Then select 'Close' to continue.

Email From: support@pal.com

To: **The contacts listed below will receive the email message**  
Chad, Smith;

CC:

Email Subject: New Announcement

Email Message: [Edit Message](#)

HTML Template:

Butterfly

Blossom

Aloe Vera



Big Earth

Big Sea

Big Tech



[Preview Email](#)

Select to Send it Now

Send it Now

Schedule the delivery at a later time

Send at 3/22/2010 8:00 AM

Then click to send the eMail.

[Send Email](#)

Or send the message at a  
specified time.

You then have the option to send the message to your contact(s) now by selecting 'Send it Now', or you may send the message at a specific time. If so, select 'Schedule the delivery at a later time' and select the date and time you would like the eMail to be sent.

To send the eMail, select the 'Send Email' button.