

How to Use Teczo Mailing Services

What is Teczo Mailing Services?

Send Email to Filtered Partner Contacts

Send Email to Selected (Checked) Partner Contacts

Send Email to Contacts through the Related Contacts Tab

Tracking Related Emails

Send Replies to the Recipient

Sample Email Received by the Contact or Recipient

Sample Reply Link Received by the Contact or Recipient

Sample Reply Page Accessible by the Contact or Recipient

Set Default Partner Contact

What is Teczo Mailing Services?

Teczo Mailing Services is a Teczo feature that will give Teczo users the following benefits:

1. Send emails to a set of partner contacts.
2. Track correspondences through the Teczo platform.

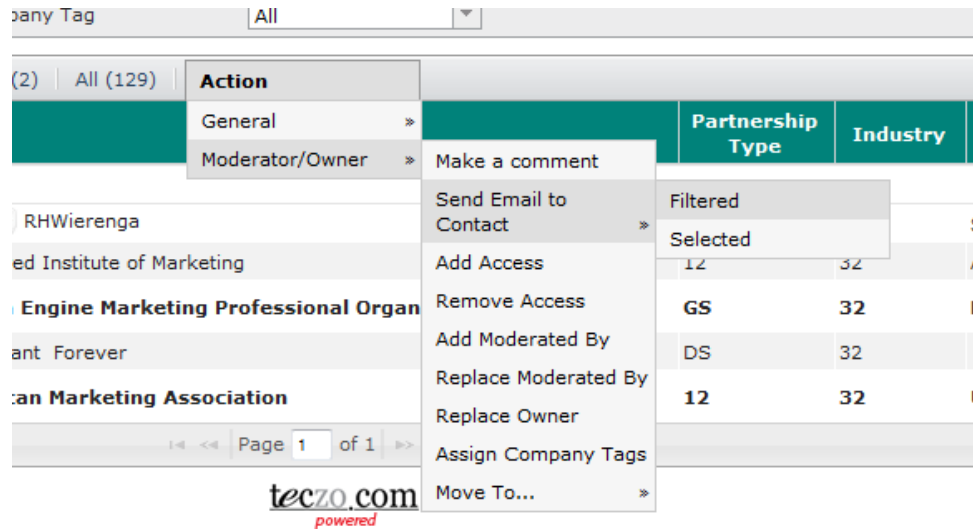
Send Email to Filtered Partner Contacts

Here's how to send email to filtered Partner Contacts:

1. Go to Partner Profile Module and filter the list according to your desired fields either using Basic or Advanced Search.

The screenshot shows the search and list interface for Partner Contacts. At the top, there is a search bar with 'PP ID' and a 'Go' button. Below it are various filter dropdowns: State (Open), Country (All), Person (All), Importance (All), Industry Segment (Advertising), Date (All), Partnership Type (All), Status (All), My Tag (All), and Company Tag (All). Below the filters is a summary bar showing counts for Current (5), Open (113), On-Hold (9), Closed (5), Archived (2), and All (129). An 'Action' dropdown is visible. The main table has columns: Updated On, Updated By, PP ID, Partner Name, Partnership Type, Industry, Ctry, Impt., and Moderators. The table lists several contacts, including René UAT Wierenga, Char Lot Bataler, Search Engine Marketing Professional Organization, and American Marketing Association. At the bottom, there is a pagination bar showing 'Page 1 of 1' and '50' items per page.

2. Click the Action Dropdown > Moderator/Owner > Send Email to Contact > Filtered selection from the Status Bar.

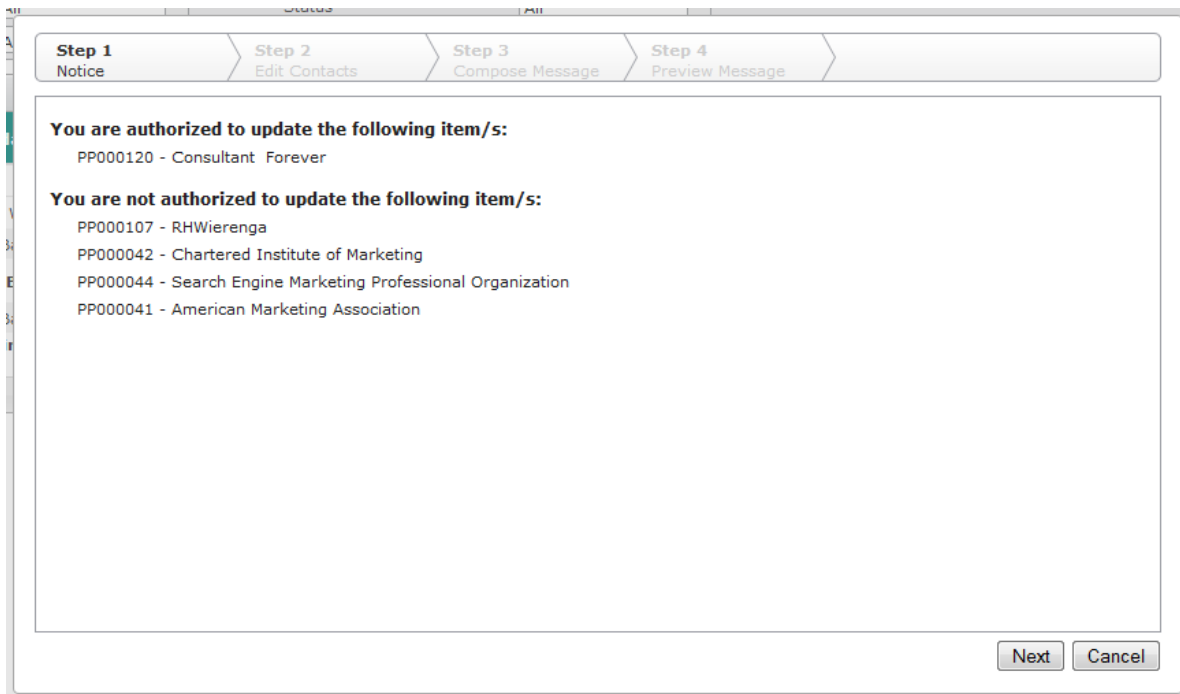


3. Upon clicking the Filtered option, the wizard in modal page will be shown:

a. Step 1: Notice

Will show you list of contacts you are allowed to edit (if you are Moderator, Owner or Module Administrator).

- Click 'Next' to continue or Cancel and return to the summary table.



b. Step 2: Edit Contacts

Will show you the list of contacts related to the filtered or selected partners you have edit rights. Below are the parts of this step:

- 1) Search box – you can type and search to filter the list of contacts.
- 2) Left Table – list of contacts that are related to the filtered or selected partners.
- 3) Right Table – list of contacts where the emails will be sent. By default, the default partner contacts are pre-selected. (See [Set Default Partner Contact](#) on how to set default partner contacts.)

- Select contacts in the left table.
- Review your list of contacts in the right table then click 'Next' button.
- You can go back to Step 1 by clicking the 'Back' button.
- Click 'Cancel' to return to the summary page without sending email.

Note: Contacts that are displayed in gray fonts do not have an email address. You can define an email address by editing the details of the partner contacts through the Contact Management module.

The screenshot shows a web application interface for Step 2: Edit Contacts. At the top, there are four steps: Step 1 Notice, Step 2 Edit Contacts (active), Step 3 Compose Message, and Step 4 Preview Message. Below the steps is a search box with the placeholder text "Type contact name or company name to search...". There are two tables side-by-side. The left table has columns "Display Name" and "Company Name" and contains two rows: "Contact Management" (gray font) and "Search Engine Marketing Professional Organization" (black font). The right table also has columns "Display Name" and "Company Name" and contains one row: "Philips Solitaire" (black font) and "Chartered Institute of Marketing" (black font). At the bottom, there is a warning message: "Warning: Contacts displayed in gray font do not have email address. You can define email address via Edit page of the contact details." and three buttons: "Back", "Next", and "Cancel".

c. Step 3: Compose Message

You can compose your message through this page. Below are the parts of this step:

- 1) Greetings – where you can type your own greetings e.g. Dear, Hi, Hello

- 2) Salutation – you can check this if you want to include the salutation of your contact, if there's any (values are defined in the contact details through the CM module) e.g. Mr, Ms, Mrs.
- 3) Subject – main subject of your email or message.
- 4) Message box with Editor – place where you can compose your email message.

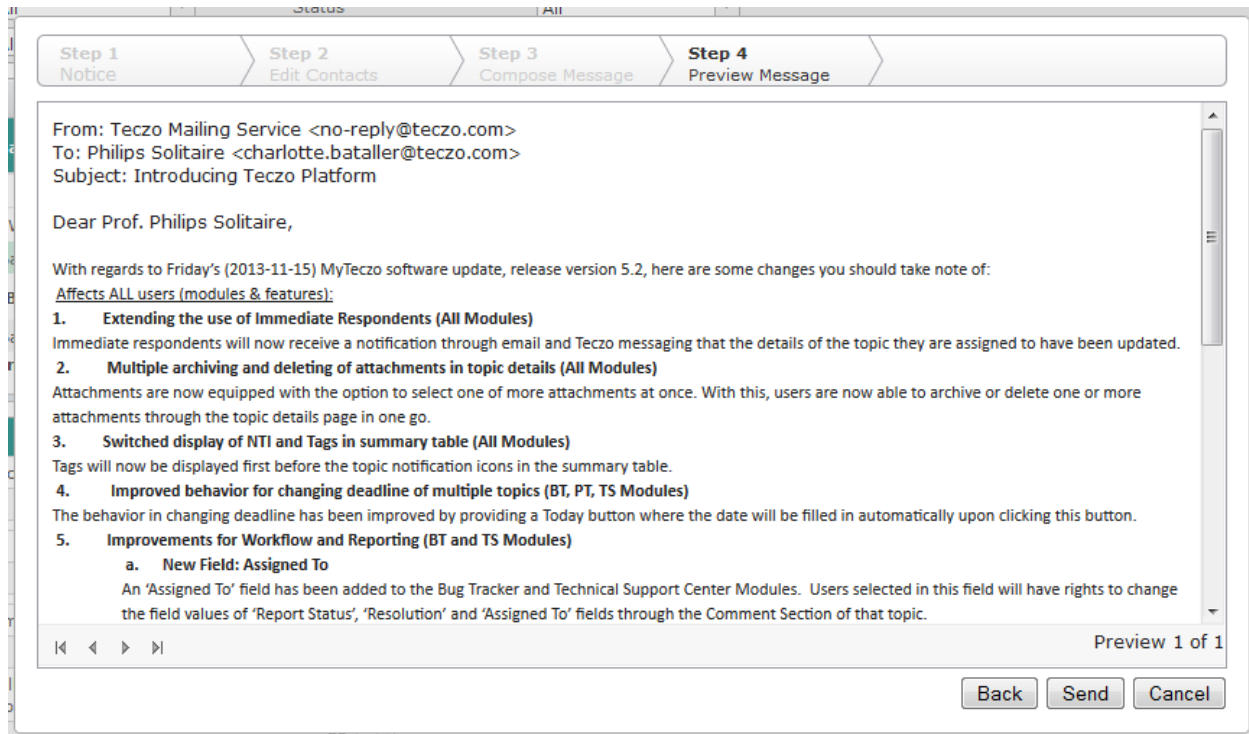
- Fill in the different parts in this step.
- Fields displayed in yellow are required to be filled in.
- You can go back to Step 2 by clicking the 'Back' button.
- Click 'Next' to see preview of the email.
- Click 'Cancel' to return to the summary page without sending email.

d. Step 4: Preview Message

You can preview your message through this page. Below are the parts of this step:

- 1) Email Message – the preview of the message that will be sent to the contacts. An auto-generated message with sample link is also included just below your original message. Upon sending the message, there will be a unique link in the email where the contact can reply.
 - 2) Paging – navigate through different email messages through the paging below the message in case multiple contacts were selected.
- Review your message by navigating through the paging functionality.

- You can go back to Step 3 by clicking the 'Back' button.
- Click the 'Send' button to send the email message to the contacts.
- Click 'Cancel' to return to the summary page without sending email.



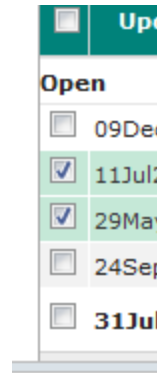
Send Email to Selected (Checked) Partner Contacts

Here's how to send email to selected (checked) Partner Contacts:

1. Go to Partner Profile Module and filter the list according to your desired fields either using Basic or Advanced Search.

Updated On	Updated By	PP ID	Partner Name	Partnership Type	Industry	Ctry	Impt.	Moderators
09Dec2013	René UAT Wierenga	PP000107	RHWierenga	IN	32	SI		Junk Meteor...
11Jul2013	Char Lot Bataller	PP000042	Chartered Institute of Marketing	12	32	AU	11	Chiara Aina Nicole Javan
29May2013	Char Lot Bataller	PP000044	Search Engine Marketing Professional Organization	GS	32	BH	12	Chiara Aina Nicole Javan
24Sep2012	Char Lot Bataller	PP000120	Consultant Forever	DS	32			Char Lot Bataller...
31Jul2009	Chiara Aina Nicole Javan	PP000041	American Marketing Association	12	32	US	11	Chiara Aina Nicole Javan...

2. Select the partner profile from the list by checking on the first column of the item on the summary table.



3. Click the Action Dropdown > Moderator/Owner > Send Email to Contact > Selected selection from the Status Bar.

Tag		All	
All (129)	Action	Partnership Type	Indust
	General »		
	Moderator/Owner »		
Wierenga	Make a comment	Filtered	
Institute of Marketing	Send Email to Contact »	Selected	
ne Marketing Professional Organization	Add Access	12	32
Forever	Remove Access	GS	32
Marketing Association	Add Moderated By	DS	32
	Replace Moderated By	12	32
	Replace Owner		


4. Follow the number 3 step of [Send Email to Filtered Partner Contacts](#).

Send Email to Contacts through the Related Contacts Tab

Here's how to send emails to contacts through Related Contacts Tab:

1. Go to Partner Profile module.
2. Select a partner where you're assigned as Owner and/or Moderator to see the details.

The screenshot shows the 'Partners' section of the Teczo Mailing Services interface. At the top, there is a search bar and navigation tabs for 'Current (113)', 'Open (113)', 'On-Hold (9)', 'Closed (5)', and 'Archived (2)'. Below this is a table of partners with columns: Updated On, Updated By, PP ID, Partner Name, Partnership Type, Industry, Ctry, Impt., and Moderators. The 'Open' tab is selected, showing three partner entries. The second entry, 'Partner Profile' (PP000178), is selected. Below the table, there are two panels: 'Details' on the left and 'Comments' on the right. The 'Details' panel shows fields for Customer Code, Immediate Respondents, Importance, Description, and Miscellaneous (Country: Canada (CA), Submitted By: Char Lot Bataller). The 'Comments' panel shows 'No comments posted.' and an 'Add Comment' button.

- Click the Related Contacts tab. You will see the list of contacts related to the partner. Contacts with the icon  before the name are set as default contact (See [Set Default Partner Contact](#) on how to set default partner contacts).

The screenshot shows the 'Related Contacts' tab selected. At the top, there are buttons for 'Send Email', 'Add New Contact', and 'Add From Existing'. Below is a table of contacts with columns: Contact Name, Company Name, Primary ph, Country, and Moderated By. The first contact, 'Andy Lau', has a person icon next to his name. The table lists four contacts. At the bottom, there is a 'Delete Link' button, pagination controls (Page 1 of 1), and 'Items 1 - 4 of 4'.

- Select one or more contacts from the list and click 'Send Email' button.

This screenshot is identical to the previous one, but the first three contacts in the table are selected, indicated by checkmarks in the selection column. The 'Send Email' button is now highlighted, indicating it is the active action.

5. Follow the number [3](#) step of [Send Email to Filtered Partner Contacts](#).

Tracking Related Emails

All emails sent though the Partner Profile are being tracked through the Related Emails tab either in Partner Profile or Contact Management Module. Replies from sender and recipients are recorded as well. Here's how to see the email details:

Partner Profile Module

1. Go to Partner Profile and select a partner in the summary table to see the details.
2. Click the Related Emails tab.

Comments					Related Contacts					Related Projects					Related Emails					Notes				
Last Update		Subject			Sender																			
+ 02:45 PM		Introducing Teczo Platform			Char Lot Bataller																			

Page 1 of 1 | 10 | Items 1 - 1 of 1

3. The list is grouped per Subject. Click the plus sign on the first column to expand the list.

Comments					Related Contacts					Related Projects					Related Emails					Notes				
Last Update		Subject			Sender																			
- 02:45 PM		Introducing Teczo Platform			Char Lot Bataller																			
Updated On		Updated By		Contact Name		Company Name																		
02:45 PM		Philips Solitaire		Philips Solitaire		Chartered Institute of Marketing																		

Page 1 of 1 | 10 | Items 1 - 1 of 1

4. Double click the desired contact in the list to see the email details in a new tab page which is composed of the following:
 - a. Original Message – details of the original message sent to the contact with the following:
 - 1) Subject – email message subject.

- 2) To - name of the recipient and email address.
- 3) From – company user who sent the email.
- 4) Date – date when the email was sent.
- b. Correspondences – replies from the recipient or the moderators of the Partner or Contact.

The screenshot shows two panels. The 'Original Message' panel on the left contains the following details:

Subject	Introducing Teczo Platform
To	Philips Solitaire <charlotte.bataller@teczo.com>
From	Char Lot Bataller <charlotte.bataller@teczo.com>
Date	10Dec2013 02:19 PM

The message body contains a greeting and a list of updates:

Dear Prof. Philips Solitaire,

With regards to Friday's (2013-11-15) MyTeczo software update, release version 5.2, here are some changes you should take note of:

Affects ALL users (modules & features):

- Extending the use of Immediate Respondents (All Modules)**
Immediate respondents will now receive a notification through email and Teczo messaging that the details of the topic they are assigned to have been updated.
- Multiple archiving and deleting of attachments in topic details (All Modules)**
Attachments are now equipped with the option to select one of more attachments at once. With this, users are now able to archive or delete one or more attachments through the topic details page in one go.
- Switched display of NTI and Tags in summary table (All Modules)**
Tags will now be displayed first before the topic notification icons in the summary table.
- Improved behavior for changing deadline of multiple topics (BT, PT, TS Modules)**
The behavior in changing deadline has been improved by providing a Today button where the date will be filled in automatically upon clicking this button.
- Improvements for Workflow and Reporting (BT and TS Modules)**
 - New Field: Assigned To**
An 'Assigned To' field has been added to the Bug Tracker and Technical Support Center Modules. Users selected in this field will have rights to change the field values of 'Report Status', 'Resolution' and 'Assigned To' fields through the Comment Section of that topic.
 - Changing Fields through Comment Section**
Report Status, Resolution and Assigned to fields can now be changed through the Comment Section. Any user in the topic selected in the 'Moderated By', 'Owner' or 'Assigned To' fields will have the right to use this functionality.
 - Added 'Report Status' and 'Resolution' fields in TS Module**
'Report Status' and 'Resolution' fields are now available in the Technical Support Center module.
- Changes in Product Line and Product Selection (TS, PT, PC, BT, QI Modules)**
The following changes have been implemented:
 - Product Line can now be chosen independently from Product
 - Product will be filtered upon selection of a Product Line
 - Product Line is automatically set upon selection of a Product

Best Regards,
Charlotte Bataller
Teczo.com, Ltd.

The 'Correspondences' panel on the right shows a 'Click to Reply' button, a rich text editor with a yellow background, and buttons for 'Send', 'Reset', and 'Close'. Below the editor is a pagination control showing 'Page size: 10' and a 'Change' link. A reply is shown below:

Reply 1 by Philips Solitaire on 10Dec2013 02:45 PM

Thanks a lot.

Keep me updated with recent changes.

Contact Management Module

- 1. Go to Contact Management module and select a contact in the summary table to see the details.
- 2. Click the Related Emails tab.

The screenshot shows the 'Related Emails' tab selected in a contact management interface. It features a table with the following data:

Last Update	Updated By	Subject	Sender
02:45 PM	Philips Solitaire	Introducing Teczo Platform	Char Lot Bataller

At the bottom of the table, there is a pagination control showing 'Page 1 of 1' and 'Items 1 - 1 of 1'.

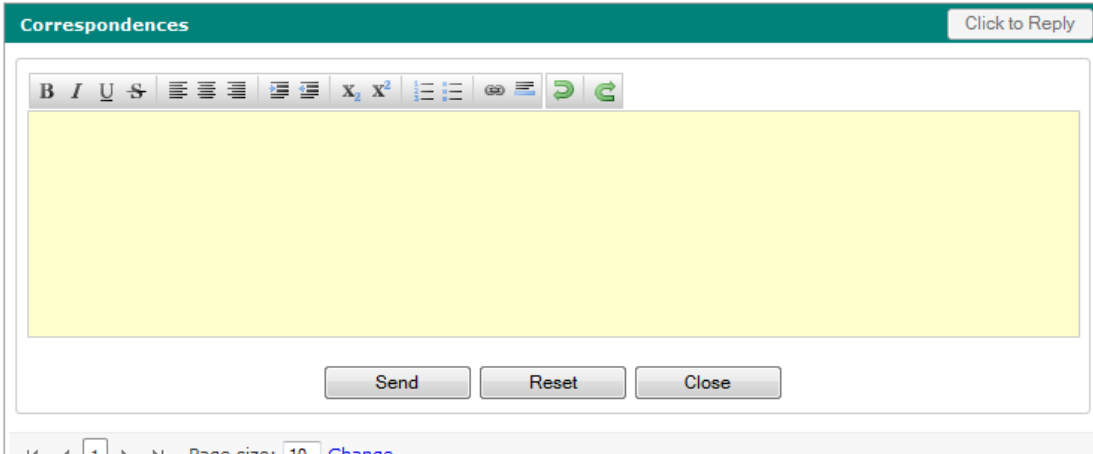
- 5. Double click the desired email or subject in the list to see the email details in a new tab page which is composed of the following:
 - a. Original Message – details of the original message sent to the contact with the following:
 - 1) Subject – email message subject.

- 2) To - name of the recipient and email address.
 - 3) From – company user who sent the email.
 - 4) Date – date when the email was sent.
- b. Correspondences – replies from the recipient or the moderators of the Partner or Contact.

Send Replies to the Recipient

A company user who is assigned as Owner and/or Moderator of the Partner or Contact can reply to the recipient. Here's how to reply:

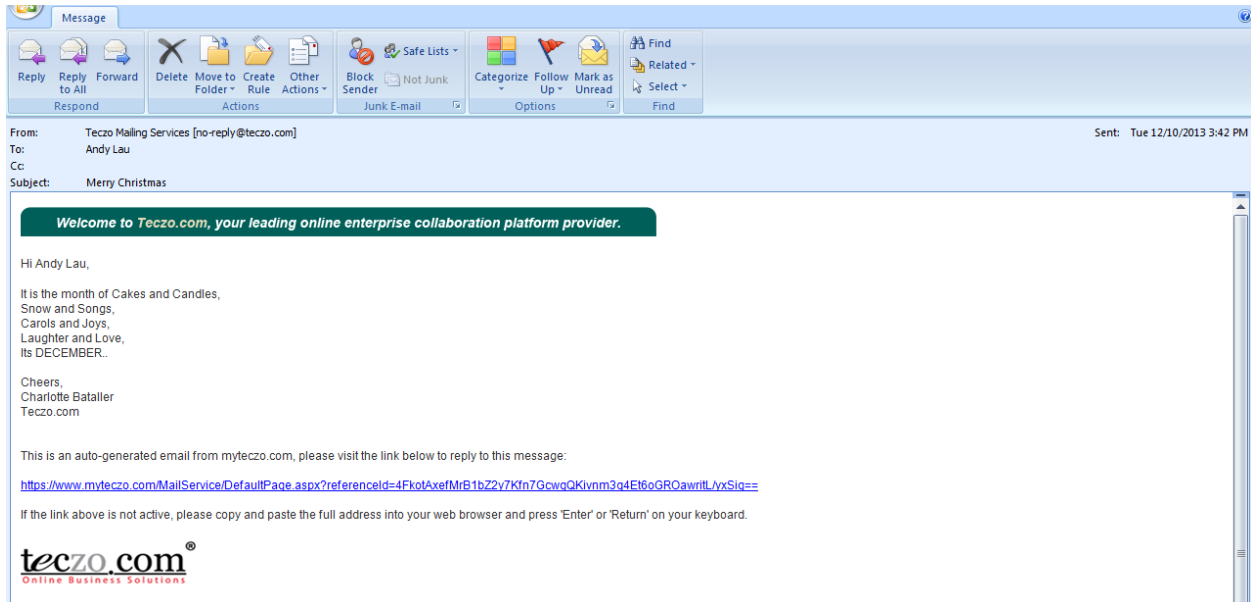
1. Follow the steps in [Tracking Related Emails](#).
2. Write the message in the reply box.



The screenshot shows a web interface titled "Correspondences" with a "Click to Reply" button in the top right corner. Below the title bar is a rich text editor toolbar with icons for Bold (B), Italic (I), Underline (U), Strikethrough (ABC), Bulleted List, Numbered List, Indent Left, Indent Right, Undo (X), and Redo (X²). Below the toolbar is a large yellow text area for writing the reply. At the bottom of the text area are three buttons: "Send", "Reset", and "Close". At the very bottom of the interface, there is a "Page size: 10" label and a "Change" link.

3. Click the 'Send' button to send the email.
4. Click the 'Reset' button to empty the reply box or 'Close' button to cancel without sending the reply.

Sample Email Received by the Contact or Recipient



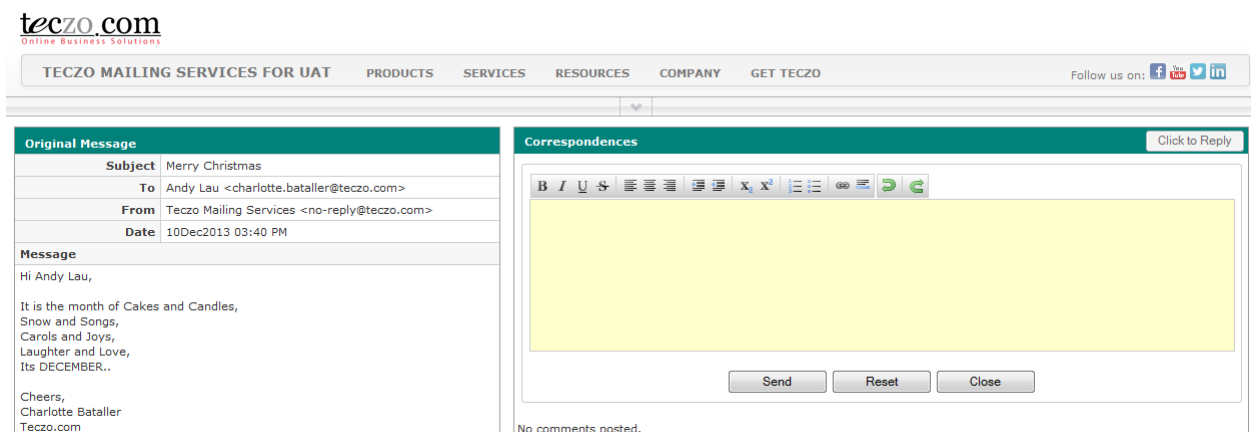
Sample Reply Link Received by the Contact or Recipient

This is an auto-generated email from myteczo.com, please visit the link below to reply to this message:

<https://www.myteczo.com/MailService/DefaultPage.aspx?referenceId=4FkotAxefMrB1bZ2y7Kfn7GcwqQKivnm3q4Et6oGROawritL/yxSig==>

If the link above is not active, please copy and paste the full address into your web browser and press 'Enter' or 'Return' on your keyboard.

Sample Reply Page Accessible by the Contact or Recipient



The screenshot shows the Teczo Mailing Service website. The top navigation bar includes links for PRODUCTS, SERVICES, RESOURCES, COMPANY, and GET TECZO. A prominent banner advertises "Start Saving Now! Only \$9 per user/month" with bullet points: "No license costs.", "No upgrade costs.", and "No maintenance fees." It also features a "Higher ROI!" graphic with a smiling couple. Below the banner is an email interface with an "Original Message" section and a "Correspondences" section for replying.

Original Message

Subject: Merry Christmas
To: Andy Lau <charlotte.bataller@teczo.com>
From: Teczo Mailing Services <no-reply@teczo.com>
Date: 10Dec2013 03:40 PM

Message

Hi Andy Lau,
 It is the month of Cakes and Candles,
 Snow and Songs,
 Carols and Joys,
 Laughter and Love,
 Its DECEMBER..

Cheers,
 Charlotte Bataller
 Teczo.com

Correspondences Click to Reply

Rich text editor with buttons: B, I, U, S, Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Indent, Outdent, Undo, Redo, Send, Reset, Close.

No comments posted.

Set Default Partner Contact

A contact can be set as a default partner contact through the Add/Edit page of the Contact Management module. Here's how to set default partner contact:

1. Go to Contact Management module.
2. Select a contact that you own and/or moderate.
3. Click the 'Edit' button to go to the edit page.

The screenshot shows the Teczo Contact Management module. The top navigation bar includes Home, General, Product Development, Sales & Marketing, Operations & Admin, Time & Attendance, and System. The user is logged in as Char Lot Bataller on 10Dec2013. A search bar and a list of contacts are visible. The contact list has columns for Updated On, Updated By, CM ID, Display Name, Company Name, Primary ph, Ctry, and Moderators. The first contact is selected, and its details are shown in a pop-up window.

Current (108) Open (108) On-Hold (0) Closed (6) Archived (0) All (114) Action Add Contact

Updated On	Updated By	CM ID	Display Name	Company Name	Primary ph	Ctry	Moderators
<input checked="" type="checkbox"/> 03:15 PM	Char Lot Bataller	CM000100	Philips Solitaire	Chartered Institute of Marketing		IE	Char Lot Bataller...
<input type="checkbox"/> 02:35 PM	Char Lot Bataller	CM000002	Andy Lau	HP	34256587	CN	Char Lot Bataller...
<input type="checkbox"/> 08Oct2013	Char Lot Bataller	CM000026	Michale Chan	IBM	65438976	US	Paul Chen...

Details Edit

CM000100 - Philips Solitaire

Tags

Immediate Respondents

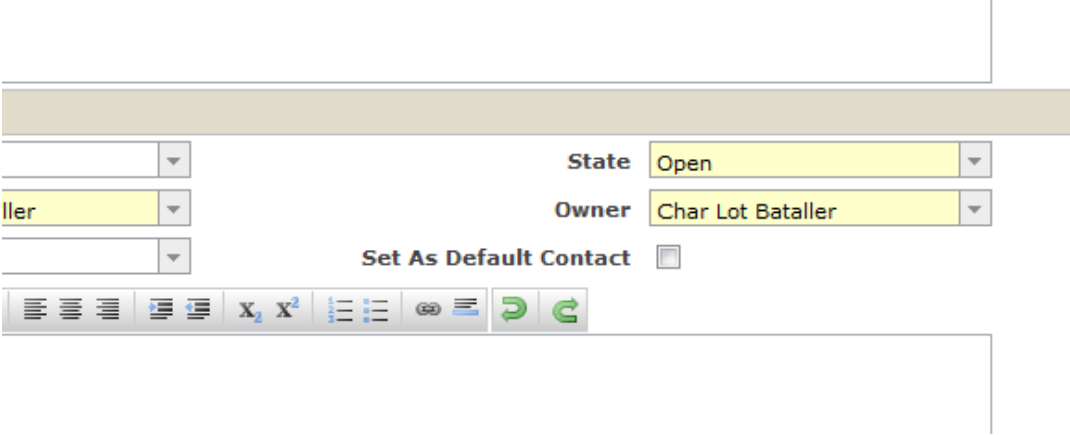
Company Name: Chartered Institute of Marketing

Comments Partner Profile Related Projects Related Emails Notes Add Comment

No comments posted.

Access Rights

4. Locate the 'Set As Default Contact' below the Owner field.



- 5. Tick the box to check and click 'Save', 'Save & New' or 'Save & Close' button to save the changes.