

Setting a letter to be your Default Signature Document for Emailing

WorkCenter will allow you to create a letter that you can use as a default email page. This will allow you to add your personal information including any company logo or graphics to this letter for emailing. This will be especially effective when you open a contact record and wish to send a quick email using the Email Envelope Icon in the contact record.

If you wish to have a default email letter, follow these steps:

1. Create your personal letter or email that contains your desired default information.
2. Add your personal message to the subject line of your email
3. Mark this letter as your “Set as Default Email Signature” under the advanced tab
4. Test your email signature for desired results

Steps #1 and #2: Create your custom letter or email and add a personalized subject message: For this example, we have elected to duplicate an existing library form and name it #1 Default Signature Email Message. During this process we have also added our company logo and left the “Date” and “Contact_FirstName” mail merge fields inside the letter.

Right click on the desired letter, choose “duplicate Item” and we will change the name to reflect: “#1 Default Email Signature”. We will leave this letter under “Applicants” and we will modify the subject message line to say “A personal Message from <My_Name>”. When you have finished, click the “OK” box and you will notice the new letter added to the top of your list. WorkCenter loads letters in alphabetical listing, so when we elected to us the #1 in the name, it automatically placed the letter at the top.

Next step is to edit this new letter and remove all unnecessary text and add your personal logo or graphics to this letter. For more information about editing and creating new letters in your library, watch the other flash videos pertaining to “Library Items” or read the Quick Start Guide.

Step #3: Mark this letter as your “Default Email Signature”: To do this, right click on the letter and choose “Advanced” and then select “Set As Default Email Signature”.

Step #4: Test your default email signature: Open any contact record by a double mouse click. Click on the “Envelope Icon” located to the right of the “Email...” Line. WorkCenter will automatically open your Outlook and place the default email message in the Outlook Screen. Make any modifications needed by following the procedures above until the message meets your professional needs.