Page: http://localhost/helpconsole2010/outreachEN/_temp_PublishPDF/pdf_cover_page.htm could not be added

# outreachEN

# Table of Contents

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**

# System Requirements

This opening paragraph should describe the feature that you are documenting. Explain how it is commonly used and what the benefits are. For example: The Widget Master email link allows you to easily send information about each widget to various departments within your company. Often, the feature that you are documenting can be best explained by walking the reader through step by step. Use screenshots to illustrate the steps where possible.

1. Start the application by...
2. On the startup screen, click the...
3. 

## See also

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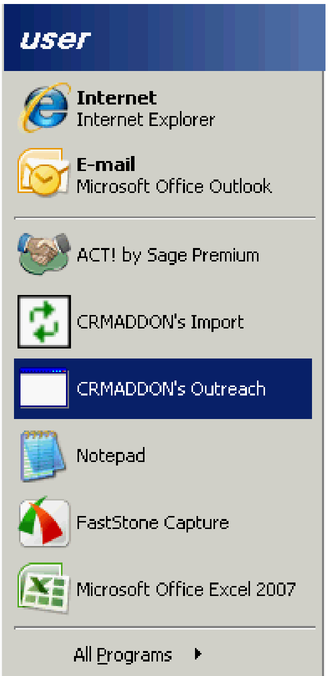
Outreach IT
Workflow Schema
Bounced Emails Schema
Service Task

Home > Outreach IT

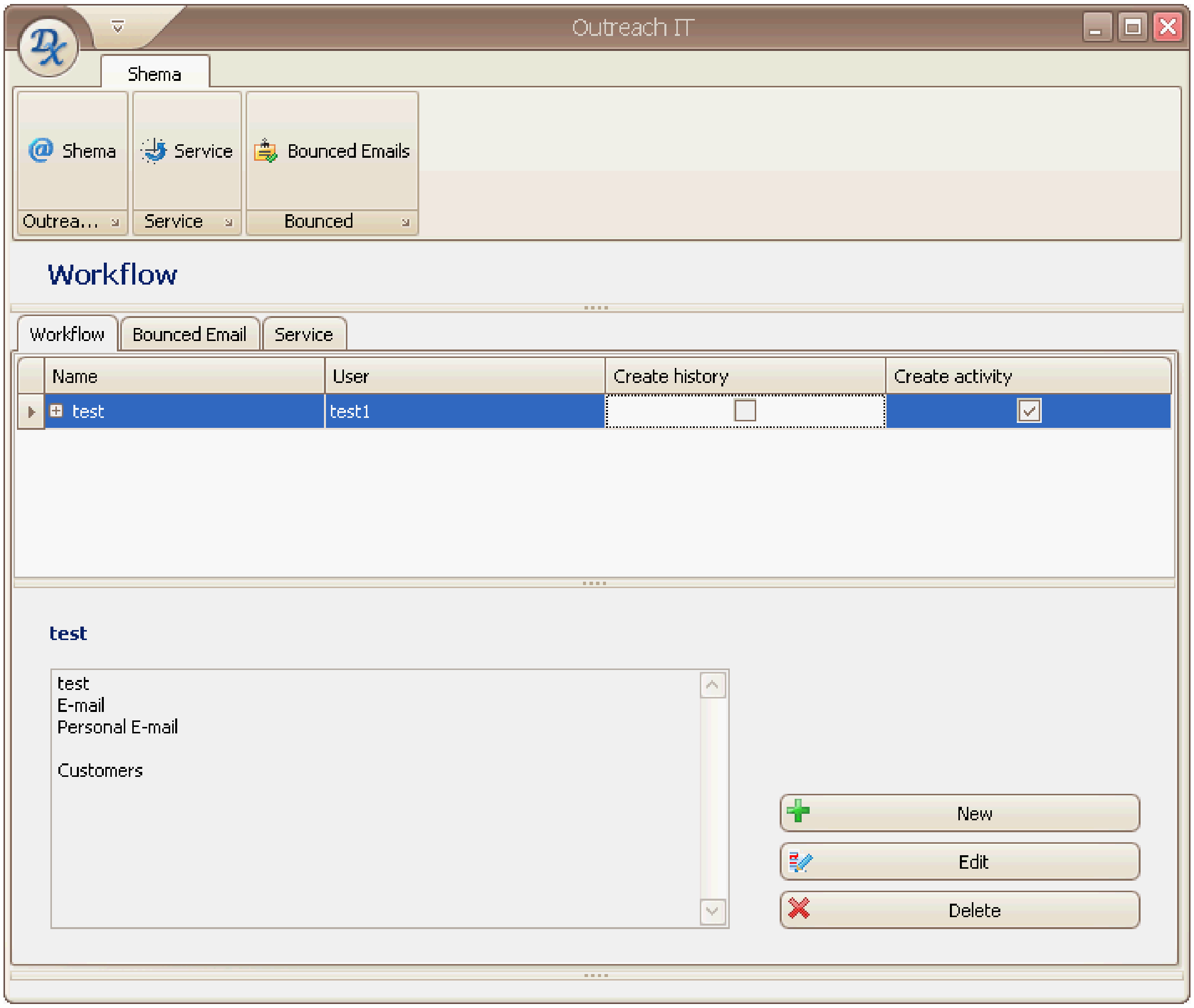
# Outreach IT

Outreach IT is a stand-alone program that is installed on your machine an can be started by clicking a desktop shortcut or opened from Windows Start menu:




With this tool you can create a schema for emails sending (Workflow), parse bounced emails (Bounced Email) and set service tasks which will help to make emails sending automated (Service):

**




## See also

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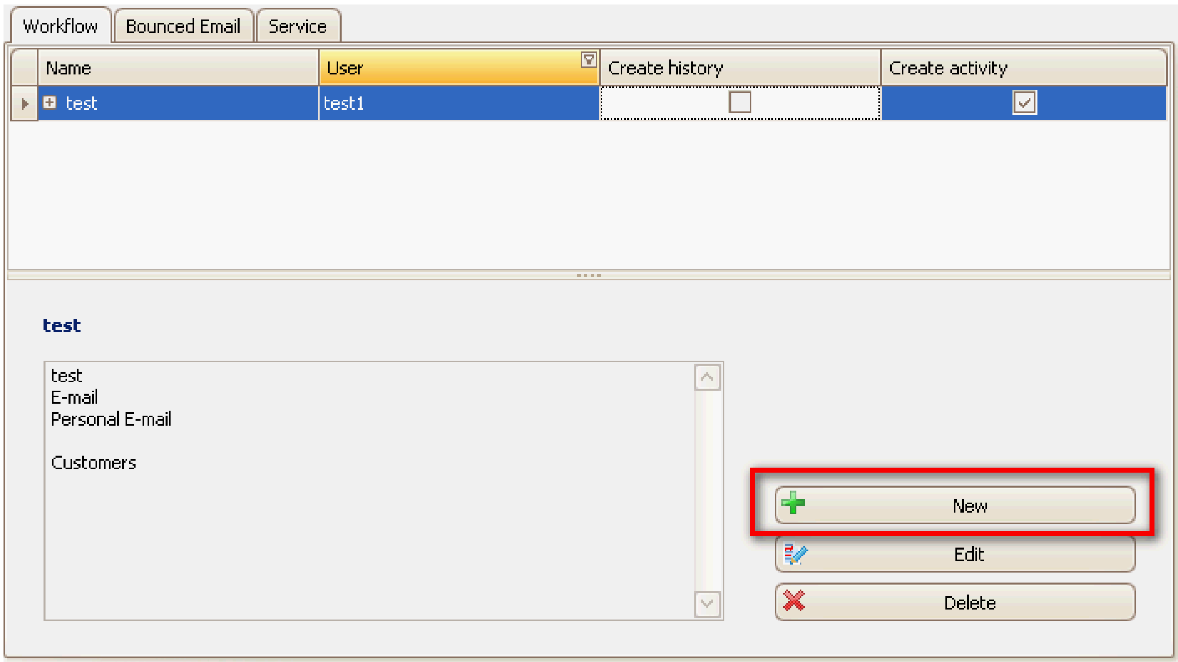
**

Home > Workflow Schema

# Workflow Schema

With Workflow Schema you can create a schema for outgoing emails. A convenient built in Wizard will help you to configure all needed settings. To create a Workflow Schema, please click "New" button in a Workflow tab:




Once after clicking "New" button a Workflow Wizard will start.

To Edit an existing schema, just select your schema and click "Edit" button.

To remove a schema, select needed schema and click "Delete" button.

## See also

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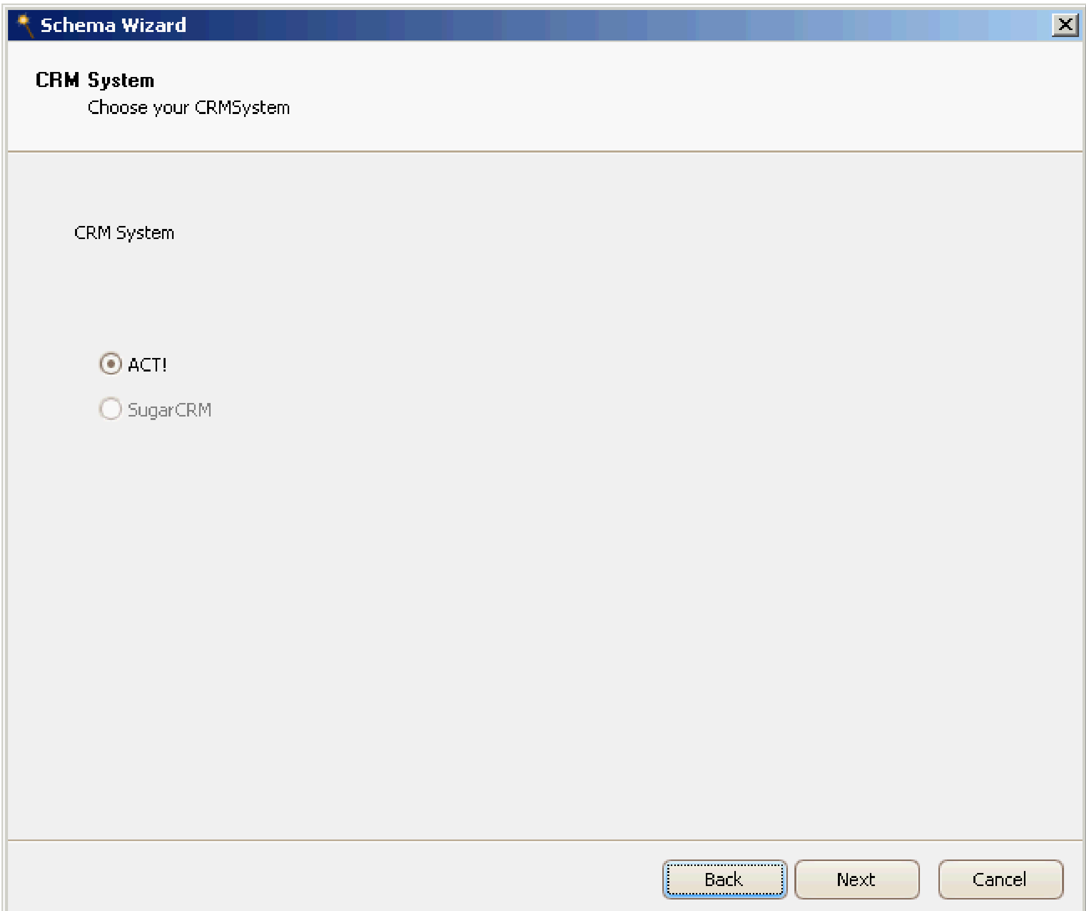
Home > Workflow Schema > Workflow Wizard

# Workflow Wizard

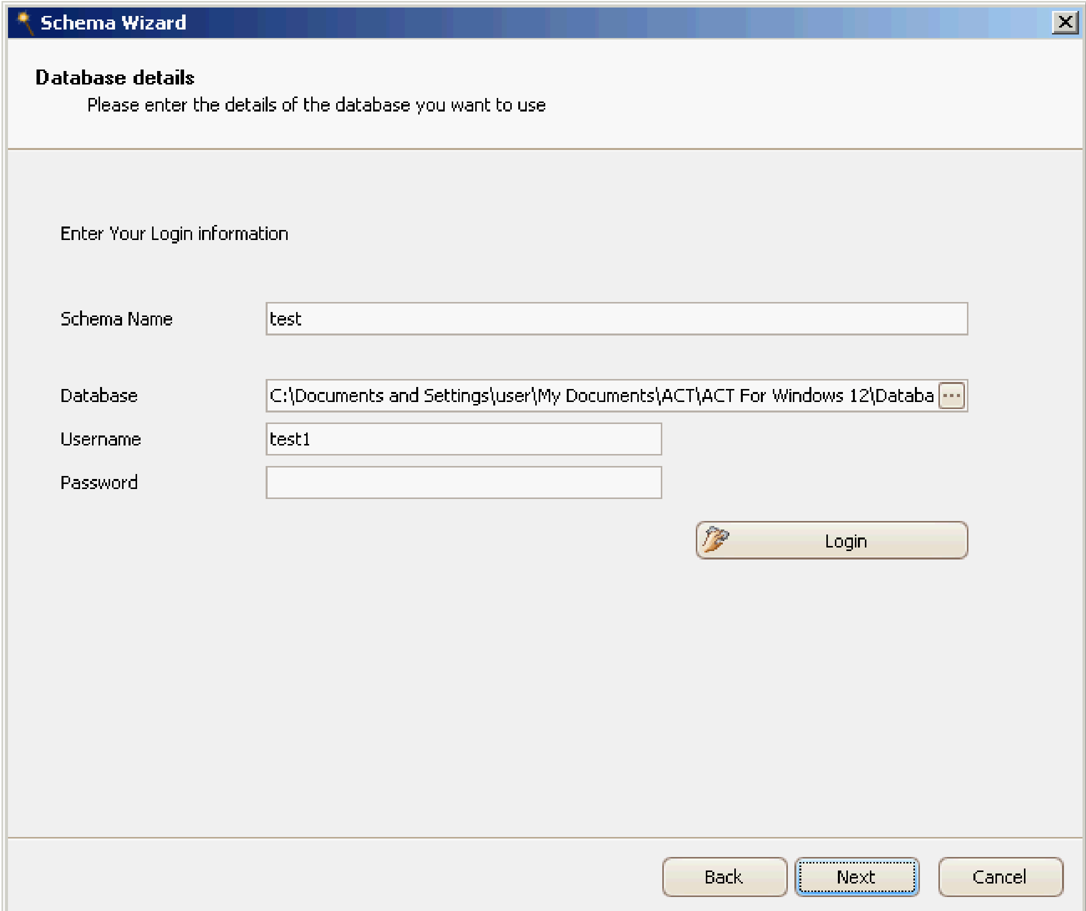
With Workflow Wizard you can configure your Outreach Schema by filling out Wizard fields.

Select here the CRM system you work with. At present Outreach is available for ACT! only:



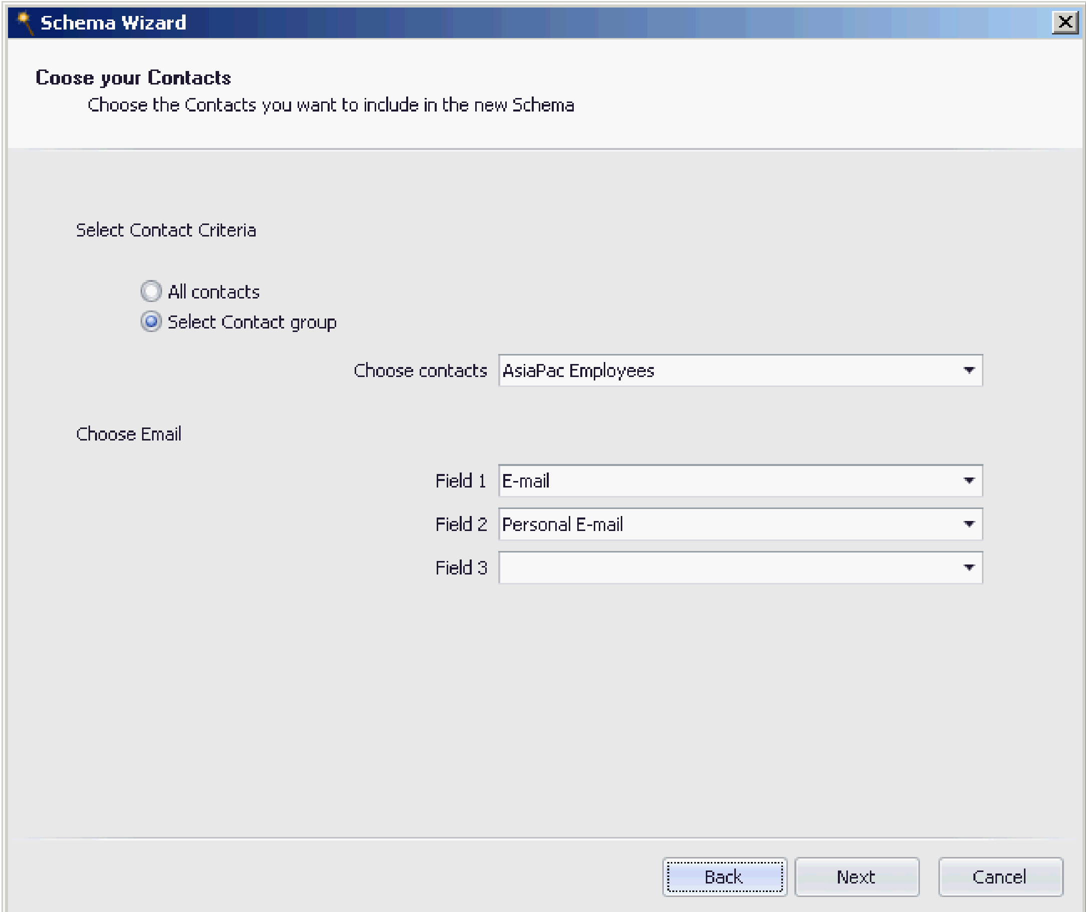

Specify on the following Window a path to your ACT! database and your database details and click "Login" button to log into the database you would like to work with:

**




Here you can define a group of contacts you would like to send emails to and fields with email addresses for them:

**




On the following window you will need to specify settings for your outgoing emails:

- 'Subject' - Your outgoing email subject
- 'Choose Emailbody' - Select here a template for your outgoing email or create a new one with Report Designer tool
- 'Attachment' - Specify a path to your attachment
- 'Send as' - Select a format the email will be sent in
- 'Time since last mail' - Select the recurrence for emails sending, i.e. how often you would like to send this email to your contacts

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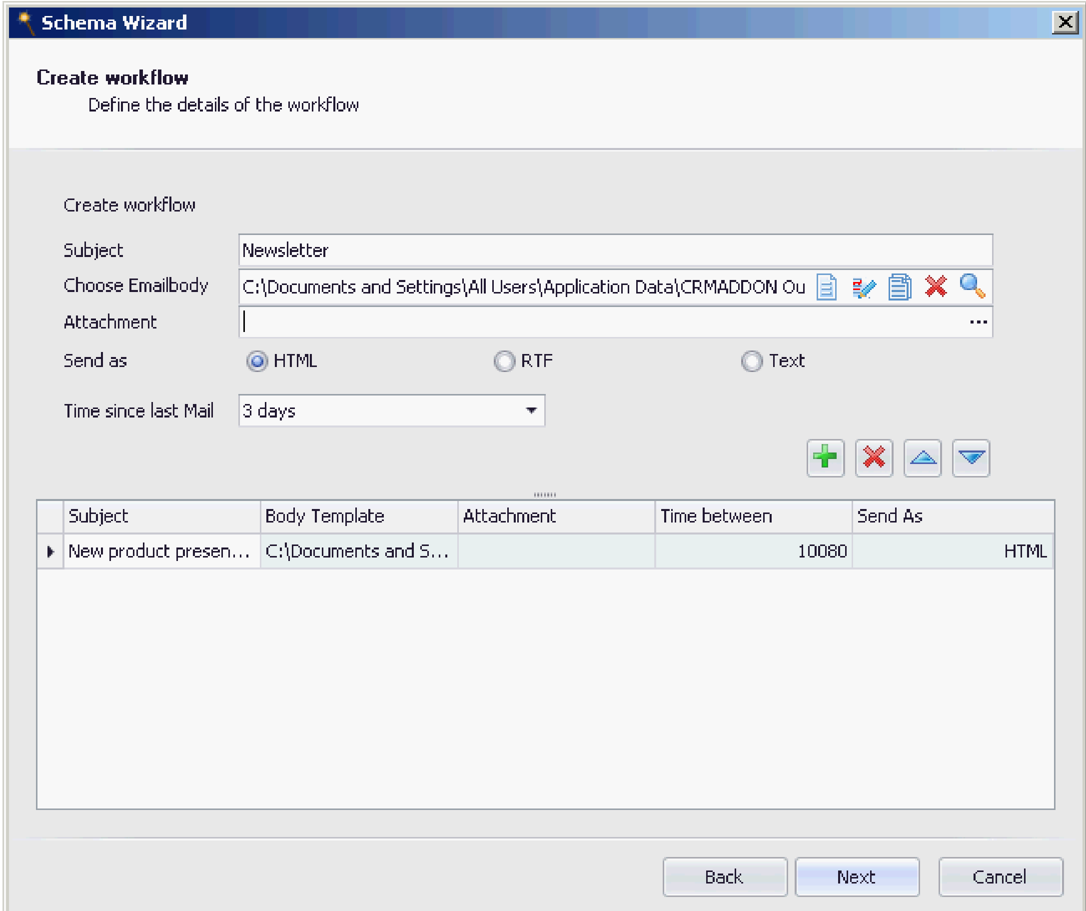
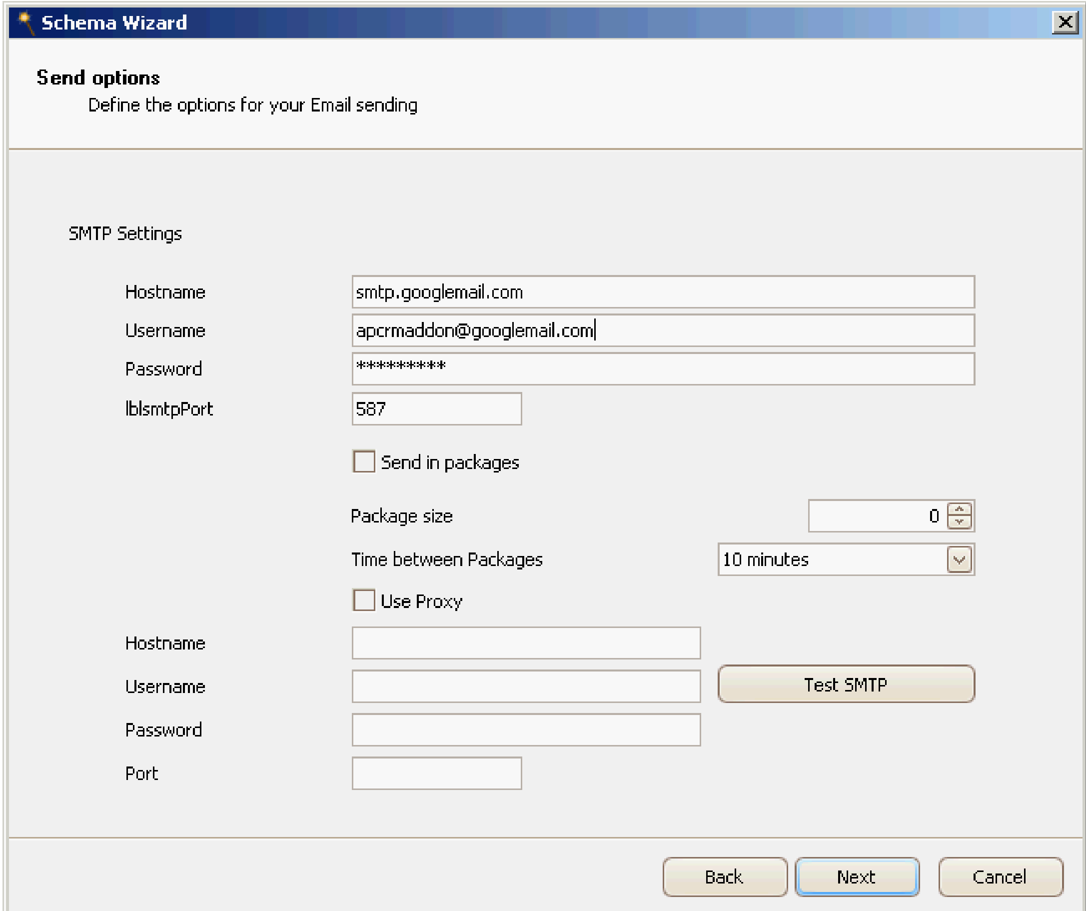



Here you can define SMTP connection settings for your outgoing emails. If you use proxy, its details can be configured on the below screen. Click "Test SMTP" to test if connection is successful or not.

By checking 'Send in packages' box you can enable sending several emails at a time. This setting will depend on your mail client since package size can be limited by it. E.g. if you select 20 as package size the system will send 20 emails at a time. If 'Send in packages' option is not enabled the system will send one email at a time.

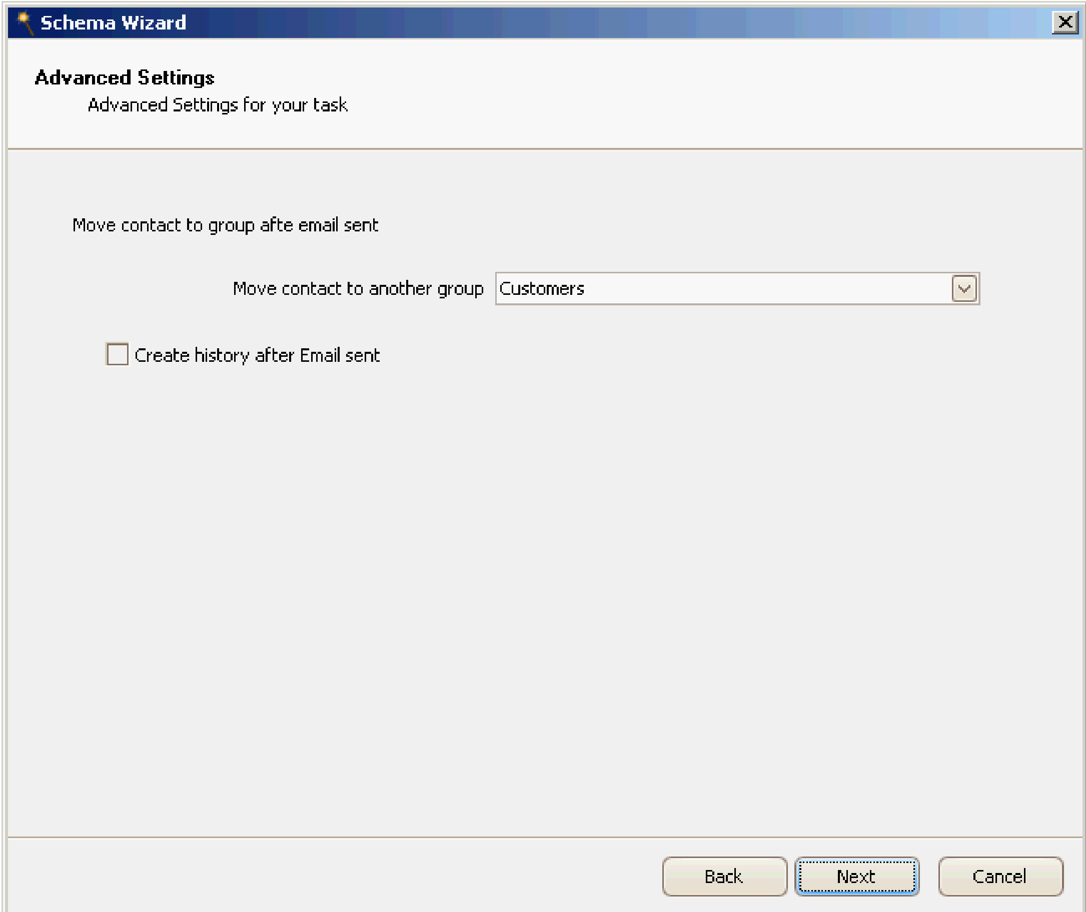
**




On the following dialog you can specify the group your contacts will be moved to after emails sending. It is also possible to create a History after sending emails by checking

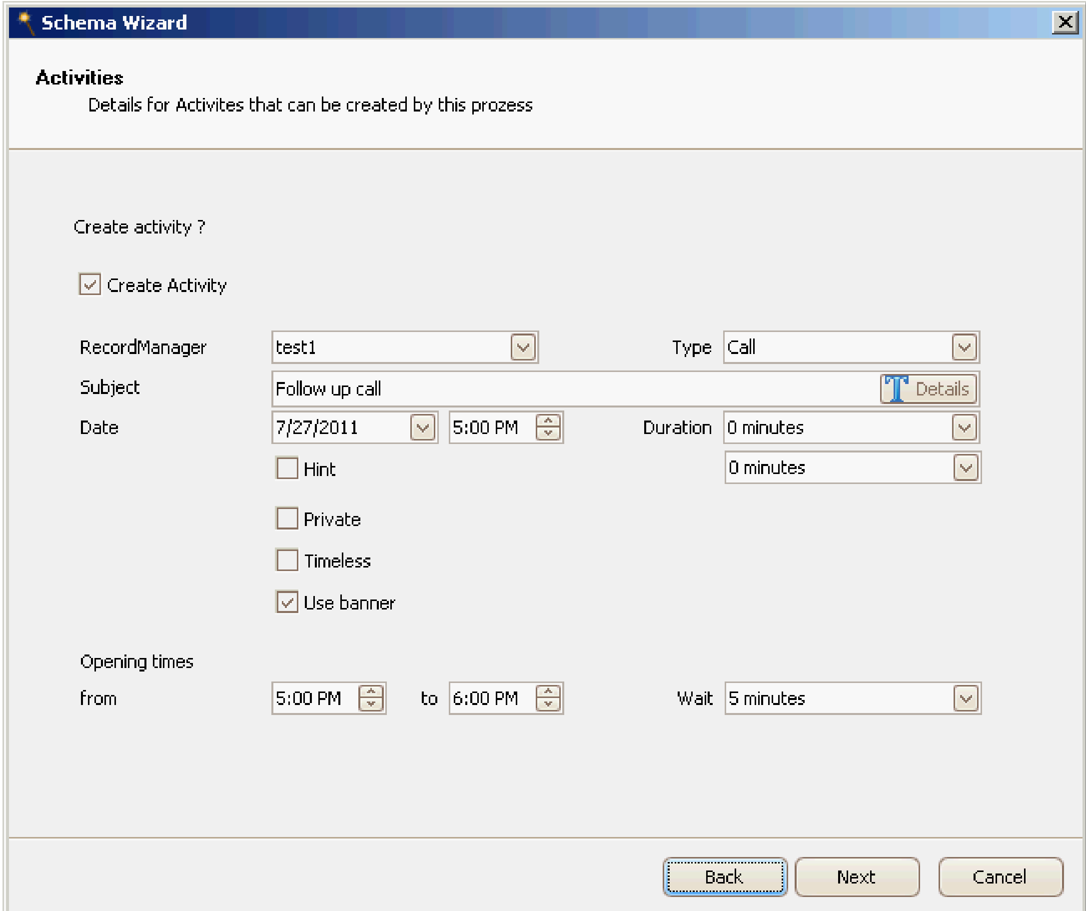

.

**




Here you can set to create an Activity and specify Activity settings like Record manager, subject, date/time, duration and opening time frame for Activity planning:

**




By specifying all above settings you will configure the Workflow Schema. To set automated emails sending you will need to create a Service Task Schema. If there are bounced emails you can parse them by creating a Bounced Emails Schema .

See also

About the report designer

**

Home > Workflow Schema > About the report designer

# CRMADDON's Online Help

Report Designer is a similar to ACT! report designer tool. It allows you to generate reports and create your own report templates. It is built in Table IT, Dial IT, Service IT and Scan IT addons. With Report Wizard you can create templates and send them by email to your contacts.

Report Wizard gives you an opportunity to create a report template, select which variables will be added to it. Report Designer will help you to add content to this template about your service making the report more user friendly.

Later those reports can be sent by email to your contacts and leads improving your sales and saving your time for creating follow ups for each particular case.

- Welcome
- Workflow Schema
- Workflow Wizard
- Bounced Emails Schema
- Calendar View
- Settings
- Outreach IT
- Creating Task Service Schema

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Page: http://localhost/helpconsole2010/outreachEN/_temp_PublishPDF/Report-Designer_report_designer.htm could not be added

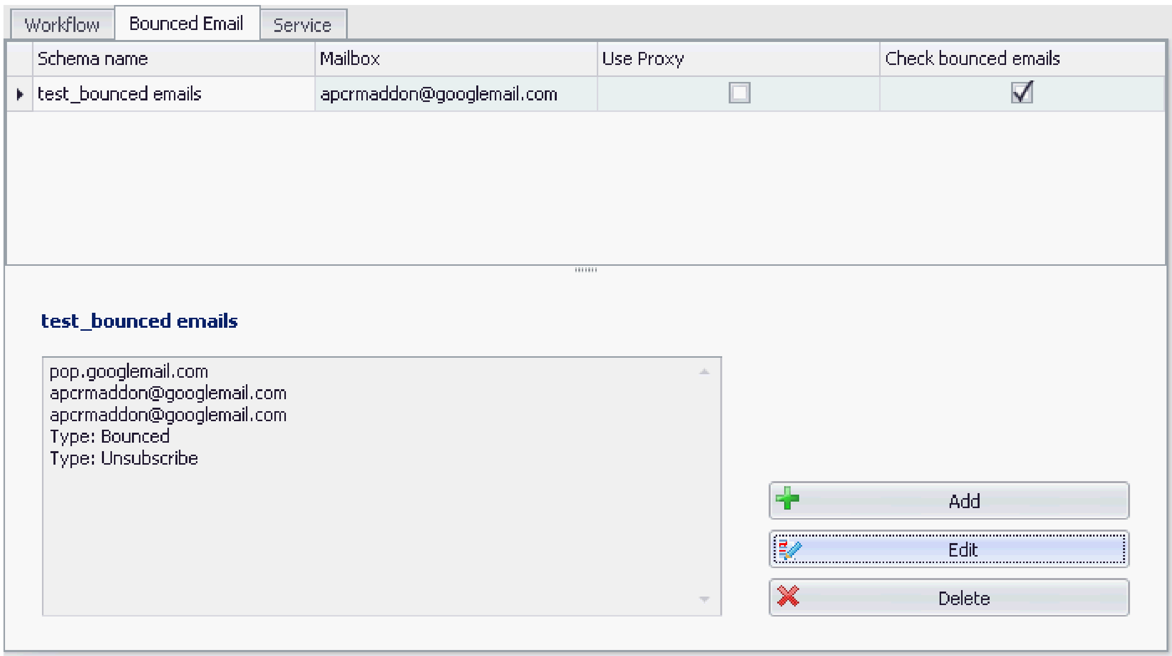
**

Home > Bounced Emails Schema

# Bounced Emails Schema

Bounced Emails feature can be used for sorting out bounced emails into a separate group for further checking and parsing. It might happen that the wrong email address was specified for your contact or email is no longer available or was blocked by a spam blocker. This tool will help you to sort out those emails and double check details for the contacts whom such emails are assigned to. Unsubscribe requests can be also processed with bounced emails schemas.

To create such schema you will need to follow Bounced Email Wizard steps and specify all required settings, such as your mail server and mailbox details, settings for bounced emails groups and unsubscribe settings. To start creating bounced email schema you need to follow 'Bounced Emails' tab in your Outreach IT program and click 'Add' button:




## See also

Welcome
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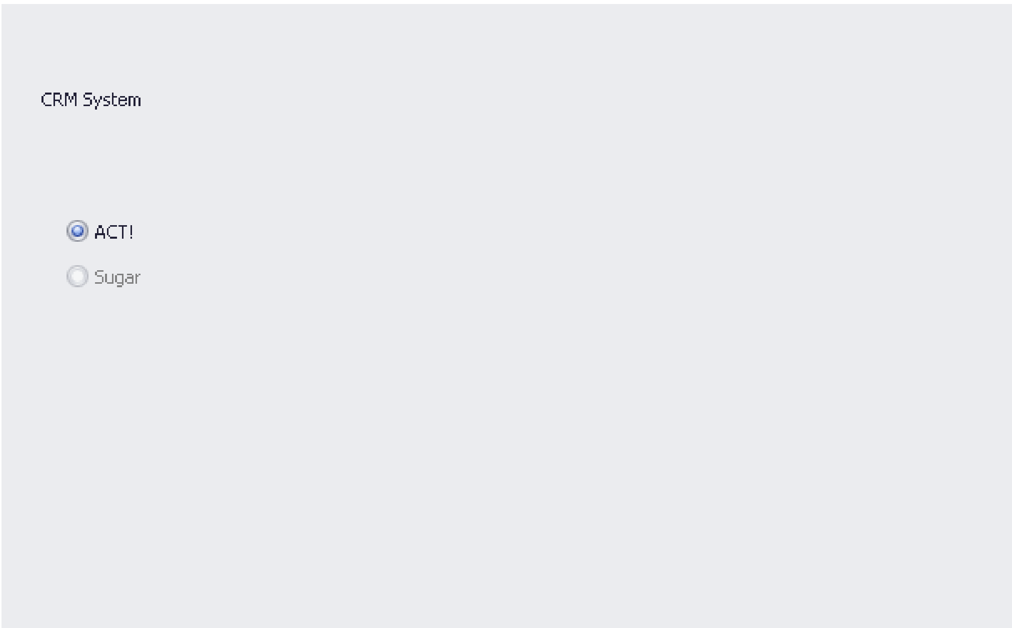
Home > Bounced Emails Schema > Bounced Emails Wizard

# Bounced Emails Wizard

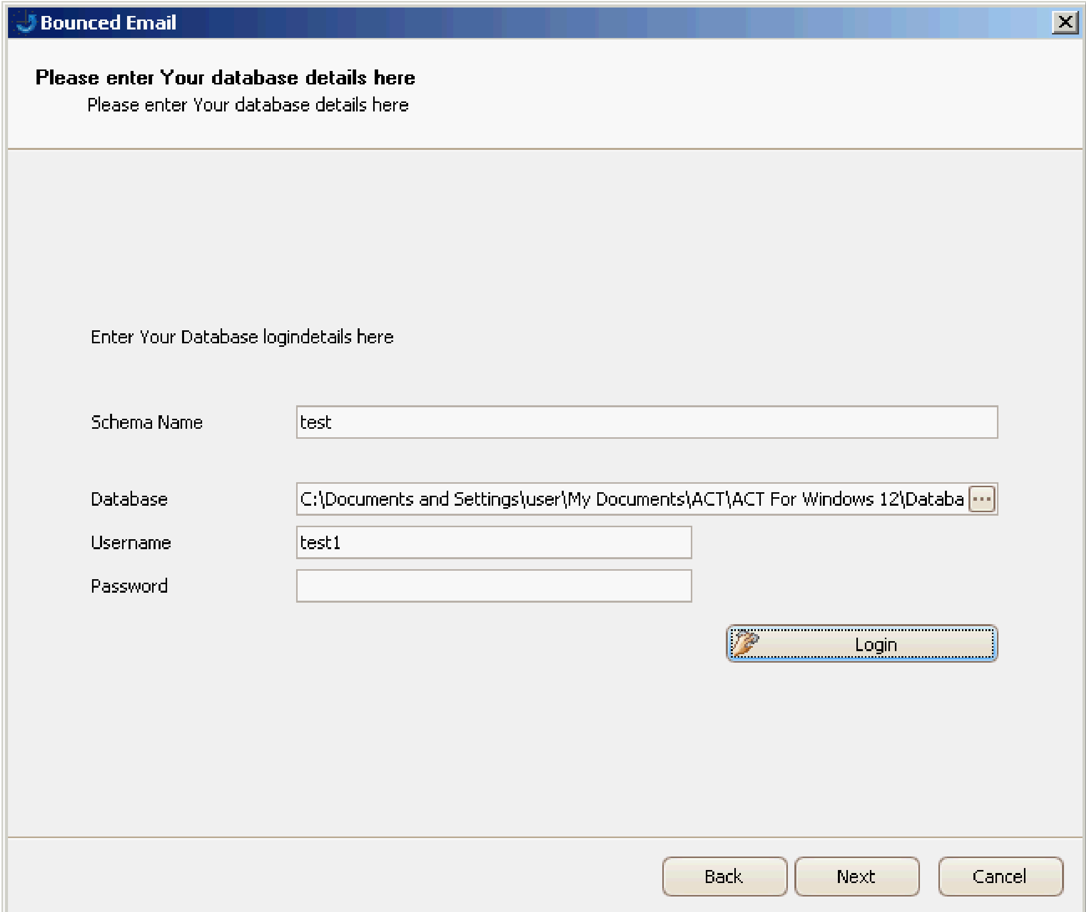
After clicking 'Add' button on the Bounced Emails Tab the Wizard will start.

On the following screen you should select the CRM you work with. At present Outreach IT is available for ACT!. Outreach IT for Sugar CRM is coming soon:




Then, please select a path and specify connection details for your ACT! database:

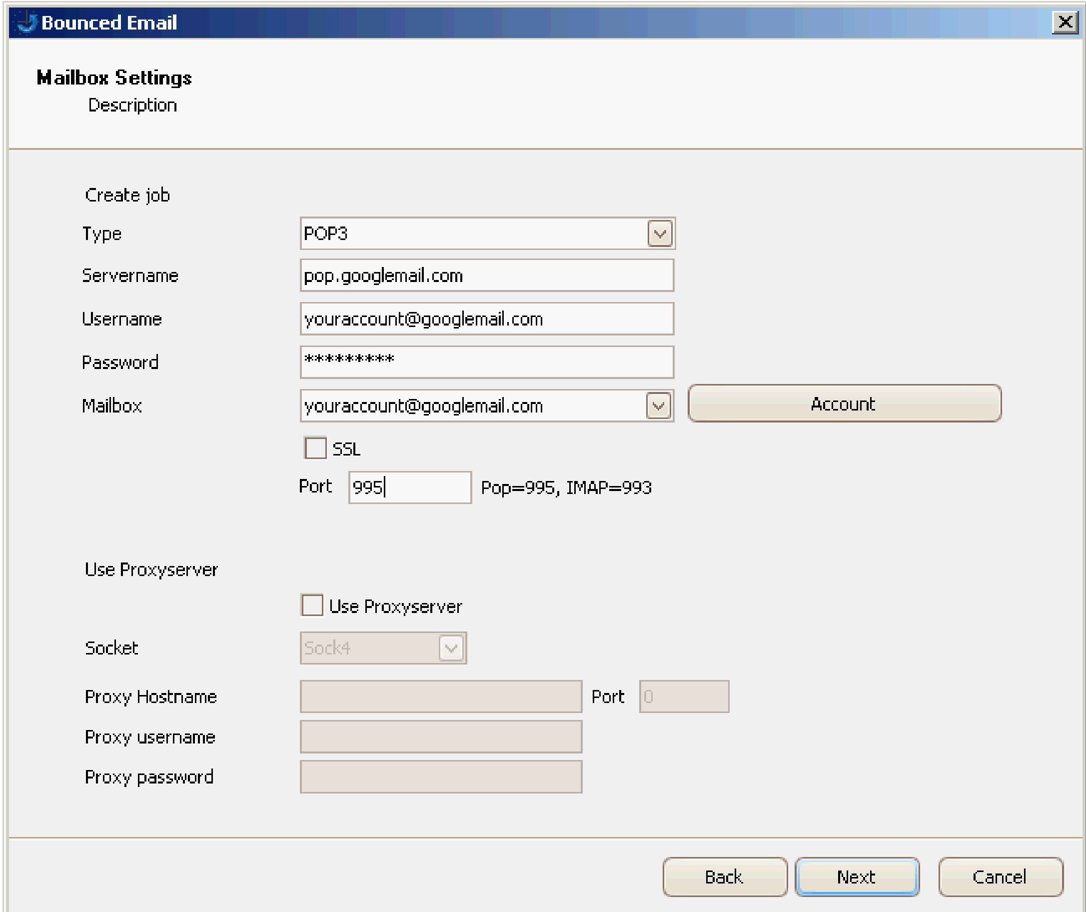
**



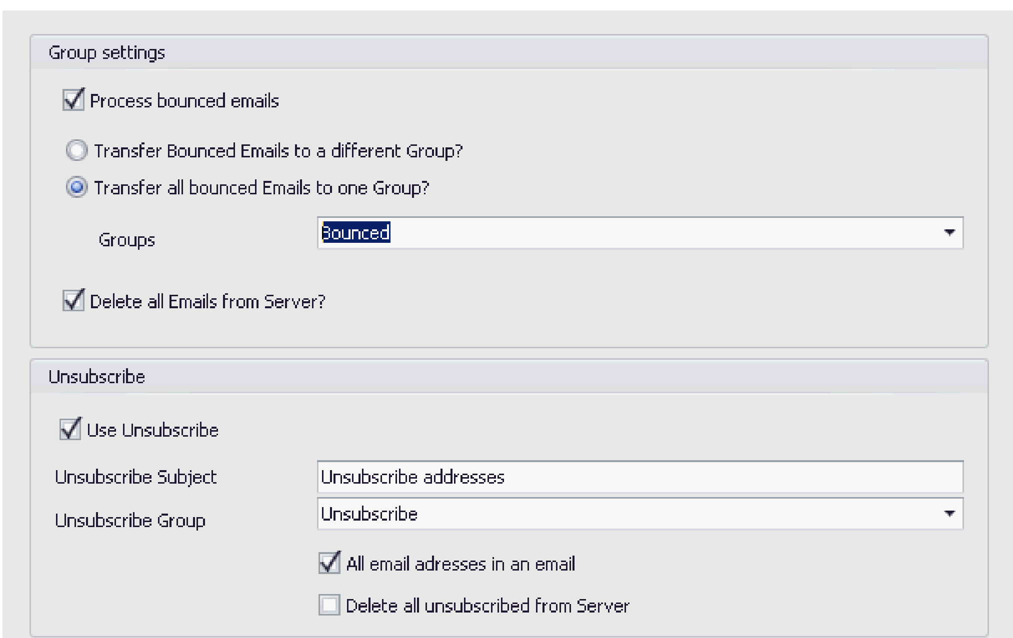

Click 'Login' to test the connection and proceed further.

On the following screen mailbox settings should be specified:

**




On the Group Setting screen you can select a group emails are transferred to, enable unsubscribe option and specify a group for unsubscribe emails requests. You can check 'Delete all emails from server' option in case you would like not to keep those emals on your mail server.




**

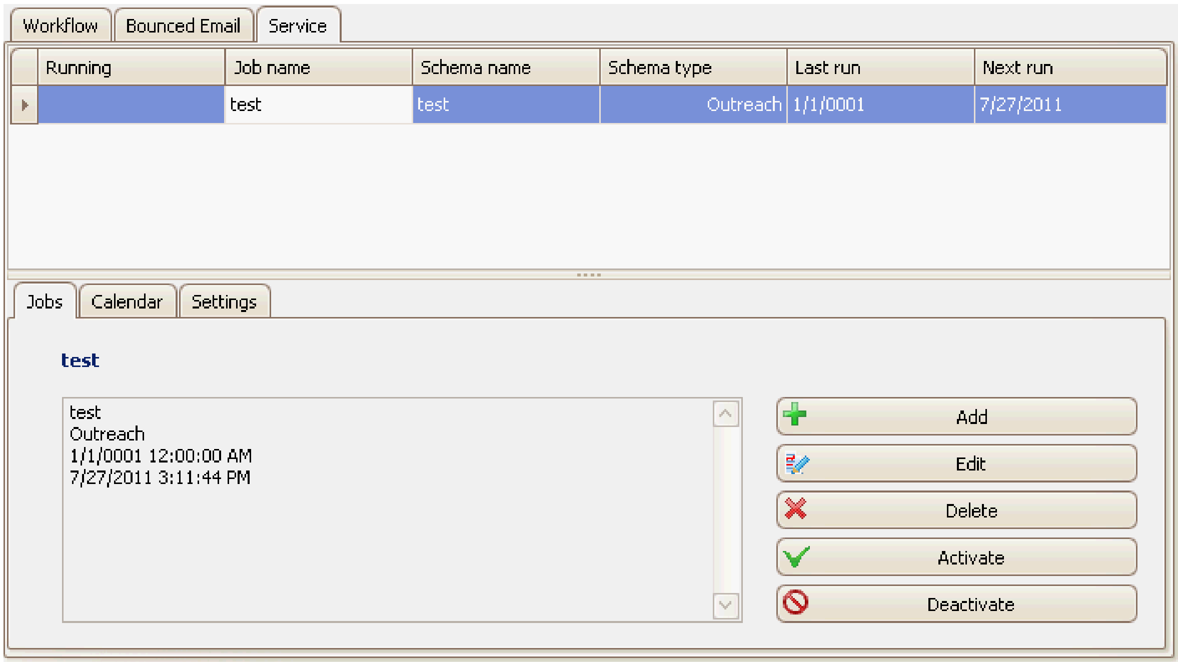
See also

**

Home > Service Task

# Service Task

Service allows running Outreach schemas automatically and with particular recurrence. Service mask has the following look:




By clicking "Add" button you can create a task for particular Outreach IT schema. "Edit" button will run the Wizard for updating an existing Service Task schema. "Delete" button will remove a selected schema. "Activate" button will make a task active and this will mean that it will run with predefined recurrence automatically. "Deactivate" button will deactivate a selected task without removing it from the list. You will be able to activate it any time later.

## See also

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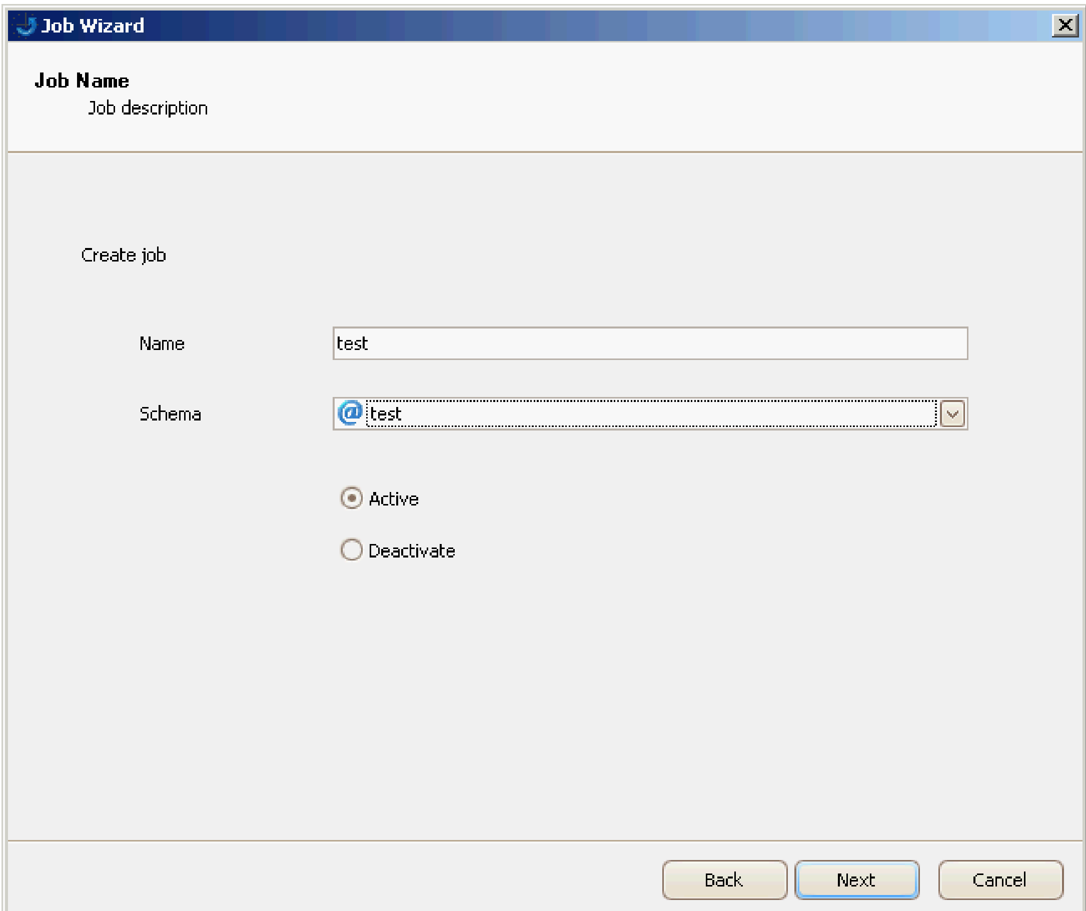
Home > Service Task > Creating Task Service Schema

# Creating Task Service Schema

To create a Service Task schema for your Outreach IT schema you need to click "Add" button on the Service main mask and fill in the fields on the built in Wizard for Service Task schema configuration:

On the following dialog you need to define a name for your Service Task schema and select Outreach IT schema you would like to set the task for:

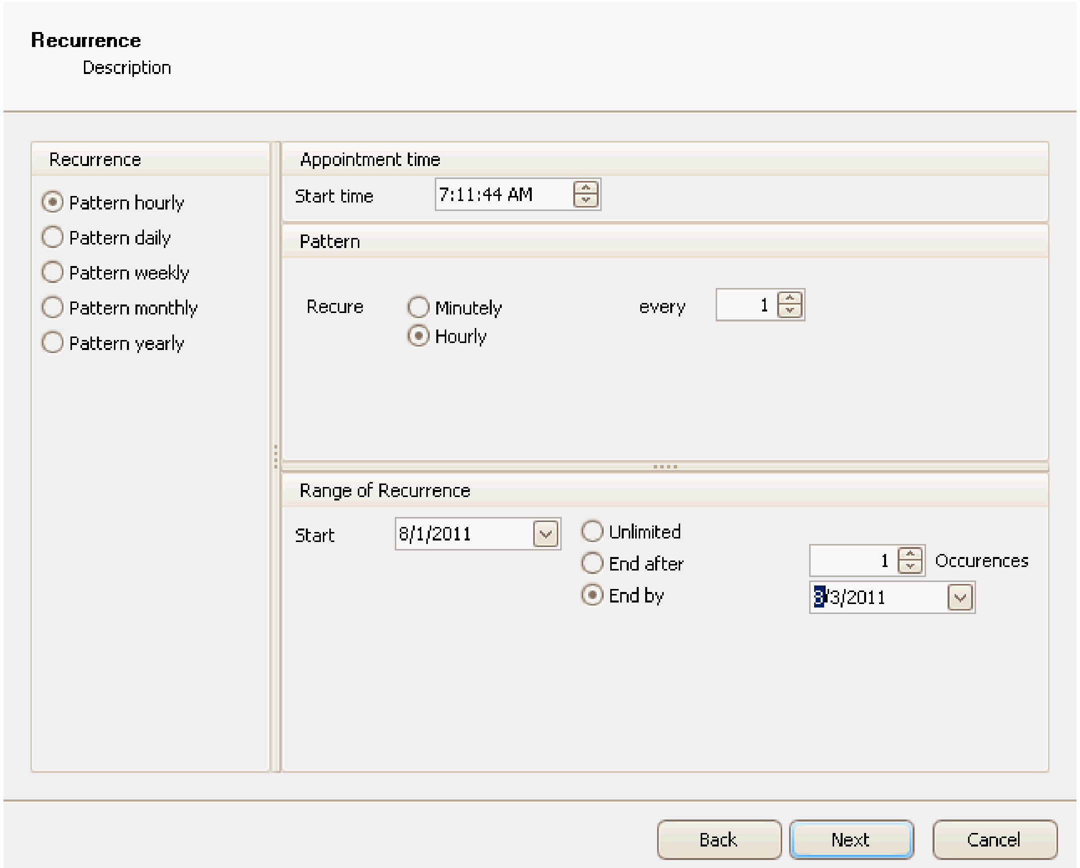



Then a recurrence for running your schema should be set. You can select to run your task on hourly, daily, weekly, monthly and yearly basis.
All recurrence patterns have common setting of 'Appointment time' - the time when the task should start and 'Range of Recurrence'.
Range of recurrence can be set to:

- Unlimited - There is no end date for the task, it will be performed unlimited number of times until is deactivated by he user.
- End after - The task will be ended after n number of occurrences
- End by - The task will be ended after defined date

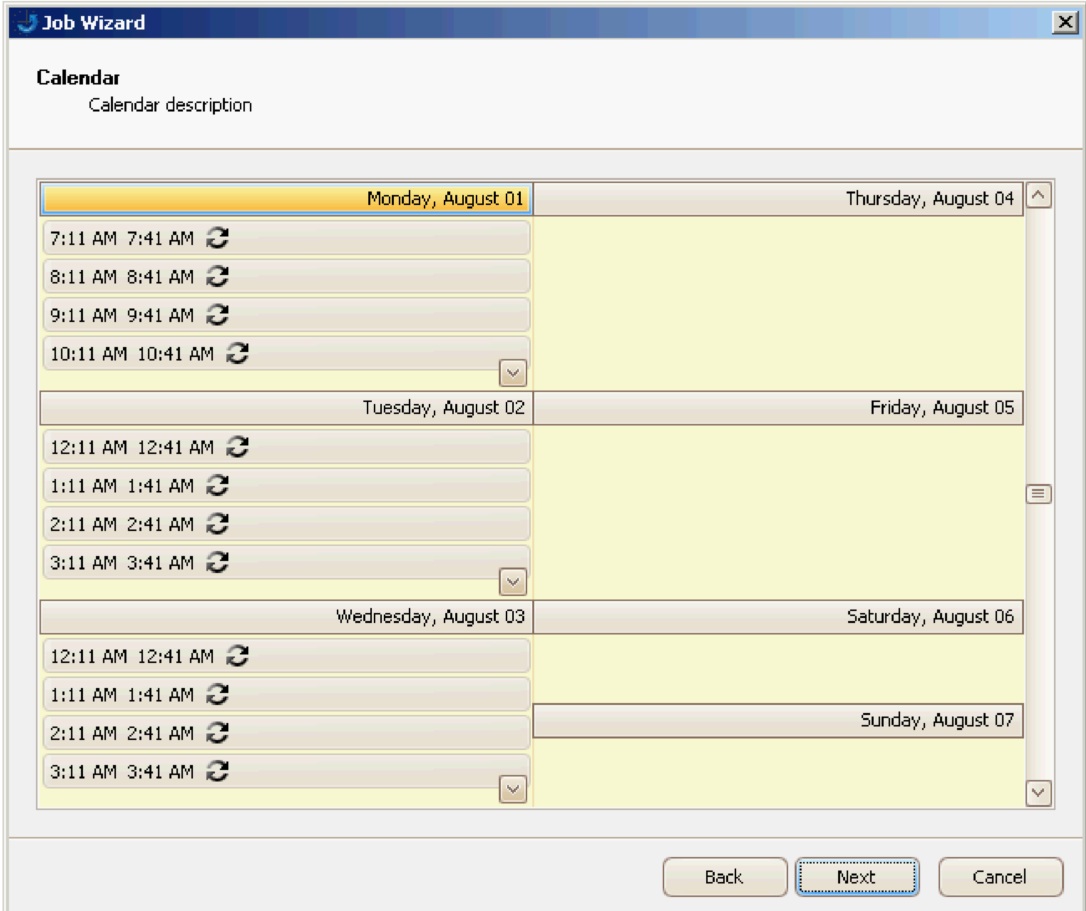
Start field is for specifying the date when the task will start.

Pattern section changes depending on the recurrence pattern you select. You can specify there setting for running the task on hourly, daily, weekly, monthly and yearly basis.



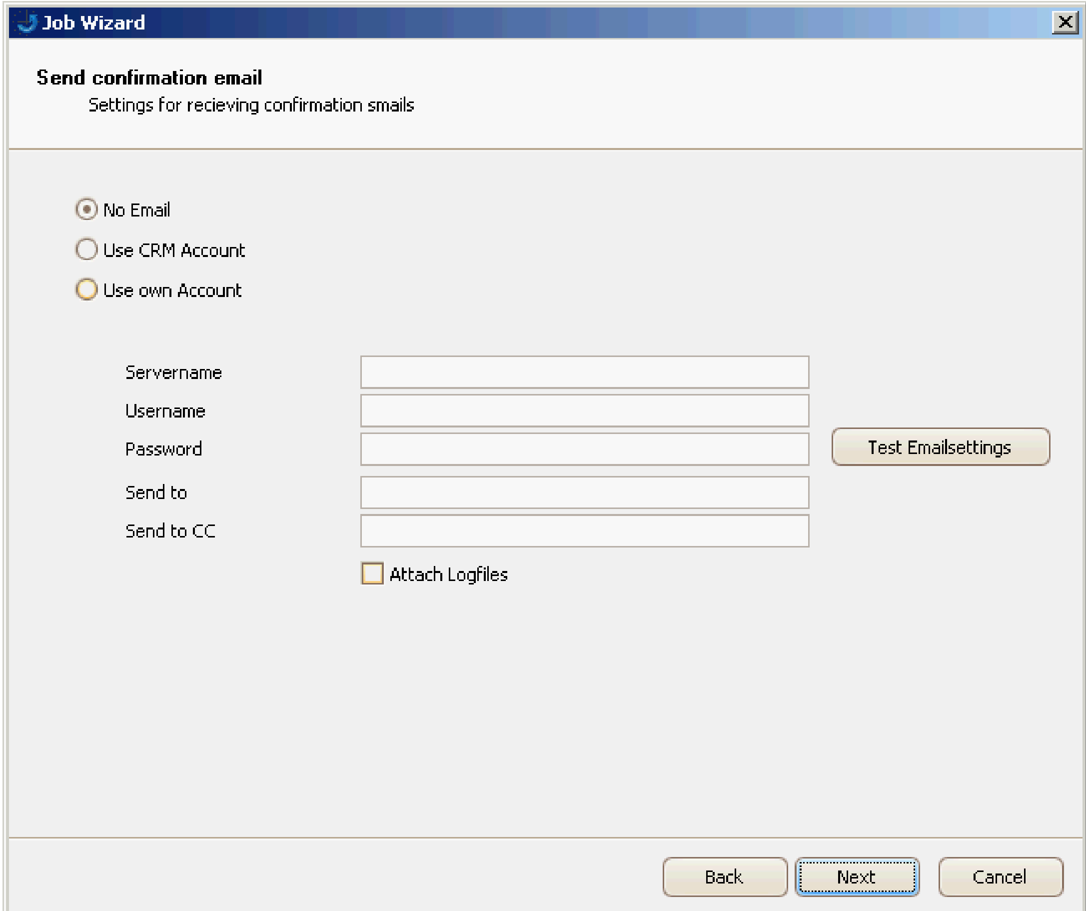

On the next dialog your tasks performance will be displayed in [Calendar view](#) :

**




If you would like to receive confirmation email each time the task is performed you will need to define mail server settings here:

**




When you specify all settings in the Wizard you will see the task in the Service tab of your Outreach IT program:

See also

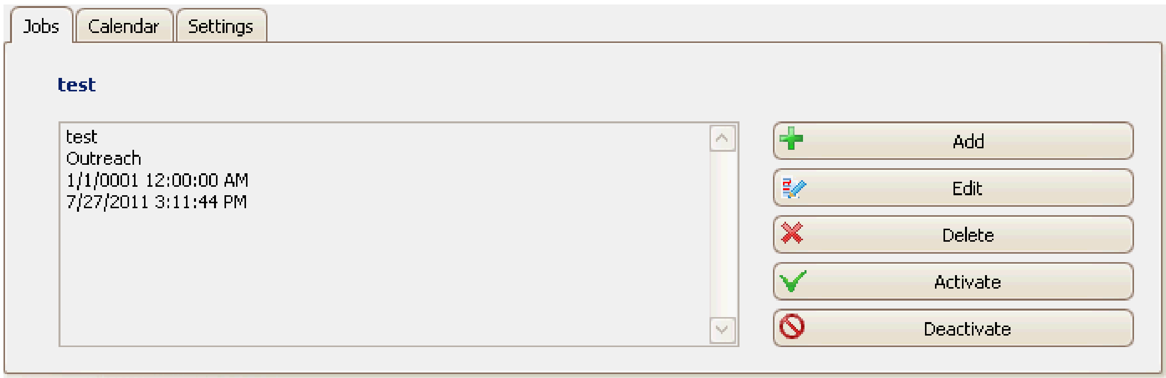
Jobs
Calendar View
Settings

**

Home > Service Task > Jobs

# Jobs

Jobs tab allows you to add/remove/edit and activate/deactivate your Service Task schemas. You will see the information on activities that was performed on Task Srvice schemas:




## See also

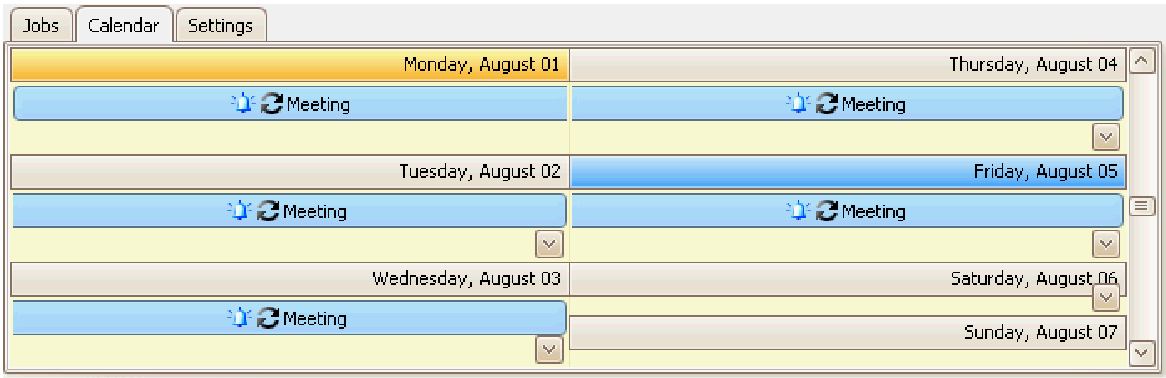
Creating Task Service Schema
Calendar View
Settings

**

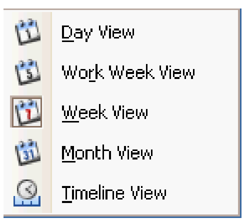
Home > Service Task > Calendar View

# Calendar View

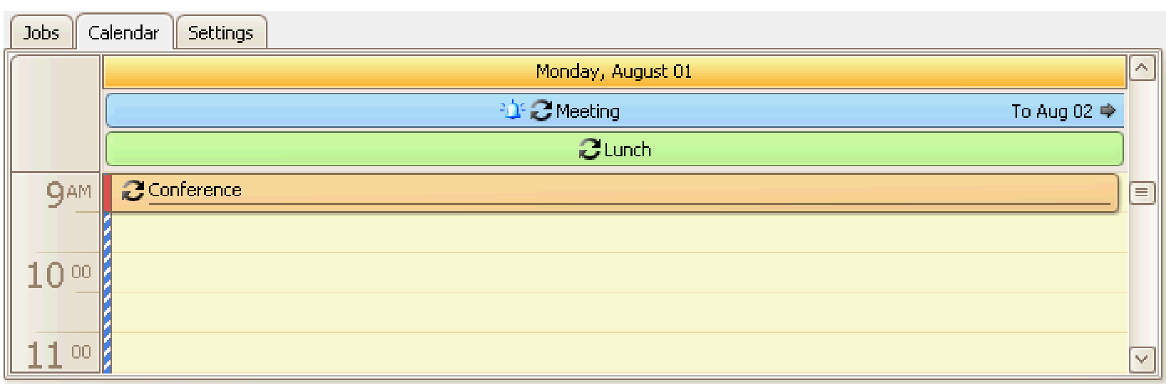
Calendar View tab displays tasks performance in a calendar. It has the following look (Week View example is provided below):




You can also select the format of events displaying:

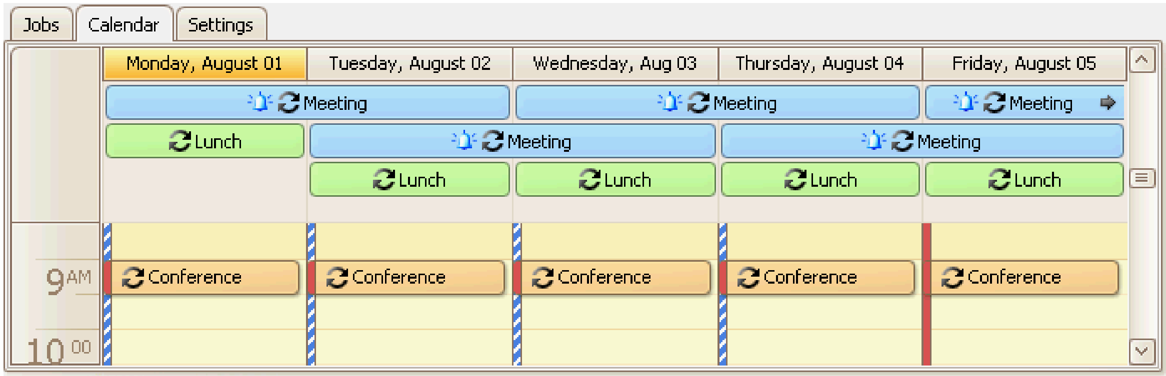



Day View has the following look:

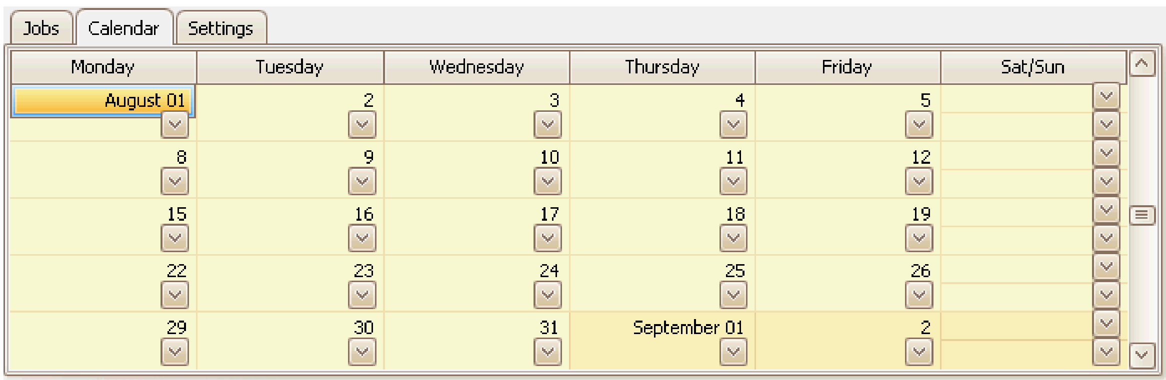



Work Week View has the following look:

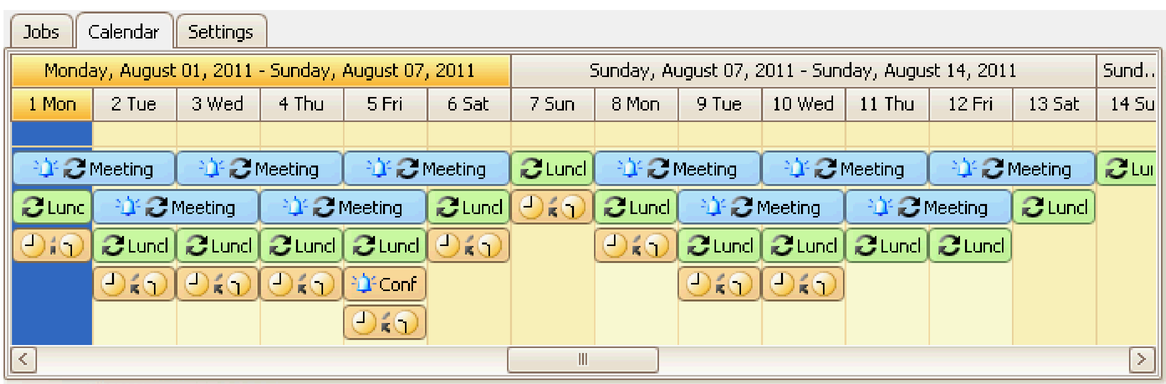
**




Month View has the following look:




Timeline View has the following look:




## See also

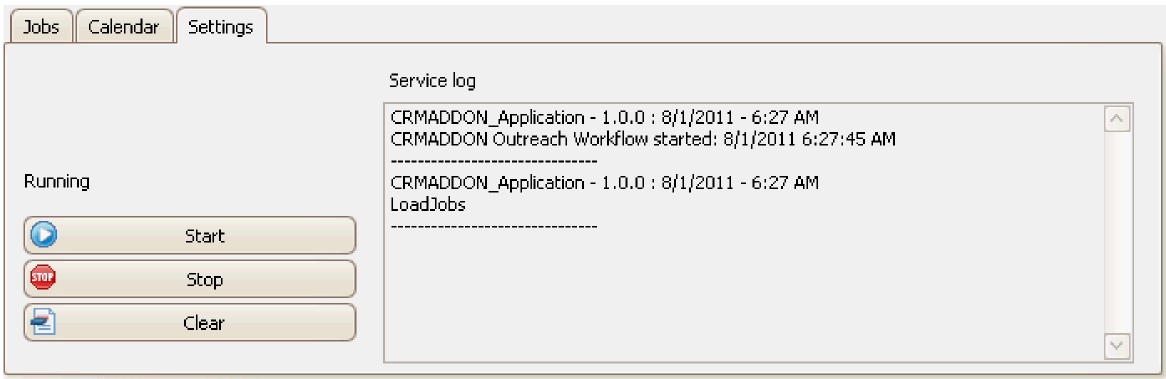
Creating Task Service Schema
Jobs
Settings

**

Home > Service Task > Settings

# Settings

In Settings tab you can review service log for Outreach IT program:




Click 'Start' to start gathering information regarding activities in Outreach IT application.
Click 'Stop' to stop gathering those details
Click 'Clear' button to clear the Service log list

## See also

Creating Task Service Schema
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Calendar View

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