



# GeoCom® Customer & Contacts 5.0 Build 240

The following manual points out modifications of version 5.0 Build 240 versus Build 232

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## 1 Modifications within electronic forms for customer and contact profiles

### 1.1 Usage of E-Mail or fax number when Mail-To-Fax-Gateways is available

Within customer and contact profiles as well as private customer profiles it is possible to decide whether the “fax number” or “E-Mail-address” should be used as the recipients address. The letter “M” (=Mailing) indicates, if for outgoing mass e-mails the corresponding fax number or corresponding e-mail-address should be used. However, this is only relevant for those customer and contact profiles that have both, fax number AND e-mail-address.

The selected “method” will be indicated by the letter “M” either in the field “fax-number” or in the field “E-Mail”.

The selection can be easily changed at every time due to individual needs. While in edit mode a single click on one of the entries - fax or e-mail - changes the status.

Field	Value
Company name	ISG Information Systems GeoCom GmbH
Branch	c/o
Division	Phone +49 (0)234 94175-0
Salutation	Mr.
Title	Fax (M) +49 (0)234 94175-16
Given name	Habbo
Initial	Behrends
Surname	Behrends
Street	Kolkmannskamp 6
ZIP	44879
City	Bochum
Country	Germany
Letter salutation	Dear Mr. Behrends
Postal address	ISG Information Systems GeoCom GmbH c/o Mr. Habbo Behrends Kolkmannskamp 6 44879 Bochum
Job title	Attribute 1 Attribute 2
Phone	+49 (0)234 94175-0
E-mail	helpdesk@geocom.de
Homepage	http://www.geocom.de
Description	

Illustration: Contact profile with usage of fax-number for mailings

### 1.2 New field c/o

This field can contain a deviating address. The usage of this field can be defined within the personal configuration settings.

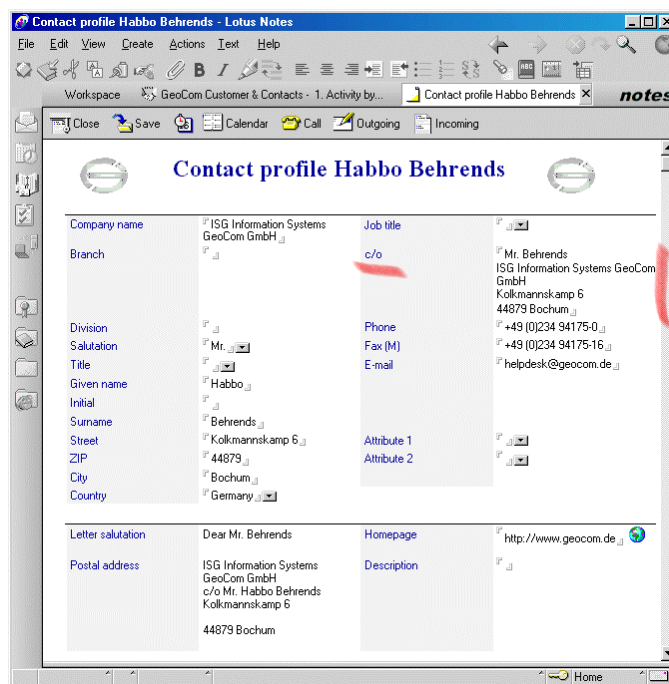


Illustration: New field c/o within a contact profile

### 1.3 Hide fields

If certain fields are not needed, its visualisation can be suppressed. The corresponding settings for the configuration document are described in the "configuration manual: appendix A".

## 2 New options using MS-Word for outgoing correspondence

### 2.1 Creation of address slips using WinWord

Using MS-Word, it is possible to set “address slips” as type. This setting ensures that for multiple usage of forms the start position of the printing process will be checked. Furthermore this ensures that selected customer and contact profiles will be used to create name lists. Fields of selected documents will be adopted automatically.

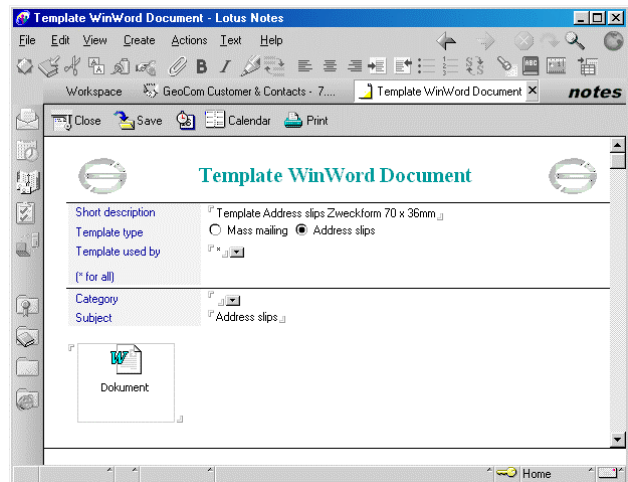


Illustration: Usage of a MS-Word template for address slips

As result a WinWord table will be filled with address data of the previously selected documents.

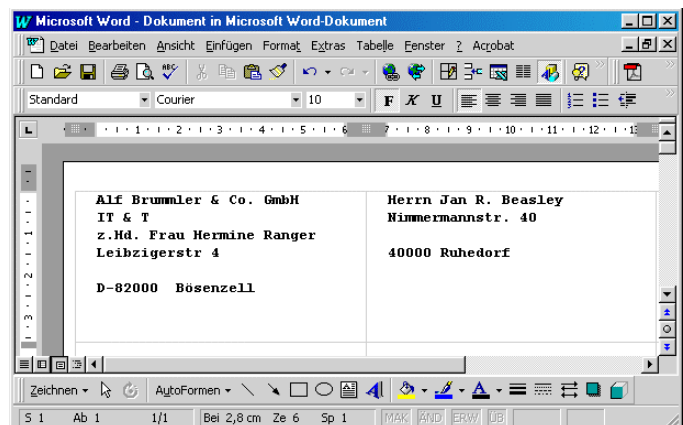


Illustration: Address slips in MS-Word

See also chapter "3.5.4 Usage of MS-Word for address slips"

### 2.2 Alternative notation for data transfer to MS-Word-templates

Hitherto, for data transfer between Notes-documents and MS-Word-templates exclusively bookmark-names were used. Thus, for data transfer it was necessary that the name of the bookmark had to match

the fieldname used within Notes. As bookmarks in MS-Word must have an unique name, the usage of a field was only possible once.

To cure this problem another notation was introduced, that alternatively can be used.

The new “notation“ allows you to use bookmark names of your choice. Instead the content of the bookmark will be checked, whereas field marks have to be carried in peaked brackets “< >”.

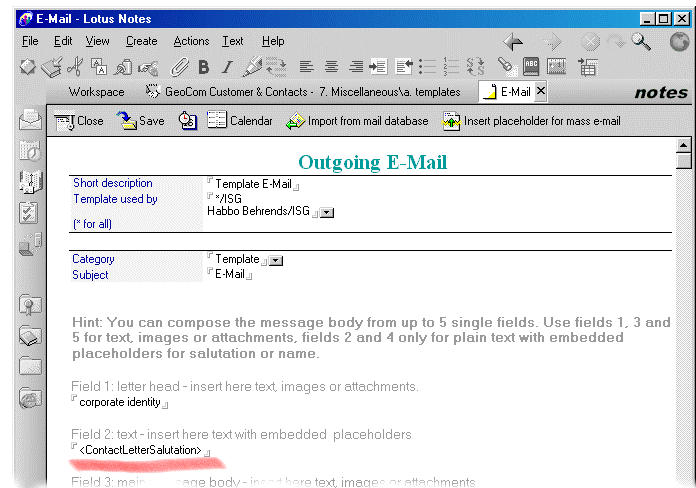


Illustration: Example for a bookmark as placeholder for letter salutation

### 2.3 New dialog box for mass mailing created with MS-Word

A new dialog box for the definition of primary recipients, copy recipients etc. is used for mass mailing created using MS-Word. This specification can be used in recipient lists.

The following options are at your disposal:

- Recipient
- Copies
- Blind copies

Furthermore the following options can be set:

- Save mass mailings in Word-Documents
- Output of massmailings on preselected printer
- Save Word-Documents in Notes

See also chapter 3.5.6.4.1 Mass mailing from WinWord template

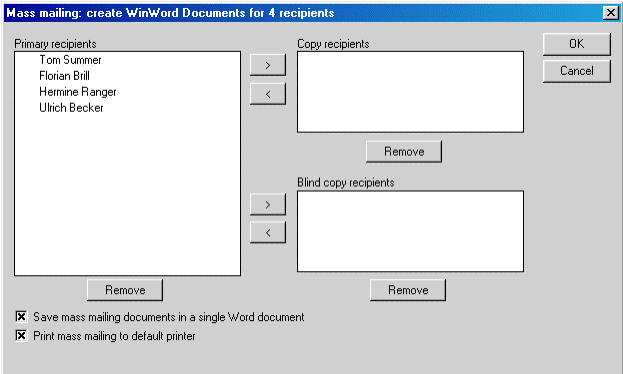


Illustration: Dialog box for Mass mailing created by MS-Word

### 3 Outgoing E-Mails

#### 3.1 Changes of the template for outgoing E-Mail

Analogous to MS-Word mass mailing it is possible to transfer data from selected documents into e-mails and mass e-mails (or fax letters, when a Mail-To-Fax-Gateways is existing)

To ensure an attractive E-Mail-design, the structure of the e-mail-template was modified. The new template now consists of a combination of RTF-fields and text-fields. Within the text-fields it is possible to use placeholders for field contents that should be replaced subsequently.

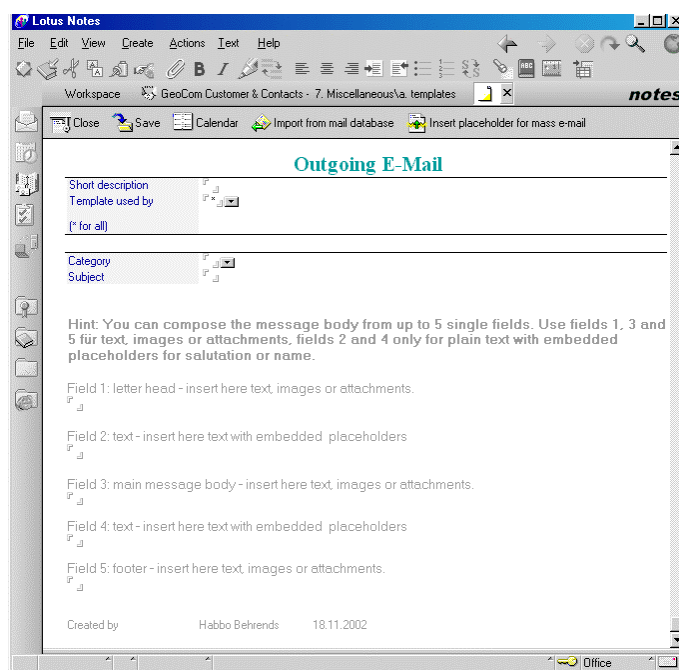


Illustration: Template for outgoing E-Mail

#### 3.2 Populate outgoing e-mails from selected profile documents

Now, it is possible to populate outgoing e-mails and mass e-mails from selected documents. Herewith e-mails count with the same functionality like MS-Word.

### 3.2.1 Usage of placeholders for field values from selected documents

To do so, fill into the template the fieldname in peaked brackets "< >", e.g. <ContactLetterSalutation> for the letter salutation. While the creation of an e-mail based on this template this definition will be replaced by the current letter salutation. The individual salutation results from your personal settings.

### 3.2.2 Usage of placeholders for recipient lists

For this, the following definition style as placeholder is used:

```
< RECIPIENTS <ContactLongName>, <ContactPhone>>
```

Alternatively it is possible not only to use "RECIPIENTS" for all recipients but also "PRIMARY" for the recipient , "CC" for copy recipients and "BCC" for blind copy recipients.

### 3.3 New dialog box for mass e-mails

A new dialog box for the definition of primary recipients, copy recipients etc. is used for mass e-mails. This specification can be used in corresponding recipient lists.

The following options are at your disposal:

- Primary recipients (default)
- Copy recipients
- Blind copy recipients

Furthermore the following send options can be set:

- Send e-mails and/or fax letters now (using this option allows everybody to see all primary recipients and copy recipients)
- Send e-mails and/or fax letters individually without displaying distribution list
- Save e-mails and/or fax letters and send them later (save but don't send yet)

See also chapter 3.5.6.4.2 Mass mailing from E-Mail-template

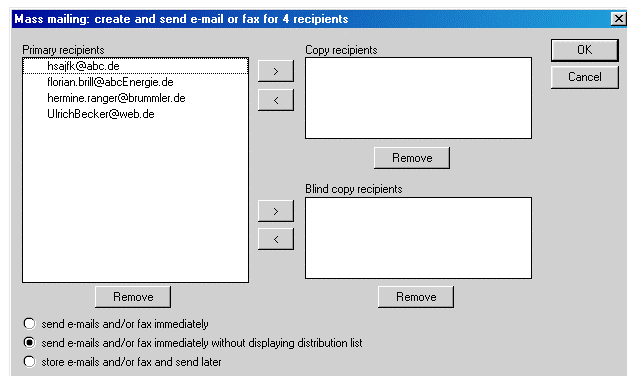


Illustration: Dialog box for series-E-Mails

## 4 General modifications in templates

### 4.1 Usage of wildcards within the field "template used by"

The field "template used by" is designed to enter individuals, that should have access to the template.


You can easily adopt those persons from the public Lotus Notes Address Book (PAB) whereas a "\*" is used as wildcard. It can replace a domain name or a user name.

See also chapter "6.7 Configuration options for templates"

### 4.2 Default "use template" within action "outgoing"

The checkbox "use template" is activated by default for all options, that displays the dialog box. The checkbox only can be de-activated for the options "outgoing correspondence" and "Notes E-Mail". However, it is NOT possible to uncheck the box for documents of type "Letter A4" and "MS-Word".

Nevertheless, if you want to create a document WITHOUT template

use the action  .

### 4.3 Changes in "Incoming E-Mail" and "Outgoing E-Mail"

### 4.4 New action: Import from Mail database

Within the electronic forms "incoming correspondence" and "outgoing e-mail" a new button is at your disposal. Using this button you can adopt information from an original E-Mail from the Mail-database.

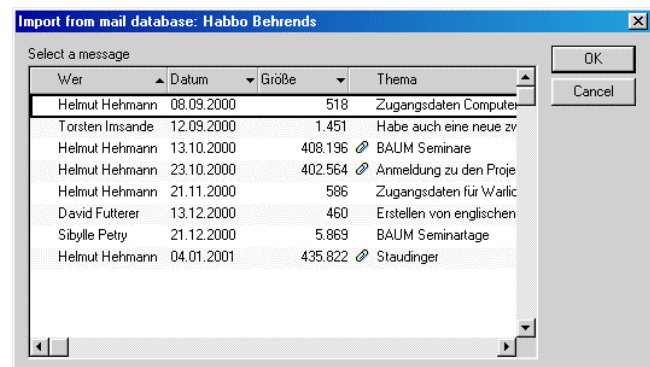


Illustration: Import of data from Mail database

## 5 Views

### 5.1 Displaying project profiles in views

Hitherto, customer profiles that carried within the field “project” a value, where displayed in views as “project profile Name\_of\_the\_project”.

Now, in order to enable other entries, that should not be displayed as project profile, new entries that begin with an underscore “\_” or minus “-“ will be displayed within the views without the introducing text “project profile”.

### 5.2 Changes of view "Export" for exportation into a text file

Hitherto within this view only contact profiles and profiles of private customers were displayed. Now, customer profiles will also be showed.

### 5.3 New view "Export" for customer and contact profiles

Aside the existing view according to the export into a text file with semicolon as separator, now a column-oriented view to export to a spreadsheet is at your disposal. This view should be preferred for the exportation to Lotus 1-2-3 with extension WK4 or MS-Excel.

### 5.4 New action: Search and replace fields

Administrators disposes of a new action within all views. This action “search and replace fields” allows you to change field values within several documents simultaneously. It allows you to search and replace strings in any documents. This action is suitable for e.g. changing the responsible person within a list of names.

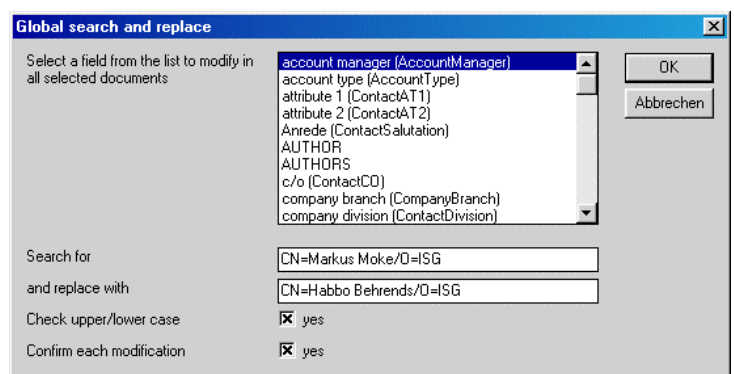


Illustration: Dialog box “Global search and replace“

## 6 Configuration

### 6.1 Admitting new values for selection lists

For all pre-defined selection lists (with exception of the customer status) it is possible to define, if a user is allowed to enter new values or not. This also includes the admission to enter values that are not showed by the selection list.

Job title	▾ Account Manager ▾
Default	▾ Account Manager ▾
New values allowed	<input checked="" type="radio"/> yes <input type="radio"/> no

Illustration: Example "Job title"

### 6.2 Mail-to-Fax-Gateway

The availability of a Mail-to-Fax-Gateways can be endorsed within the "global configuration document"

Additionally, if a Mail-To-Fax-Gateways exists, it is possible to set within the contact profile whether the fax-number or the corresponding E-Mail-address should be used for mass mailing.

Mail-to-Fax Gateway available	<input checked="" type="radio"/> yes <input type="radio"/> no
Address for Mail-to-Fax Gateway (e.g. <FAXNUMBER>@FAX)	▾ <FAXNUMBER>@Fax ▾

Illustration: Mail-To-Fax-Gateway is available

## **7 Bugfix**

### **7.1 Bugfix: Template outgoing correspondence**

Within the template “outgoing correspondence” and “E-Mail” the field “DocOwner” was of type “author field” instead “reader field”

### **7.2 Bugfix: Incoming correspondence**

Both, “incoming correspondence”-documents as well as “incoming E-Mail”-documents were assigned to the referenced document, instead to the customer profile when this option was set.

### **7.3 Bugfix: Superfluous sending\_dialog while saving of templates**

While saving a template for “outgoing E-Mail” the “sending dialog box” will not be displayed anymore.

### **7.4 Bugfix: Incorrect displaying of re-submission within category "concept" and "due date"**

The status of re-submission with actions “concept” and “due date” was displayed within views by task as “not categorised”.