



DAILY EMAIL NOTIFICATION CONTENT

If the customer chooses to have Daily Email Notification [this feature needs to be requested when the individual workgroup is set up and turned on in the individual user logon] then a template must be set up to define the basic content and other key data. Daily Email Notifications are prepared and sent to individuals at 1am each day.

Email Notifications can be produced for any of the four assignment level personnel: Group (main contact), Acct Mgr, Partner (main contact) and Partner Rep.

The Email Notification contains the following events:

- New Leads the prior day (input via load process or manual add)
- Leads reassigned the prior day
- Lead expiring (see description of this feature in Campaign Management)
- Call Backs today

Description of Email Notification Content fields:

- Company – the name of the workgroup that this Email Notification Content belongs to
- From Name – What is to appear in the From Name of the individual Email Notification
- From Address – this address needs to be set up when the signing up for the application
- Body – what appears in the Email Notification preceding the four items listed above

The following is what the Email Notification Content template screen look like:

Daily Email Notification Content

Workgroup	XYZ Widgets
From Name	Alive Sales & Marketing Departm
From Address	emailnotifications@leadmaster.ct <small>Please enter a valid email address, e.g. sales@companyabo.com</small>
Subject	LEAD NOTIFICATION
Body	<p>[Please do not reply to this e-mail, this is an unattended e-mail account]</p> <p>This is to notify you that a sales opportunity has been posted on our lead management system.</p> <p>Go to http://www.leadmaster.com/login and log into using your user name.</p> <p>If you have any questions, please contact Sandy Perko at sperko@alive.com</p>

Update Information

Date Created:	Before 8/12/2002	Last Updated:	Updated By:
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The following is what a sample Daily Email Notification would look like that was sent out by the application at 3 AM EST:

From: "Alive Sales & Marketing Department" <emailnotifications@client.com>
To: "Mike Jolly" <mike.jolly@alive.com>
Subject: Leads Notification

Company: Alive

[Please do not reply to this e-mail, this is an unattended e-mail account]

This is to notify you that a sales opportunity has been posted on our lead management system.
Go to <http://www.client.com/login> and log into using your user name.
If you have any questions, please contact Sandy Perko at sperko@alive.com

- 1 New Lead(s) assigned on 17-Jul-2007
 - Leeds Consulting Group: Bill Jones

- 4 Re-assigned Lead(s) on 17-Jul-2007
 - Heads Up Technologies: Frank Smith
 - Inet Inc.: Sally Fields
 - Intervoice Inc.: Sharon Young
 - Motorola: Bob Lang

- 3 Lead(s) must be followed-up immediately
 - Analog Modules: Dick Mason



- Comtech Systems: Nancy Wills
- Dynacs Engineering Co. Inc: Ronda Taylor

[Note: Group and Partner main contacts will receive a “recap” of their respective Acct Mgrs or Partner Reps (if they have Email Notification activated).

LEADMASTER

EXPRESS EMAIL NOTIFICATION CONTENT

If the customer chooses to have Express Email Notification [this feature needs to be turned on in the individual user logon] then a template must be set up to define the basic content and other key data. Express Email Notifications are prepared and sent to individuals immediately at the time that a lead is manually assigned online. Note: If a group of leads is assigned manually at one time then no Express Email Notification is sent.

Email Notifications can be produced for any of the four assignment level personnel: Group (main contact), Acct Mgr, Partner (main contact) and Partner Rep.

Description of Email Notification Content fields:

- Company – the name of the workgroup that this Email Notification Content belongs to
- From Name – What is to appear in the From Name of the individual Email Notification
- From Address – this address needs to be set up when the signing up for the application
- Body – what appears in the Email Notification preceding the four items listed above

The following is what the Email Notification Content template screen look like:

The screenshot shows a web-based CRM application interface. At the top, there is a navigation menu with links for Home, Contacts, Reports, Library, User Settings, Add New Records, Campaigns, Search Archives, Administration, Change Database, and Calendar. A search and login bar is on the right. The main content area is titled "Express Email Notification Content" and contains a form with the following fields:

- Workgroup: XYZ Widgets (dropdown menu)
- From Name: Express Lead Support
- From Address: emailnotifications@leadmaster.CI (with a note: "Please enter a valid email address, e.g. sales@companyabc.com")
- Subject: New Lead
- Body: A text area containing the text: "You have a new lead. Please see below for details. Please do not reply directly to this e-mail message, as this is an unattended e-mail account."

Below the form, there is a section for "Update Information" with fields for Date Created (Before 8/12/2002), Last Updated, and Updated By.

The following is what a sample Express Email Notification would look like:



From: "Alive Sales & Marketing Department" <emailnotifications@client.com>

To: "Mike Jolly" <mike.jolly@alive.com>

Subject: New Lead

You have a new lead. Please see below for details.

Please do not reply directly to this e-mail message, as this is an unattended e-mail account.

Workgroup: Alive

Please remember to update the status of this item by going to <http://www.client.com/login>

Campaign: LM TEST

Initial Status: WARM

ID: none

Company: Heritage Marble Of Michigan Inc

Address:

City:

State:

Zip:

Contact: Richard Cross

Title:

Phone:

Email:

Sales Comment:

18-Jul-2007 4:53 PM EDT – Support Acct Mgr Reassignment from John King to Don Budge

28-Jun-2007 12:25 AM AEST – Support (Send transaction from Ed Jones to Sally Fields)

[Note: Group and Partner main contacts can receive copies of the Express Email Notifications of their respective Acct Mgrs or Partner Reps (if they have Email Notification activated). But they will be not be combined like the Daily Email Notifications but will be individual emails of each one sent to the respective Acct Mgrs or Partner Reps.]