

15R1 Enterprise Email Integration and Functionality

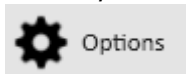
The integration of email within Enterprise allows Enterprise users to mirror their Microsoft Outlook®. or other SMTP or IMAP email, including inbox subfolders, drafts, and sent items. Additionally, Enterprise users have the ability to link incoming and outgoing email messages to both employee and customer contact records as a message. This document will cover how to set up an email account, various functionality options within the email, such as creating a new contact and attaching documents to records, as well as creating email templates and mass emails.

Adding your Email account to Enterprise:

1. In the upper left hand side of your Enterprise screen select the *E button*.



2. Select *Options* from the dropdown menu.



3. Select *Email* from the list of options on the left hand side.
4. In the upper right, select + *add new*. A new tab will be developed.
5. Enter the account name and account description as you would like. Enter the email address you wish to link to Enterprise. There is an option to select one address as the 'default' email. This is the one that Enterprise will automatically pull up when Enterprise is opened – it is the one Enterprise will default to.
6. Select the account type; SMTP, Outlook, or IMAP.
7. Click *Save*.

A screenshot of the Enterprise software interface for adding an email account. On the left is a navigation menu with 'Email' circled in red. The main area shows a form for an account named 'Elizabeth Outlook'. The 'add new' button in the top right is also circled in red. The form fields include: Account Name (Elizabeth), Account Description (Outlook), Email Address (james@tempworks.com), a 'Default' radio button, and a 'Shared System Account' checkbox. At the bottom, the 'Account Type' is set to 'Outlook' with a checked box. A 'Send test email' button is visible in the top right of the form area.

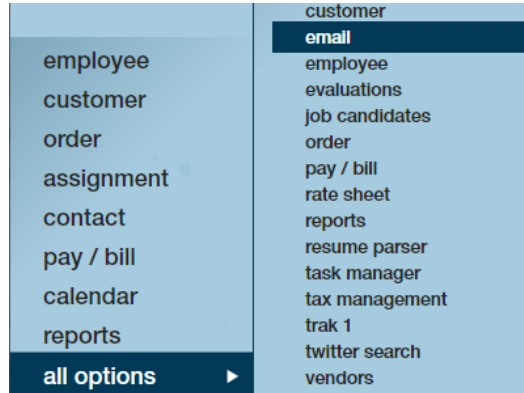
You will note that in the upper right there is an option to send a test email. This will send an email to that address. Check your email to ensure that the test came through correctly.

Email Functionality

To view your email account, including sub folders of your inbox, drafts, and sent items, click on the *email* button toward the upper right of the screen at any time.



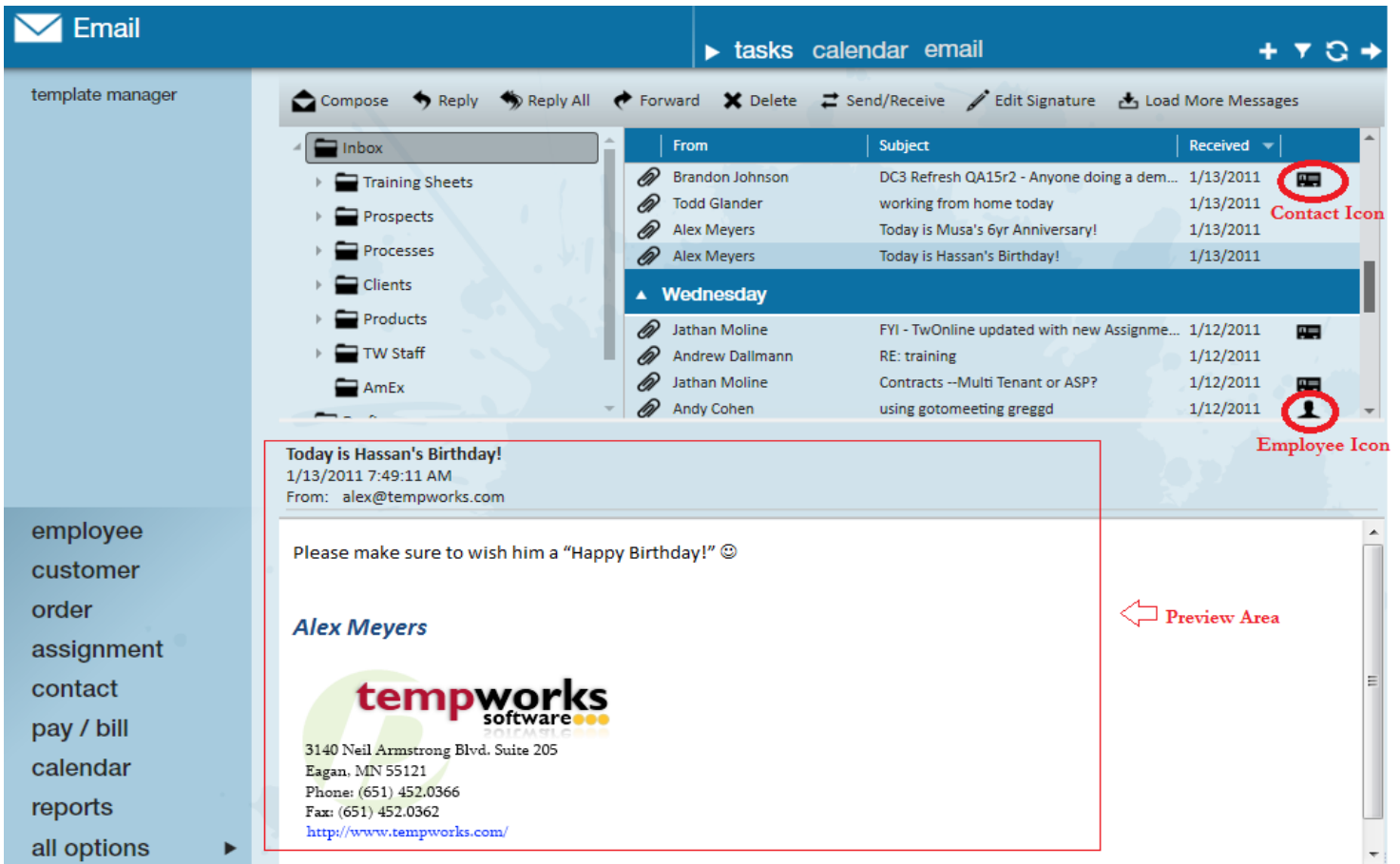
You can also access your email from the navigational tree on the lower left, but selecting all options, followed by email, as seen on the right.



With the main email area displayed you are able to view your inbox, as well as your subfolders. If an email is highlighted you will be able to preview the email in the preview area just below your inbox view. If an email address is recognized by Enterprise an icon will be displayed with the type of contact on the email line item within your inbox.

 = customer contact

 = employee contact



The screenshot shows the email interface with a navigation bar at the top containing 'tasks', 'calendar', and 'email'. On the left is a 'template manager' sidebar and a main sidebar with a tree view of folders like 'Inbox', 'Training Sheets', 'Prospects', etc. The main area displays an inbox table with columns for 'From', 'Subject', and 'Received'. The selected email is from Alex Meyers with the subject 'Today is Hassan's Birthday!'. A red circle highlights a 'Contact Icon' (customer icon) next to the email. Below the inbox is a preview area for the selected email, showing the sender's name 'Alex Meyers', the TempWorks logo, and contact information. A red circle highlights an 'Employee Icon' (employee icon) next to the email in the inbox. A red arrow points to the 'Preview Area'.

| From | Subject | Received |
|------------------|---|-----------|
| Brandon Johnson | DC3 Refresh QA15r2 - Anyone doing a dem... | 1/13/2011 |
| Todd Glander | working from home today | 1/13/2011 |
| Alex Meyers | Today is Musa's 6yr Anniversary! | 1/13/2011 |
| Alex Meyers | Today is Hassan's Birthday! | 1/13/2011 |
| Wednesday | | |
| Jathan Moline | FYI - TwOnline updated with new Assignme... | 1/12/2011 |
| Andrew Dallmann | RE: training | 1/12/2011 |
| Jathan Moline | Contracts --Multi Tenant or ASP? | 1/12/2011 |
| Andy Cohen | using gotomeeting greggd | 1/12/2011 |

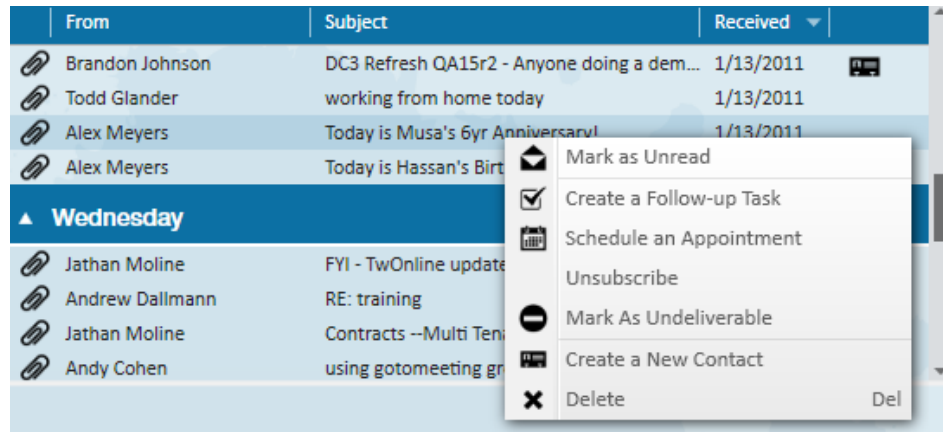
Today is Hassan's Birthday!
1/13/2011 7:49:11 AM
From: alex@tempworks.com

Please make sure to wish him a "Happy Birthday!" ☺

Alex Meyers

tempworks software
3140 Neil Armstrong Blvd, Suite 205
Eagan, MN 55121
Phone: (651) 452.0366
Fax: (651) 452.0362
<http://www.tempworks.com/>

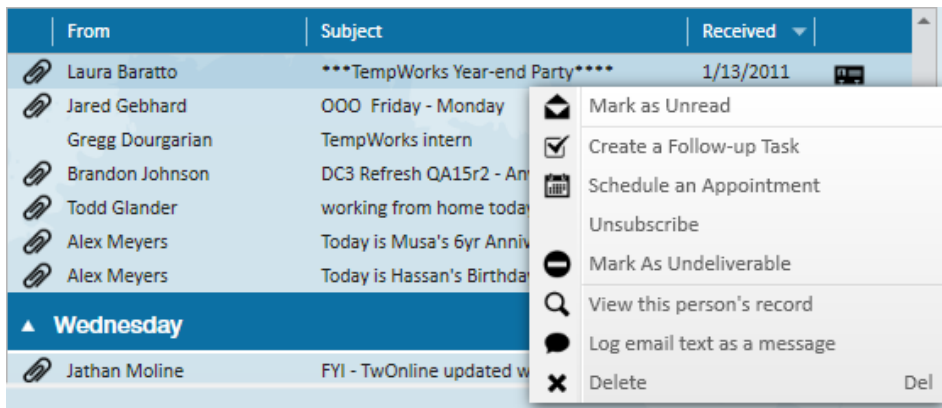
Right clicking on any email within your inbox will provide you with a number of options. If the email address is not recognized by Enterprise, right clicking on an email will provide you with the following options;



1. *Mark as Unread:* Marks the email as unread within your inbox.
2. *Create a Follow-up Task:* Allows you to create a follow up task associated with that email, which will show in your task area of Enterprise. For more information on Tasks please reference page 9 of the [15R1 Enterprise Front Office Manual](#).
3. *Schedule an Appointment:* Allows you to schedule an appointment in relation to the email. For more information on the Appointment options within Enterprise please reference pages 111 and 127 of the [15R1 Enterprise Front Office Manual](#).
4. *Unsubscribe:* If this is a marketing email you received you can unsubscribe to the email campaign list.
5. *Mark as Undeliverable:* Selecting this option will deactivate the email address of the employee or contact within Enterprise. Utilize this, for example, if you sent an email and received an undeliverable bounce back.
6. *Create a New Contact:* Creates a new customer contact record, parsing in the contact information possible, such as email address, name, and phone number. For more information on creating new contacts, reference page 98 of the [15R1 Enterprise Front Office Manual](#).
7. *Delete:* Deletes the email from your inbox.

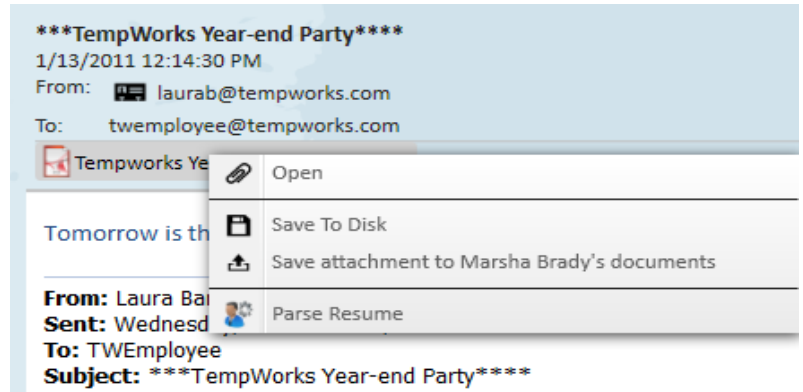
If the email address is recognized by Enterprise, right clicking on the email from your inbox will display the options to *Mark as Unread*, *Create a Follow-up Task*, *Schedule an Appointment*, *Unsubscribe*, and *Mark as Undeliverable* (see 1-5 just above for more details). In addition, you will have the options to;

1. *View this person's record:* This will take you to the contact or employees record within Enterprise.
2. *Log email text as a message:* This will create and log a message within the employee or contacts record in Enterprise, and will include the subject and body of the email.
3. *Delete:* Deletes the email from your inbox.



If an email includes an attachment, you will have the following options by right clicking on the attachment in the email preview area;

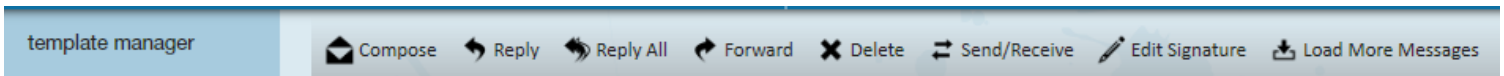
1. *Open*: This will open the attachment.
2. *Save to Disk*: This will save the attachment to an area of your selection.
3. *Save attachment to the contact or employee's documents area*: This will attach the document to the employee or contacts document area within their Enterprise record. **Note: This option will only be available if the email address is recognized as a contact or employee within Enterprise.**



4. *Parse Resume*: This will put the document through the resume parser of Enterprise. For more information on the Resume Parser please see reference page 21 of the [15R1 Front Office Manual](#).

The integration of email within Enterprise also allows you the ability to *Compose (A)*, *Reply (B)*, *Reply All (C)*, *Forward (D)*, *Delete (E)*, *Send/Receive (F)*, *Edit Signature (G)*, and *Load More Messages (H)*.

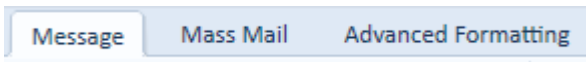
Additionally, you will note that toward the upper left there is an option for the *template manager*. Following will be a breakdown of each of the previous mentioned (A-H). The *template manager* will be covered in more detail on page 8 of this document.



A. Compose:

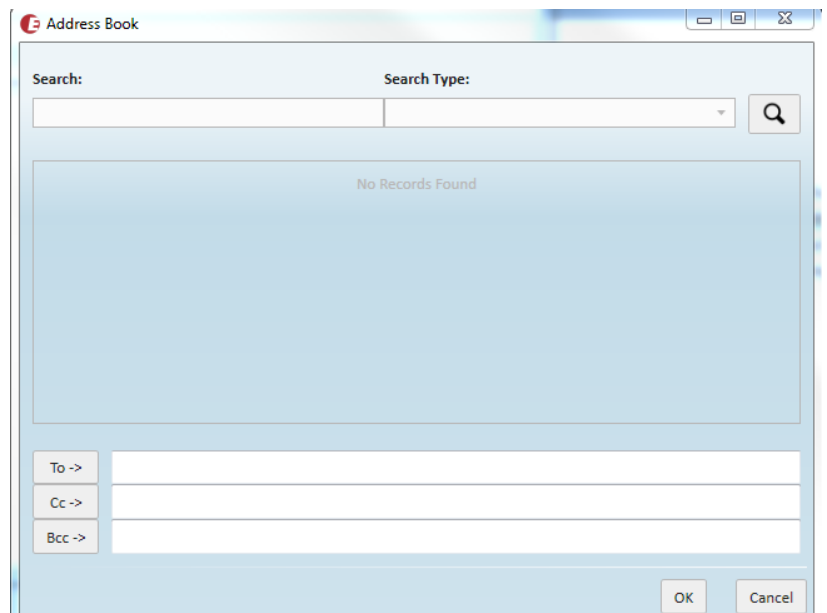
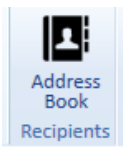
Clicking on compose will bring up a blank email message. From here, you have the following options;

1. **Message**
2. **Mass Mail**
3. **Advanced Formatting**




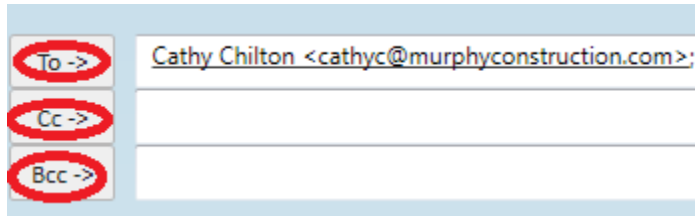
1. Message

A Message should be utilized when you are free writing an email. This can be to one or more persons. You can either type in the email address(es) you wish to send the email to, or you can look them up by either selecting the Address Book (below) or by clicking on the To... or Cc... fields (also seen below). Any of these will bring up the Address Book Search (right).



To select recipients from the Address Book, you can either;

1. Search for the employee or contact by inputting a partial or full name, or an email address, in the text box below *Search:* and then clicking the magnifying glass. 
2. Search by contact type (Employee, Contact, or Service Rep) from the *Search Type:* dropdown to either broaden or narrow your search, depending on if you entered text in the general search area, and then clicking on the magnifying glass.
3. Once your search is complete you can select who the recipients are by either;
 - a. Highlight the contacts name and then clicking on either the To, Cc, or Bcc buttons. This will place their email address in the field you clicked on.



- b. Double clicking on the contact will place them in to the 'To...' field.
 - c. If you have multiple people from your search that you wish to select, hold down the 'Ctrl' key while clicking on the contacts you wish to email. Once all recipients have been highlighted that you wish to select, click on the line you wish to insert them in, either To, Cc, or Bcc.
4. Once all recipients have been added from the Address Book click OK. Selecting OK will pull those contacts you just selected in the Email Message. If you wish to discard your work in the address book, click Cancel.

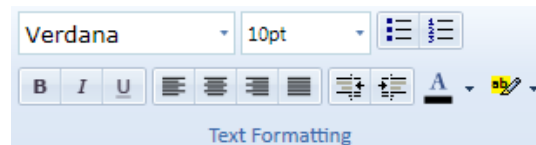
You may now continue your email message as normal by entering the text you wish in the Subject and Body of the email. Once you have completed composing your email, click on Send to send out your email.



There are additional areas within the Message area which can be utilized to further personalize and format your email. The following will be a breakdown of *Text Formatting, Recipients, Include,* and *Options.*

Text Formatting

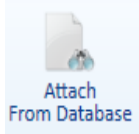
There are multiple options within the email feature to personalize the email, such as, changing the font style and size, adding bullet points, and bolding text. These options are located in the upper left of the email message area. For further details on how to use these features, please contact the training department to schedule something more in depth.

**Include**

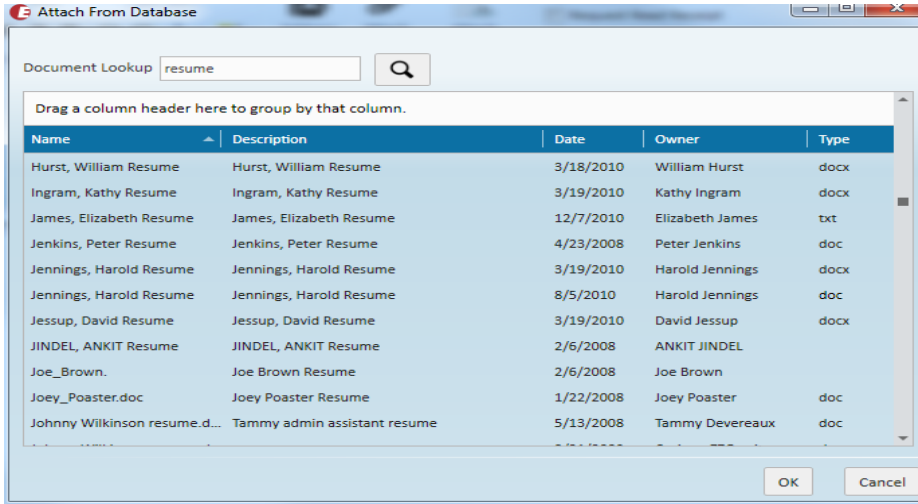
There are also options within the email message to *Attach File* and *Attach From Database.*



Attach File: Select this option to attach a file from your computer, such as a Word or PDF document. This could be anything from your desktop, S: drive, C: drive, etc.



Attach From Database: Select this option to attach a file from the Enterprise database. This could be a resume, a job description, or a customer contract. Anything that is attached as a document within Enterprise can be selected. Clicking on *Attach From Database* will pull up a new form. Enter partial or full search criteria in the *Document Lookup* field and then click on the magnifying glass. The search criteria you entered will search for both Document Names and Document Descriptions that match your criteria.

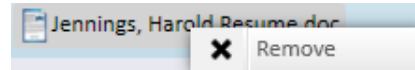


To select the document you wish to attach either;

1. Double click on the line item.
2. Highlight it and click OK.
3. Hold down the Ctrl key and click on multiple line items to insert more than one document, and then click OK.

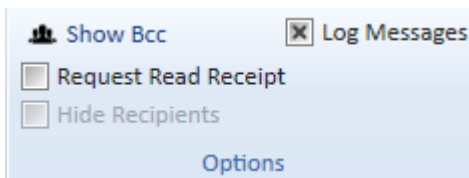
The attachments will then be attached to the email.

To remove a document from an email, if you mistakenly attached it, from the email message area highlight the attachment, right click, and select *Remove*.



Options

The Additional Options area includes; *Show Bcc*, *Request Read Receipt*, *Hide Recipients*, and *Log Messages*.



Show Bcc: Clicking on this will add an additional line item below Cc so you can include Bcc recipients.

Requesting Read Receipt: Checking this box will prompt recipients when they open the email that a receipt is being sent, and you will be notified that the email has been opened.

Log Messages: If you sent an email to a contact or employee within Enterprise and their email address is in their record, checking this box will log a message in their record including the body of the email which was sent.

2. Mass Mail



Once the Mass Mail tab has been selected a similar format will be seen as in the Message tab. If you had selected recipients or formatted anything on the Message tab and then clicked over the Mass Mail tab, your recipients and the body of the email will follow. The Mass Mail is unique in that it allows you to select an Email Template.

Selecting an Email Template will pull in the previously developed template and when sent out will pull the appropriate information in to the selected fields. The Email Template will be covered in more detail in the *template manager* area, page 8, of this document.

Note: Selecting a template will remove selected recipients that do not meet the criteria of the template.

3. Advanced Formatting



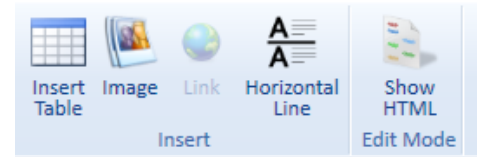
Clicking on the Advanced Formatting tab will allow you to select further options to customize your email message.

Insert Table: Inserts a table into your email. Double click on the field you wish to insert text in to. Right click on the table to format.

Image and Link options: Inserting an image or link allows you to insert an image url or link.

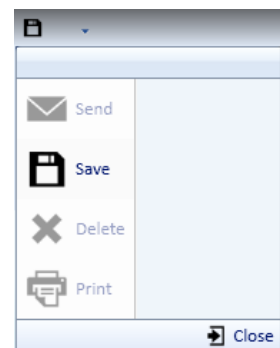
Horizontal Line: Inputs a horizontal line across your email.

Show HTML: Displays the HTML of your email.



In the upper left of the screen at all times will be a save button (seen on the left).

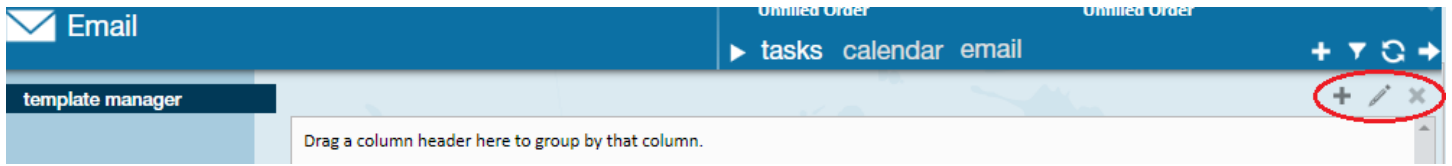
Clicking on the blue tab (seen on the right) will provide you with the options to *Send, Save, Delete, and Print*.



- B. Reply:** Generates a reply email message for the sender of the email that is currently highlighted in your inbox. This will be a reply including the history of the email.
- C. Reply All:** Clicking on the *Reply All* button will generate a reply email message to all of the recipients, including the sender, of the email that is currently highlighted within your inbox.
- D. Forward:** Clicking on the *Forward* button will generate an email that can be forwarded on to other recipients. You can either utilize the address book to look up the recipients you wish to send it to, or other methods previously discussed.
- E. Delete:** Clicking on the *Delete* button will delete the email currently highlighted in your email inbox.
- F. Send/Receive:** Clicking on the *Send/Receive* button will refresh your email to update received and sent mail.
- G. Edit Signature:** Clicking on the *Edit Signature* button will pop up a box in which you can edit the signature of your email. This will be self generated on email messages that you compose.
- H. Load More Messages:** Clicking on the *Load More Messages* button will load more emails from your inbox. Default will bring in your 20 most recent emails.

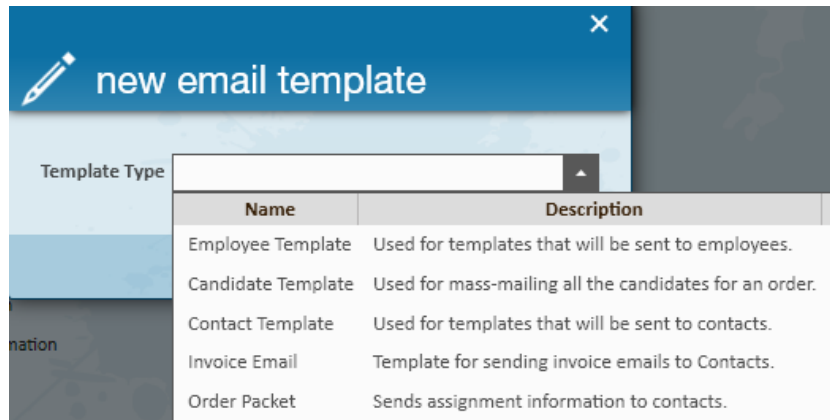
Template Manager

The Template Manager area allows you to add, edit, and delete email templates.



To create, or add, email templates click on the **+** button.

Once you have selected the add button you will be prompted to select a *Template Type*, as seen on the right.



Once you have selected the type of template you would like to create a new screen will generate and you will want to enter a *Template Name*, *Description*, and *Message Subject*.

Template Name: Anything that summarizes the template and what it is used for.

For example, Employee Welcome.

Description: Further detail of what the template is for.

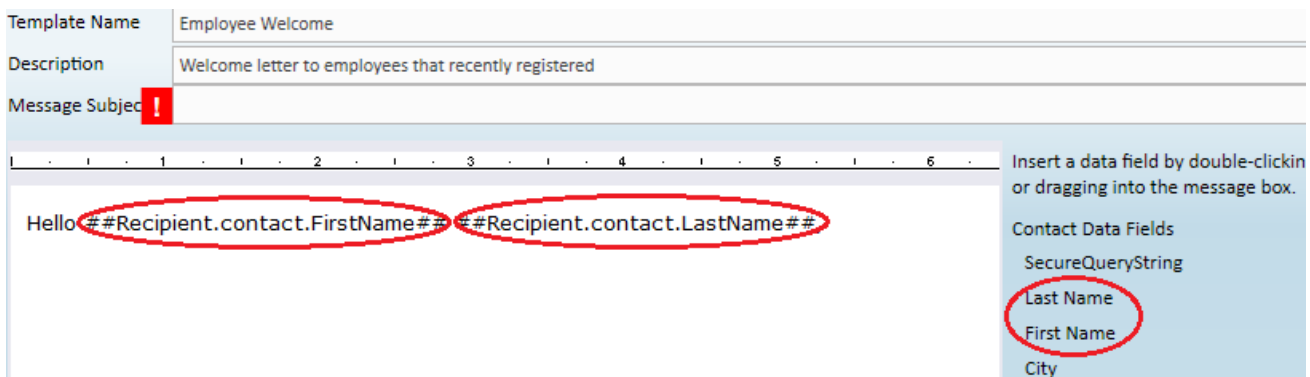
For example, Welcome letter to employees that recently registered.

Message Subject –This populates in the subject field of the email.

For example, Welcome to XYZ Staffing!

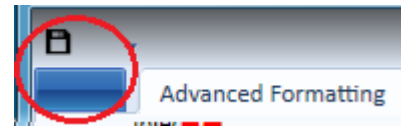
| | |
|-----------------|--|
| Template Name | Employee Welcome |
| Description | Welcome letter to employees that recently registered |
| Message Subject | |


To customize the template to your needs, utilize the data fields located on the right side of the screen. Inserting these in to the email will generate contact specific data pertaining to each recipient that is selected for the email when this template is used. To insert a data field, double click on your selection.

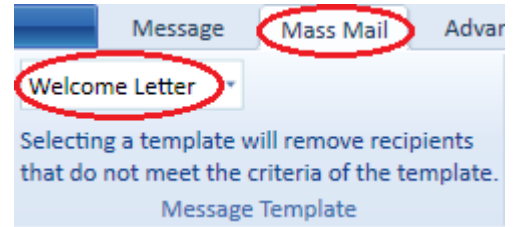


For example, inserting the data fields of *First Name* and *Last Name*, after you have typed Hello in the body of the email, will pull each email recipients first and last name from their record and insert it where the data field is placed on the template when the email is sent. Therefore, you have no need to go in and personalize each email.

Once you have completed creating the template you will need to save it by selecting the save button located in the upper left, as seen on the right.



As a reminder, to utilize a template, select  **Compose** followed by selecting the Mass Mail tab. You will then see on the left a dropdown to select the email template.




Once you have selected the template from the dropdown, the data fields will pull into the body of the email. Complete and send the email as desired.

To edit or delete an email template, highlight it from the list and select either the edit  or the delete  button.

Other methods of sending emails within Enterprise:

There are a number of other ways besides going through 'Compose' to send an email.


Anywhere you find a  within Enterprise you have the ability to send an email directly from that record, whether that be an employee, contact, order, etc. Following is just a few examples of various ways to utilize the integration of email within Enterprise.

A. Emailing contacts and employees from an order

If you have an order which multiple employees are assigned to, from the **order visible** screen, on the bottom where it lists the assignments, you have the option to email all of the employees who have been assigned to the order.


| assignments | | | | | | | |
|--------------------------|------------------|-----------------------|-------------|-----------|-----------|---------|---------|
| Title | Employee | Perf Code Description | Orig. Start | Start | End | Bill | Pay |
| Shipping And Receivin... | James, Elizabeth | No Show/No Call | 1/11/2011 | 1/11/2011 | 1/11/2011 | \$16.50 | \$11.00 |
| Shipping And Receivin... | James, Bailey | Open | 1/17/2011 | 1/17/2011 | | \$16.50 | \$11.00 |
| Shipping And Receivin... | Kyle, Johnson | Open | 1/17/2011 | 1/17/2011 | | \$16.50 | \$11.00 |


The following are all options to email options from this area (see the above area circled in red).

 - Email Employees: Selecting this option from an order will prompt you to select either;

Employees currently on active assignment


All employees that have ever worked this order

 - Assignment Confirmation: A screen will pull up asking you to choose a template (refer to the *template manager* section above) and will prompt you to select the recipients (contacts) based on those contacts that are associated with the order.

 - Email New Hire Packet: Clicking on this will prompt you to choose a template. Selecting recipients will not be an option as this will be being sent to all of the employees listed in the assignments area.

B. Emailing contacts of the same customer

If you have a number of contacts you wish to email who are listed under the same customer, you can easily do so from the **customer visifile** screen.

From the customer visifile screen, on the right hand side where the contacts are listed, select the contacts you wish to email by holding down the Ctrl key and clicking on the desired recipients. Once you have selected the contacts you wish to email, click on the envelope button  located just above the contacts area. This will generate an email message, with the recipients in the Bcc field. Complete your email message as desired.




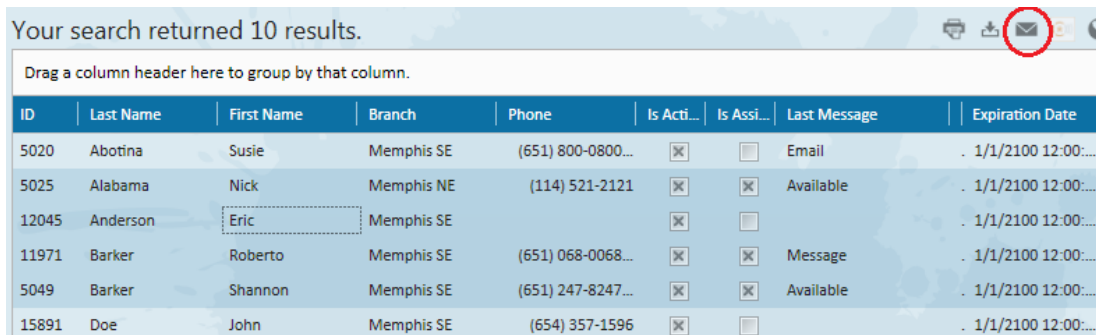
| Name | Title | Office Phone |
|-------------------|---------------------|----------------|
| Ferrero, Pete | Finance Manager | (651) 954-4811 |
| Jackson, Jon | Accounts Payable... | (951) 489-6786 |
| Johnson, Kelly | Shipping Supervisor | (651) 954-8852 |
| Jones, Flip | Shipping Lead | (651) 952-6688 |
| Lambert, Michelle | HR Supervisor | |
| Larson, Chad | CFO | (651) 952-5555 |

C. Emailing employees based on an employee search

There may be times when you want to send an email to a number of employees based on a search that you did.

For example, perhaps you did an Enhanced Search for employees who had required documents that have future expiration dates as you want to send them an email to remind them that they will be expiring. To do this, run the Enhanced Search. For more information on Employee Searches please reference the [15R1 Employee Searches Help Document](#).

When your results pull up you may decide that you want to email one, some, or all of the employees. Simply hold down the Ctrl key and click on the employees you wish to email. Once you have selected your desired recipients, click on the envelope  located just above the search results. This will generate an email message with the selected recipients in the Bcc field. Complete and send your email message as desired.




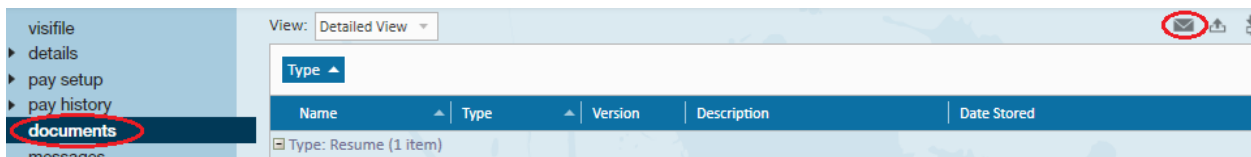
Your search returned 10 results.

Drag a column header here to group by that column.

| ID | Last Name | First Name | Branch | Phone | Is Acti... | Is Assi... | Last Message | Expiration Date |
|-------|-----------|------------|------------|-------------------|-------------------------------------|-------------------------------------|--------------|----------------------|
| 5020 | Abotina | Susie | Memphis SE | (651) 800-0800... | <input checked="" type="checkbox"/> | <input type="checkbox"/> | Email | . 1/1/2100 12:00:... |
| 5025 | Alabama | Nick | Memphis NE | (114) 521-2121 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Available | . 1/1/2100 12:00:... |
| 12045 | Anderson | Eric | Memphis SE | | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | . 1/1/2100 12:00:... |
| 11971 | Barker | Roberto | Memphis SE | (651) 068-0068... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Message | . 1/1/2100 12:00:... |
| 5049 | Barker | Shannon | Memphis SE | (651) 247-8247... | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Available | . 1/1/2100 12:00:... |
| 15891 | Doe | John | Memphis SE | (654) 357-1596 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | . 1/1/2100 12:00:... |

D. Emailing documents from a record

If desired, you can email any documents that are attached to the document area of any record. To do so, open the desired record and highlight the selected document within the documents area. Once the document is highlighted click on the envelope  just above to generate an email message with the document attached. Complete and send your email message as desired.



visifile


- details
- pay setup
- pay history
- documents**
- messages

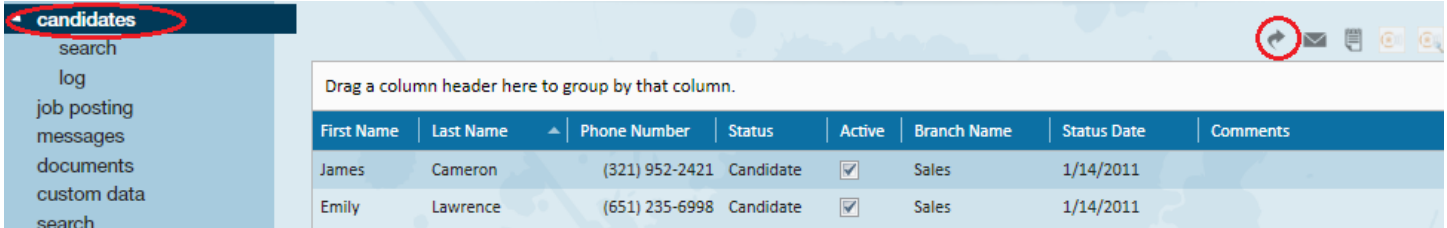
View: Detailed View

Type




| Name | Type | Version | Description | Date Stored |
|-----------------------|------|---------|-------------|-------------|
| Type: Resume (1 item) | | | | |

E. Email employee resumes to order supervisors for consideration

Utilizing the candidate search function directly within an order allows for quick submission of candidates resumes to the order contact. Once you have completed your search and have employees attached as candidates to the order, you can email the resumes directly to the supervisor by selecting the  button just above the candidate screen. Once you have selected this you will have the option to either send the resumes that are attached to the employee record, or to generate and send emails from a new template. Enterprise will then generate an email to the contacts on the order and attach the resume of the candidates you selected.




F. Emailing candidates on an order

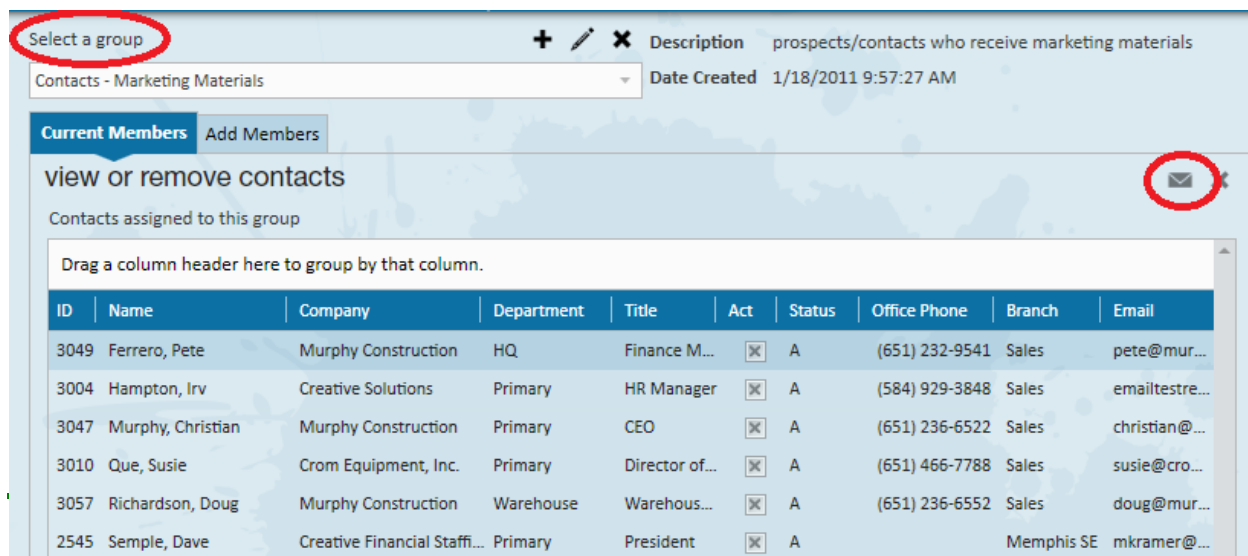
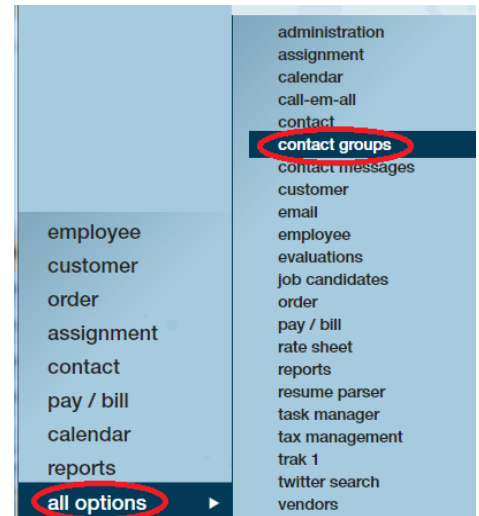
Utilizing the same area as discussed just above in E. you can also email the potential candidates of an order. To do this, instead of selecting the  as mentioned in E., to email the candidates you would select the  button, which is located just to the right of . This will generate an email to all of the potential candidates on the order.

G. Emailing contact groups

Creating contact groups is a great way to have quick efficient access to those contacts you frequently send emails to, for example, contacts you send marketing materials to. Please reference page 106 of the [15R1 Front Office Manual](#) for more information on how to create a Contact Group and additional functionality within this area.

To send an email to a contact group you will need to go to the contact groups screen. This can be found under *all options* on the navigation tree, as seen on the right.

Once the contact groups screen has pulled up, select the group you wish to send an email to from the *Select a group* dropdown. The contacts within the group will be listed just below the dropdown. To send an email to the group simply click on the envelope button  just on the top right of the list, as seen below.



Still Have Questions?

For more information about email integration please contact our customer support group at 651.452.0366, or by sending an email to support@tempworks.com.

To request training on email functionality, or to request training or documentation on other Enterprise functionality, please contact the training department at trainers@tempworks.com