



Product Overview



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eMiQ was developed to deliver tight workflow process and customization related to inbound and outbound email and merge documents/templates.

Features to improve workflow focus on inbound email disposition, outbound merge templates and email marketing tracking management (opt-out, opt-in, database updates, survey responses, etc.).

Outbound Merge - In addition to alleviating the need for MS Word, eMiQ's built-in template editor has the distinct advantage of being much more customizable for inserting any database field anywhere in the template. For example, any database field can be used in the From, To, CC, BCC, subject or body of an email template. Templates can also be used for merge printing in addition to emails.

Inbound email disposition - This feature provides the user with a heads up window for viewing and dispositioning inbound emails from matching contacts in your database. Important emails bring heightened awareness to the user for systematic filing, posting and follow-up.

Outlook View - with eMiQ, the user no longer needs to flip back and forth between the CRM application and Outlook. All Outlook folders (including Calendar) can be viewed directly from the Nav Bar within MIQ/SalesLogix.

Features

➤ Outbound

- Build Merge Templates for Print or Email
- Custom Merge fields for:
 - From/To/CC/BCC
 - Subject
 - Body
- Embed links for
 - Opt-in
 - Opt-out
 - Forms
- Survey questions
- HTML Editor with Preview and Spam Score Advisor
- Send to one recipient or group
- Stamp History
- Delay Start Time
- Track Click-throughs

➤ Inbound

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Edit eMail iQ® - Merge Template Editor Information

Name: Active Default Template

< Special Fields >

CONTACT
ACCOUNT
ADDRESS
C_CON_EXT
CON_USER_DEFINED

@Current Date
@User Name
@User Title
@User Email
@User Phone
@User Fax
@User Company
@LO Name
@LO Title
@LO Email
@LO Phone
@LO Fax
@LO Company
@LO Address1

From: CRMnow <info@crmnow.com>

To: {{{CONTACT.FIRSTNAME}}} {{{CONTACT.LASTNAME}}} <{{{CONTACT.EMAIL}}}>

CC:

BCC:

Subject: Your Recently Funded Loan

Attachments:

Dear {{{CONTACT.FIRSTNAME}}}

In these hurry-up times we live in, too often we forget to say thank you. So, from our whole staff, it has been a pleasure to serve you, and we appreciate your business.

In a continuing effort to do a better job and to improve our efficiency, I would like to ask that you take a few minutes and click [on this link](#) to answer 3 simple questions, the results of which will come directly to me. We would like your honest opinion so we know what we have done well or what we could improve upon. We are committed as a team to offering the best in mortgage service.

SpamCheck Report

Your TOTAL SPAM SCORE for your e-mail was **2.4**.

How To Interpret Your Score:

The higher the score, the more likely the e-mail will be considered spam by ISPs, which means the more likely it is to get filtered out. Note these levels...

0.0 - 4.5 nice and clean, no problems except tiny ones below; no action required

4.6 - 7.0 the strictest may object; clean up the easy-to-find issues (below)

7.1 - 10.0 getting into dangerous territory; clean up any big issues and the easy-to-find smaller penalties

10.1 - 13.0 likely over ISP limits; review and clean

13.1+ major problems; overhaul needed -- systematically clean, point by point and then re-test (this may require two or three checks).

In order of importance, here are the mistakes that we found in your e-mail...

(1.1 points) An exceedingly large amount of HTML coding is often used to disguise common spam phrases. Consider reworking slightly.

(1.0 points) BODY: HTML: images with 1000-1200 bytes of words

(0.2 points) URI: 'remove' URL contains an email address

(0.1 points) BODY: HTML has "tbody" tag

(0.0 points) BODY: HTML included in message

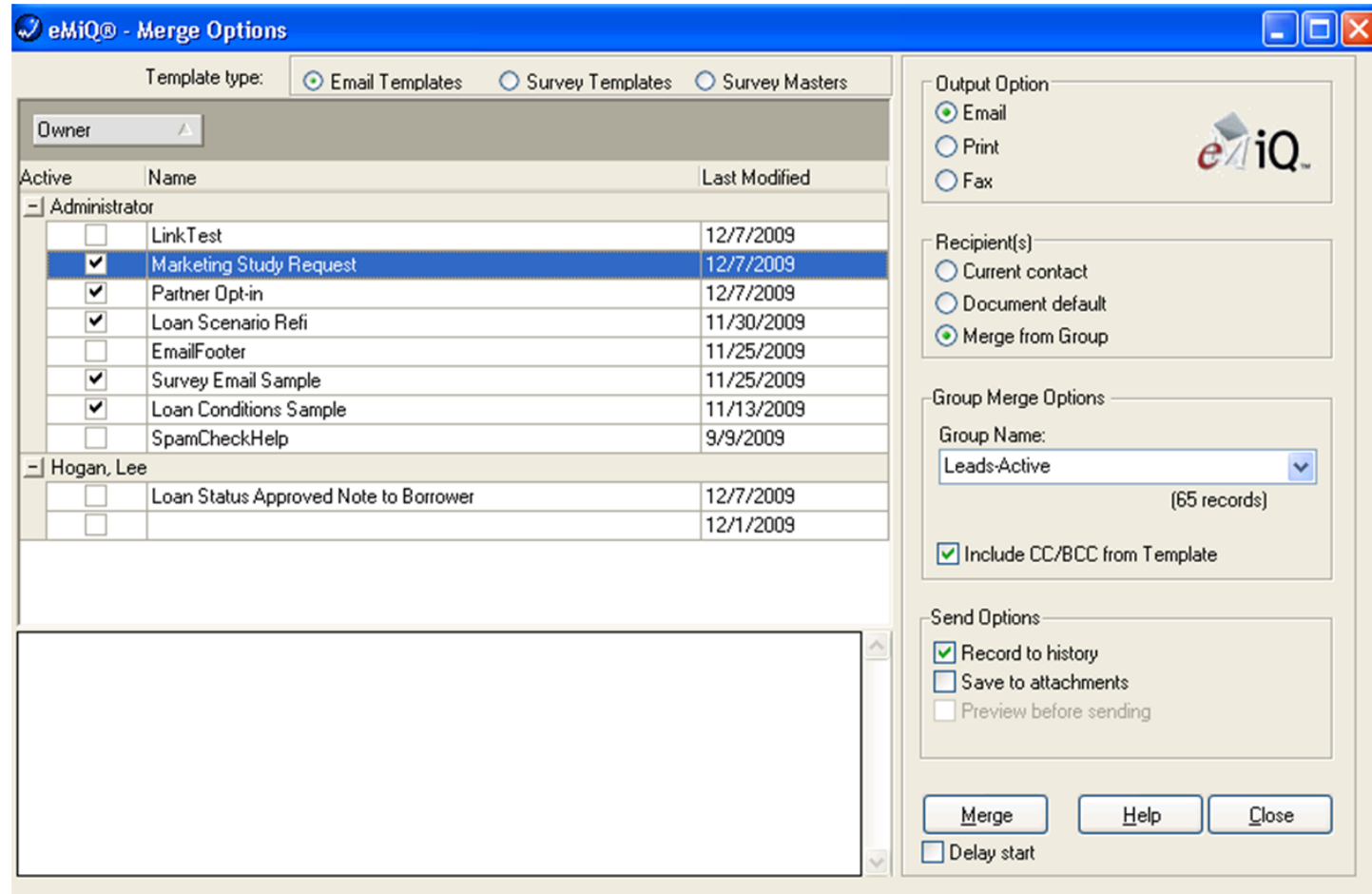
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The screenshot shows the 'eMiQ® - Merge Options' window. At the top, there are radio buttons for 'Email Templates' (selected), 'Survey Templates', and 'Survey Masters'. Below this is a table with columns 'Active', 'Name', and 'Last Modified'. The table is grouped by owner: 'Administrator' and 'Hogan, Lee'. The 'Marketing Study Request' template is selected. On the right side, there are several sections: 'Output Option' with radio buttons for 'Email' (selected), 'Print', and 'Fax'; 'Recipient(s)' with radio buttons for 'Current contact', 'Document default', and 'Merge from Group' (selected); 'Group Merge Options' with a dropdown menu set to 'Leads-Active' (65 records) and a checked box for 'Include CC/BCC from Template'; and 'Send Options' with checked boxes for 'Record to history' and 'Save to attachments', and an unchecked box for 'Preview before sending'. At the bottom right, there are buttons for 'Merge', 'Help', and 'Close', along with a 'Delay start' checkbox.

Active	Name	Last Modified
- Administrator		
<input type="checkbox"/>	Link Test	12/7/2009
<input checked="" type="checkbox"/>	Marketing Study Request	12/7/2009
<input checked="" type="checkbox"/>	Partner Opt-in	12/7/2009
<input checked="" type="checkbox"/>	Loan Scenario Refi	11/30/2009
<input type="checkbox"/>	EmailFooter	11/25/2009
<input checked="" type="checkbox"/>	Survey Email Sample	11/25/2009
<input checked="" type="checkbox"/>	Loan Conditions Sample	11/13/2009
<input type="checkbox"/>	SpamCheckHelp	9/9/2009
- Hogan, Lee		
<input type="checkbox"/>	Loan Status Approved Note to Borrower	12/7/2009
<input type="checkbox"/>		12/1/2009



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More Tabs... Activities Attachments Events Outlook Inbox Literature Requests ClickThru Lead Sources Opportunities Associatio

Drag a column header here to group by that column

Date	Source	Action	Target	Value
7/23/2009 11:58 AM	FundedSurvey		Survey	
7/23/2009 11:56 AM	FundedSurvey		Survey	
7/23/2009 11:07 AM	FundedSurvey		Survey	
7/23/2009 10:45 AM	FundedSurvey		Survey	
7/23/2009 10:36 AM		http://www.crmnc	redirect	
7/22/2009 3:40 PM		http://www.crmnc	redirect	
7/22/2009 3:38 PM		http://www.crmnc	redirect	

More Tabs... Activities Attachments ClickThruResponses ClickThru Processes Summary Notes

Drag a column header here to group by that column

Submitted	Form Name	No.	Response Name	Response Value
7/23/2009 11:07 AM	FundedSurvey	1	SurveyData1	1
7/23/2009 12:17 PM	FundedSurvey	1	HowDidYouChooseUs	Liked LO
7/23/2009 11:57 AM	FundedSurvey	1	HowDidYouChooseUs	Referral
7/23/2009 11:58 AM	FundedSurvey	1	HowDidYouChooseUs	Referral
7/23/2009 12:15 PM	FundedSurvey	1	HowDidYouChooseUs	Previous loan
7/23/2009 12:21 PM	FundedSurvey	1	HowDidYouChooseUs	Lower Cost
7/23/2009 12:25 PM	FundedSurvey	1	HowDidYouChooseUs	Lower Cost
7/23/2009 12:25 PM	FundedSurvey	2	ExpectationsMet	9
7/23/2009 12:21 PM	FundedSurvey	2	SurveyData2	9

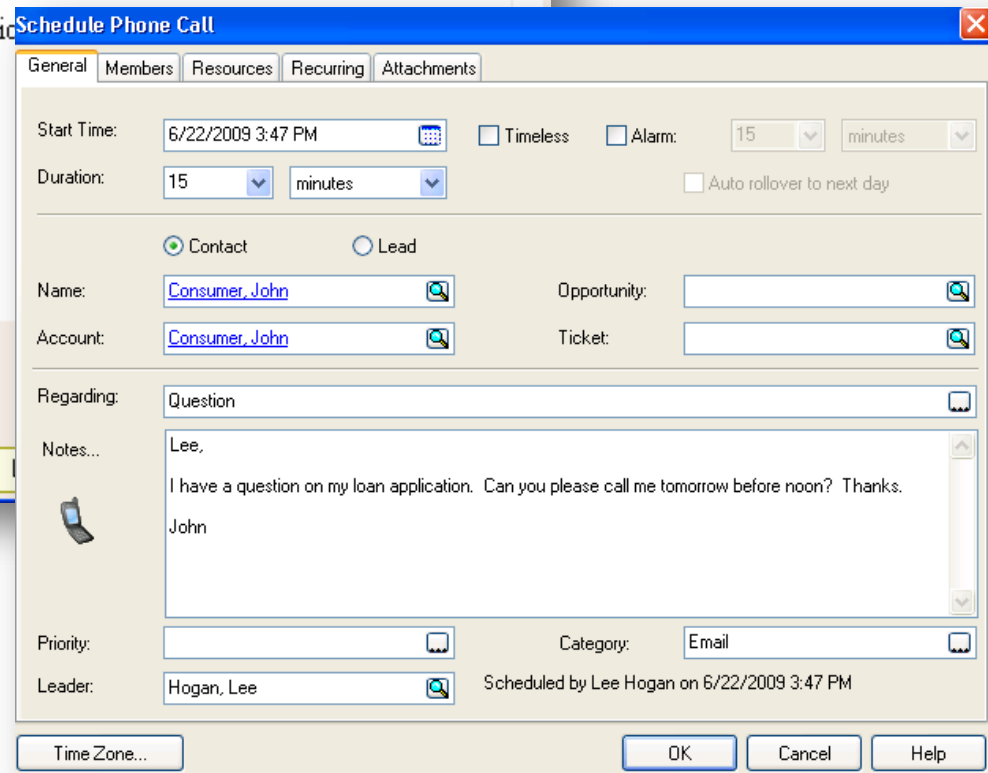
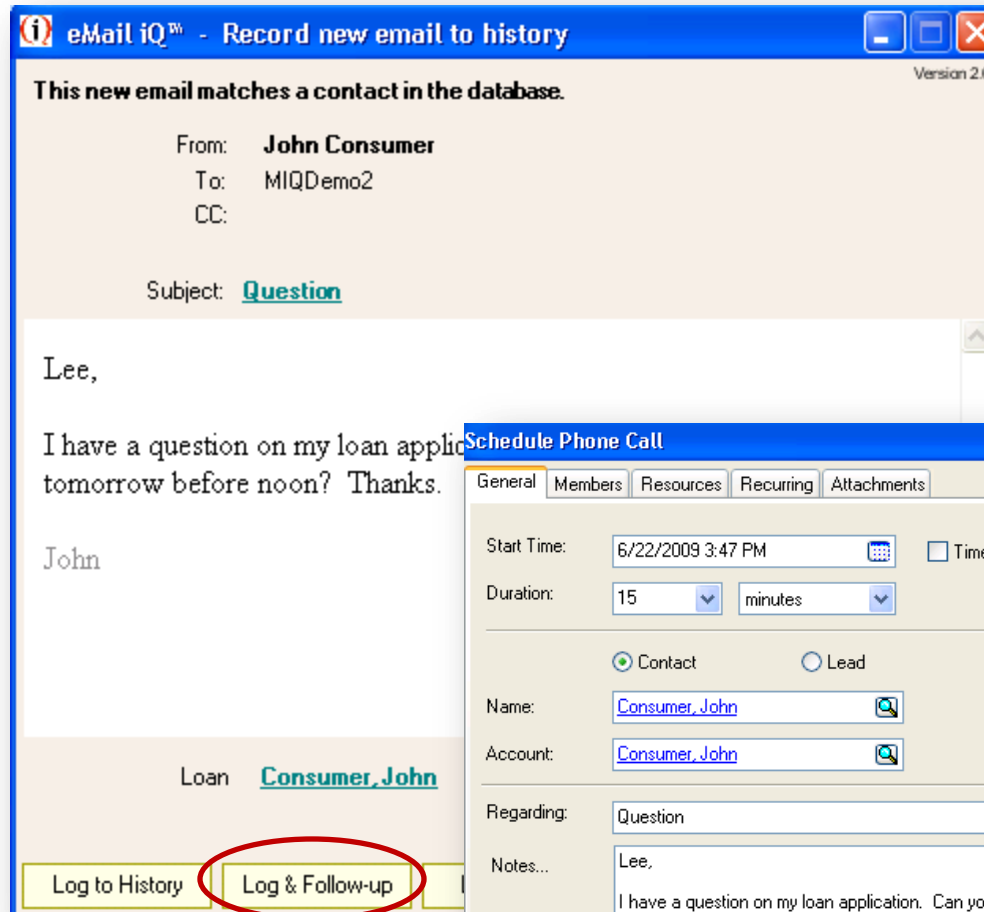
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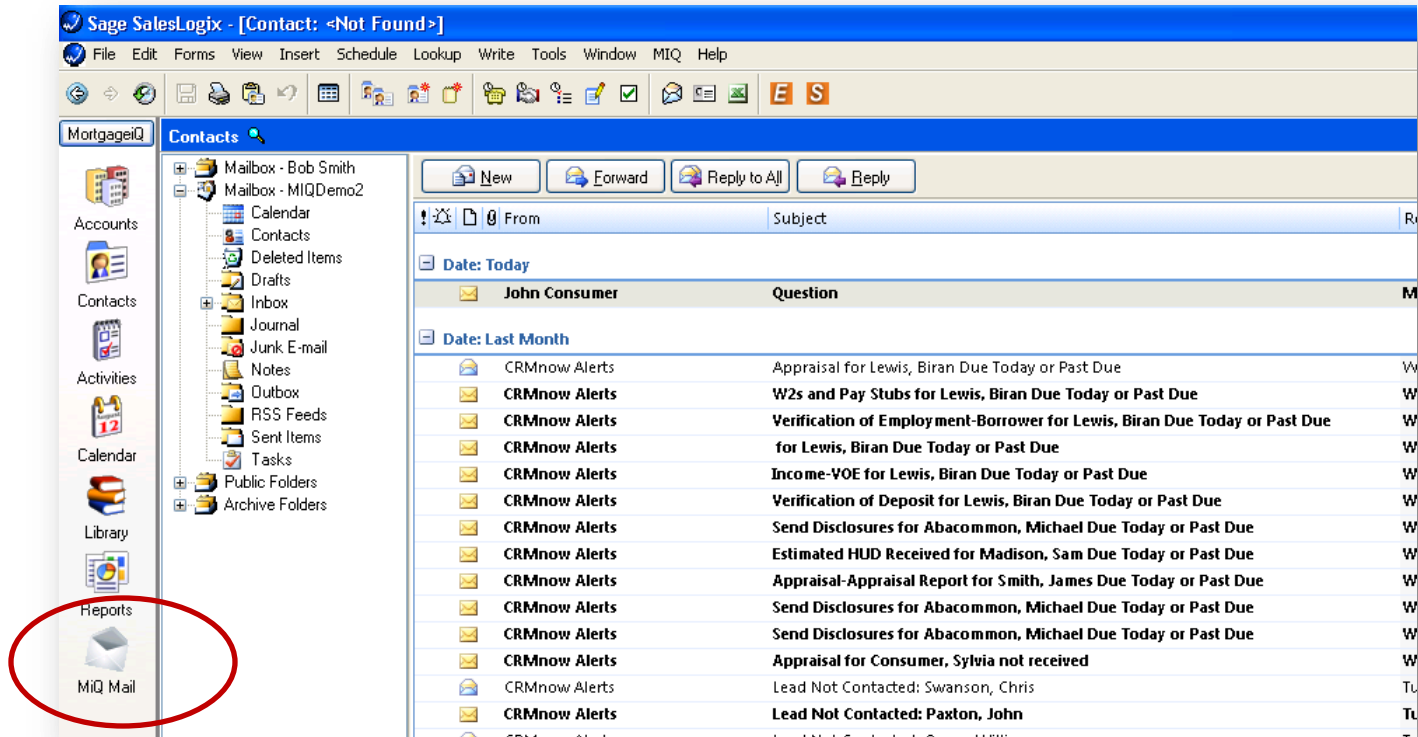
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Email Marketing/Mail Merge Feature Comparison

Inbound Email Disposition	eMiQ	SalesLogix	Swiftpage
Pop-up/Disposition Alert on emails matching contacts in database	✓		
Disposition options			
Log to History	✓	✓	
Log and Reply	✓		
Log and Follow-up	✓		
Add New contact or ticket from inbound email	✓		
View Outlook Inbox and Calendar within SalesLogix	✓		
Outbound Email	eMiQ	SalesLogix	Swiftpage
Build Merge Templates	✓	✓	✓
Ability to Print Merge Templates	✓	✓	
Editor	HTML Editor	MS Word	HTML Editor
Insert Merge Fields from table picklists	✓	✓	
Customize "From" Line with any merge field	✓		
Customize "To" and/or "CC" Lines with any merge field	✓		
Customize "Subject" Line with any merge field	✓		
Insert one-many table merge fields	✓	✓	
Auto reference picture files to avoid "red x issue"	✓		
Opt Out Tracking	✓		✓
	Real Time		Batch
Opt in Tracking	✓		
	Real Time		
Email Open Tracking	✓		✓
Click-thru Tracking	✓		✓
	Real Time		Batch
Click-thru link history linked to Contact	✓		
Auto Opt-out Update of contact record	✓		✓
Auto Field Update	✓		✓
	(overwrite or append)		(overwrite only)
Survey Builder	✓		✓
Mail Sending Process	Internal Mail Server/Pop	Outlook	Swiftpage Hosted Mail Server
Immediate Send	✓	✓	Must submit to Swiftpage for approval
Pricing Structure (call for quote)	Non-recurring Purchase	Included with SalesLogix	Monthly Subscription per User