Deltek Vision© 7.x Template-Based Email Quick Reference Card

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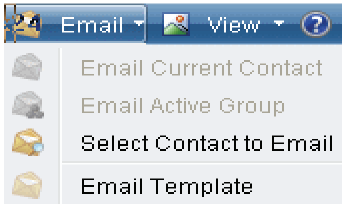
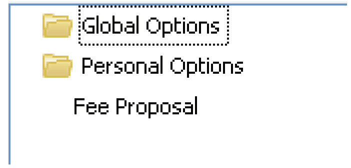


Access the Email Templates dialog by selecting **Email Template** from certain Email menus throughout Deltek Vision. For example, from the Employees, Contacts or Leads Info Center toolbar. When you open the Email Templates dialog you are prompted to create an activity. You can create an activity for an email template, just as you can for a standard e-mail.

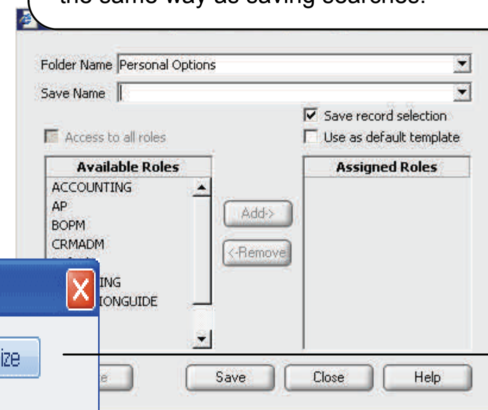
Records —Select records for which this email will merge data. In the Contacts, Leads, and Employees Info Centers selections from this field also control to whom the email is sent. For the Projects and Opportunities Info Centers, selections from this field control only the records for which the e-mail will merge data. You use the **Advanced** options to specify who receives the email.

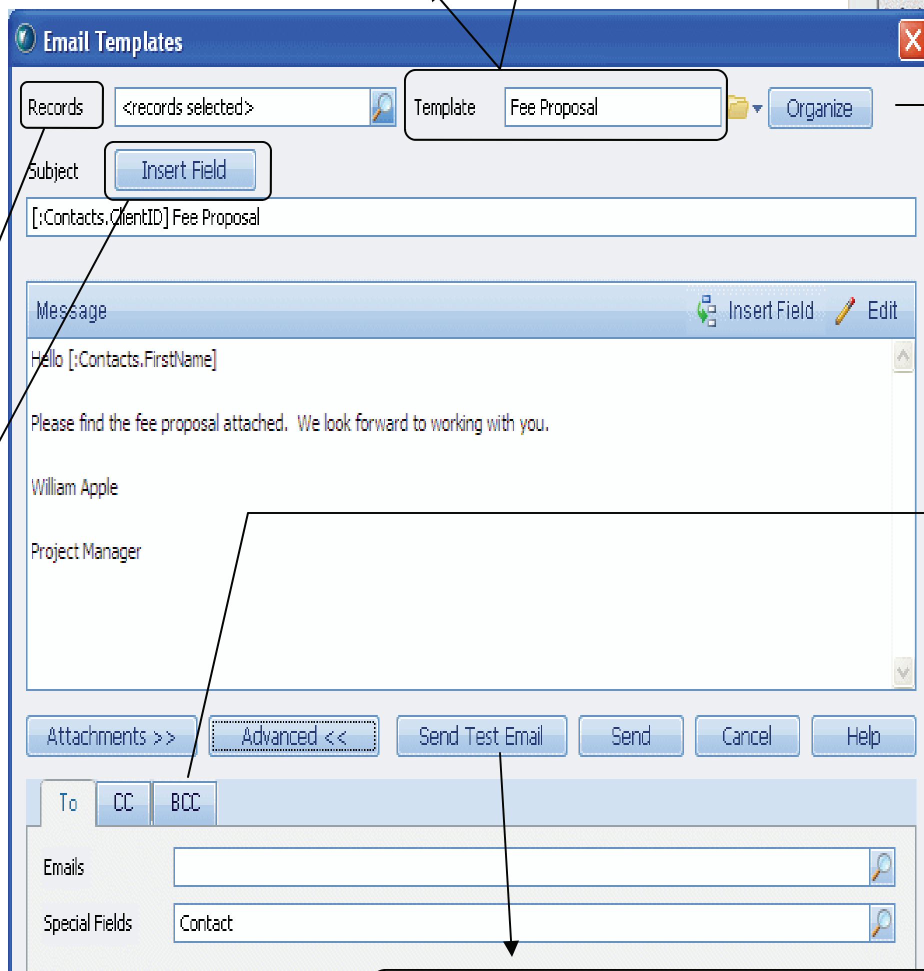
Insert Fields — Click **Insert Field** in the **Subject** or **Message** fields to open the **Insert Field dialog**. From this dialog select fields to insert from a list of all available fields in the Info Center from which you opened the Email Templates dialog. For each selected field, Vision inserts a code in the subject or message body as a placeholder. When the message is sent, the field codes are replaced with data from that field for that record. If no data is selected for merging in the **Subject** or **Message** fields, Vision uses Standard e-mail functionality.

Template Field — Select a previously saved e-mail template from the drop-down list. Save templates by clicking the **Organize** button.



Organize — Save your email templates for future use or create new folders within the Global or Personal Templates folders using the Organize Options dialog. Saving email templates in Deltek Vision works much the same way as saving searches.





Advanced Options

Click the **Advanced** button to display the To, CC, and BCC tabs.

To, CC, and BCC Tab Fields

Emails — Type email addresses in this field or click the magnifying glass icon to open the Search for addresses dialog. From this dialog type email addresses or click the **To**, **CC** or **BCC** buttons to open the Employee, Leads, or Contacts Lookup dialog. Each address should be separated by semicolons.

Special Fields — Click the magnifying glass icon to open the Special Fields dialog. From this dialog select people who you want to receive this email based on look-up fields. For example, if you have defined a field called **Contact Manager** in the Contacts Info Center which links to the employee record for the person responsible for this contact relationship, you can cc this individual by selecting his record from the Special Fields field on the CC tab.

Click **Send Test Email** to send the email to yourself with merged text replacing field codes from your Employee Info Center record or from the first Contact/Lead record in the list.

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When to Send Standard vs. Template-Based Emails

Use Standard Emails When:

- You do not want to use database fields in the **Subject** or **Message** fields of the email.
- It is appropriate (for performance reasons perhaps) to send only one email to all addresses (To, CC, BCC), rather than a separate email per record selected in the **Records** field, as must happen with template-based emails.
- You want to use the content of the email one time only, and you want to send it to one contact/lead/employee only.

Use Template-Based Emails When:

- You are sending the same email to multiple people and you want to use fields from the database in the **Subject** or **Message** fields. For example, if you want the email to include a database field for an employee's first name (for example, "Hello [Contacts.First Name].")
- You want to include database fields in the email and you want to use the email repeatedly to send emails to different employees/leads/contacts.

What's the Difference?

Deltek Vision's standard email functionality is more efficient because only one email is sent when you click **Send**, and all other recipients are copied on that one email. When using template-based emails, every recipient in the **Records** field is sent an individual email. Then everyone in the **Emails** fields on the **To, CC**, and **BCC** tabs is sent one email per recipient in the **Records** field. This is because when you use database fields, Vision merges different data (for example a different first name) into each email, making each email unique.