How to Use Teczo Mailing Services

What is Teczo Mailing Services?

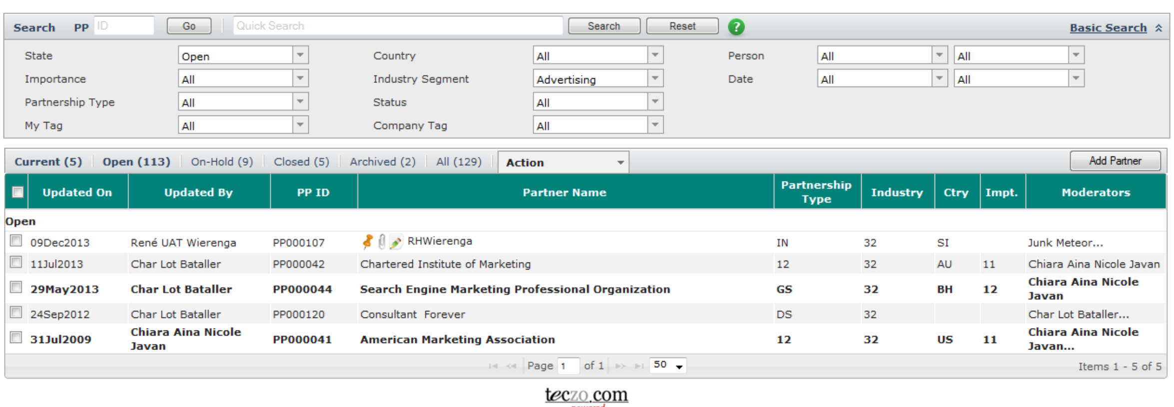
Teczo Mailing Services is a Teczo feature that will give Teczo users the following benefits:

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

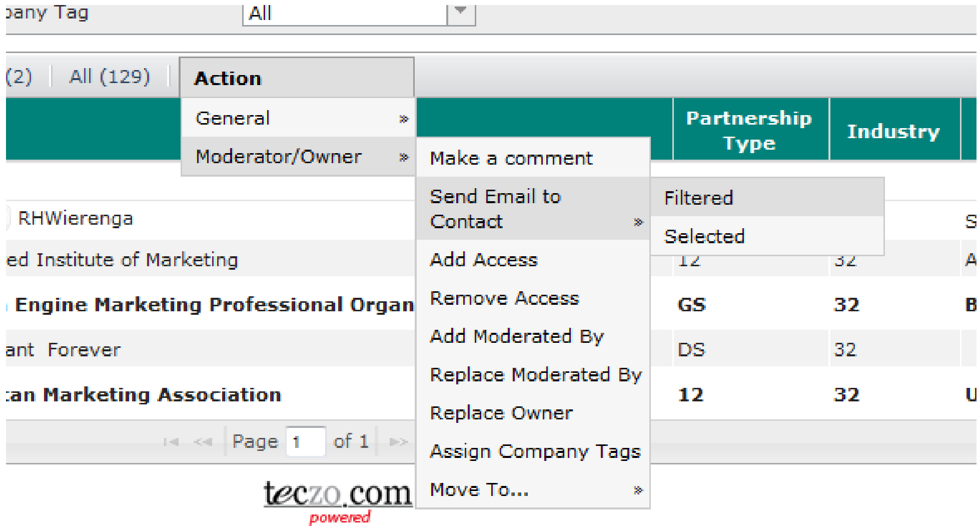
Send Email to Filtered Partner Contacts

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.



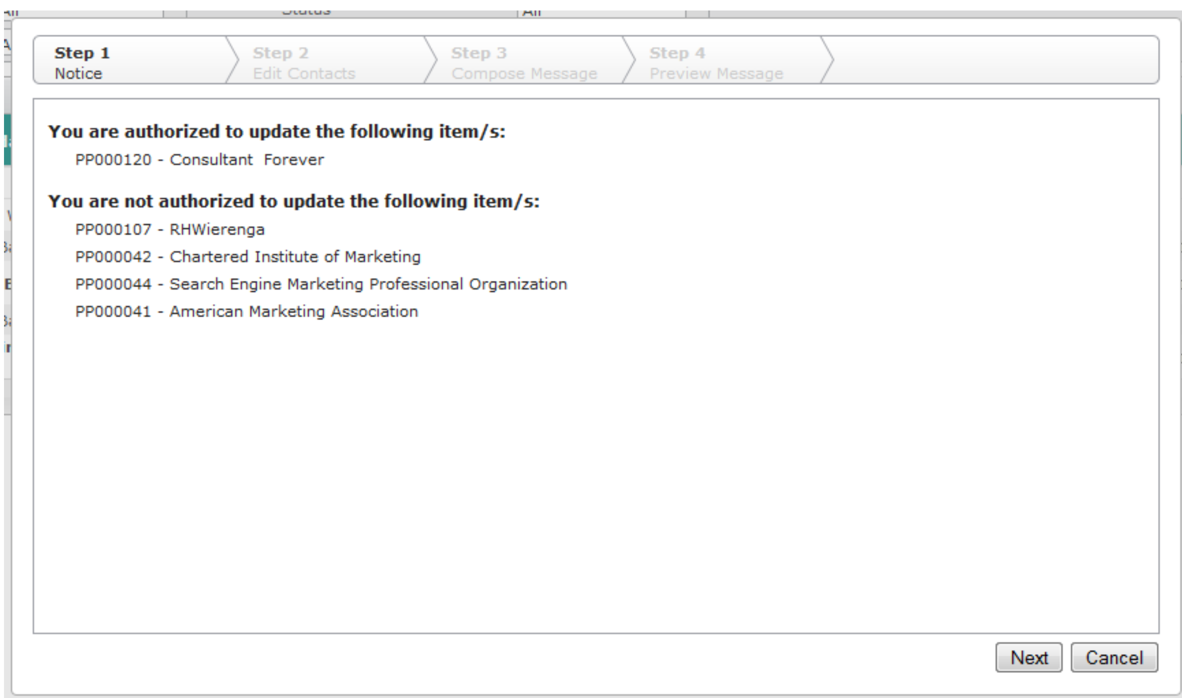
2. Click the Action Dropdown > Moderator/Owner > Send Email to Contact > Filtered selection from the Status Bar.



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.



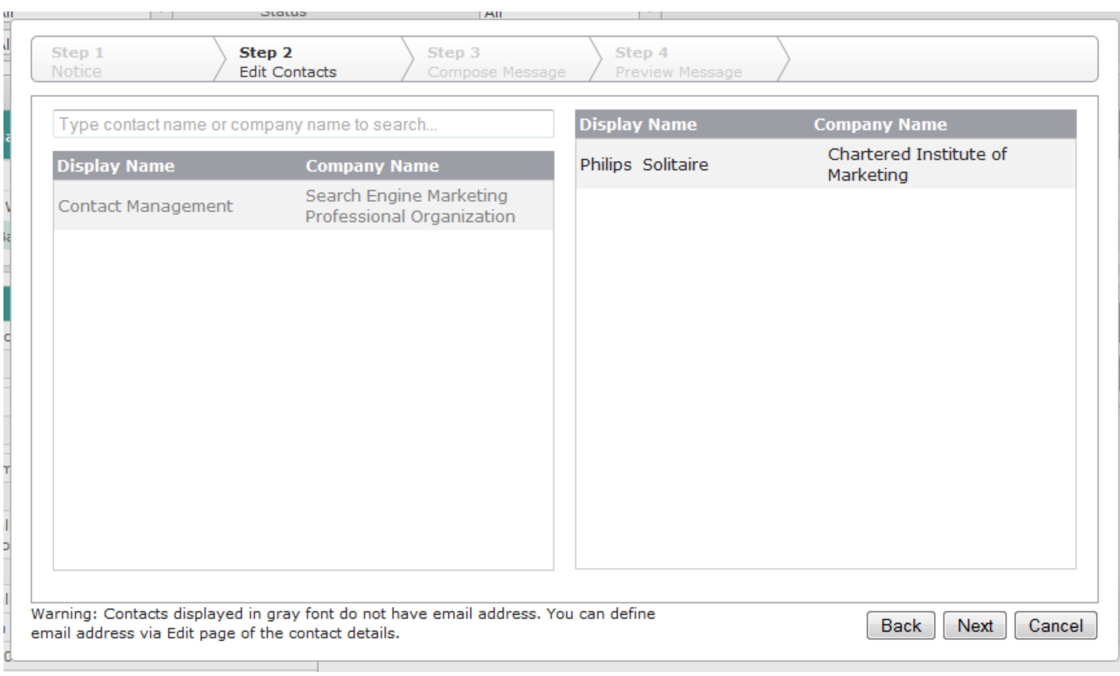
   b. Step 2: Edit Contacts

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.



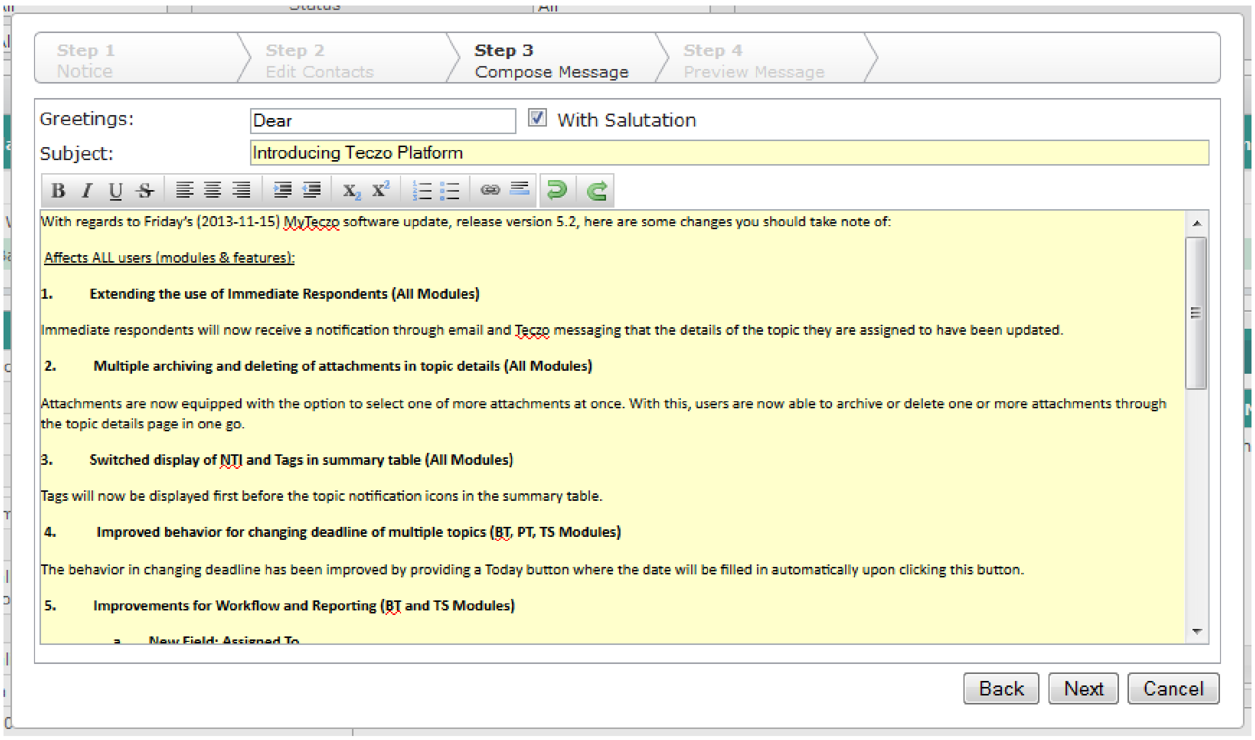
c. Step 3: Compose Message

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.



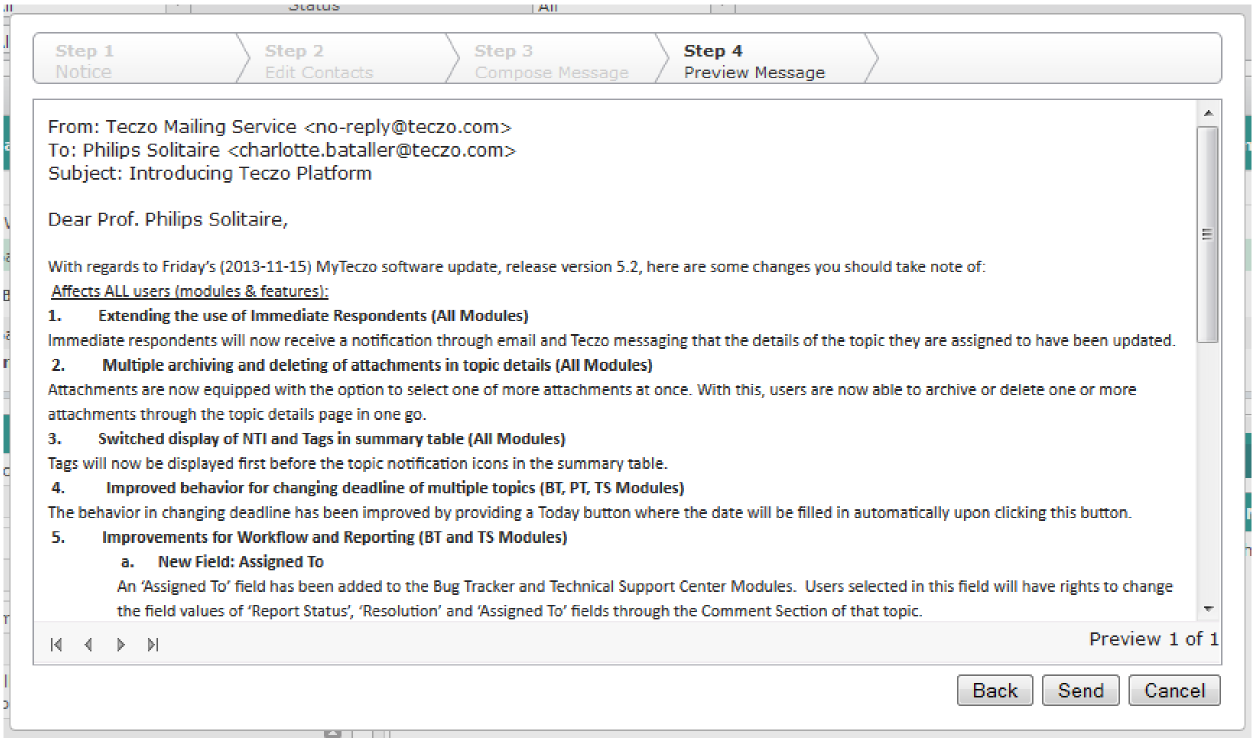
d. Step 4: Preview Message

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.

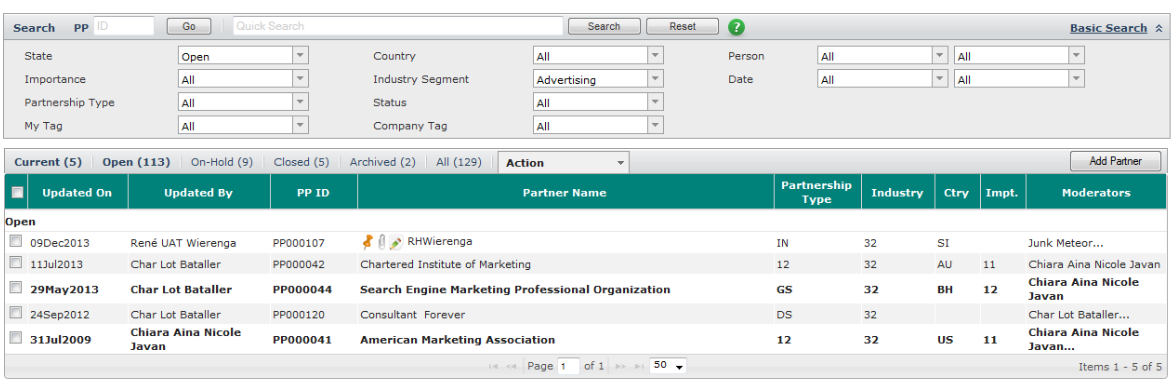
- You can go back to Step 3 by clicking the 'Back' button.
- Click the 'Send' button to send the email message to the contacts.
- Click 'Cancel' to return to the summary page without sending email.



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.



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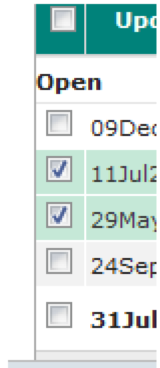
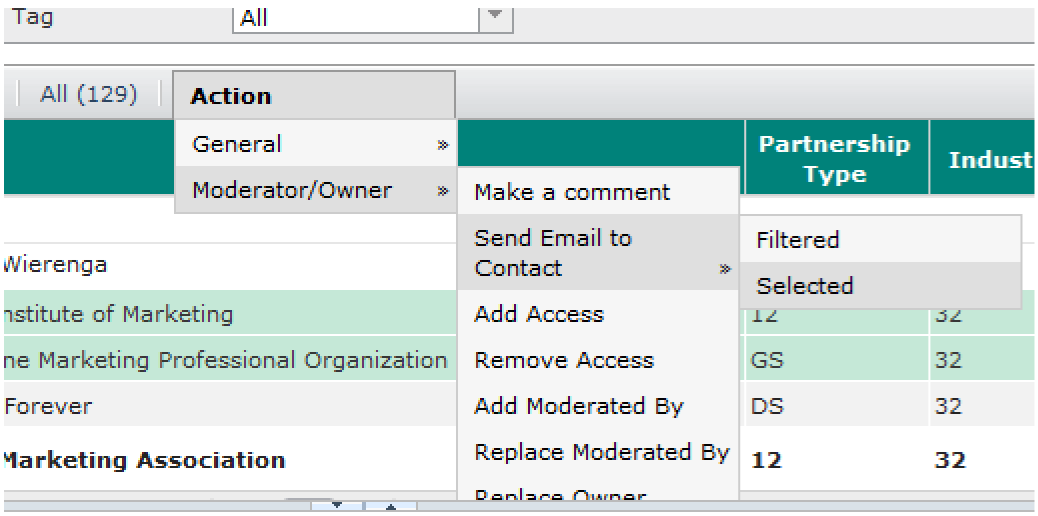
2. Select the partner profile from the list by checking on the first column of the item on the summary table.



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

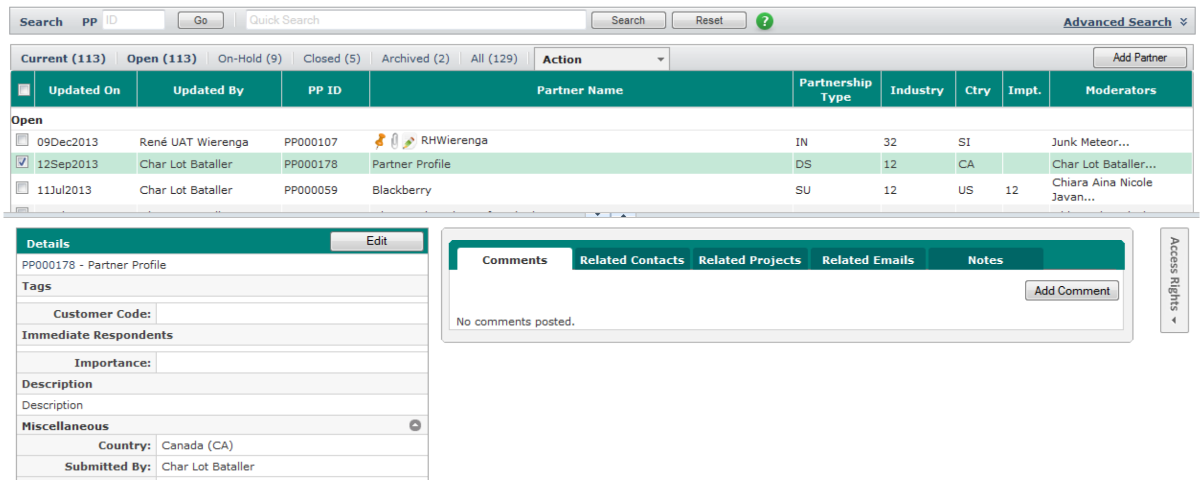


4. Follow the number 3 step of Send Email to Filtered Partner Contacts.

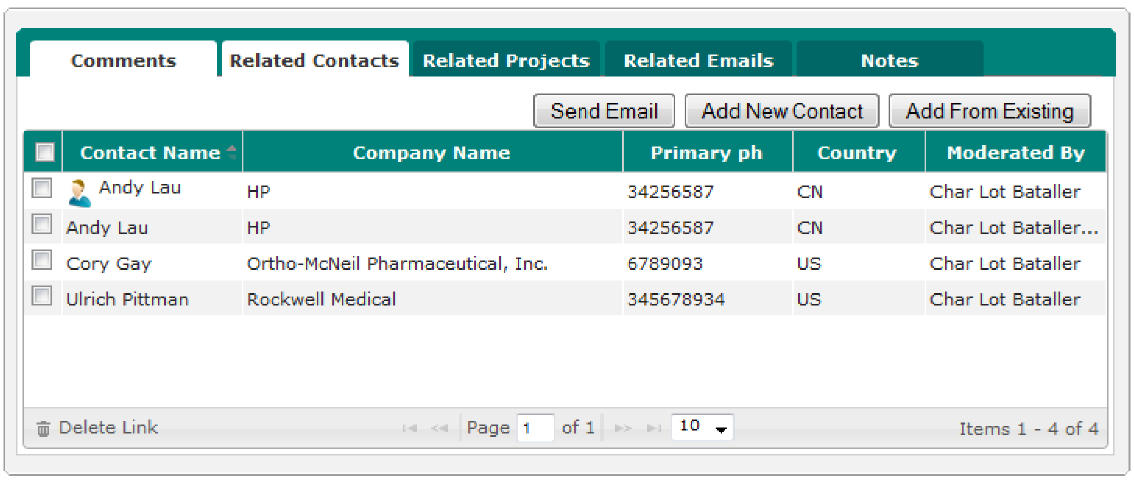
Send Email to Contacts through the Related Contacts Tab

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

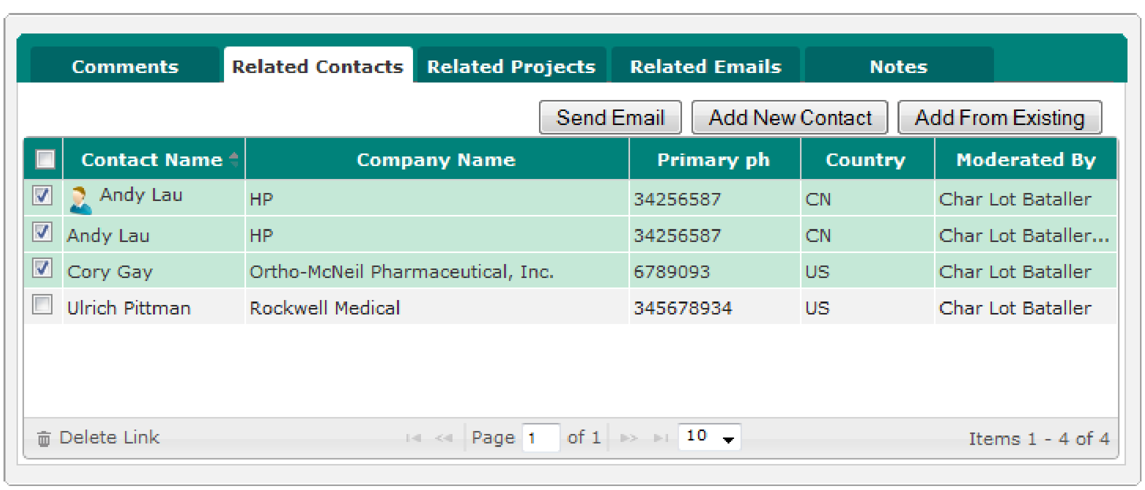
1. Go to Partner Profile module.
2. Select a partner where you’re assigned as Owner and/or Moderator to see the details.



3. 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).



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



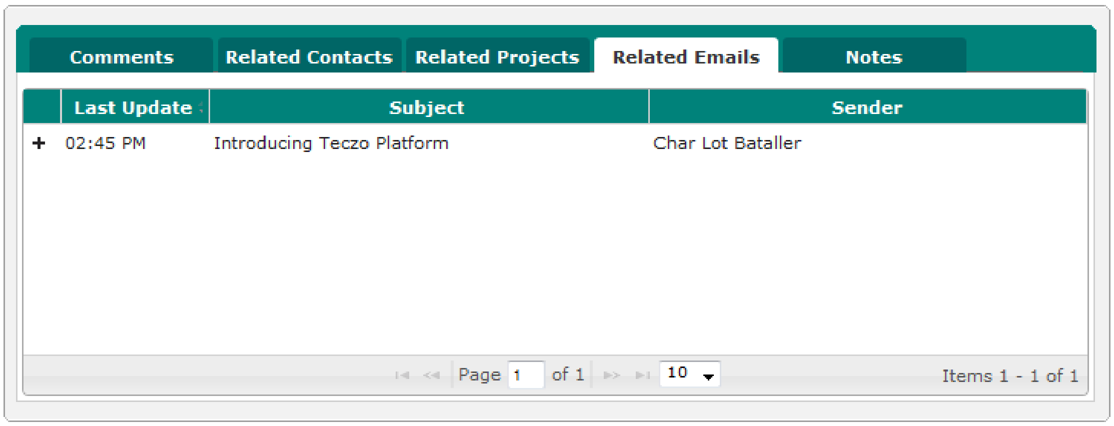
5. Follow the number 3 step of Send Email to Filtered Partner Contacts.

Tracking Related Emails

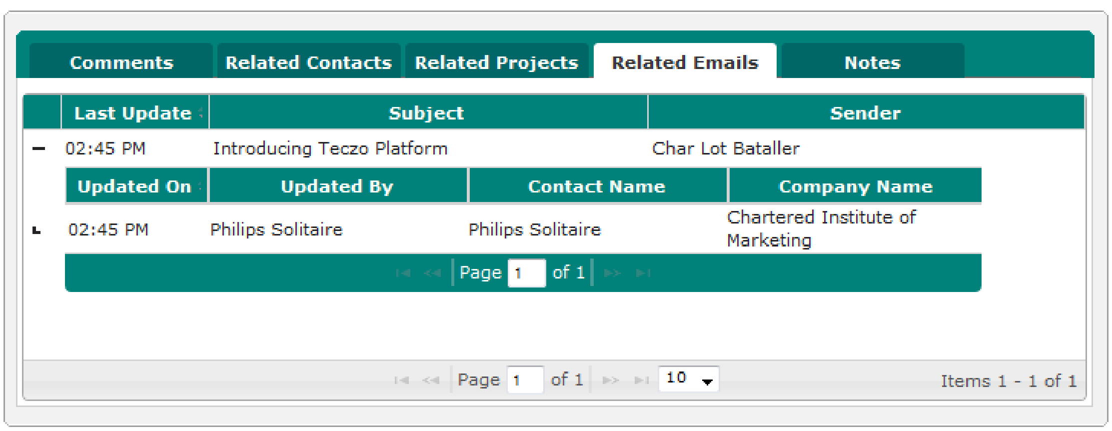
All emails sent though the Partner Profile are being tracked through the Related Emails tab either in Partner Profile or Contact Management Module. Replies from sender and recipients are recorded as well. Here's how to see the email details:

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.



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

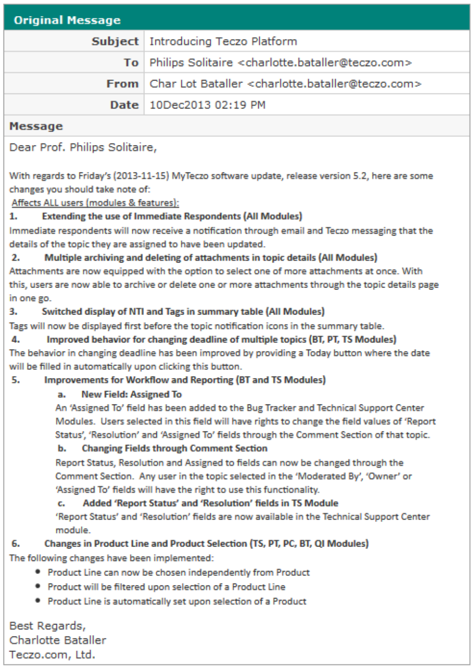


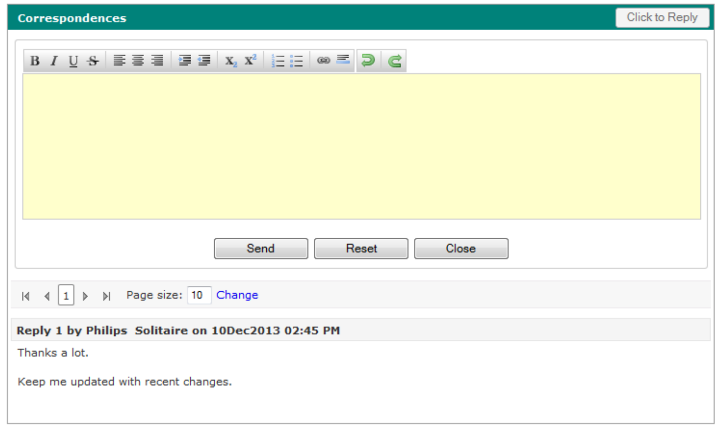
4. Double click the desired contact in the list to see the email details in a new tab page which is composed of the following:

   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.

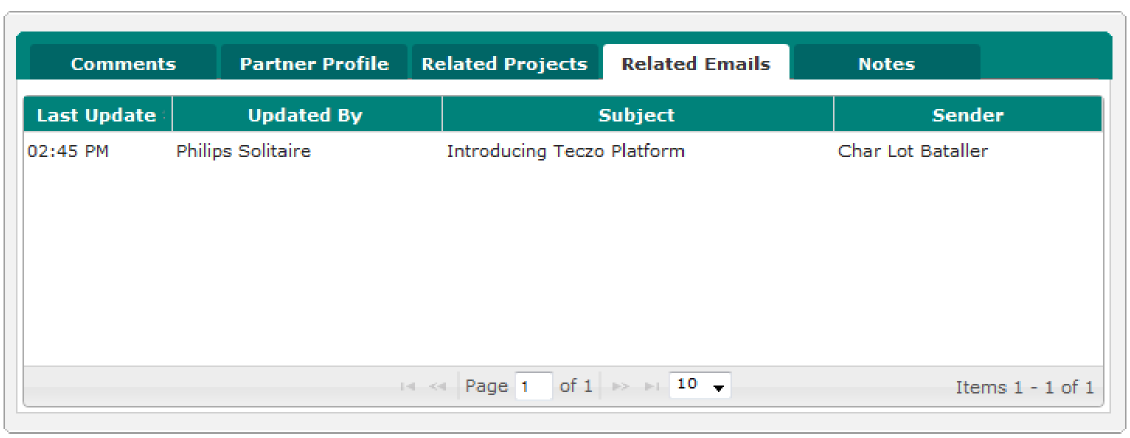
b. Correspondences – replies from the recipient or the moderators of the Partner or Contact.





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.



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.

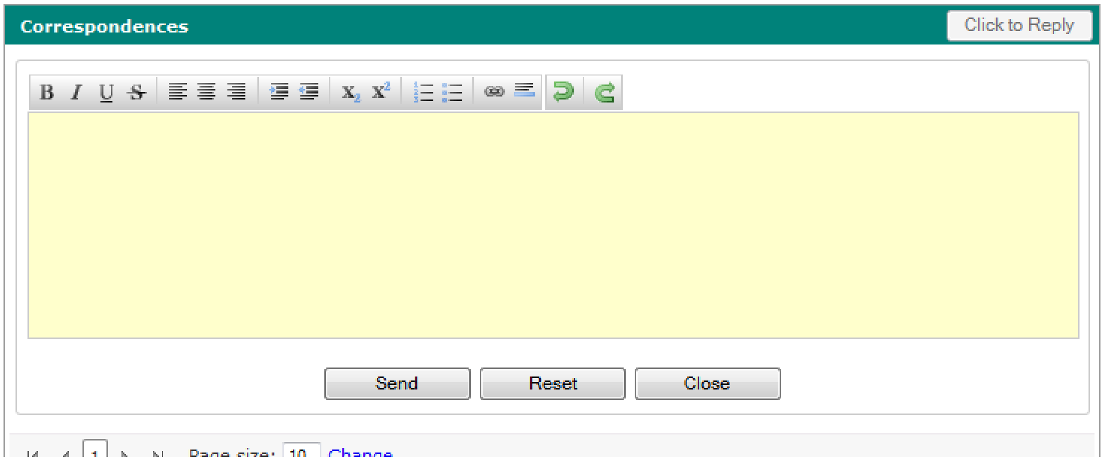
2) To - name of the recipient and email address.
3) From – company user who sent the email.
4) Date – date when the email was sent.

b. Correspondences – replies from the recipient or the moderators of the Partner or Contact.

Send Replies to the Recipient

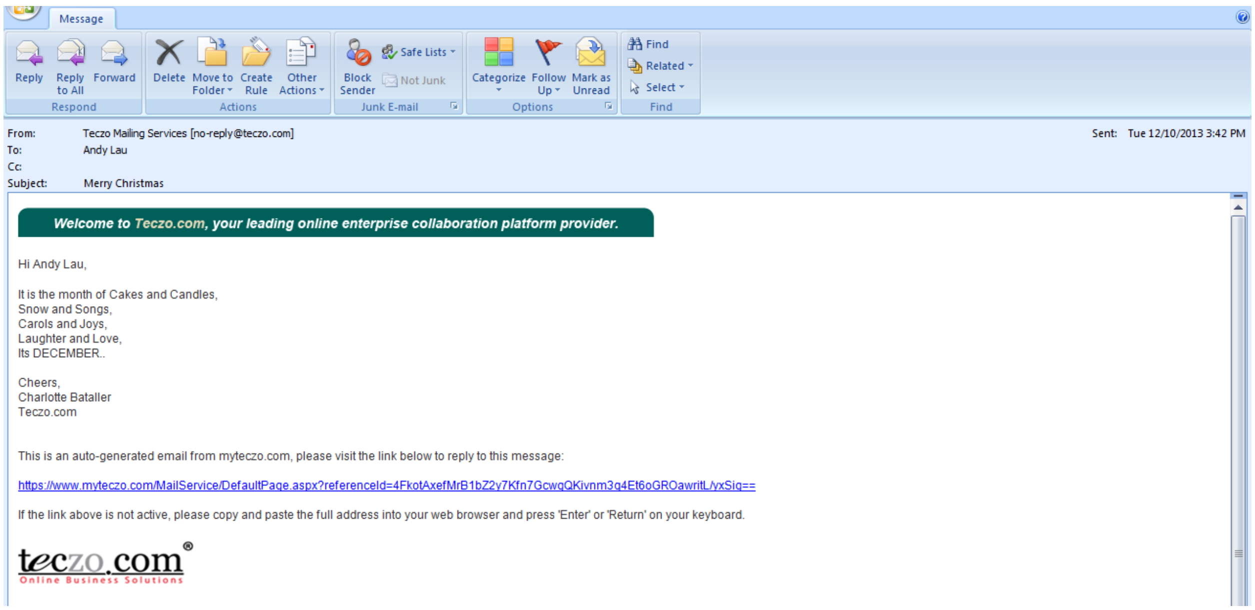
A company user who is assigned as Owner and/or Moderator of the Partner or Contact can reply to the recipient. Here's how to reply:

1. Follow the steps in Tracking Related Emails.
2. Write the message in the reply box.



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



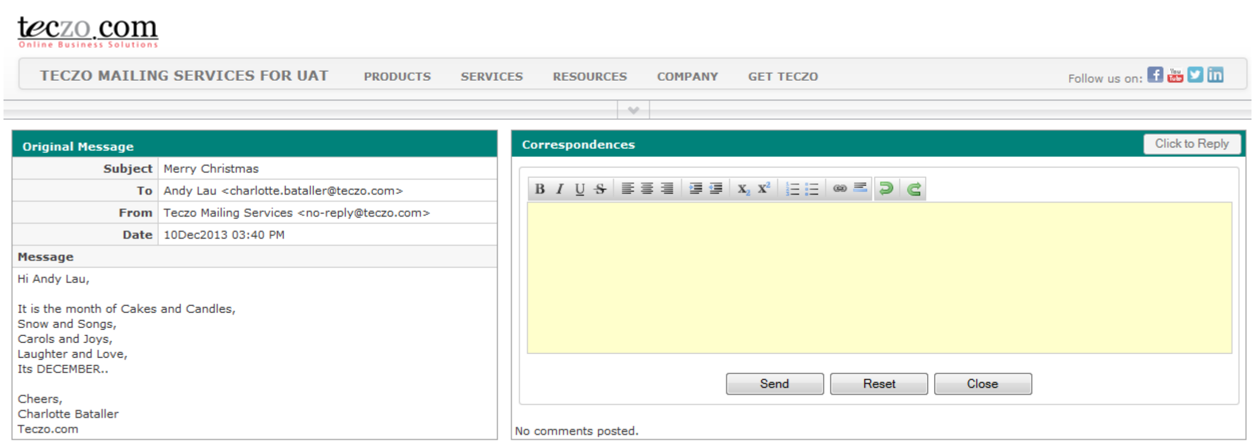
Sample Reply Link Received by the Contact or Recipient

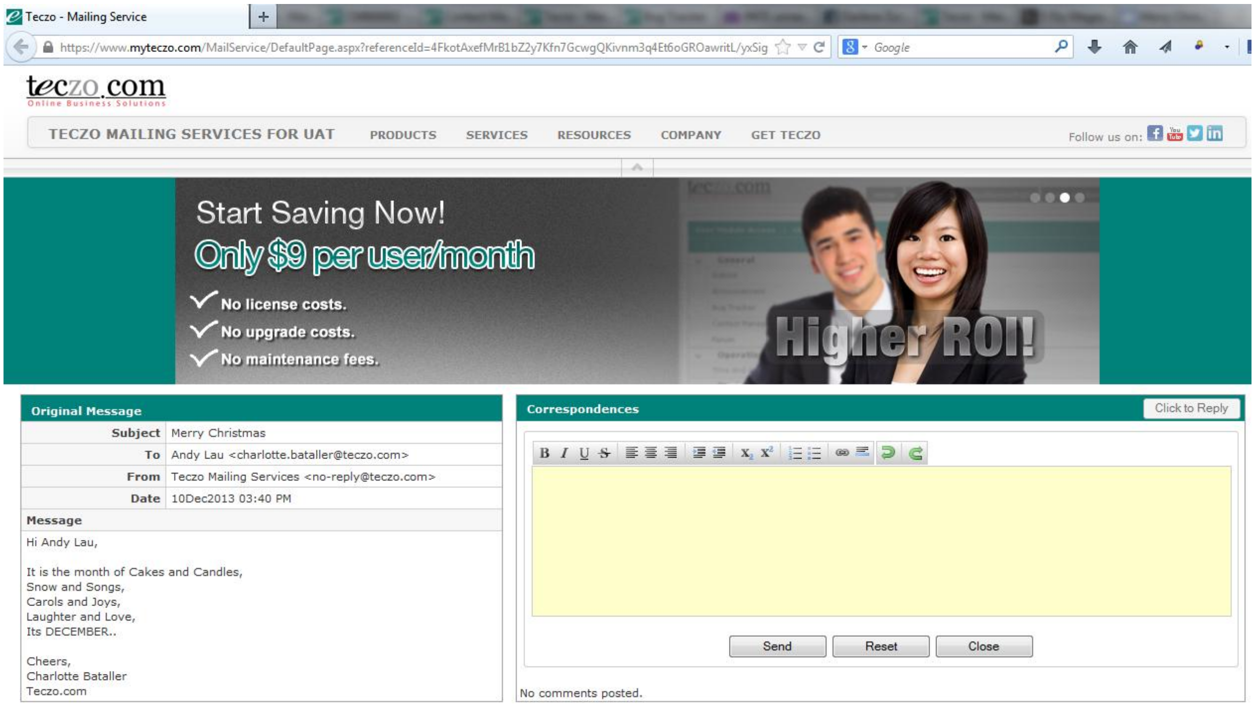
This is an auto-generated email from myteczo.com, please visit the link below to reply to this message:

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

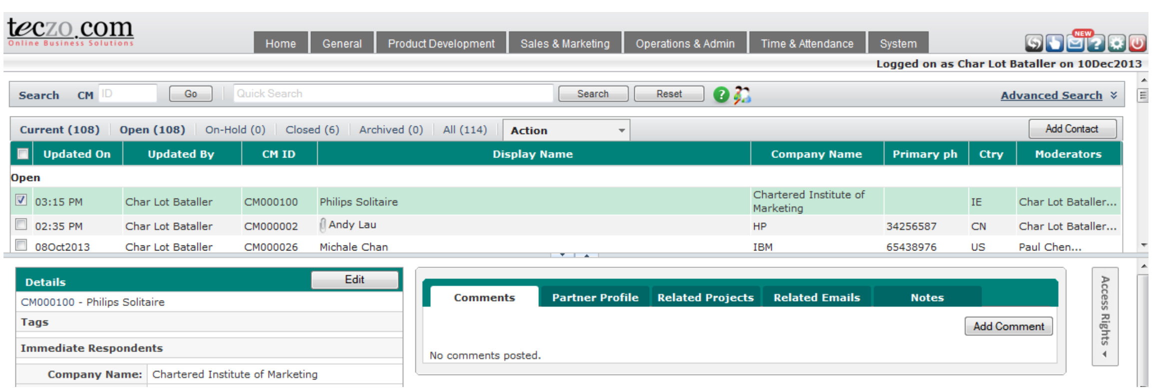




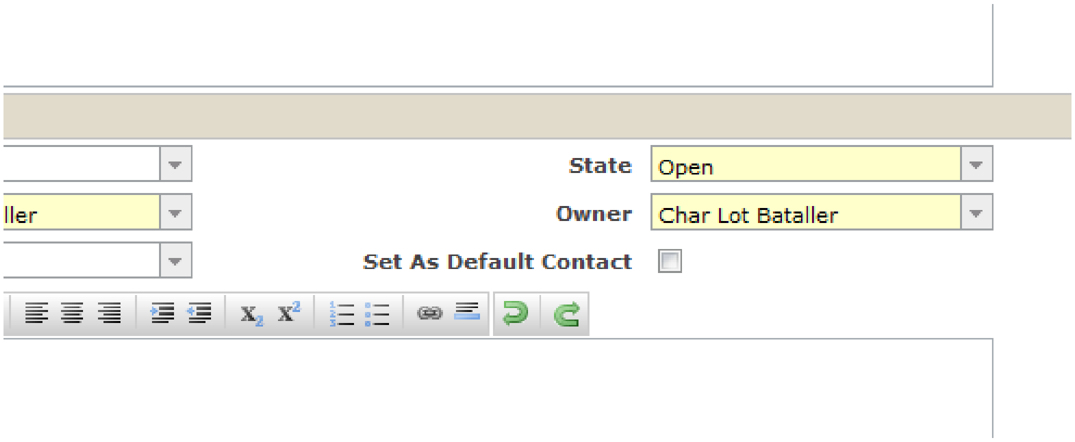
Set Default Partner Contact

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.



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.