

SENDING CORRESPONDENCE

If you see an E-mail Address, Fax No or Address anywhere in the system and either double-click it, or if there is an associated Button, click it, the system will open a **SEND – E-mail**, **SEND – Fax** or **SEND - Letter** Form as shown pre-addressed to the Organisation or Person concerned.

These forms all behave in the same way. Simply choose who you want it to go to and how to address them. Leave it set to Custom E-mail, Custom Fax, or Custom letter, specify the **Subject** and click **Send E-mail**, **Send Fax** or **Send Letter** as appropriate.

GEM will open the appropriate Custom Template in WORD, substitute the appropriate fields and wait for you to do some editing. Simply click on:

[Click here to add – Body of E-mail]

[Click here to add – Body of Fax] or

[Click here to add – Body of Letter].

and add whatever you want to say. When you've finished simply click: **Send a Copy** to send an E-mail or Fax, or print your letter as normal. Then **Close** your WORD Document as normal.

When prompted whether you want to save your document, it does not matter what you tell WORD. If you left **Make 'Diary Note'** checked, GEM will create a 'Diary Note' for you anyway.

If you want to send an E-mail, Fax or Letter to someone other than the currently visible Organisations or People, then you can click on the **Send E-mail**, **Send Fax** or **Send Letter** Buttons in the GEM Toolbar.



This will open the same **SEND – E-mail**, **SEND – Fax** or **SEND - Letter** Form as before. But this time you will have to select the Person or both the Organisation and Staff Member that the correspondence is to go to.

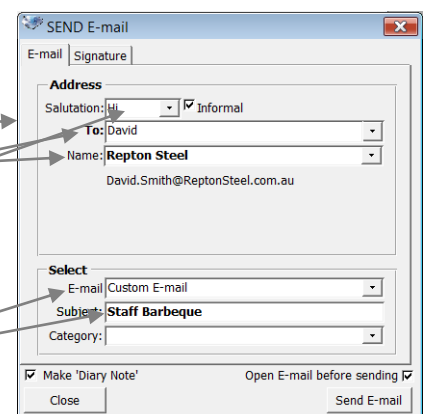
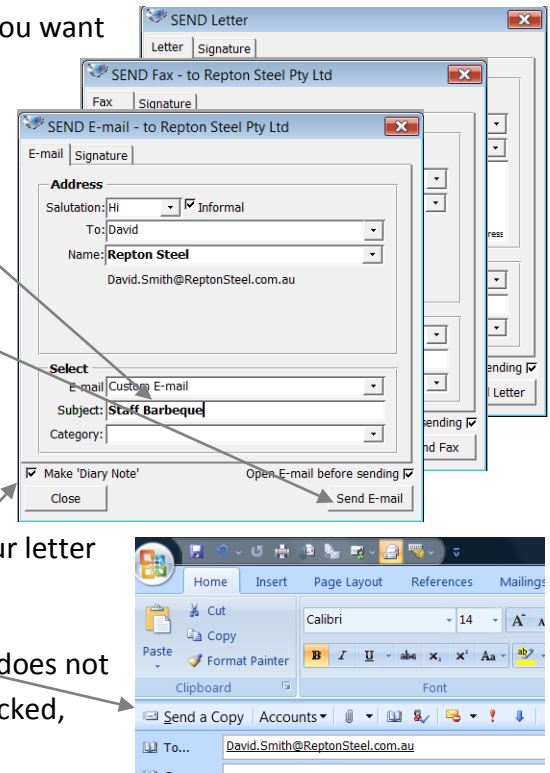
Exercise – SEND a Custom E-mail

This seems like a long exercise because it is illustrated at EVERY step of the way, so that you know what to expect. It will take longer to read about therefore, than to do it.

Log into GEM and click on the **Send E-mail** Button on the GEM Toolbar, as above. This will open the **SEND – Email** Form.

Enter the **Name** 'Repton Steel' and then choose the CEO, David Smith from the Drop-down Staff List in the **To** field. This displays David Smith's E-mail Address.

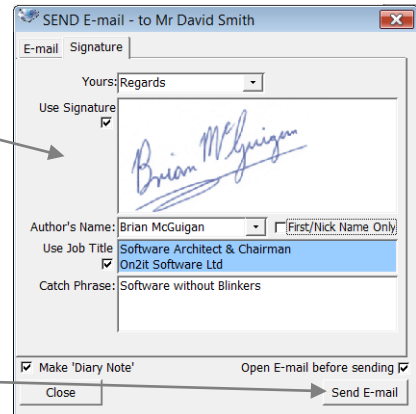
Play around with the **Salutation** and **Informal** Controls and see what difference they make to the **To** field. Leave **E-mail** set to 'Custom E-mail'. Enter the **Subject** 'Staff Barbeque'.



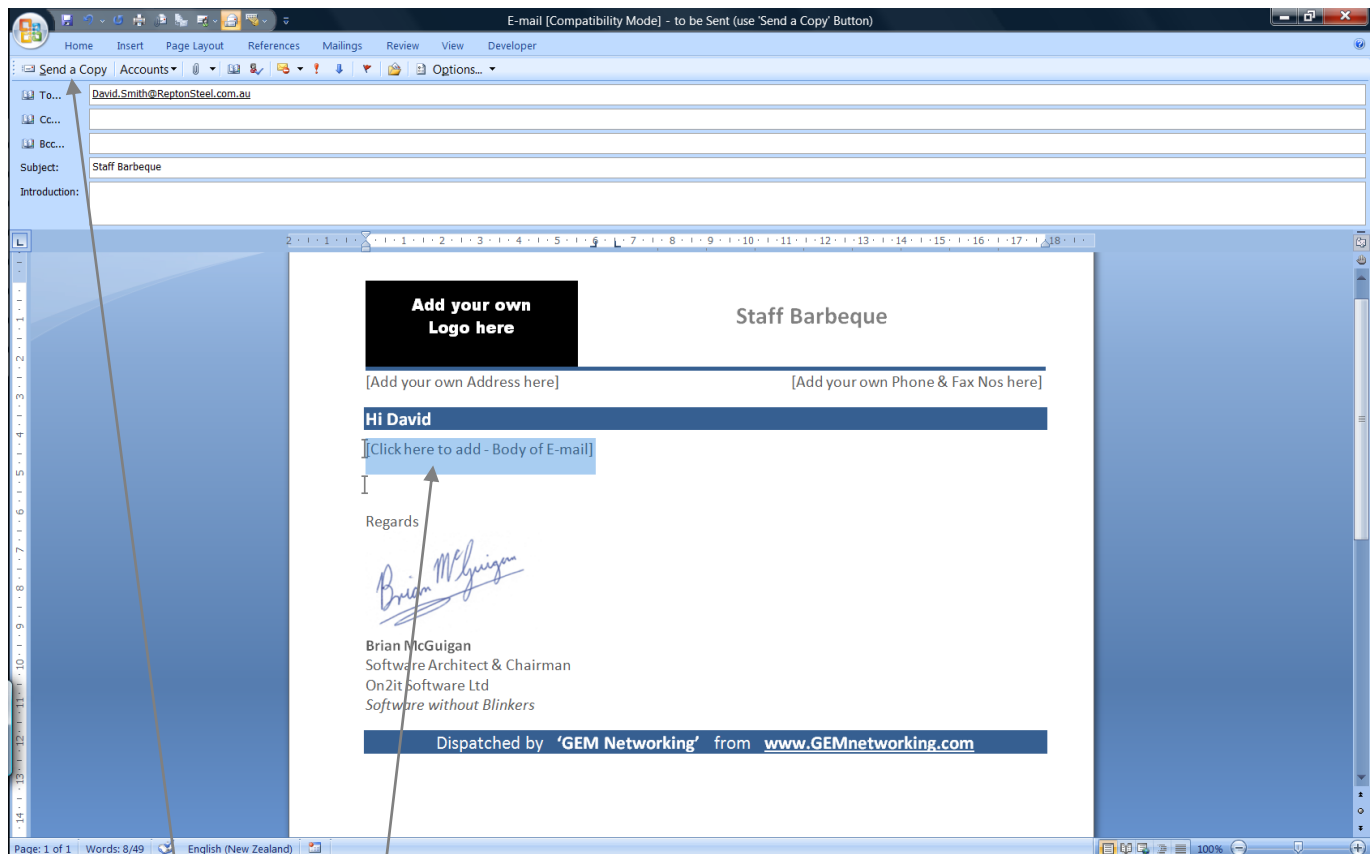
Check the **Signature** Tab looks like this:

You won't have a Signature that you can use, but it should be showing the name of your Organisation and perhaps your Job Title – depending upon whether you gave yourself one when you created your own record. This Tab is reasonably self explanatory, but if you need more information, just press **F1** for context sensitive HELP.

Now click the **Send E-mail** Button. (Don't worry this is a hypothetical Organisation, so the E-mails will bounce later.)



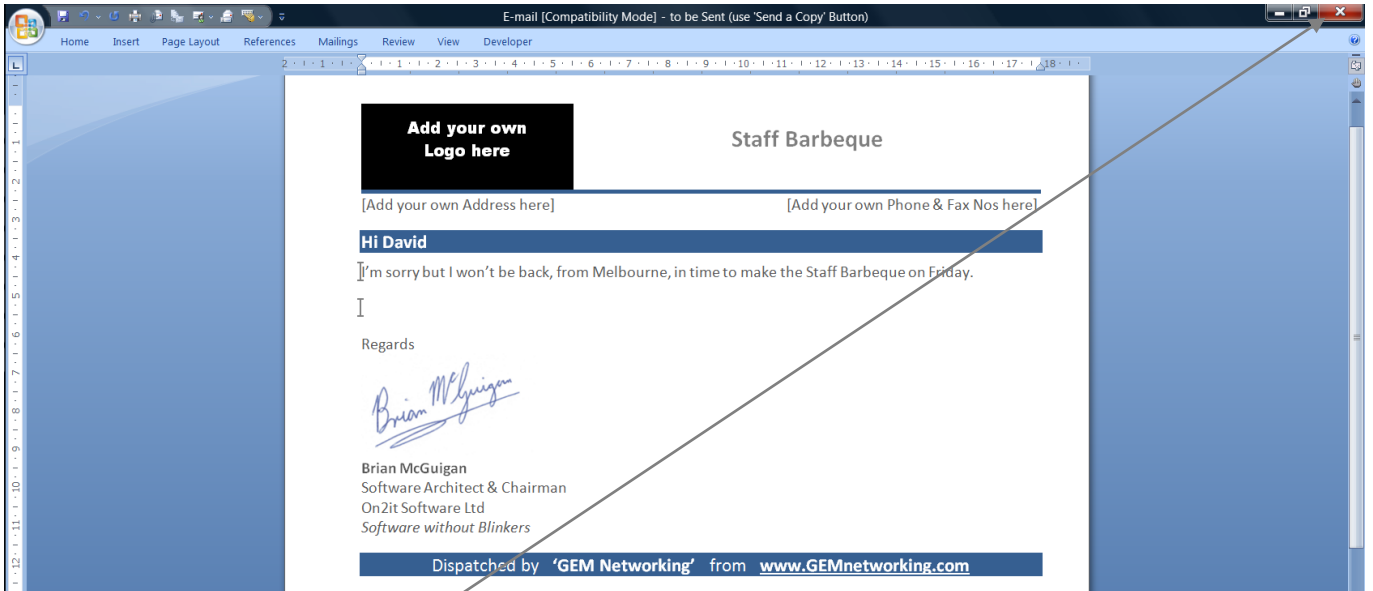
This should open WORD and display an E-mail formatted for you as below.



It should, of course, have your own details, instead of mine – but you get the idea.

Now click in the **[Click here to add – Body of E-mail]** and type “I’m sorry but I won’t be back, from Melbourne, in time to make the Staff Barbeque on Friday.”

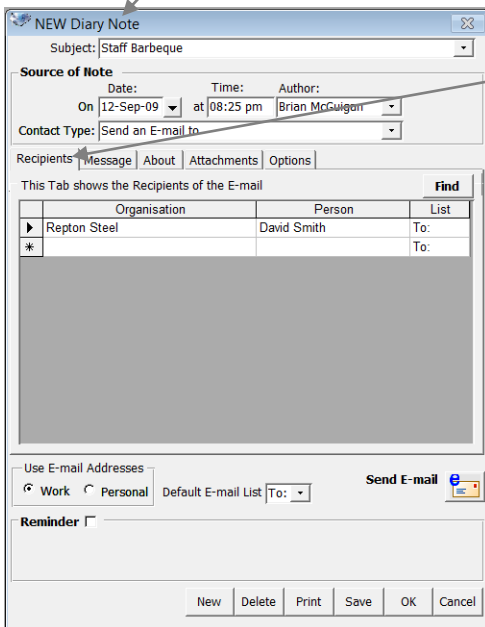
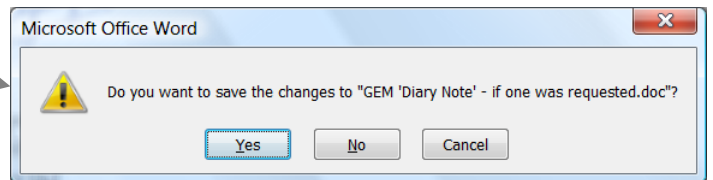
Now click **Send a Copy**. WORD will send the E-mail to MS Outlook and WORD’s E-mail fields will close.



Don't worry too much if your screen does not look exactly like this. This was done in WORD 2007 and I hid the 'Office Ribbon' by double-clicking one of the Tabs on the Ribbon.

You can now close WORD, as normal.

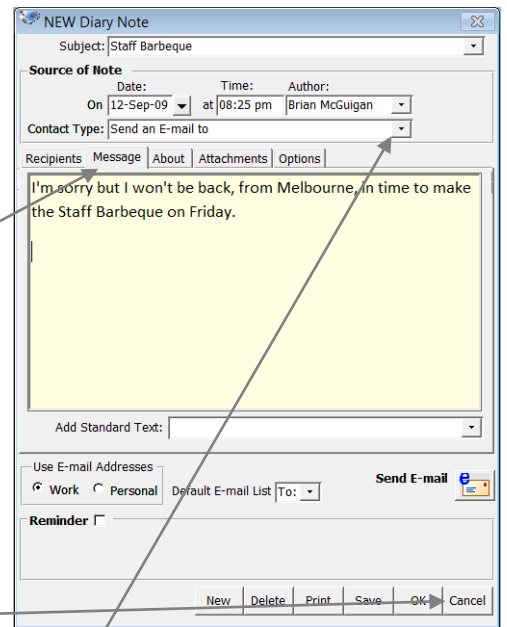
It does not matter how you answer this question. Because the **Make 'Diary Note'** Control was checked in the **SEND – E-mail Form**, GEM will make a **NEW Diary Note** for you anyway.



If you look at the **Recipients Tab** you will see that it has recorded both the Organisation and the Person the E-mail went to.

The **Message Tab** contains the Message itself.

We don't want to save the Diary Note, so instead of clicking Save or OK, just click **Cancel**.



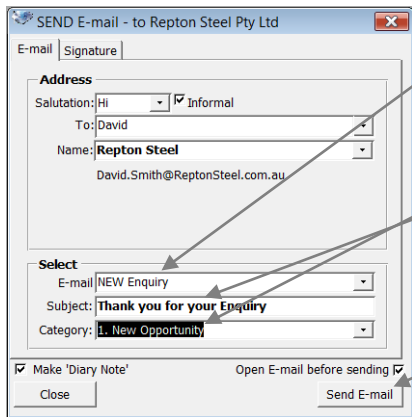
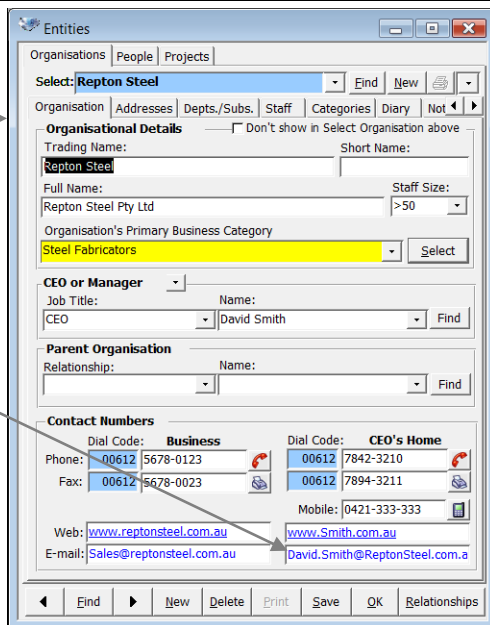
GEM uses 'Diary Notes' to originate, send and record all correspondence. They can also be used to record anything else that involves a date. Examine all the **Contact Types** available. (You can even add your own, if you wish.) Use the **F1** Key for context-sensitive HELP to get more information

Exercise – Sending a Standard E-mail

Open Repton Steel’s Record.

Double-Click David Smith’s E-mail Address.

This will open the **SEND – E-mail** Form already addressed to David Smith.



Select E-mail 'NEW Enquiry'

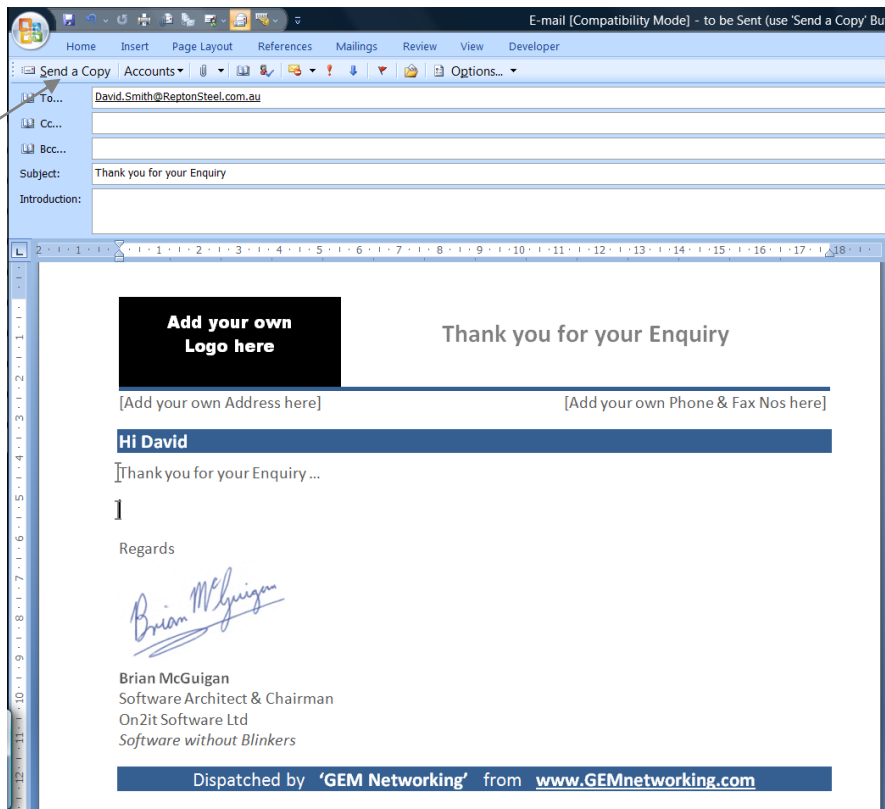
This will complete the **Subject** and **Category** you selected when you setup the WORD Template.

Click **Send E-mail** Button.

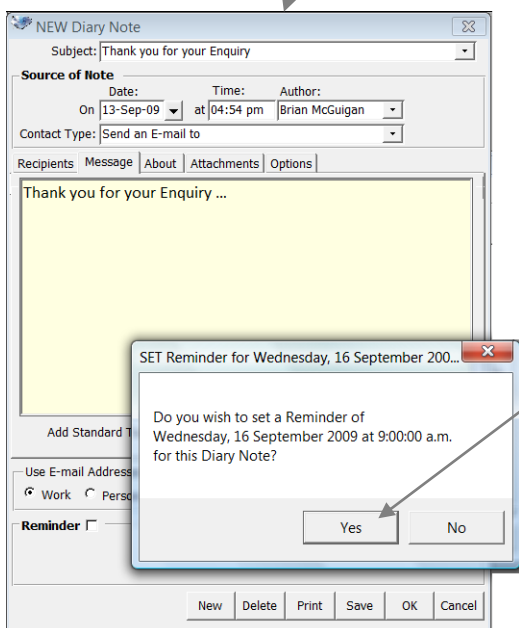
GEM will then open a copy of the WORD Template, address it and sign it for you.

Make any changes you like.

Click **Send a Copy** and close the document.



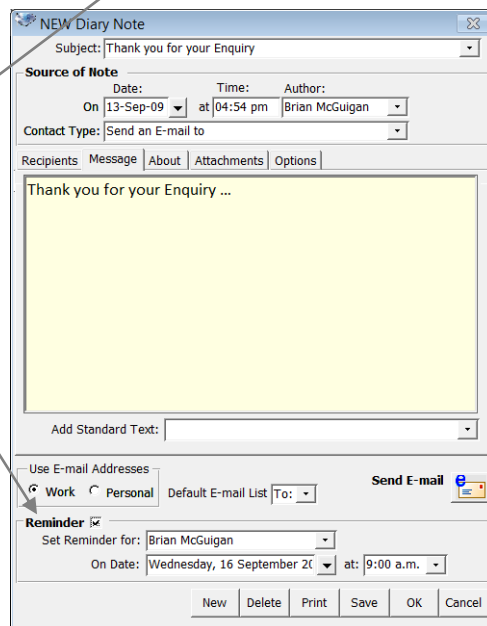
GEM will create a **NEW Diary Note** for you and suggest a default reminder.



If you want to set a reminder click **Yes**.

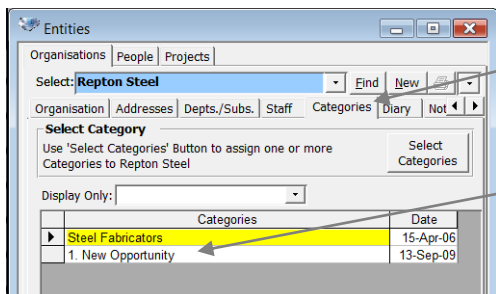
This will add a **Reminder** for you at the bottom of the Diary Note.

You can turn the Reminder On/Off, change who it's for and change its timing.



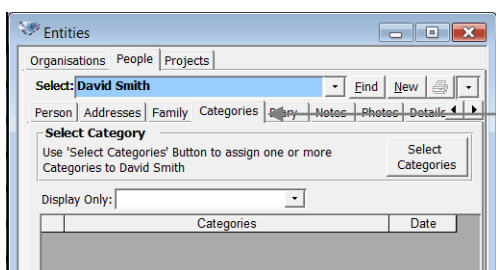
Let's have a look at the **Recipients** Tab to check who the E-mail went to.

As elsewhere in the system you can bring up anyone's record just by double-clicking their name. But at the moment Repton Steel's record should be on the left-hand side of the screen. So let's



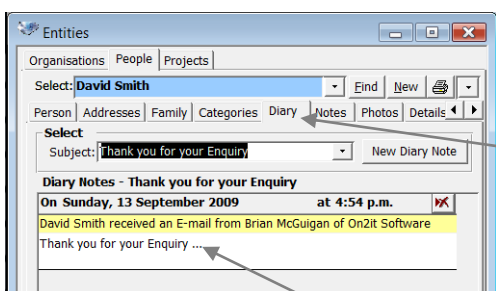
have a look at their **Categories** Tab.

As you can see the Category got allocated correctly.



Double-Click David Smith's name to display his record and look at his **Categories** Tab.

As you can see he did NOT get a Category added. This was because the e-mail was sent to Repton Steel. David Smith was merely acting as their representative. (If the E-mail had been sent to David Smith in his private capacity, he would have got the Category and Repton Steel wouldn't have.)

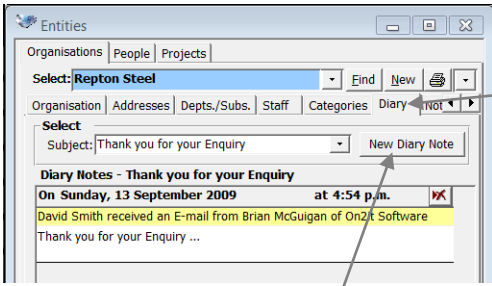


Save and close the **NEW Diary Note** by clicking on it's **OK** Button.

Now click on David Smith's **Diary** Tab.

As you can see his Record shows the original Diary Note.

To re-display the Diary Note double-click the text of the note. It will be re-displayed on the right.

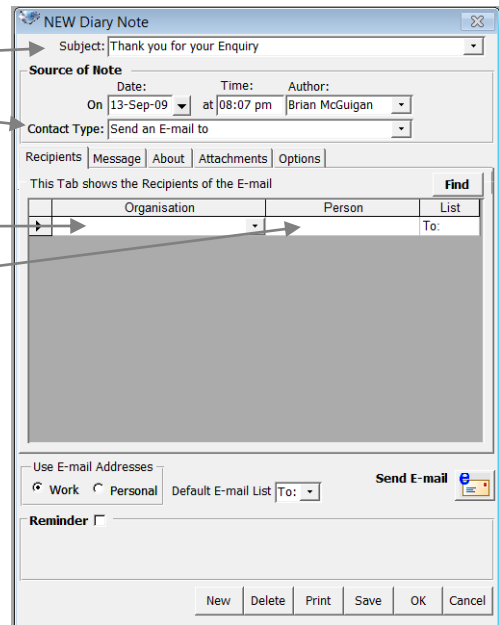


Double-Click 'Repton Steel' on the Diary Note to display their Record and then their **Diary** Tab.

As you can see their record shows the Diary Note too.

Both Repton Steel's record and David Smith's record will continue to show the Diary Note even if David Smith no longer works for Repton Steel. Furthermore Repton Steel's record will still show that it was David Steel involved – even though he would no-longer be on their Staff list.

Now click the **New Diary Note** Button. This will open a new Diary Note on the right with the same **Subject** already set, but it won't be addressed to anyone in particular. The **Contact Type** will be set to whatever you last created a Diary Note for.



Now double-click in **Organisation**. 'Repton Steel' will be copied from the Entities Form. You will then have to select 'David Smith' from the Staff list in the **Person** column. (If you had known only one Person at Repton Steel their name would have been inserted too.)

Conclusion

So you can see there are several ways you can initiate correspondence and keep a note of what you have done - the more specific the context that you start from, the more of the next Form will be completed for you.

You will find the same principles and Forms still apply when we go on to look at 'Using FIND and Mail-Merge' in the next module.