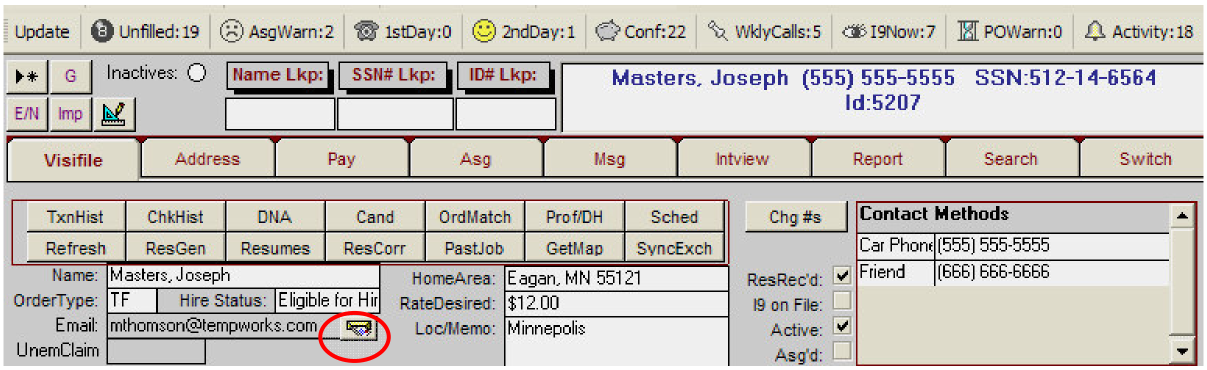
Email Functionality 10R2

Emails within TempWorks Software can be accessed from the **Employee**, **Customer**, **Documents,** or **Contact** tabs as well as the *Email* button in the Workflow Toolbar and the *Attachment* (paper clip icon) button in the **Reports** tab.

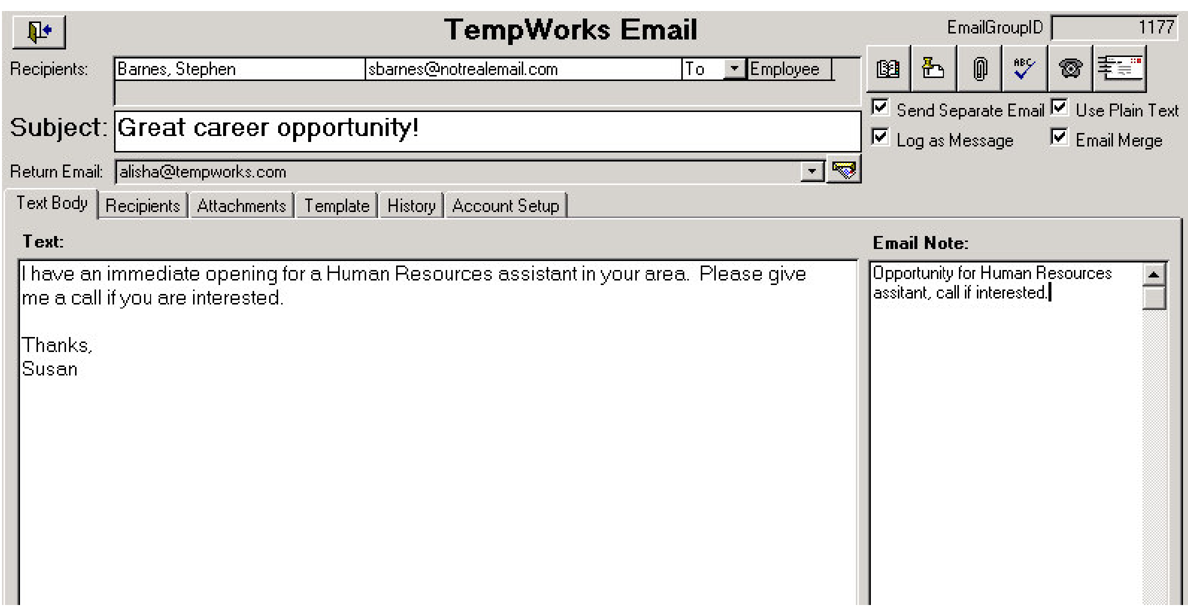
Email – Employee Record

When setting up a new employee in the database, entering the email address (if they provide one) will allow an email to be sent to them.



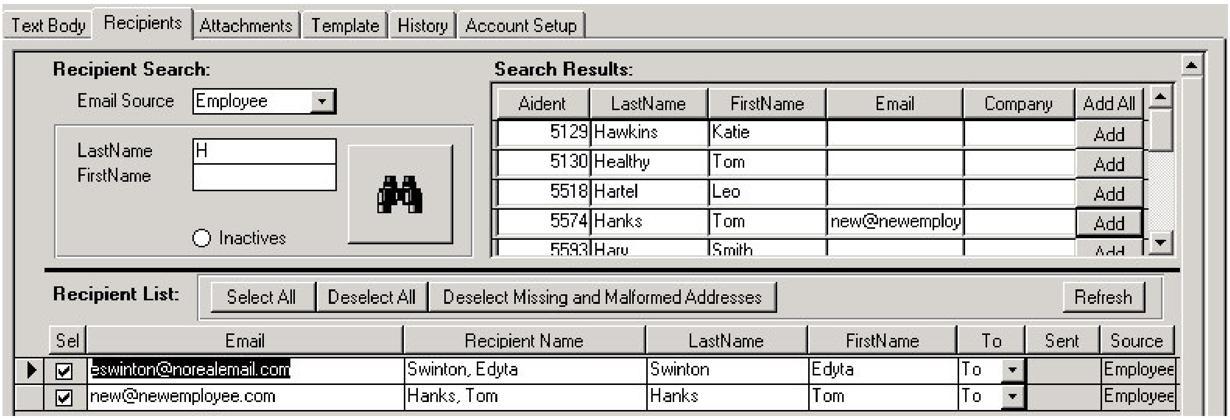
Clicking the *Email* (envelope entering mail slot icon) button will open the Tempworks email functionality.

*Note – If there is not an email address listed in the *Email* field the Tempworks email functionality will not open. To add the email address to the employee's record click on the *Chg #s* button to open the *Contact Methods* form.



Now that a new email message has been opened, click in the *Subject* field to enter the subject of the email.

In the **Text Body** tab enter the text for the email in the *Text* field. The *Text* field is a free form field that will hold as much information as needed. If there is additional information that should be included in any messages logged, but that should <u>not</u> be sent with the email, then put that information in the *Email Note* free form field.



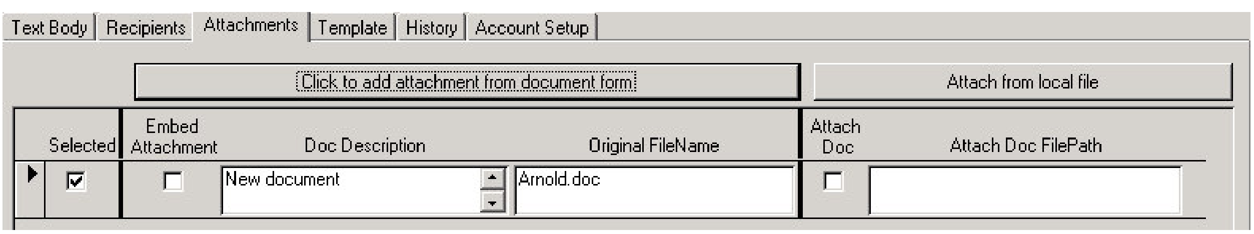
In the **Recipients** tab employee's and contacts, as well as service reps can be added to receive the email. From the Email Source drop down menu choose if the recipient is an employee, contact or service rep. In the fields displayed, enter the criteria for locating the record.

When the "Employee" is selected the fields are: *LastName* and *FirstName*.
When the "Contact" is selected the fields are: *LastName*, *FirstName*, and *CompanyName*.
When the "ServiceRep" is selected the fields are: *RepFullName*, *RepName*, and *BranchName*.

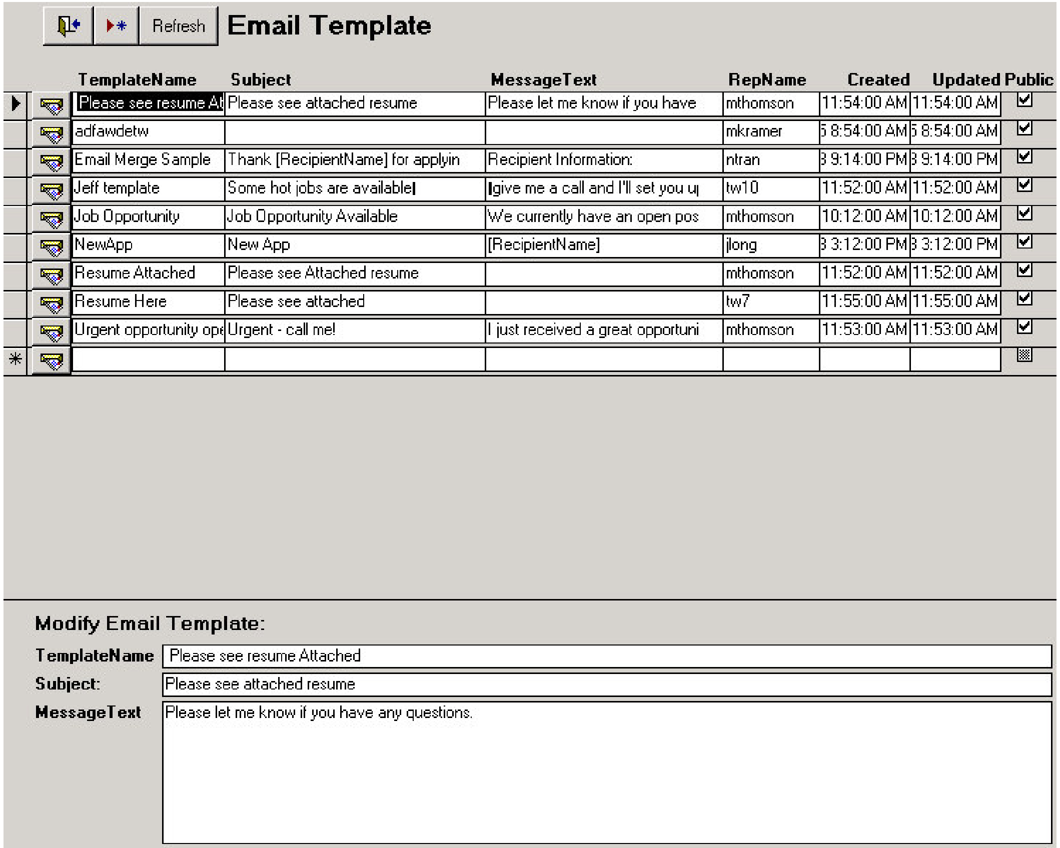
Once appropriate information is entered hit the "Enter" key on the keyboard or click on the *Binoculars* button to display the names in the <u>Search Results</u> area. Locate the person and click on the *Add* button to the right of the *Company* field. This will add the selected person to the recipients list.

If the person does not have an email address on their record it can be typed in on the *Email* field to the left of the *Recipient Name*. Entering the email address in this field does <u>not</u> update the corresponding employee or contact record.

If the recipient should not be included in the email then remove the check box in the *Sel* column to the left of the *Email* field. The *Select All*, *Deselect All*, and *Deselect Missing and Malformed Addresses* buttons allow the user to quickly change the entries that are selected or deselect recipients whose email addresses are missing or badly formatted.

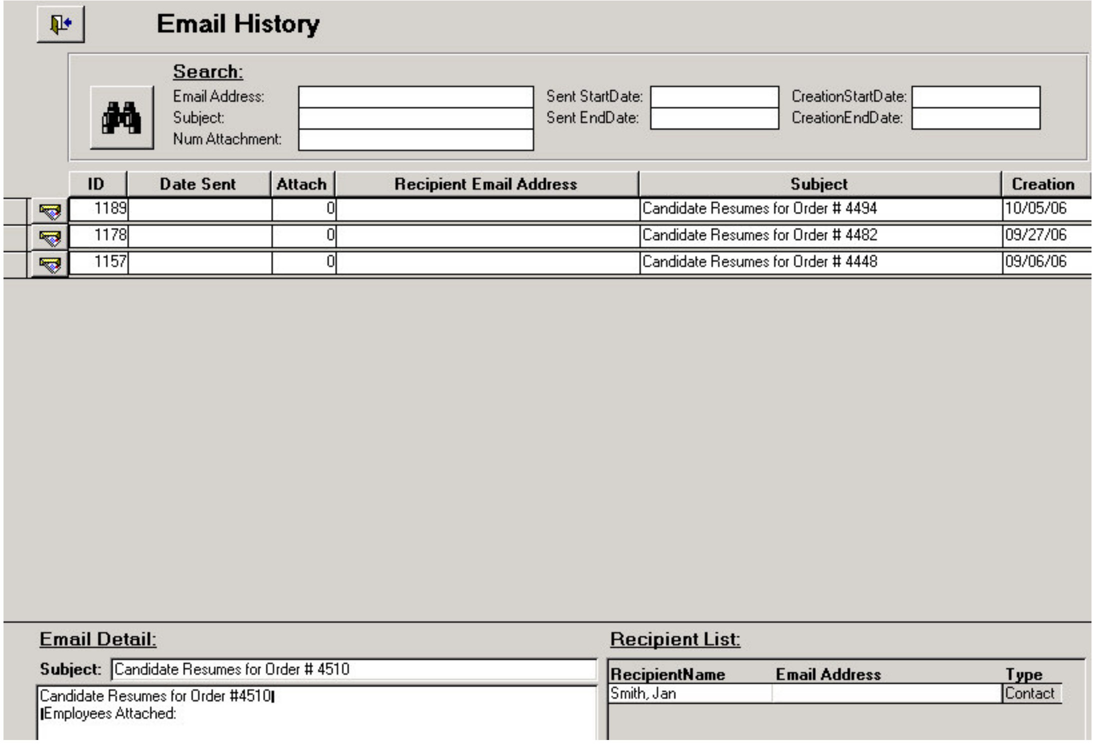


In the **Attachments** tab the user can attach documents from the Tempworks database or from a local file. To attach documents in the **Documents** tab of Tempworks click on the *Click to add attachment from document form* button. This will navigate into the **Documents** tab and the user can search documents in that database and attach them to the email. The *Attach from a local file* button will open the window where the shared drive and hard drive can be accessed and documents can be attached to the email from the chosen location.

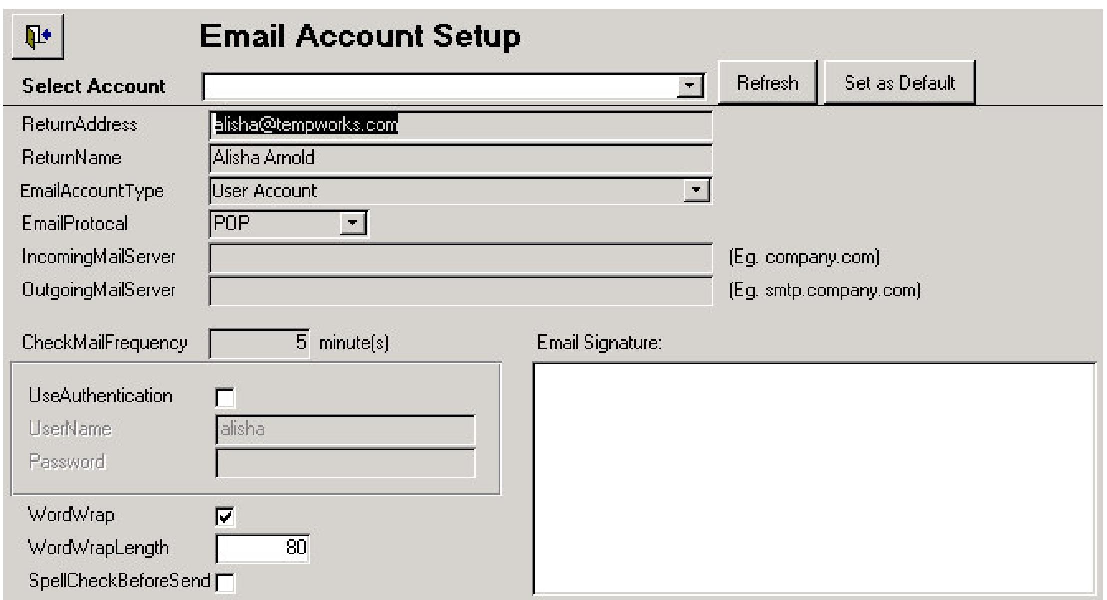


Clicking on the **Template** tab will navigate the user to the *Email Template* form where templates can be selected for a new email or templates can be created. To select a template for a new email, click on the *Email* (envelope entering mail slot icon) button to the left of the selected template. This will open the template text in the *Text* field on the *Text Body* tab.

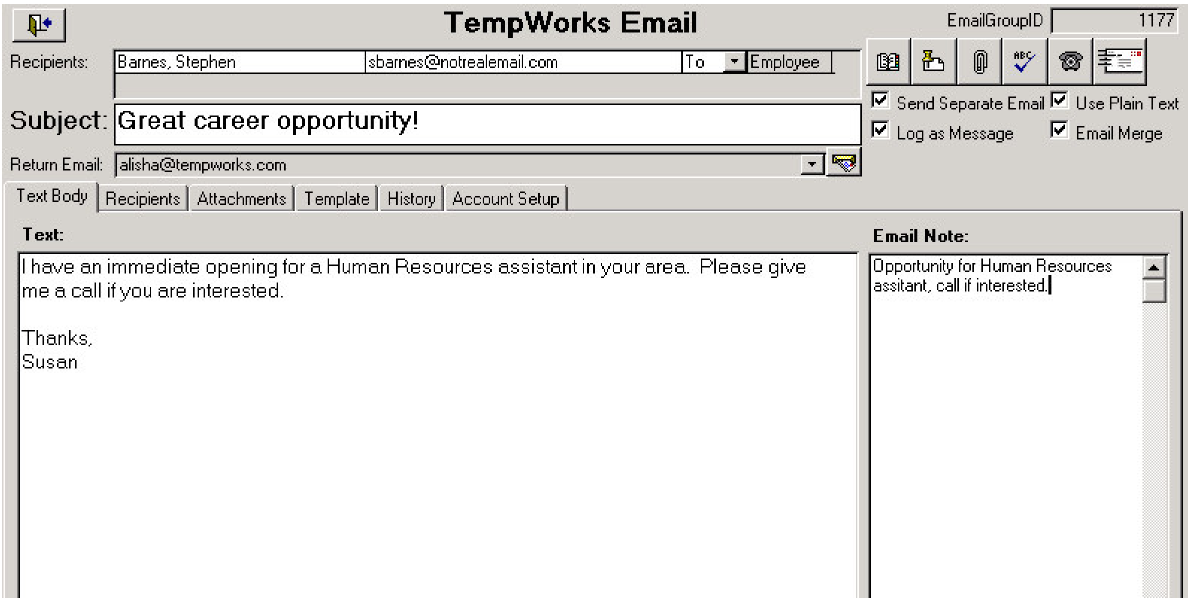
To create a new template, click on the *NSR* button in the upper left corner. This will allow the user to enter the *TemplateName*, *Subject*, and *MessageText* in the appropriate fields. The MessageText field can also be set up to pull in information from the Tempworks database by using brackets "[ ]" around the name of field. For instance, if the service rep's name should be included on the email the template could read "Sincerely, [RepName]" and the email would be sent with the appropriate name in that field.



Clicking on the **History** tab will navigate the user to the *Email History* form where the rep can search and view emails that have been sent. The user can utilize the *Email Address*, *Subject*, *Num Attachment*, *Sent StartDate*, *Send EndDate*, *CreationStartDate*, and *CreationEndDate* fields to enter search criteria to locate a specific email that was sent. Once the criteria has been entered click on the *Binoculars* button to display the search results. The user can then click on the line of the email that they wish to view and the information will be displayed at the bottom in the Email Detail and Recipient List sections.



Clicking on the **Account Setup** tab will navigate the user to the *Email Account Setup* form where the rep can establish an *Email Signature* and view other email account information.



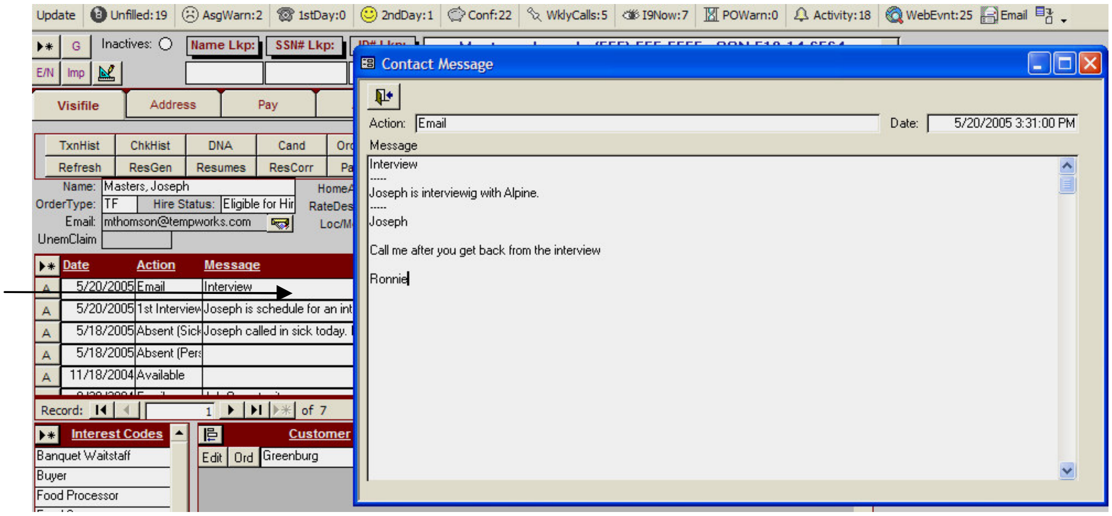
Once all of the information has been entered for the email the user can utilize the buttons and check boxes at the top to check and send the email. The *Address* (open book icon) button will open the **Recipients** tab. The *Attach documents from documents form* (index card and push pin icon) button opens the **Documents** tab of Tempworks. The *Attach from a local file* (paperclip icon) button opens a window to locate and attach files from a shared drive or hard drive.

The next button is the *Spell Check* (ABC check mark icon) and will run the email text through a spell check wizard and notify the user of any grammar errors. The *Text Message* (telephone icon) button will send the email as a text message to all recipients set up to receive text messaging (for more information on this feature see the help document titled "10R2 Text Messaging"). The last button is the *Send Email* (moving envelope icon) button and will allow the user to send the email to the selected recipients.

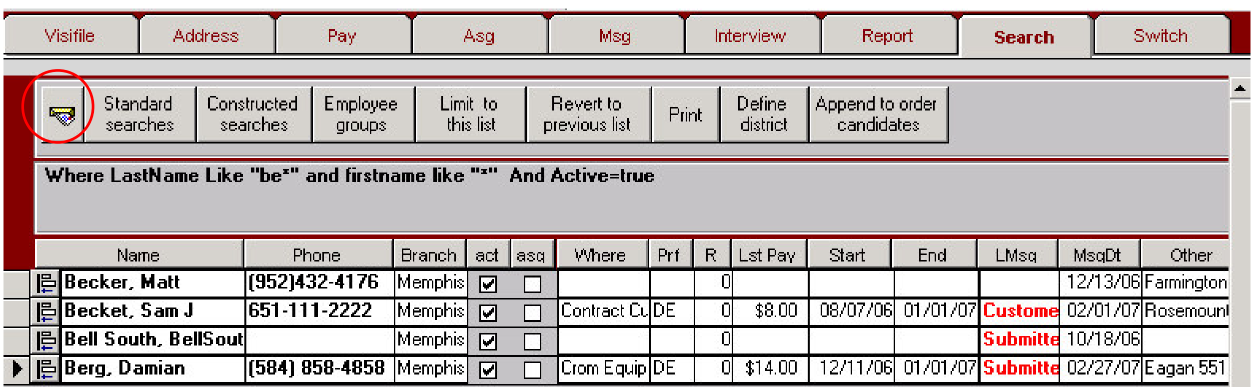
There are four check boxes that are applied to an email by default. The first is *Send Separate Email*. When this is checked the recipients of the email will not see any of the other recipients that the email was sent to. Below that is *Log as Message*. This check box ensures that the email will be logged in recipient's record with an *Action* of "Email" and the text from the message will be listed in the *Message* field.

On the right is the *Use Plain Text*. The email functionality defaults to plain text on the email but also supports HTML format. And the last check box is the *Email Merge*. This ensures that if a template is used that any information in brackets pulls the table data mentioned.

Once the email has been sent to the employee the message will log on their record and it can be viewed as shown below.

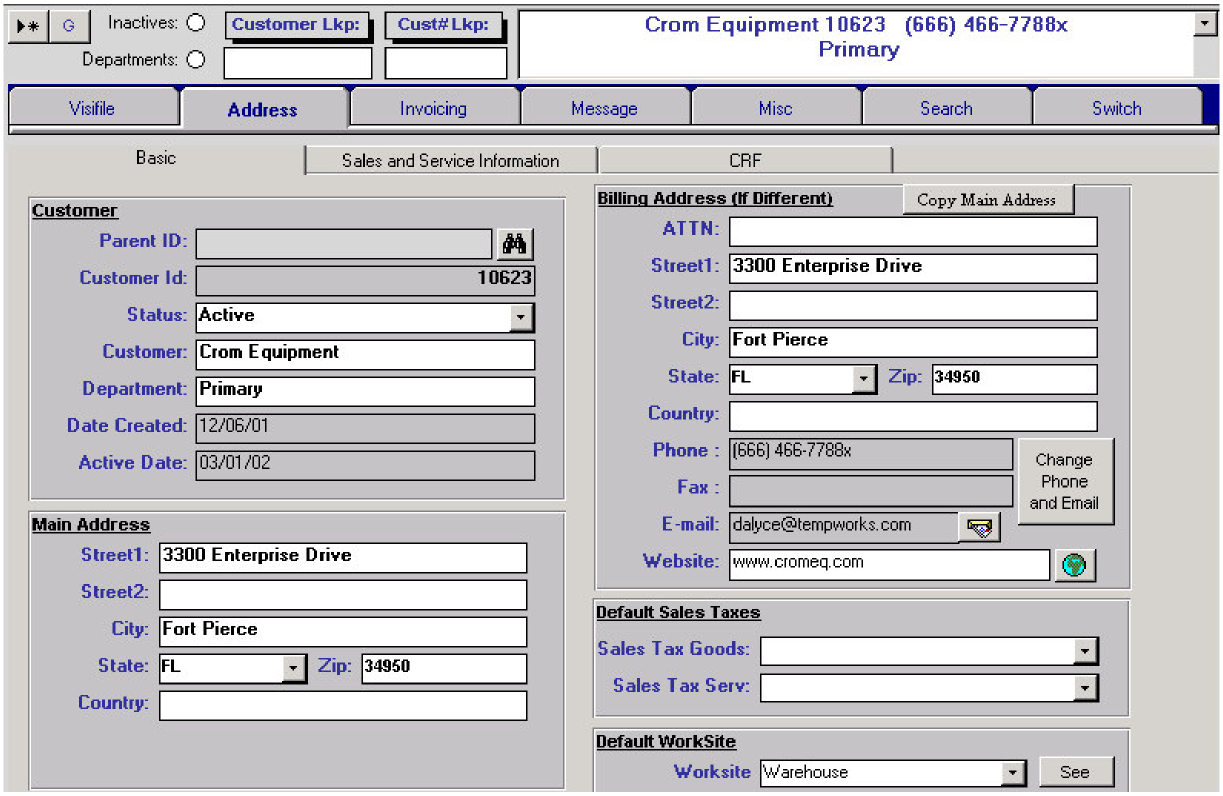


The email functionality can also be accessed from the employee *Search* tab. When search results are listed in this tab click on the *Email* (envelope entering mail slot icon) button to send a group email to the employee's in the search results list.



Email – Customer Record

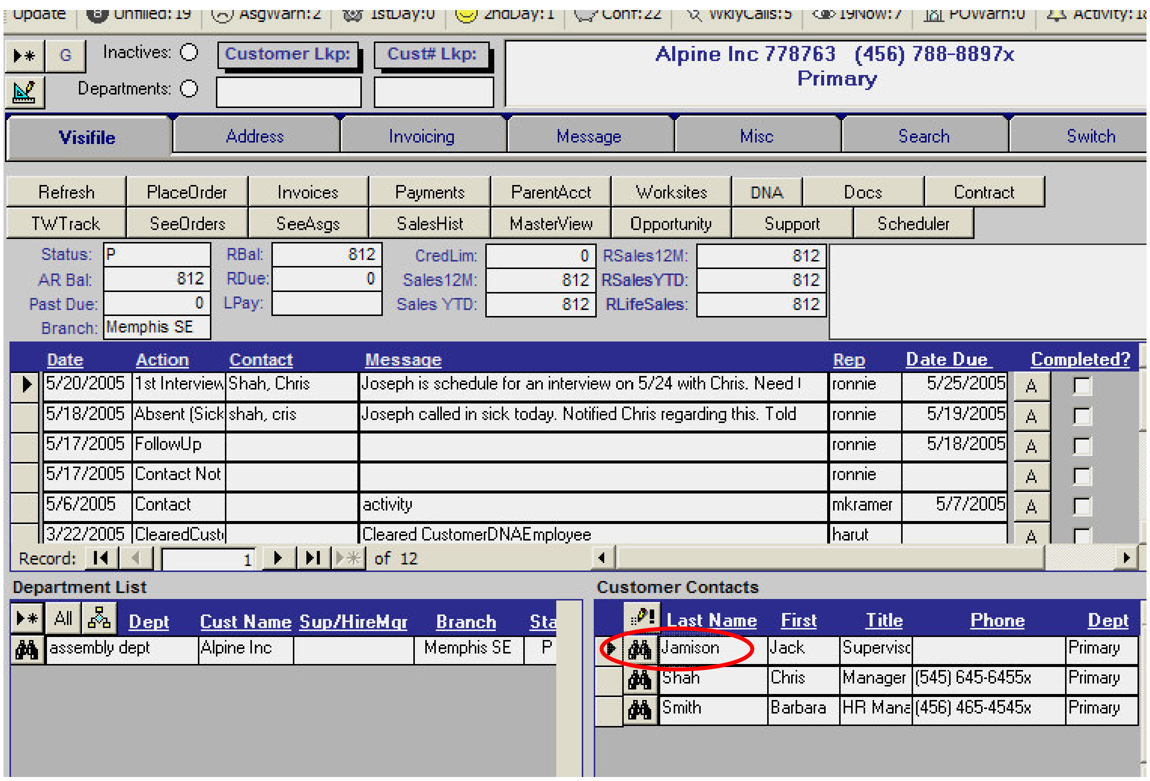
To send an email from the customer record the user should navigate to the **Address** tab/**Basic** sub tab and click on the *Email* (envelope entering mail slot icon) button.



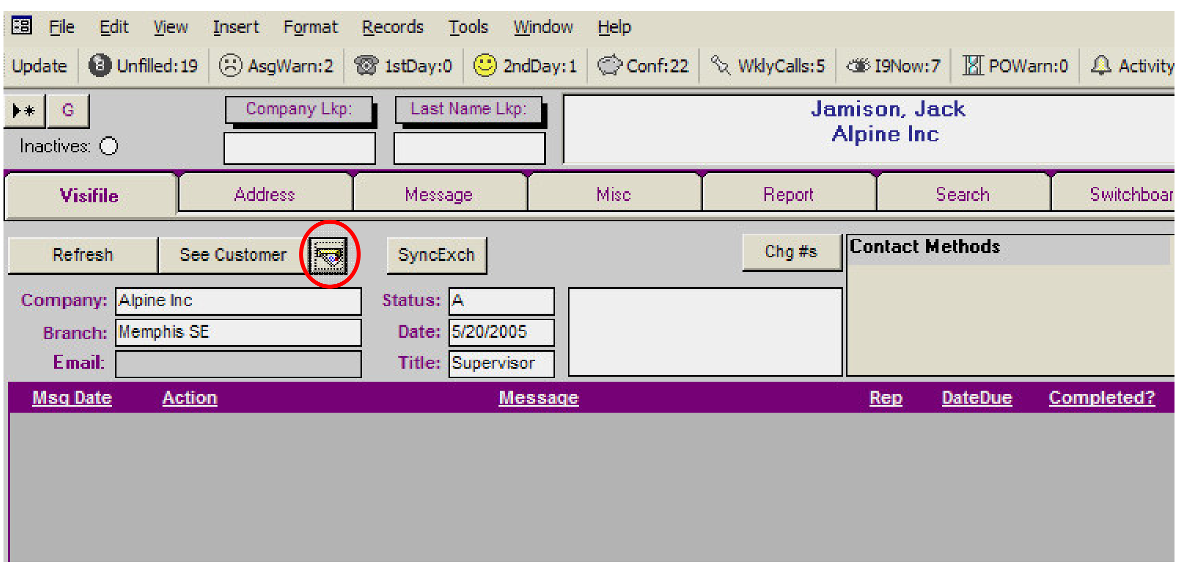
*Note – If there is not an email address listed in the *E-mail* field the Tempworks email functionality will not open. To add the email address to the customer's record click on the *Change Phone and Email* button to open the *Contact Methods* form.

Email – Contact Record

To send an email from the Contact record, first look up the contact that should be recipient for the email. If you know the customer but forgot the name of the contact, look up the customer first and click on the *Binoculars* button to navigate to the corresponding contact record.



If the contact name is known, go to the contact record and click on the *Email* (envelope entering mail slot icon) button from the **Visifile** tab, to send an email.



The Tempworks email will open.

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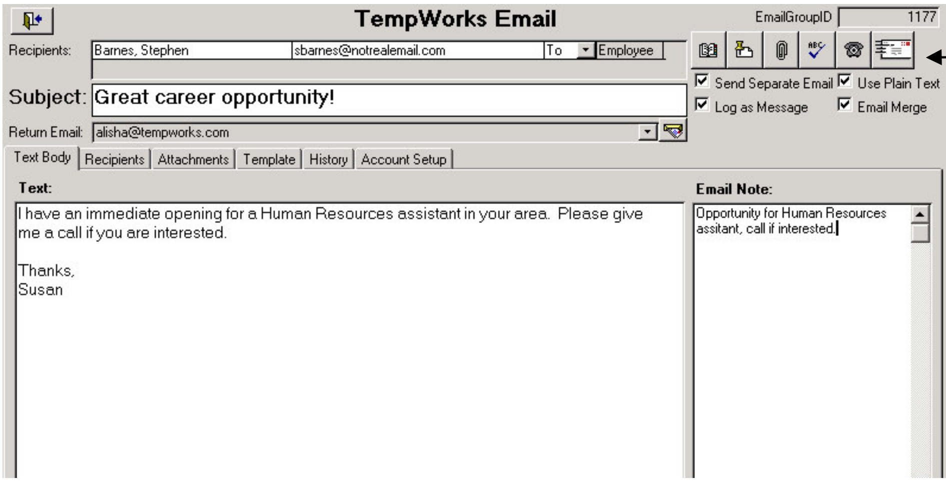

Click here to send email.

This message will be logged in Stephen Barnes' file.

Here is the logged message found in the contact record, within the **Visifile** tab. Double clicking will show both the message and the message note.