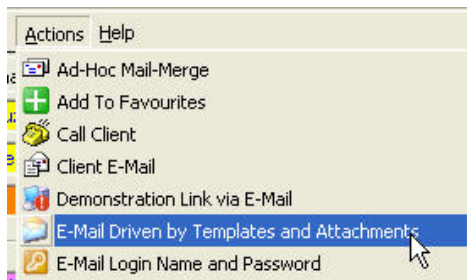


## E-Mail Driven Templates and Attachments

### Overview

TriSys E-mail template Action is a way to create all e-mails that you send from TriSys with full formatting (embedded CCS) in HTML. The e-mail format can have pre-defined information held within, and/or corresponding attachments to send out with each email.



(Figure 1 - Action Start)

The email creation is very simple, once you have selected your contacts or companies.

Select *Actions* on your tool bar menu, then *E-Mail Driven Templates and Attachments*. (Fig. 1)

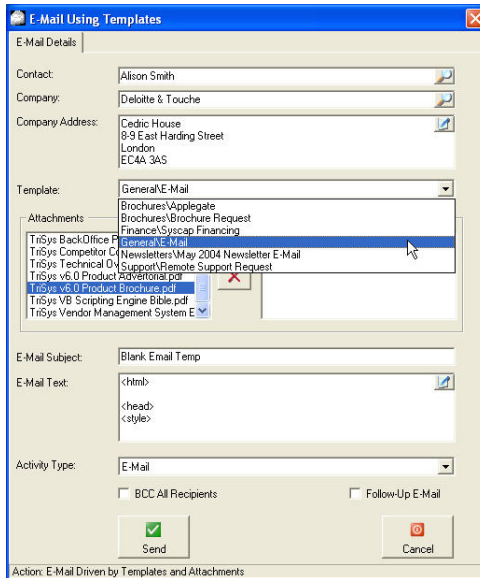
Once the action has been selected, the action form will show; Contact information, template type, attachments. Each template is created for different purposes, some have attachments associated with them, and some do not. (Fig.2)

When a template has been selected you can add files as attachments that have been placed in the folder system created to run the action. If the template that has been set up is to automatically include files on selection they will appear in the attachments box.

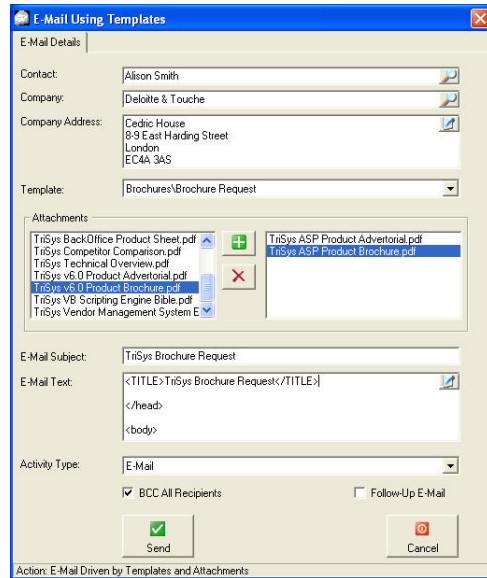
If you do not require any attachments you can select the delete button. (Fig.3)

The E-mail body that you use is defined in the E-Mail text so that you can see what you are going to generate in the created e-mail.

Once you have selected the desired template, e-mail text is automatically inserted from the template or edited by the user and defined attachments are added. Click the *send* button to generate the E-mail using Outlook.



(Figure 2 - Template selection)



(Figure 3 - Attached Files)

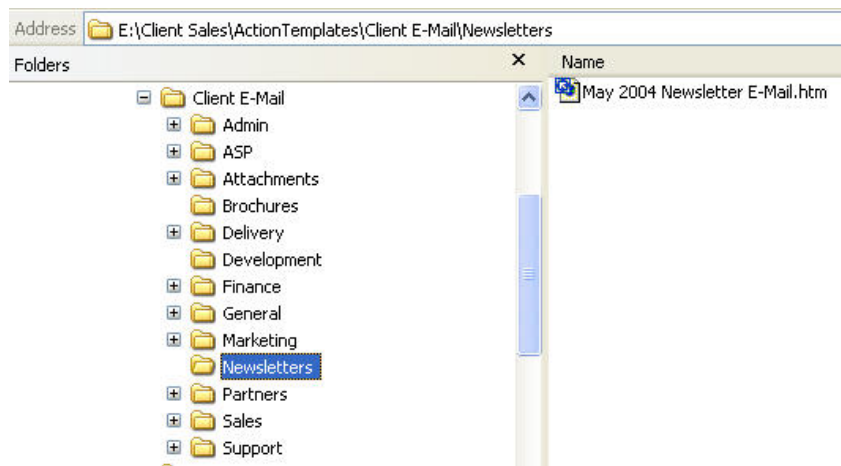
Once the E-mail has been generated by Outlook, it will have similar appearance to Fig.4. Check the e-mail document if required, select send and your E-mail template is sent, ready for use next time you require it.



(Figure 4 - Composed E-mail)

## How it works

To setup E-Mail templates and attachments, you have to create a folder hierarchy so that the attachments are in a folder (Attachments) and your E-mail Templates are stored in any number of folders with easily readable folder names (Fig.5) You will notice that the templates are located in folders allocated to types of e-mail to be composed and sent. All of your attachments that you want to use are located in the Attachments folder.



(Figure 5 - Folder Structure)

The attachments can be defined to be automatically attached to the template, this is done by adding reference tags into the source of the HTML section of the e-mail template. Each file has been named for the desired use; these are the actual file names of the attachments in the Attachments folder. If you want to add or remove the information you simply add or subtract the tag line from the HTML body.

In `<TITLE> DOCUMENT TITLE HERE </TITLE>` you can pre-define the Subject of the E-mail; If you want to change the subject line in the E-mail, you can do this either in the action in TriSys or in Outlook itself. (Fig 6.)

```
<meta name="TriSys Attachment 1" content="Syscap - Software & Intangibles.pdf">
<meta name="TriSys Attachment 2" content="Syscap - Leasing - the easy alternative.pdf">
<meta name="TriSys Attachment 3" content="Syscap - Systems Change Option.pdf">

<TITLE>TriSys Leasing Finance</TITLE>

</head>
```

(Figure 6 - Template Coding)