

Real Colors Virtual Instrument Management System Updates

With the latest updates to the Virtual Instrument, you can upload, send, and set reminders with one-click! Bulk upload your participant list, choose to send a *customized* email, and set auto-reminder emails (only sent to those who need an extra nudge to complete). All with one-click!

The new Settings tab, allows you to:

- Toggle on/off the automatic sending of Access Code emails.
- Designate a cc and/or bcc email to be included when emails are generated.
- Customize the following emails:
 - Access Code: the initial email you send to participants, requesting that they complete the Virtual Instrument.
 - Reminder (*new*): Auto-reminder emails can be scheduled when codes are assigned or sent immediately via the new bulk action. Scheduled reminders are only sent if the participant has not completed the instrument when the reminder is to be sent.
 - PDF Results: the email to participants with a link to their Color Spectrum.
 - Post Workshop Recap (*new*): Include final thoughts, realcolors.me, or other internal news.

New Bulk Actions

- Send Access Code Email
- Send Reminder
- Send Post Workshop Recap
- Clear Data: For codes with a status of Assigned or Email Sent, clear all fields to reset them to “Unassigned” and make the code quickly available for re-use.

New Data Fields

- Two generic data fields to capture the information most relevant to your organization. Use of these fields is optional. Use these fields to track data across departments, managers, etc.

NOTE: All automated emails will send from donotreply@realcolors.org. It is recommended that you work with your IT department to ensure these emails will get through any firewall or security settings. Optionally, sending emails 1:1 by using the “Send email” button, or via mail merge will function the same as before and send from your own mail client and email address.