Fields from the “Contact Us” form on the website

* First Name
* Last Name
* Company
* Email Address
* Cell Phone
* Work Phone
* Extension
* Preferred (method of communication)
* Areas of Interest
  + Product / Technical Info
    - The Cross Integration Suite
    - Cross System Integrator
    - Cross Data Integrator
    - Cross Security Manager
  + Demo Request
    - The Cross Integration Suite
    - Cross System Integrator
    - Cross Data Integrator
    - Cross Security Manager
  + Partnership
  + Career / Job Opportunity
  + Newsletter
  + Other
  + Message

----------------------------------------------------------------------------

**Actions.**

* A layout of the Excel sheet or database is provided in the “Management Database UI v.01\_mk.xlsw” file.
* Capture all information in the Excel sheet or database, whichever is appropriate.
  + Add date and time the request was received
* No matter what categories have been selected, all contacts with emails will be added to a newsletter database. After receiving at least one Newsletter to be removed. Users will have to select “unsubscribe”

1. If **Product / Technical, Demo, or Partnership** was selected is selected then

* Place an “x” in each column in the database for the option(s) that were selected.
* Send email to [sales@3insys.com](mailto:sales@3insys.com)
  + Subject “Website Request for < items that were requested>
    - Items include: Product / Technical information, a Demonstration, a Partnership
      * Ex1: Website - Request for Product / Technical Information, a Demonstration, and a Partnership
      * Ex 2: Website - Request for Product / Technical Information and a Demonstration
      * Ex 3: Website - Request for a Partnership
  + cc [Allan.Rakos@3insys.com](mailto:Allan.Rakos@3insys.com) and [Mike.Koch@3insys.com](mailto:Mike.Koch@3insys.com)
  + Body of email
    - Include information from all fields
    - Include the date and time the request was received at the top of the email
* If user provided their email address, send an email to their address:
  + Subject “Your request for information from 3Insys has been received”
  + Body of email:

“Hi! We are excited to receive your request for < enter selection>. Someone from 3Insys will get back to you very soon.

< enter selection> options include

* Product Information.
* a Partnership.
* a Demonstration.
* Product Information and a Demonstration
* Product Information and a Partnership.
* Product Information, a Demonstration, and a Partnership.
* a Demonstration and a Partnership.

Sincerely,

3Insys”

* + Include 3Insys logo in the bottom of the email.

1. If **Career / Job Opportunity** is selected

* Place an “x” in the career column.
* If an attachment (resume) was provided, then store the file in the database and put a link to the file in the “Attachment” cell.
* Send email to [hr@3insys.com](mailto:hr@3insys.com)
  + subject “Website - Job/Career Candidate”
  + Include the attachment in the body of the email
  + Body of email
    - Include information from all fields
    - Include the date and time the request was received at the top of the email
* If user provided their email address, send an email to their address:
  + Subject “Your inquiry regarding an open position at 3Insys has been received”
  + Body of email:

“Hi! Thank you for your inquiry regarding the open position: (name of position from what user selected on the web form). We are excited to receive your request, and someone will get back to you very soon.

Sincerely,

3Insys”

* + Include 3Insys logo in the bottom of the email.

1. If **Newsletter** is selected

* Place an “x” in the Newsletter column in the database
* Send email to [sales@3insys.com](mailto:sales@3insys.com)
  + subject “Website – Newsletter Request”
  + cc: [Allan.Rakos@3insys.com](mailto:Allan.Rakos@3insys.com) and [Mike.Koch@3insys.com](mailto:Mike.Koch@3insys.com)
  + Body of email
    - Include information from all fields
    - Include the date and time the request was received at the top of the email
* If user provided their email address, send an email to their address:
  + Subject “You have been added to receive the 3Insys newsletter”
  + Body of email:

“Hi! Thank you for your interest to receive our newsletter. We promise to not fill up your inbox with unnecessary emails, and will only send out an occasional update with exciting news regarding our products and solutions.

Sincerely,

3Insys”

* + Include 3Insys logo in the bottom of the email.

1. If **Other** is selected

* Place an “x” in the Other column in the database
* Send email to [sales@3insys.com](mailto:sales@3insys.com)
  + subject “Website – Other Inquiry Received”
  + cc: [Allan.Rakos@3insys.com](mailto:Allan.Rakos@3insys.com) and [Mike.Koch@3insys.com](mailto:Mike.Koch@3insys.com)
  + Body of email
    - Include information from all fields
    - Include the date and time the request was received at the top of the email
* If user provided their email address, send an email to their address:
  + Subject “Your request for information from 3Insys has been received”
  + Body of email:

“Hi! Thank you for your inquiry about 3Insys. We received your request, and someone will get back to you very soon.

Sincerely,

3Insys”

* + Include 3Insys logo in the bottom of the email.

Database Fields

Management Database UI.xlsw

Engagement

* **Received Date** 
  + This is the date that the contact form was received
  + Date
  + Date format: mm/dd/yyyy
* **Received Time**
  + This is the time that the contact form was received
  + 12hr format
  + hr:min AM/PM (referenced to Pacific Time)
* **Assigned To**
  + This field will be populated by the database user.
  + Dropdown menu with key employee names:
    - Aras Raiani
    - Allan Rakos
    - Mike Koch
    - HR
* **Initial Response**
  + This field will be populated by the user
  + Date
  + Date format: mm/dd/yyyy
* **Connection**
  + This field will be populated by the user
  + Date
  + Date format: mm/dd/yyyy
* **Demo Scheduled**
  + This field will be populated by the user
  + Date
  + Date format: mm/dd/yyyy

Contact Information (1)

* First
  + Contact’s first name
  + Text
* Last
  + Contact’s last name
  + Text
* Company
  + Company name
  + Text

Area of Interest

* Product / Tech Info
  + An “x” should be placed here if the user selected the **Product / Tech Info** option in the Contact form.
* Demo
  + An “x” should be placed here if the user selected the **Demo** option in the Contact form.
* Partnership
  + An “x” should be placed here if the user selected the **Partnership** option in the Contact form.

Product

* XSI
  + An “x” should be placed here if the user selected the **Cross System Integrator** option in the Contact form.
* XDI
  + An “x” should be placed here if the user selected the **Cross Data Integrator** option in the Contact form.
* XSM
  + An “x” should be placed here if the user selected the **Cross Security Manager** option in the Contact form.

Connection

* Career
  + An “x” should be placed here if the user selected the **Career** option in the Contact form.
* Attachment
  + If the user uploaded a resume, a link to that resume should be included here
* Newsletter
  + An “x” should be placed here if the user selected the **Newsletter** option in the Contact form.
* Other
  + An “x” should be placed here if the user selected the **Other** option in the Contact form.

Contact Information (2)

* Preference
  + If user selected the Email option, then “Email” should be in this field
  + If user selected the Cell Phone option, then “Cell Phone” should be in this field
  + If user selected the Work Phone option, then “Work Phone” should be in this field
* Email
  + The user’s email address from the contract form should be here
* Cell
  + The user’s cell phone number from the contract form should be here
* Desktop
  + The user’s Desktop phone number from the contract form should be here
* Extension
  + The user’s Desktop phone number **extension** from the contract form should be here

Text

* Message
  + If the user entered in any text in the Message box, then the text should be included in this field.
  + Text field
* Notes
  + This is a text field where the user can add notes.