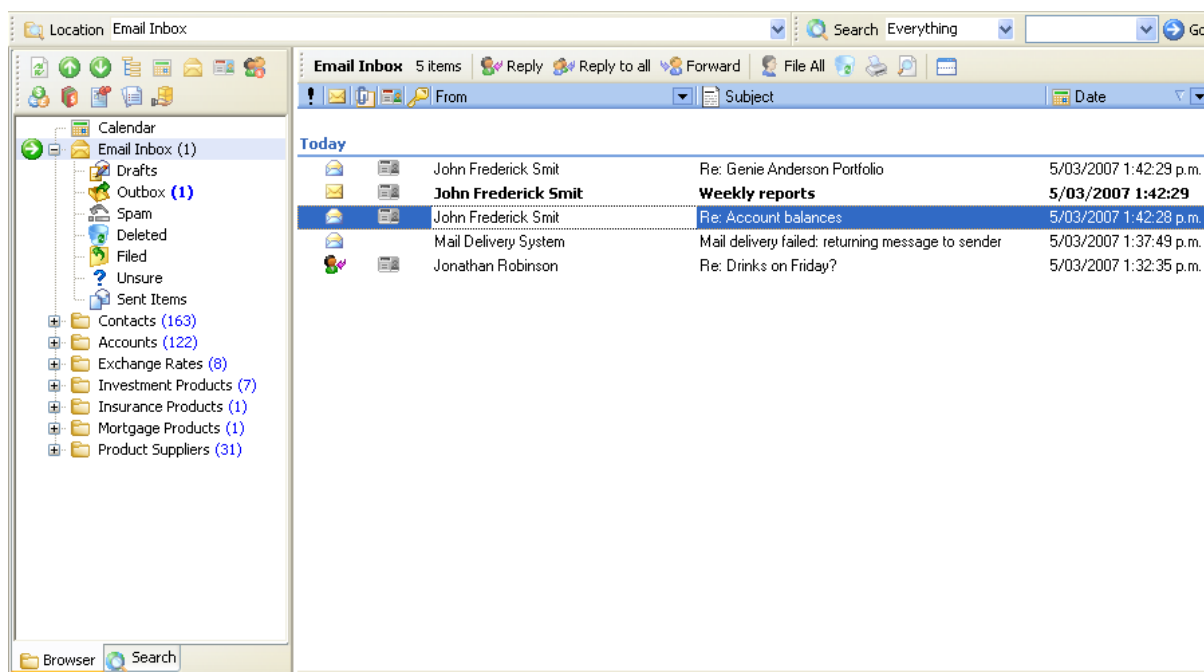


Forté Email

Fort CRM is a complete, fully featured email client for POP3 and SMTP email servers. With Fort CRM emails are filed against contacts, along with notes, documents and appointments, creating a complete electronic folder of activity for each client. Fort CRM has efficient sorting, filtering and search options to easily locate emails. Emails can be generated for lists of contacts.

Emails are updated automatically every 5 minutes, or they can be manually sent and received at any time using the 'Send and Receive' button at the top of the screen.

Standard email folders



Email Inbox

Incoming emails will appear in your Inbox. Clicking on Email Inbox in the treeview on the left of the screen will display all your incoming emails on the right of the screen.

You can then deal with these emails (File, Print, Reply, Delete, etc.) by choosing one of the options at the top of the email screen. Alternatively, right click on the required email and select one of the options in the drop down menu.

Drafts

Emails can be saved in the Drafts folder to be edited and sent at a later stage. This is useful when you are unable to complete your email, or you do not have all the required

details on hand. Select the email from the Drafts folder when you are ready to continue.

Outbox

After you create an email and press Send, the email will be stored in the Outbox to be sent on the next 'Send and Receive' cycle. Emails in the Outbox can be moved to the Drafts folder if you change your mind prior to sending.

Emails are automatically updated (sent and received) every 5 minutes or you can manually send and receive emails by clicking on the 'Send and Receive' button at the top of the screen.

Deleted

Any email that is marked as deleted is moved to this folder, and stored here until the folder is emptied. Deleted emails can be recovered from the Deleted folder by moving them to another email folder.

You can remove all deleted emails from the 'Deleted' folder by right clicking on the folder and selecting 'Empty deleted folder'. Emails are permanently deleted from the system and can no longer be accessed.

It is good practice to regularly empty your folder of deleted emails. Mistakenly deleted emails are often recovered within a day or so of their deletion. There is no point in maintaining a full history of deletions, as this will slow down your system and increase the database size.

Filed

Filing emails that have been dealt with keeps your inbox uncluttered and enables you to manage your emails more efficiently. All emails that have been filed against contacts are stored in the Filed folder, and can be grouped and searched as required. A filed email will be shown in the activity list of each contact it has been filed against. Only emails that are filed will be shared with other account managers.

Spam and Unsure

If your email provider or anti-spam package adds the keywords 'spam' or 'unsure' to the subject line of an incoming email, Forté CRM will move it automatically to the Spam or Unsure folder. Check these folders from time to time to delete unwanted items. The Spam folder has a right click menu option 'Empty Spam'. Selecting this option will permanently delete all emails in the Spam folder.

Sent Items

Emails that have been successfully sent will show in the Sent Items box.

Creating new email folders

Creating your own email folders allows you to organise your emails according to your preference. For example, if you want to store personal emails separately, you can create a folder called 'Personal'. You can then 'drag and drop' your emails from other locations into your personal folder.

Note: One of the main reasons to create email folders is to organise the email for fast searching. The auto-filing and search features in Forté CRM reduce the need to create complex email folder hierarchies.

To create an email folder:

- Select 'Setup', then 'Create New Email Folder' in the menu at the top of the screen, or right click on 'Email Inbox' and select 'New Folder'. The 'New Email Folder' screen is displayed.
- Enter the name of the new folder at the required level. Email folders can be organised in hierarchies. A new folder will be added at the same level as the standard folders, but can be added as a sub-folder by positioning the cursor (shown as a green arrow) at the parent folder.
- Click 'Ok' to create the new folder, which will be displayed in the treeview.

To rename an email folder:

A user-created email folder can be renamed by right clicking on the required folder in the treeview and selecting 'Rename folder'. Enter the new name for the folder and click 'Ok'.

To delete an email folder:

A user-created email folder can be deleted by right clicking on the required folder in the treeview and selecting 'Delete folder'. Click 'Yes' to delete the folder. Emails contained in the folder will also be deleted.

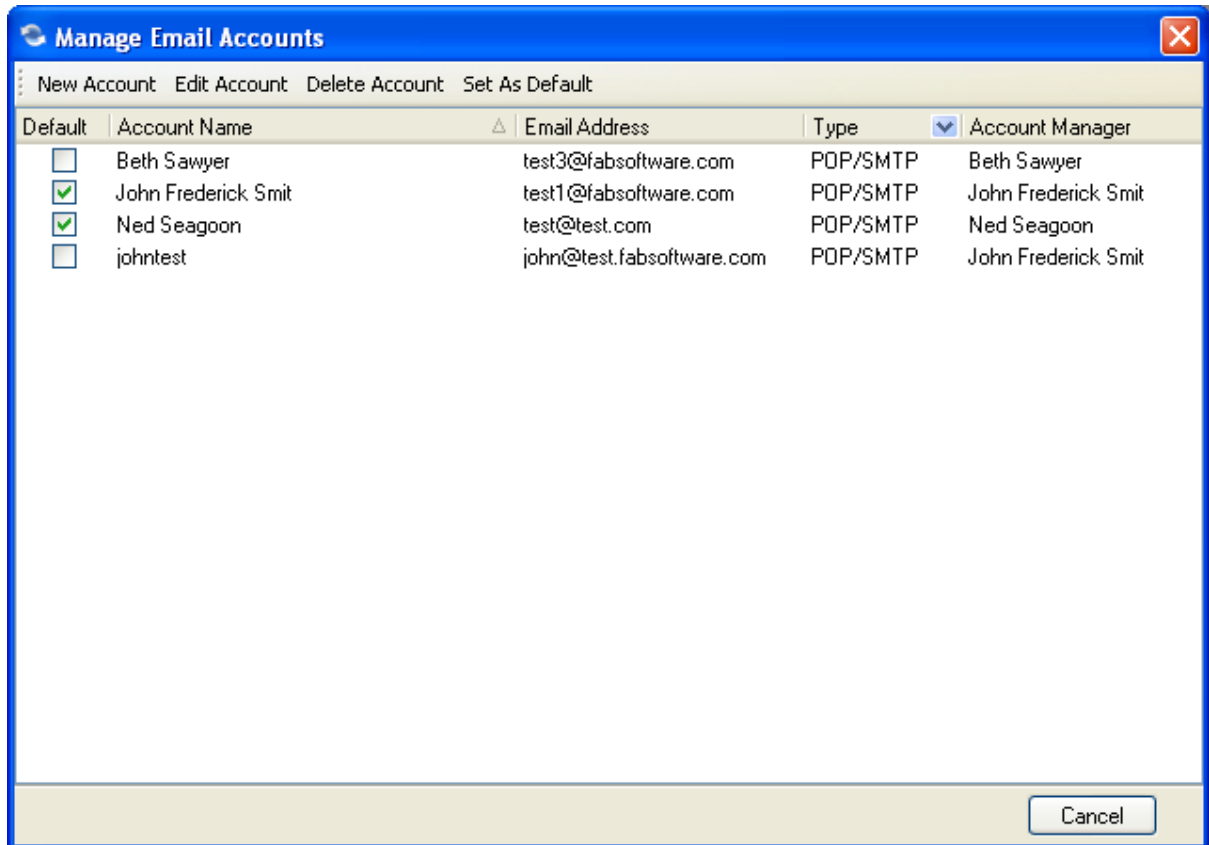
Note Standard email folders cannot be renamed or deleted.

Configuring email accounts

At least one Fort CRM email account has to be set up before you are able to receive or send emails.

To configure an email account:

- Select 'Setup Email Accounts' from the setup menu. The following window will open.



- To edit an existing email account, highlight the required account and click 'Edit Account'.
- To create a new email account, select 'New Account'.

Edit Email Account

Account Details

Account Manager: John Frederick Smit ...

Email Address: test1@fabsoftware.com

Account Name: John Frederick Smit

Incoming Email Folder: Inbox

Account Options

Default:

Include in Send/Receive:

Send/Receive when offline:

Server Type: POP

POP Server

Server: pop.mydomain.com

Port: 110

Login: yourloginhere

Password: *****

SMTP Server

Same as POP Server:

Server: smtp.mydomain.com

Port: 25

Login: yourloginhere

Password: *****

Email Signature

Normal Verdana 3 (12 pt)

regards,
John Frederick Smit
+64 374 89475011
john@fabsoftware.com

Edit HTML

Test Connection Ok Cancel

Select the Account Manager that this email account is for.

Set as default if the Account Manager has more than one email account

The following information will be required from your email service provider:

- Host Server name (POP and SMTP)
- Port location for local server
- Account login name
- Account login password