

List Track

With the addition of List Track to your Evolution system you will now have the ability to track any companies or projects that you have either telephoned or mailed over a given period of time. The process is exactly the same for the projects, companies and people sections.

There are two benefits; first of all when mail merging you will have the opportunity to avoid duplication by excluding people you have already mailed during a given time period (one to 12 months). The second benefit is to mark either a company or a project as telephoned – not only does this give a visual indication of whether you have been in touch with a company or project, but again it can be used to exclude a contact from a mail merge if you have telephoned them during a given period of time (one to 12 months).

- Mark as mailed
- Mark as phoned
- Mail merge new functionality



Logging in

Upon logging into Evolution you will see two new icons on the right hand side of the screen on both the projects or companies' screens (as shown below). The envelope icon refers to whether the project or company has been marked as mailed, while the telephone icon refers to whether the company has been marked as phoned.

Location	Stage	Updated	Envelope Icon	Phone Icon
Bolton, BL4 9HJ	Detail Planning	12-Nov-08	Yes	No
Gateshead, NE11 0HU	Detail Planning	12-Nov-08	Yes	No
Calderdale, HX1 5AF	Detail	12-Nov-	No	No

If a project has been marked as mailed then the envelope icon appears in the appropriate column next to the project or company. Likewise, if the company has been marked as phoned then the telephone icon will appear in the relevant column next to the marked project or company (as shown below).

Project List										
--Select an action-- Go 167 Projects										
CPM	Project	Type	Value	Units	Location	Stage	Updated	Envelope Icon	Phone Icon	
<input type="checkbox"/>	20 HOUSES - OLD CORPORATION YARD	New Build	£ 1.2M	20	Bolton, BL4 9HJ	Detail Planning	12-Nov-08	Yes	No	
<input type="checkbox"/>	HOLIDAY HOMES	New Build	£ 500K	-	Gateshead, NE11 0HU	Detail Planning	12-Nov-08	Yes	No	
<input type="checkbox"/>	5 APARTMENTS	New Build	£ 250K	5	Calderdale, HX1 5AF	Detail Planning	12-Nov-08	No	No	
<input type="checkbox"/>	LIBRARY	New Build / Demolition	£ 3.5M	-	North Tyneside, NE26 1LT	Detail Planning	12-Nov-08	No	No	
<input type="checkbox"/>	6 FLATS/5 HOUSES	New Build / Extn	£ 1M	11	Leeds, WF3 3PT	Detail Planning	12-Nov-08	No	No	

The new options are available to use from the drop down 'select an action' menu at the top of the screen. There are four new options:-

- Mark as phoned (today)
- Mark as mailed (today)
- Remove most recent mailed mark
- Remove most recent phoned mark.

The new actions on the menu screen read as follows:

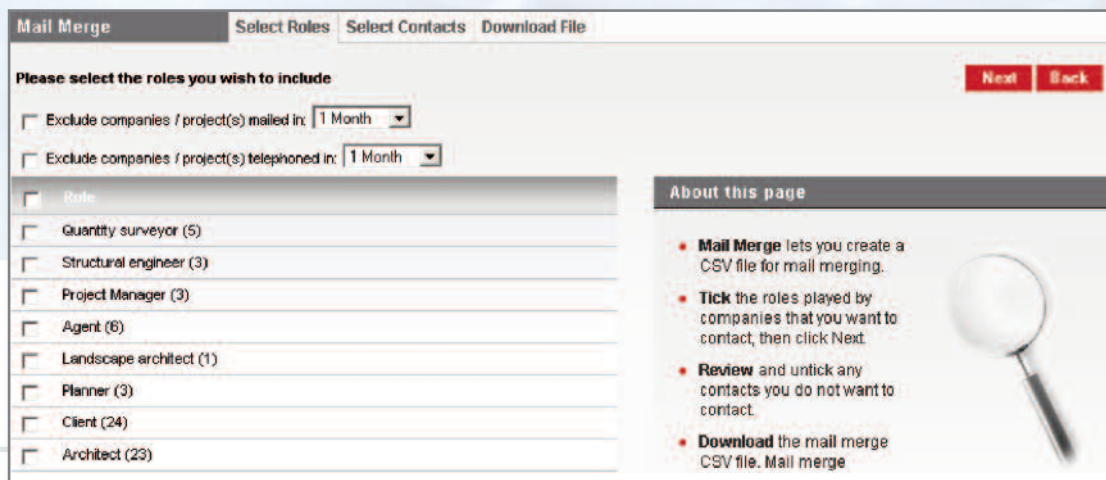


To mark a project as phoned, you can open the individual projects and select the 'Mark as phoned (today)' option from the drop down list. Alternatively, if you have a group of projects to mark, you can tick the checkbox next to each project title and then select 'Mark as phoned (today)' from the list and the phone icon will appear after all the ticked projects.

Mail merge new functionality

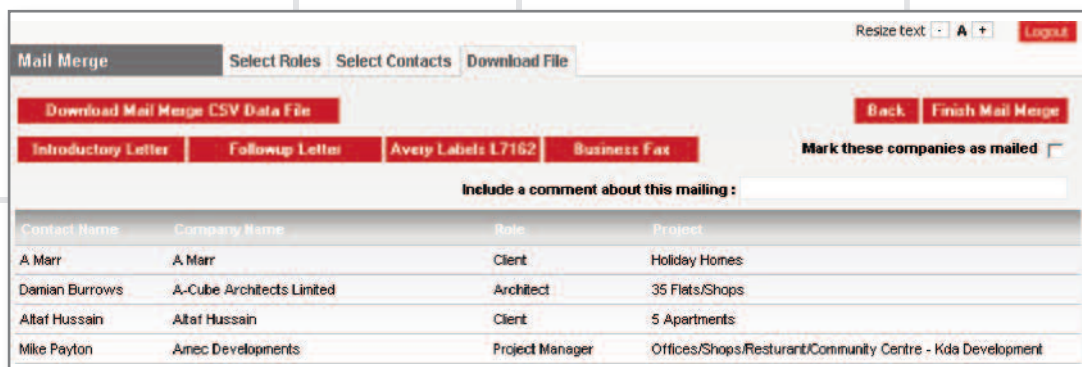
The real benefits of using the List Track function are seen when performing a mail merge. An ideal mail merge excludes companies that have already been mail merged or phoned in a set period of time. You can exclude companies that have been contacted in the last month, two months, three months and so on, up to a maximum of 12 months.

If we start our mail merge in the usual way and select the companies or projects that we want to mail merge and click on go, the next screen has two new options:



The two boxes at the top are available over a 12 month period and allow us to exclude projects or companies that we have either mailed or phoned over this time period. Once you have ticked the options you require, select the time period and the roles that you require from the list below. Then click on 'Next' to continue.

The next screen is unchanged – you can remove duplicates and single tick a company, and then click on next. The following screen is where you are able to download the CSV file, but again there is a new option on here:



The new option is on the far right. Ticking the 'Mark these companies as mailed' option will mark these companies as having been mail merged on the current date. Evolution then uses this information during future mail merges to exclude companies that have been contacted within your specified date ranges.