

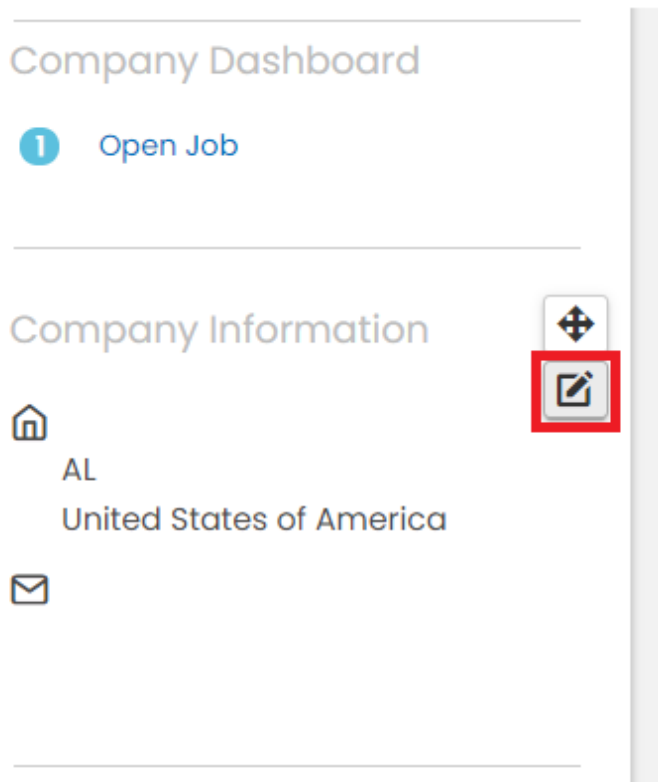
Overview

Updated 05/04/2021

Setting up an Email Rule can save you time on entering email addresses and ensuring that they are correct.

Set up Email Rule

1. Go to the Company record you want to create the Email Rule for
2. Hover over the 'Company Information' section
3. Click the 'Edit' icon



Apply Email Rule

4. Select the format for the Emails in the 'Company Email Rule' field:
 1. Below are the options available
 1. **Example** using Kate Austen

Option	Example
Firstname.Lastname	Kate.Austen
Firstname.L	Kate.A
Lastname.F	Austen.K
Firstname	Kate
F.Lastname	K.Austen
L.Firstname	A.Kate
FLastname	KAusten
Firstname-Lastname	Kate-Austen
Firstname_Lastname	Kate_Austen
FirstnameLastname	KateAusten
FirstnameL	KateA
LastnameF	AustenK
Lastname	Austen

Country:

State/Province:

Zip / Postal:

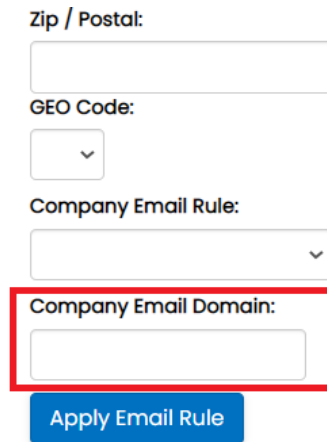
GEO Code:

Company Email Rule:

Company Email Domain:

Apply Email Rule

5. Enter the Company Email Domain (website)
 1. **Example** using pretempagency.com



Zip / Postal:

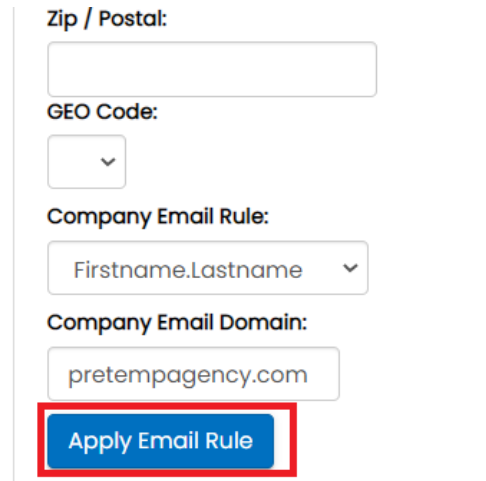
GEO Code:

Company Email Rule:

Company Email Domain:

Apply Email Rule

6. Click 'Apply Email Rule'



Zip / Postal:

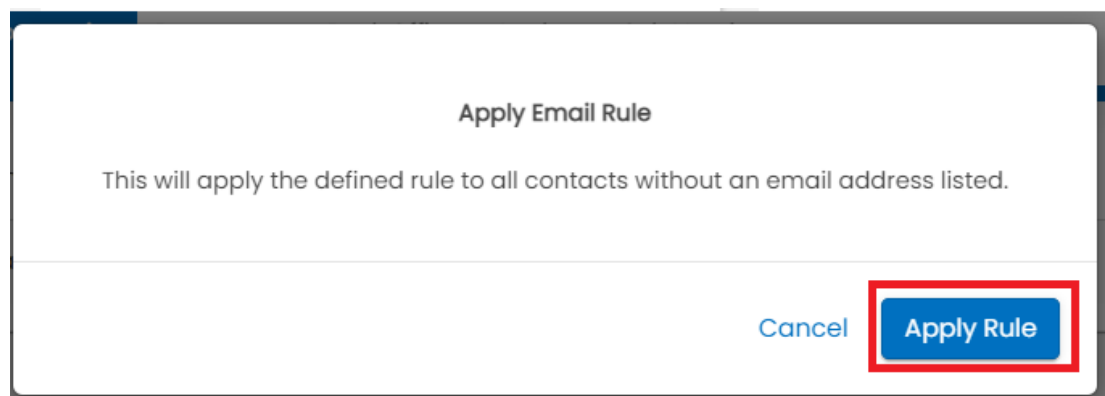
GEO Code:

Company Email Rule:

Company Email Domain:

Apply Email Rule

7. A popup will appear
 1. Click 'Apply Rule'
 1. All contacts, that don't have an email, will get one updated to the format you selected



Apply Email Rule

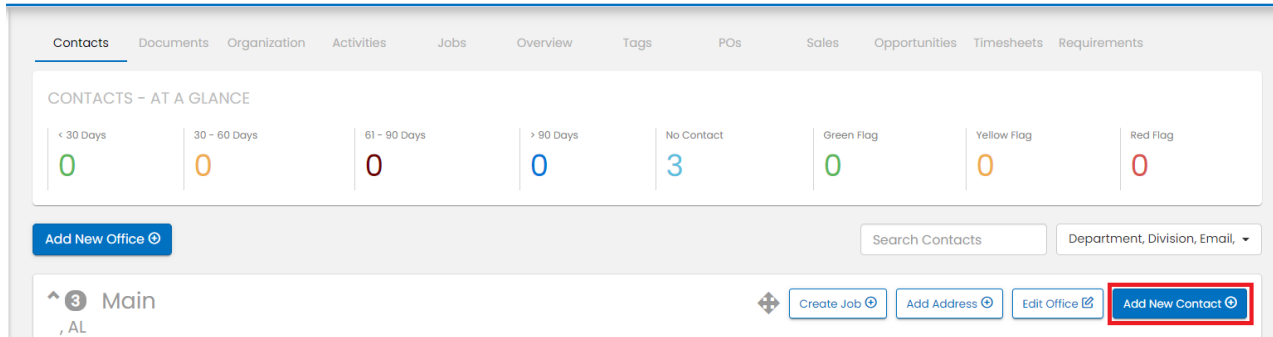
This will apply the defined rule to all contacts without an email address listed.

Cancel

Apply Email Rule

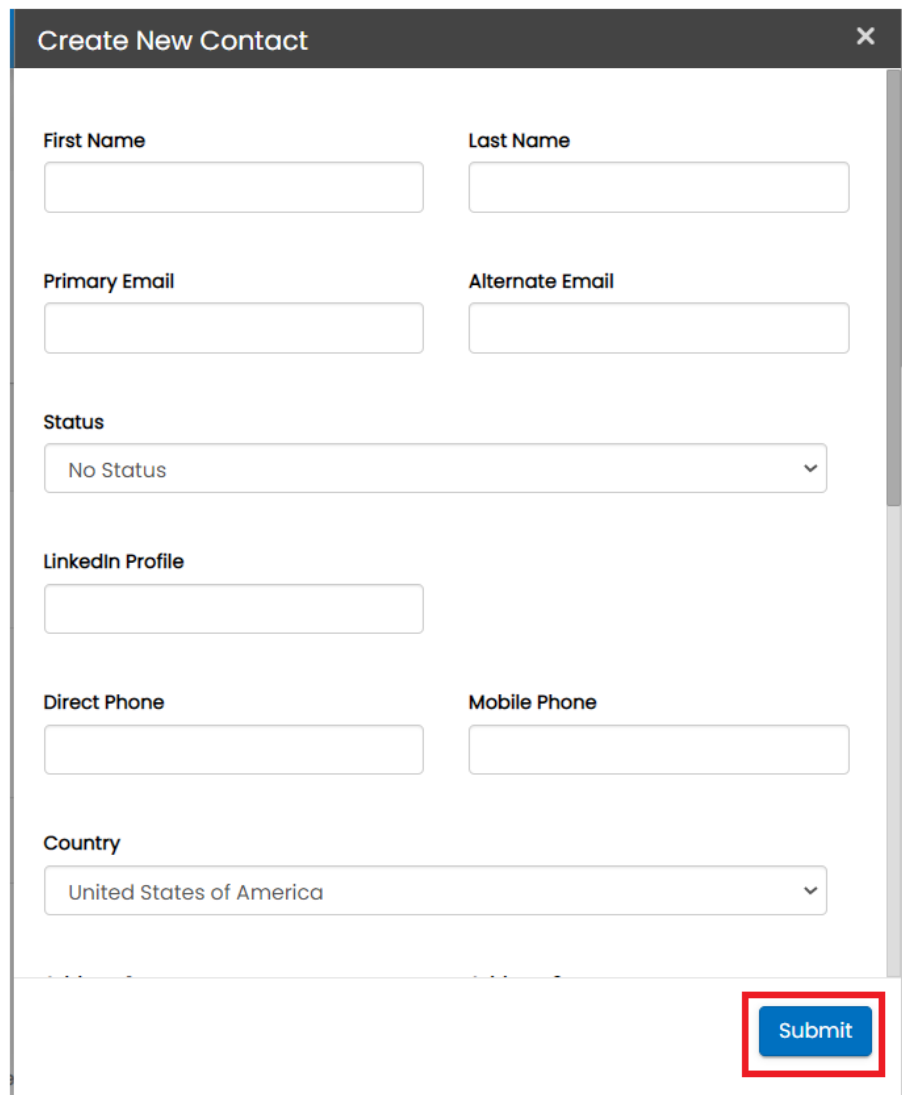
Apply Email Rule (new Contact)

1. Go to the Company profile that you would like to add a new Contact for
2. Click 'Add New Contact'



The screenshot shows the 'CONTACTS - AT A GLANCE' dashboard. It features a navigation bar with tabs for Contacts, Documents, Organization, Activities, Jobs, Overview, Tags, POs, Sales, Opportunities, Timesheets, and Requirements. Below the navigation bar, there are eight summary cards: '< 30 Days' (0), '30 - 60 Days' (0), '61 - 90 Days' (0), '> 90 Days' (0), 'No Contact' (3), 'Green Flag' (0), 'Yellow Flag' (0), and 'Red Flag' (0). A blue button 'Add New Office' is on the left, and a search bar 'Search Contacts' with a dropdown 'Department, Division, Email' is on the right. At the bottom, there are buttons for 'Create Job', 'Add Address', 'Edit Office', and 'Add New Contact' (highlighted with a red box).

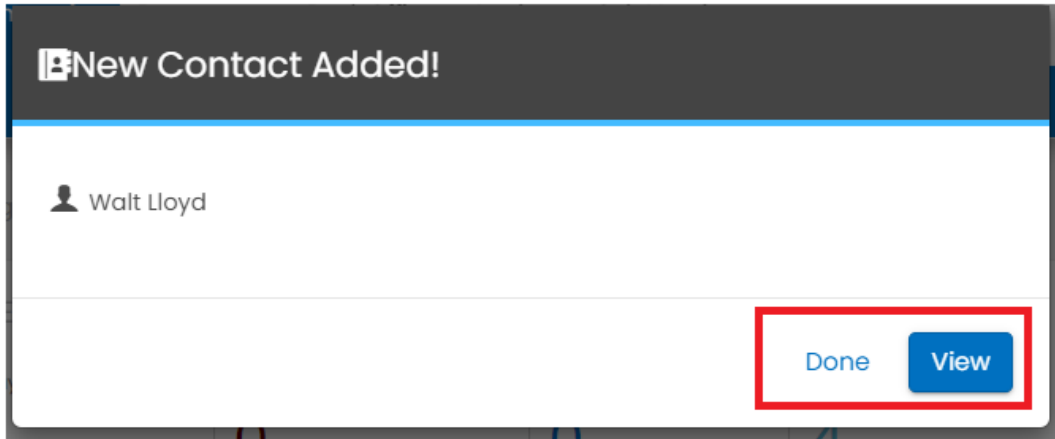
3. Fill out the Contact fields
4. Click 'Submit'



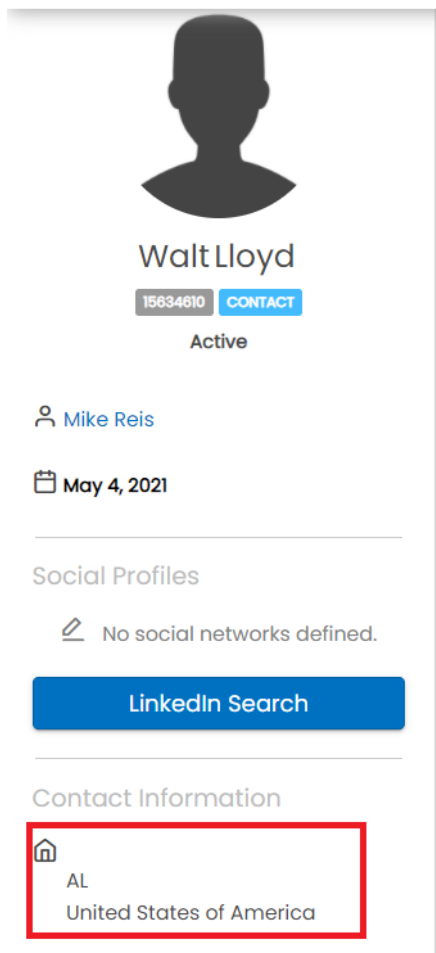
The screenshot shows the 'Create New Contact' form. It has a title bar with a close button. The form contains the following fields: 'First Name' and 'Last Name' (text input), 'Primary Email' and 'Alternate Email' (text input), 'Status' (dropdown menu with 'No Status' selected), 'LinkedIn Profile' (text input), 'Direct Phone' and 'Mobile Phone' (text input), and 'Country' (dropdown menu with 'United States of America' selected). A blue 'Submit' button is located at the bottom right, highlighted with a red box.

Apply Email Rule

5. A new pop up window will appear
6. Choose the desired option
 1. Done - closes the window
 2. View - goes to the new Contact record




****Notice there is no email address listed****



7. Hover over the 'Contact Information' section
8. Click 'Edit' icon

Social Profiles

 No social networks defined.

LinkedIn Search

Contact Information



AL

United States of America



9. Click 'Apply Email Rule'

Contact Information

Email 1: **Apply Email Rule**



Email 2:

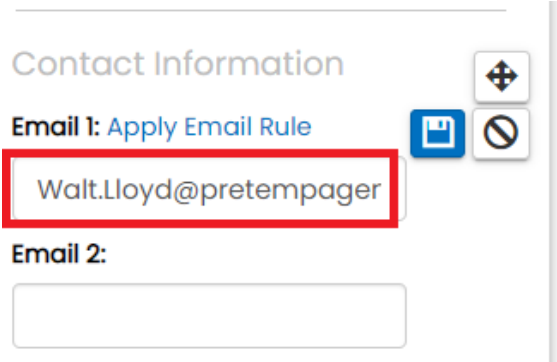
Work Phone:

Mobile Phone:

Fax:

Other:

****Notice the new email address listed****



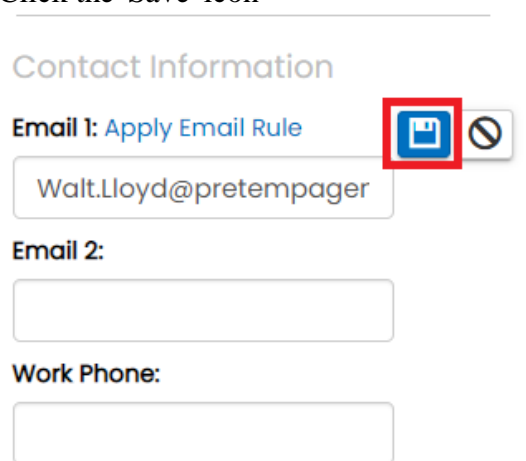
Contact Information

Email 1: Apply Email Rule

Walt.Lloyd@pretempager

Email 2:

10. Click the 'Save' icon



Contact Information

Email 1: Apply Email Rule

Walt.Lloyd@pretempager

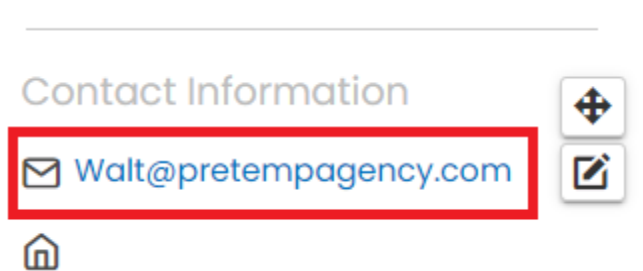
Email 2:

Work Phone:

Apply Email Rule (existing Contact)

To update existing Contacts, that already have an email, you will have to manually update them.

1. Go to the Contact that you want to edit the email address for
 1. Example using walt@pretempagency.com
 1. It should be Walt.Lloyd@pretempagency.com




Contact Information

Walt@pretempagency.com

2. Hover over the 'Contact Information' section
3. Click the 'Edit' icon

📅 May 4, 2021

Social Profiles

 No social networks defined.

LinkedIn Search

Contact Information

✉ Walt@pretempagency.com

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AL



4. Click 'Apply Email Rule'

Contact Information

Email 1: **Apply Email Rule**



Walt@pretempagency.cc

Email 2:

Work Phone:

****Notice the email changes****

Contact Information

Email 1: **Apply Email Rule**



Walt.Lloyd@pretempager

Email 2:

Work Phone:

5. Click the 'Save' icon

Contact Information

Email 1: Apply Email Rule



Walt.Lloyd@pretempager

Email 2:

Work Phone:

1. Notice the new email address associated with the Contact

Contact Information

✉ Walt.Lloyd@pretempagency.com



AL

United States of America