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# outreachEN

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Home > System Requirements

# 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

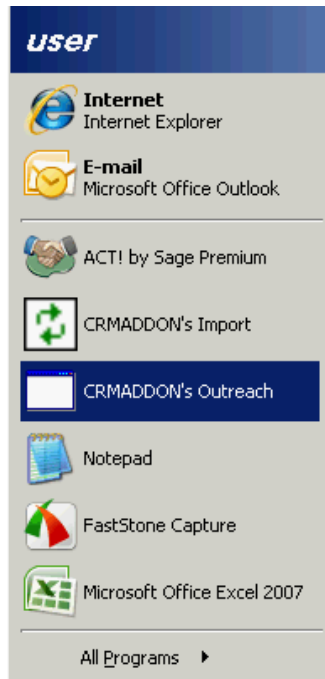
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Home > Outreach IT

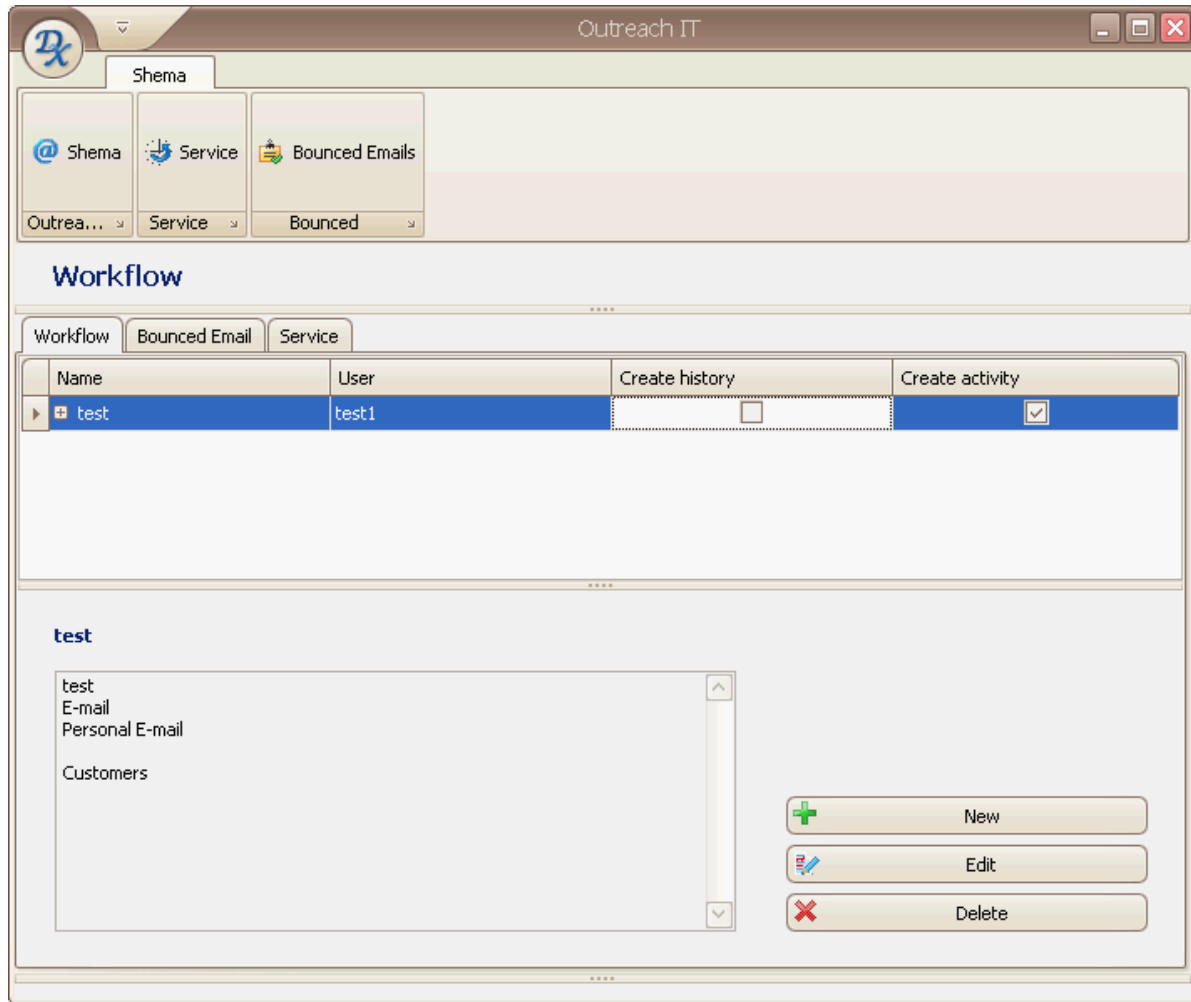
## Outreach IT

Outreach IT is a stand-alone program that is installed on your machine and 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):

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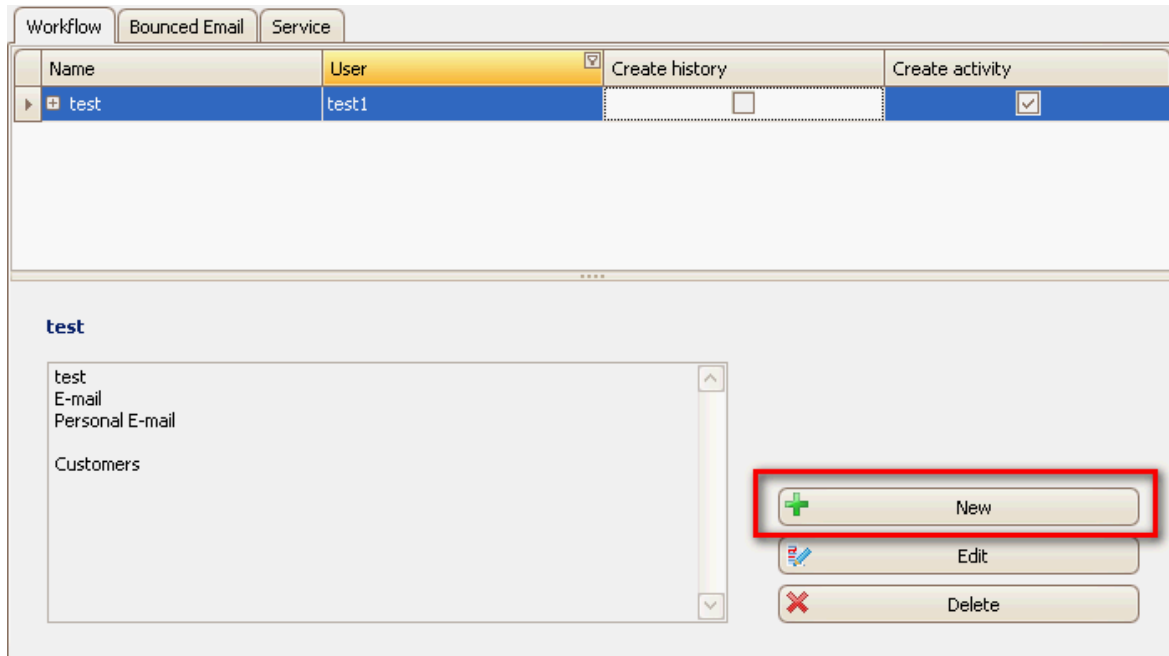
### See also

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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

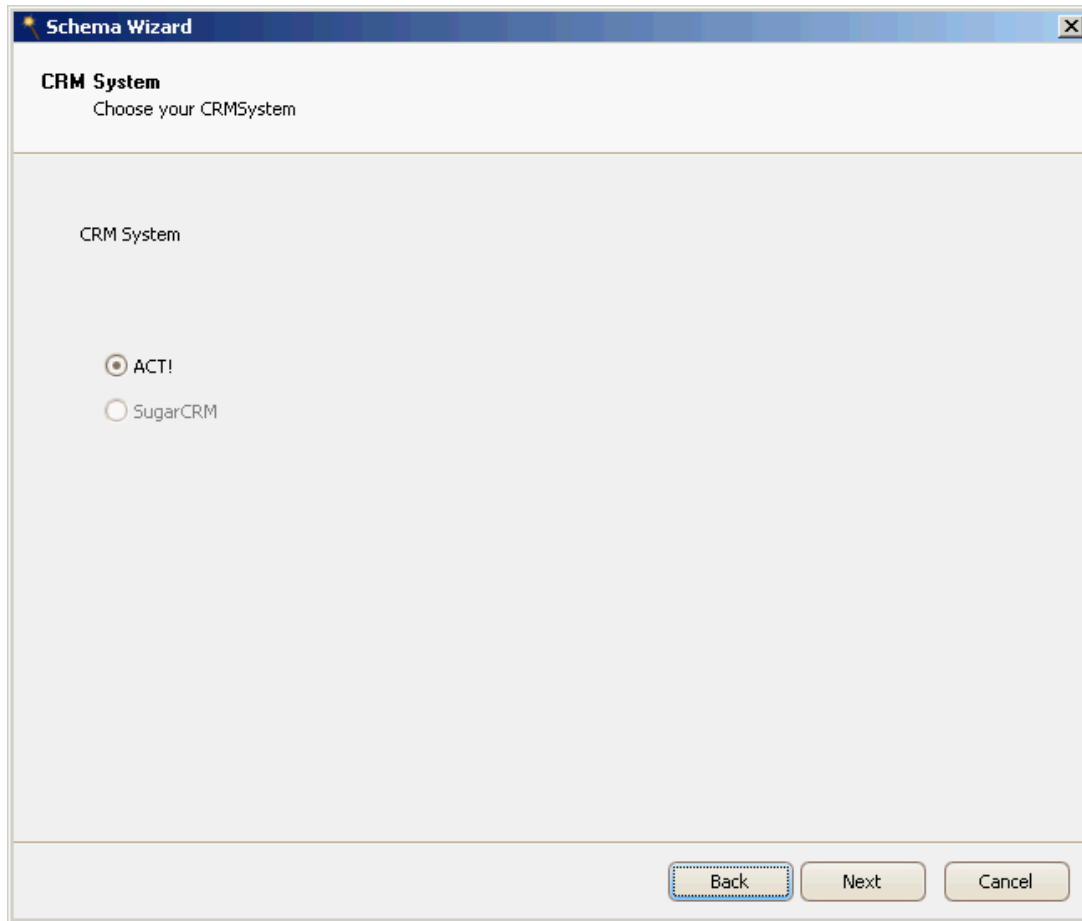
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Home > Workflow Schema > Workflow Wizard

## 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:

\*\*

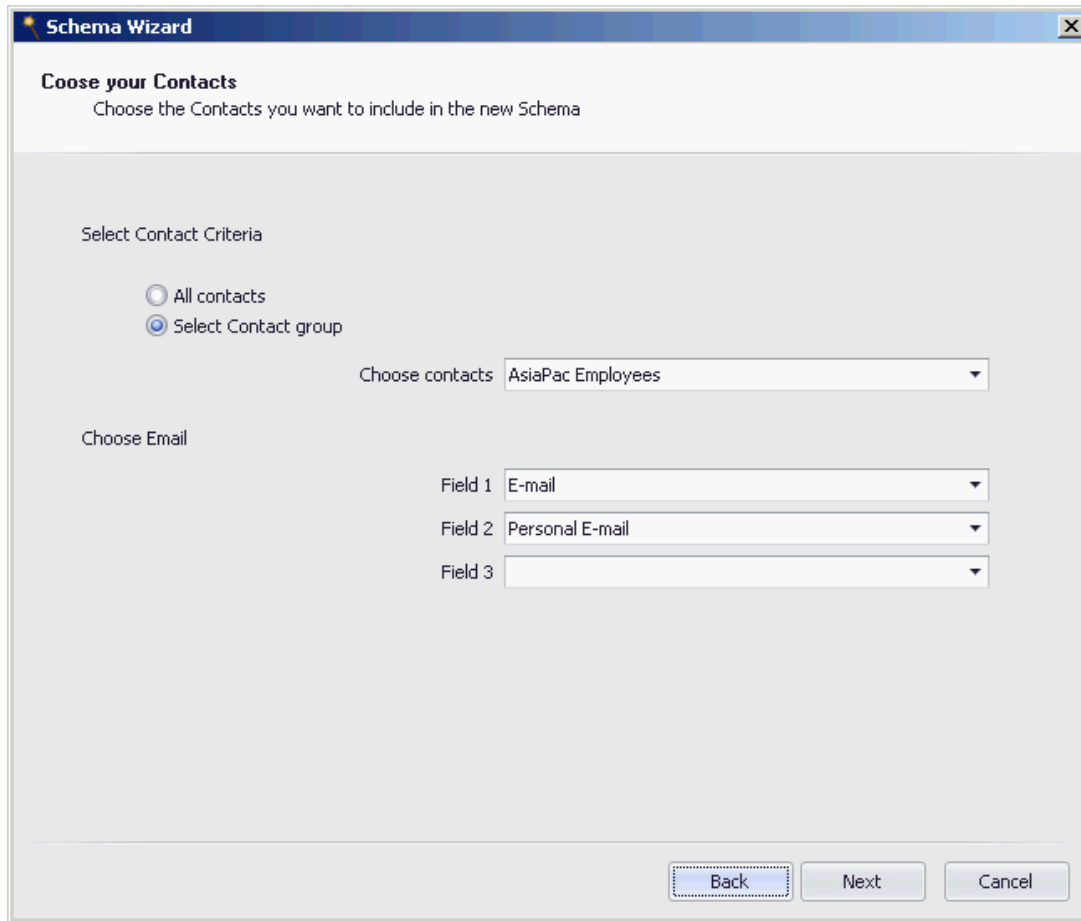
The screenshot shows a window titled "Schema Wizard" with a close button in the top right corner. Below the title bar, the text "Database details" is displayed, followed by the instruction "Please enter the details of the database you want to use".

The main area of the dialog is titled "Enter Your Login information" and contains the following fields:

- Schema Name:** A text box containing the value "test".
- Database:** A text box containing the path "C:\Documents and Settings\user\My Documents\ACT\ACT For Windows 12\Databa" followed by a browse button (three dots).
- Username:** A text box containing the value "test1".
- Password:** An empty text box.

Below the fields is a "Login" button with a key icon. At the bottom of the dialog are three buttons: "Back", "Next" (which is highlighted with a dashed border), and "Cancel".

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



The screenshot shows a dialog box titled "Schema Wizard" with a close button (X) in the top right corner. The main heading is "Choose your Contacts" with the instruction "Choose the Contacts you want to include in the new Schema".

Under "Select Contact Criteria", there are two radio buttons: "All contacts" (unselected) and "Select Contact group" (selected). Below this is a dropdown menu labeled "Choose contacts" with "AsiaPac Employees" selected.

Under "Choose Email", there are three dropdown menus labeled "Field 1", "Field 2", and "Field 3". "Field 1" is set to "E-mail", "Field 2" is set to "Personal E-mail", and "Field 3" is empty.

At the bottom right, there are three buttons: "Back" (highlighted with a dashed border), "Next", and "Cancel".

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

**Schema Wizard**

**Create workflow**  
Define the details of the workflow

Create workflow





Subject: Newsletter

Choose Emailbody: C:\Documents and Settings\All Users\Application Data\CRMADDON Ou

Attachment:

Send as:  HTML  RTF  Text

Time since last Mail: 3 days

Subject	Body Template	Attachment	Time between	Send As
▶ New product presen...	C:\Documents and S...		10080	HTML

Back Next Cancel

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.

The screenshot shows a window titled "Schema Wizard" with a sub-header "Send options" and the instruction "Define the options for your Email sending". The main area is titled "SMTP Settings" and contains the following fields and controls:

- Hostname: smtp.googlemail.com
- Username: apcrmaddon@googlemail.com
- Password: \*\*\*\*\*
- lsmtpPort: 587
- Send in packages
- Package size: 0 (spin box)
- Time between Packages: 10 minutes (dropdown)
- Use Proxy
- Test SMTP button
- Additional fields for Hostname, Username, Password, and Port.

At the bottom of the dialog are three buttons: "Back", "Next", and "Cancel".

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

Create history after Email sent

The image shows a screenshot of a software window titled "Schema Wizard". The window has a blue header bar with the title and a close button (X). Below the header, the text "Advanced Settings" is displayed in bold, followed by "Advanced Settings for your task". The main area of the window is light gray and contains the following elements:

- The text "Move contact to group afte email sent" (note the typo "afte").
- The text "Move contact to another group" followed by a dropdown menu showing "Customers".
- A checkbox labeled "Create history after Email sent", which is currently unchecked.

At the bottom of the window, there are three buttons: "Back", "Next" (which is highlighted with a blue dashed border), and "Cancel".

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:

The screenshot shows a 'Schema Wizard' dialog box with the following fields and options:

- Activities**: Details for Activities that can be created by this process
- Create activity ?**:  Create Activity
- RecordManager**: test1 (dropdown)
- Type**: Call (dropdown)
- Subject**: Follow up call (text input) with a 'Details' button
- Date**: 7/27/2011 (dropdown) and 5:00 PM (time dropdown)
- Duration**: 0 minutes (dropdown)
- Hint**:  Hint
- Private**:  Private
- Timeless**:  Timeless
- Use banner**:  Use banner
- Opening times**: from 5:00 PM (time dropdown) to 6:00 PM (time dropdown)
- Wait**: 5 minutes (dropdown)

Buttons at the bottom: Back, Next, Cancel.

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](#)

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[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](#)
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- [Creating Task Service Schema](#)

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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.


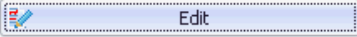

To create such schema you will need to follow Bounced Email Wizard steps and specify all required settings, such as your mail server and mailbox details, settings for bounced emails groups and unsubscribe settings. To start creating bounced email schema you need to follow 'Bounced Emails' tab in your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

Schema name	Mailbox	Use Proxy	Check bounced emails
▶ test_bounced emails	apcrmaddon@googlemail.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**test\_bounced emails**

pop.googlemail.com  
 apcrmaddon@googlemail.com  
 apcrmaddon@googlemail.com  
 Type: Bounced  
 Type: Unsubscribe

 Add
 Edit
 Delete

### See also

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[Outreach IT](#)  
[Workflow Schema](#)  
[Service Task](#)

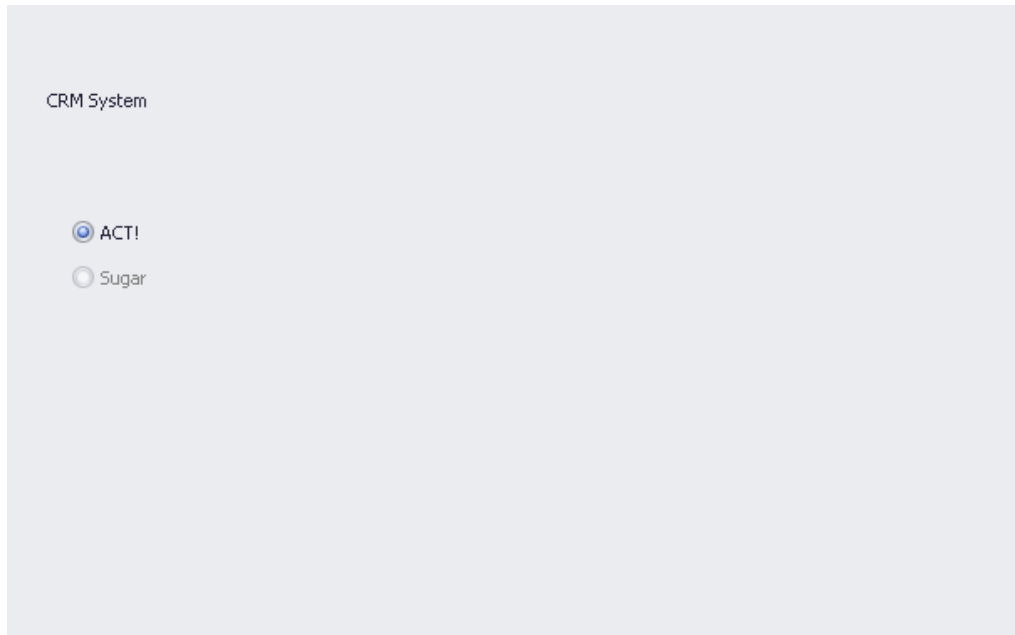
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Home > Bounced Emails Schema > Bounced Emails Wizard

## Bounced Emails Wizard

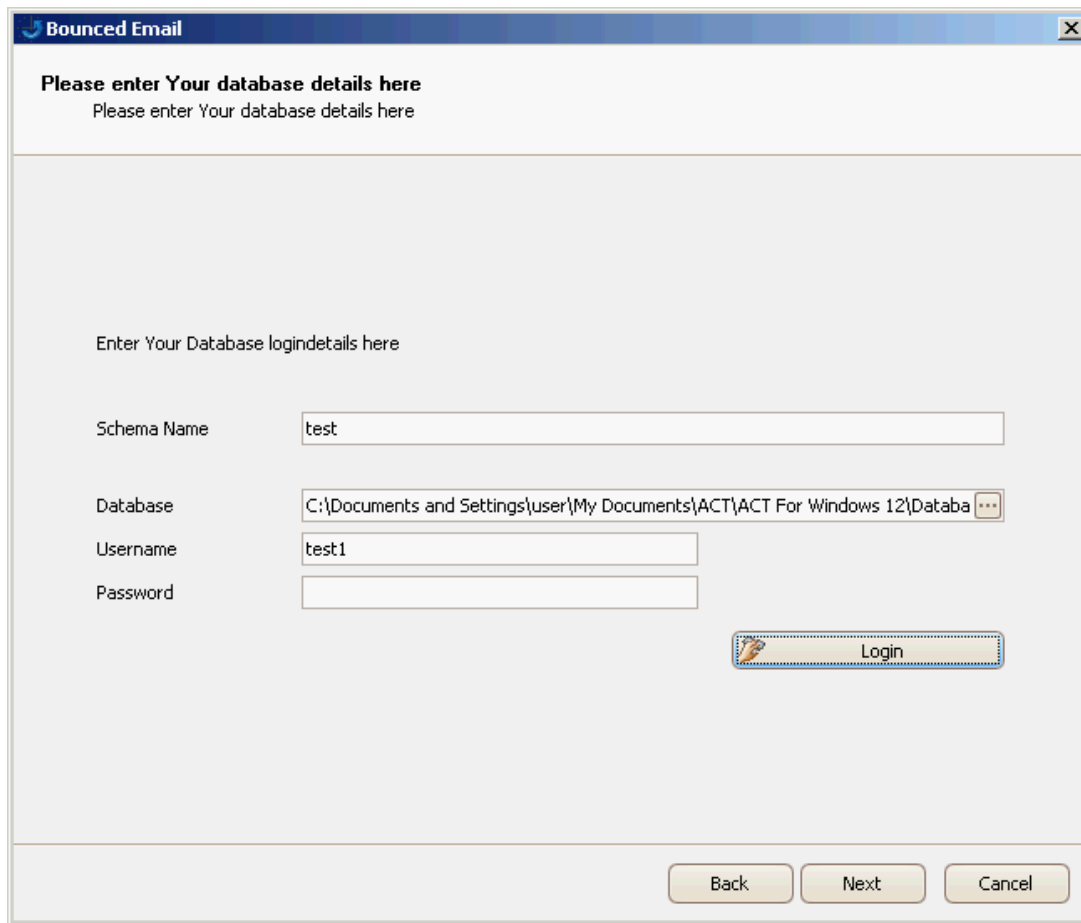
After clicking 'Add' button on the Bounced Emails Tab the Wizard will start.

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:



The screenshot shows a light gray rectangular area representing the wizard's interface. At the top left, the text "CRM System" is displayed. Below it, there are two radio button options. The first option is "ACT!" with a blue radio button that has a white dot in the center, indicating it is selected. The second option is "Sugar" with a gray radio button that is empty.

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



The screenshot shows a window titled "Bounced Email" with a close button in the top right corner. The main content area contains the following text and fields:

**Please enter Your database details here**  
Please enter Your database details here

Enter Your Database logindetails here

Schema Name:

Database:  ...

Username:

Password:

At the bottom of the window, there are three buttons: , , and .

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.

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See also

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Home > Service Task

## Service Task

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

The screenshot shows the 'Service' tab in a software interface. At the top, there are tabs for 'Workflow', 'Bounced Email', and 'Service'. Below these is a table with the following data:

Running	Job name	Schema name	Schema type	Last run	Next run
▶	test	test	Outreach	1/1/0001	7/27/2011

Below the table, there are tabs for 'Jobs', 'Calendar', and 'Settings'. The 'Jobs' tab is active, showing a detailed view for the task 'test'. The view includes a scrollable list of task details:

```
test
Outreach
1/1/0001 12:00:00 AM
7/27/2011 3:11:44 PM
```

To the right of the list are five action buttons:

- Add (with a green plus icon)
- Edit (with a blue pencil icon)
- Delete (with a red X icon)
- Activate (with a green checkmark icon)
- Deactivate (with a red circle and slash icon)

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

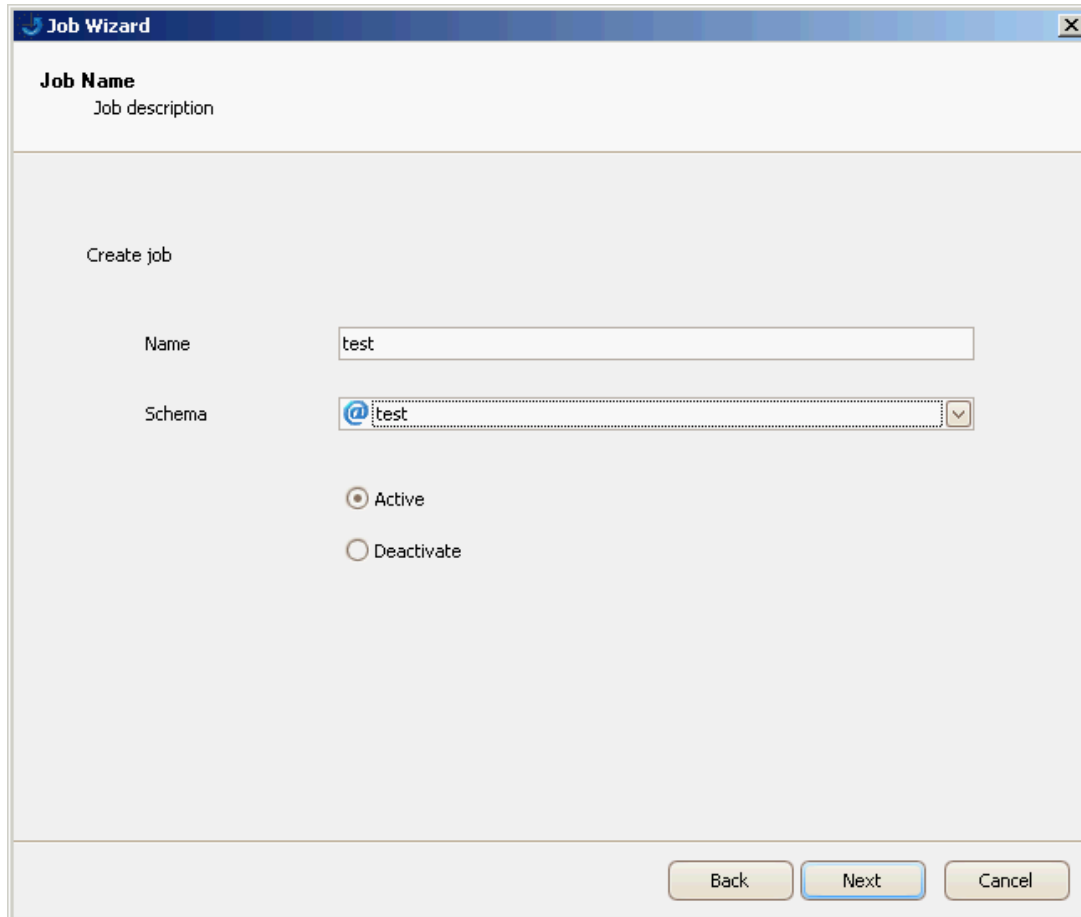
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[Bounced Emails Schema](#)

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:



The screenshot shows a dialog box titled "Job Wizard" with a close button in the top right corner. The dialog is divided into sections. The top section is labeled "Job Name" and contains a "Job description" field. Below this is a section titled "Create job" which contains two main fields: "Name" and "Schema". The "Name" field is a text input containing the word "test". The "Schema" field is a dropdown menu with a blue icon and the text "@test" and a downward arrow. Below these fields are two radio buttons: "Active" (which is selected) and "Deactivate". At the bottom of the dialog are three buttons: "Back", "Next" (which is highlighted with a blue border), and "Cancel".

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 the 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.

**Recurrence**  
Description

Recurrence

- Pattern hourly
- Pattern daily
- Pattern weekly
- Pattern monthly
- Pattern yearly

Appointment time

Start time 7:11:44 AM

Pattern

Recure  Minutely every 1   Hourly

Range of Recurrence

Start 8/1/2011

Unlimited

End after 1 Occurrences

End by 3/3/2011

Back Next Cancel

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

**Job Wizard**

**Calendar**  
Calendar description

Monday, August 01	Thursday, August 04
7:11 AM 7:41 AM ↻	
8:11 AM 8:41 AM ↻	
9:11 AM 9:41 AM ↻	
10:11 AM 10:41 AM ↻	
Tuesday, August 02	Friday, August 05
12:11 AM 12:41 AM ↻	
1:11 AM 1:41 AM ↻	
2:11 AM 2:41 AM ↻	
3:11 AM 3:41 AM ↻	
Wednesday, August 03	Saturday, August 06
12:11 AM 12:41 AM ↻	
1:11 AM 1:41 AM ↻	
2:11 AM 2:41 AM ↻	
3:11 AM 3:41 AM ↻	
	Sunday, August 07

Back Next Cancel

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

\*\*

The screenshot shows a window titled "Job Wizard" with a sub-header "Send confirmation email" and the text "Settings for receiving confirmation emails". There are three radio button options: "No Email" (selected), "Use CRM Account", and "Use own Account". Below these are five text input fields labeled "Servername", "Username", "Password", "Send to", and "Send to CC". To the right of the "Password" field is a "Test Emailsettings" button. Below the input fields is a checkbox labeled "Attach Logfiles". At the bottom of the window are three buttons: "Back", "Next" (highlighted with a dashed border), and "Cancel".

When you specify all settings in the Wizard you will see the task in the [Service tab](#) of your Outreach IT program:

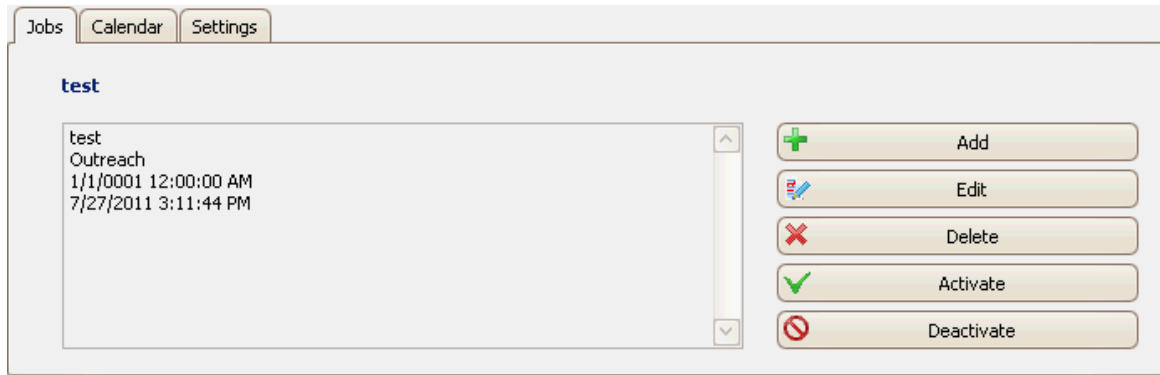
#### See also

[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 Service schemas:



See also

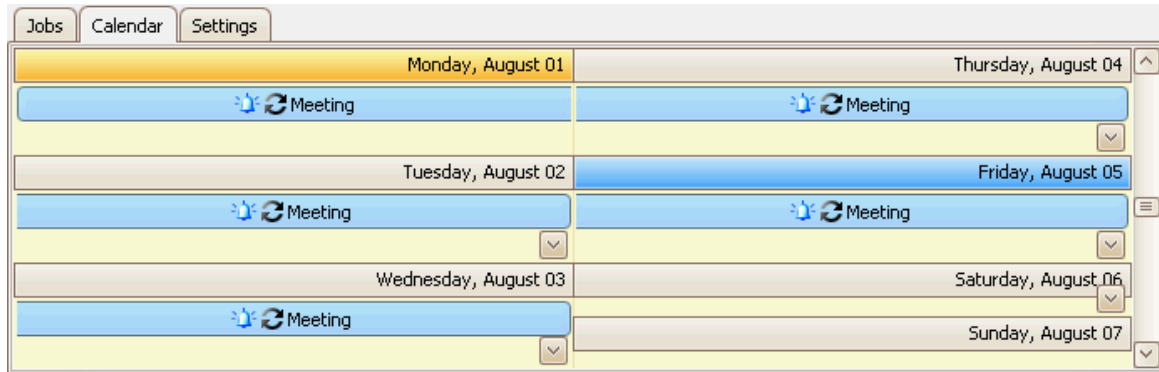
- [Creating Task Service Schema](#)
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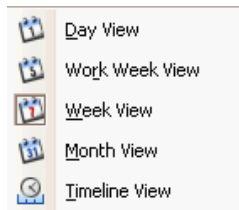
Home > Service Task > Calendar View

## Calendar View

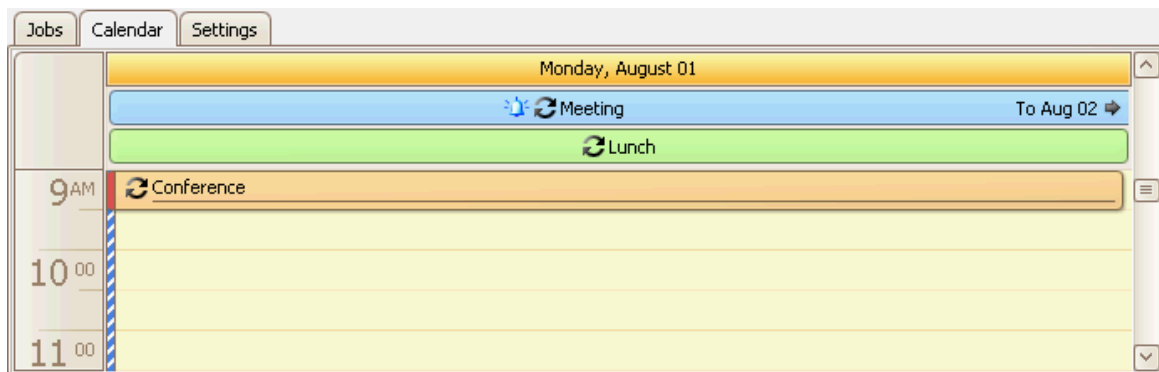
Calendar View tab displays tasks performance in a calendar. It has the following look (Week View example is provided below):



You can also select the format of events displaying:

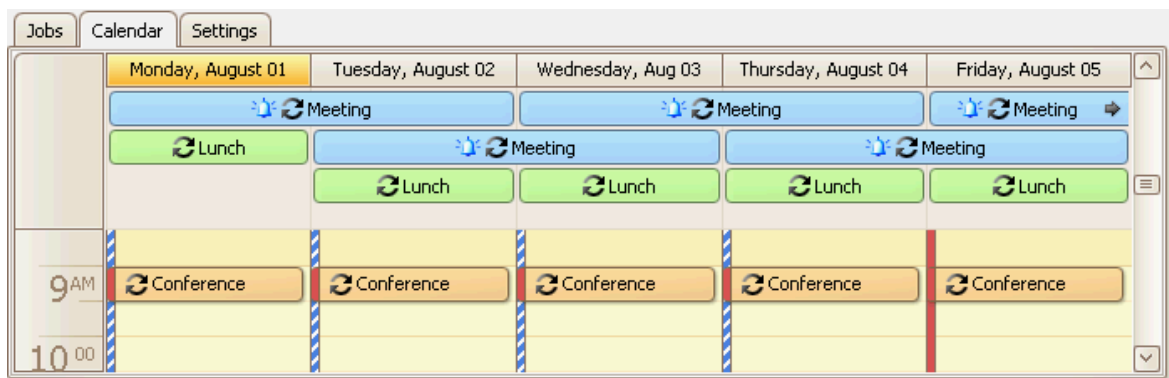


Day View has the following look:

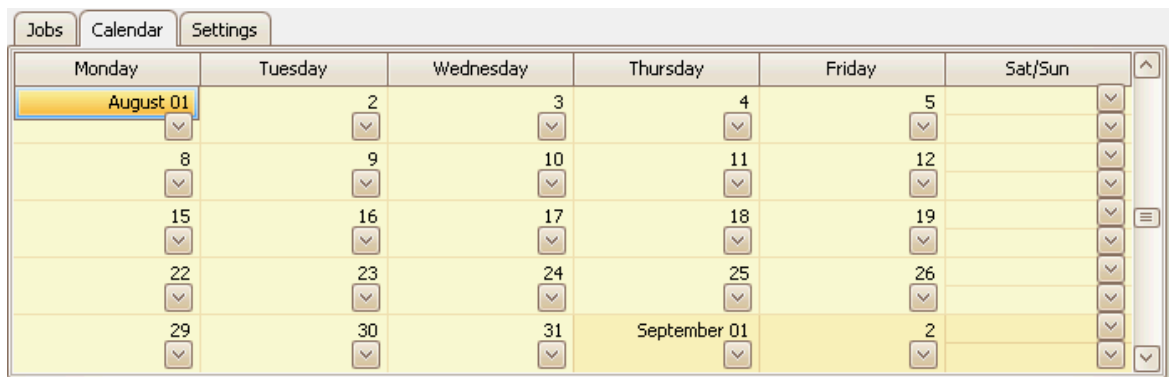


Work Week View has the following look:

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Month View has the following look:



Timeline View has the following look:



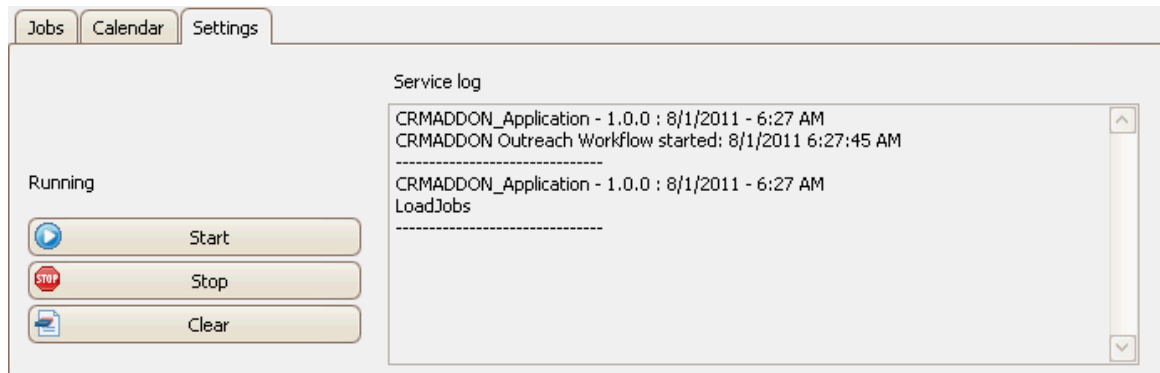
See also

- [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](#)

[Jobs](#)

[Calendar View](#)

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