

## 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 not be sent with the email, then put that information in the *Email Note* free form field.

The screenshot shows the 'Recipients' tab with a search interface. The 'Email Source' is set to 'Employee'. Search criteria include 'LastName: H' and 'FirstName:'. A 'Binoculars' icon is used to execute the search. The 'Search Results' table lists several employees with 'Add' buttons. The 'Recipient List' table below shows two recipients selected: 'swinton@norealemail.com' and 'new@newemployee.com'.

Recipient Search:		Search Results:					
Email Source	Employee	Aident	LastName	FirstName	Email	Company	Add All
LastName	H	5129	Hawkins	Katie			Add
FirstName		5130	Healthy	Tom			Add
<input type="radio"/> Inactives		5518	Hartel	Leo			Add
		5574	Hanks	Tom	new@newemploy		Add
		5593	Haru	Smith			Add

Recipient List:							
Select All		Deselect All		Deselect Missing and Malformed Addresses		Refresh	
Sel	Email	Recipient Name	LastName	FirstName	To	Sent	Source
<input checked="" type="checkbox"/>	swinton@norealemail.com	Swinton, Edyta	Swinton	Edyta	To		Employee
<input checked="" type="checkbox"/>	new@newemployee.com	Hanks, Tom	Hanks	Tom	To		Employee

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 *Search Results* 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 not 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.

The screenshot shows the 'Attachments' tab with two buttons: 'Click to add attachment from document form' and 'Attach from local file'. Below is a table for document selection.

Selected	Embed Attachment	Doc Description	Original FileName	Attach Doc	Attach Doc FilePath
<input checked="" type="checkbox"/>	<input type="checkbox"/>	New document	Arnold.doc	<input type="checkbox"/>	

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.

Refresh

Email Template

	TemplateName	Subject	MessageText	RepName	Created	Updated	Public
	Please see resume At	Please see attached resume	Please let me know if you have	mthomson	11:54:00 AM	11:54:00 AM	<input checked="" type="checkbox"/>
	adlawdetw			mkramer	5/8/54:00 AM	5/8/54:00 AM	<input checked="" type="checkbox"/>
	Email Merge Sample	Thank [RecipientName] for applyin	Recipient Information:	ntran	3/9/14:00 PM	3/9/14:00 PM	<input checked="" type="checkbox"/>
	Jeff template	Some hot jobs are available!	I give me a call and I'll set you up	tw10	11:52:00 AM	11:52:00 AM	<input checked="" type="checkbox"/>
	Job Opportunity	Job Opportunity Available	We currently have an open pos	mthomson	10:12:00 AM	10:12:00 AM	<input checked="" type="checkbox"/>
	NewApp	New App	[RecipientName]	jlong	3/3/12:00 PM	3/3/12:00 PM	<input checked="" type="checkbox"/>
	Resume Attached	Please see Attached resume		mthomson	11:52:00 AM	11:52:00 AM	<input checked="" type="checkbox"/>
	Resume Here	Please see attached		tw7	11:55:00 AM	11:55:00 AM	<input checked="" type="checkbox"/>
	Urgent opportunity op	Urgent - call me!	I just received a great opportuni	mthomson	11:53:00 AM	11:53:00 AM	<input checked="" type="checkbox"/>
*							<input type="checkbox"/>

**Modify Email Template:**

**TemplateName**

**Subject:**

**MessageText**

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.

**Email History**

**Search:**

Email Address:	Sent StartDate:	CreationStartDate:
Subject:	Sent EndDate:	CreationEndDate:
Num Attachment:		

ID	Date Sent	Attach	Recipient Email Address	Subject	Creation
1189		0		Candidate Resumes for Order # 4494	10/05/06
1178		0		Candidate Resumes for Order # 4482	09/27/06
1157		0		Candidate Resumes for Order # 4448	09/06/06

**Email Detail:**

**Subject:** Candidate Resumes for Order # 4510

Candidate Resumes for Order #4510[]

Employees Attached:

**Recipient List:**

RecipientName	Email Address	Type
Smith, Jan		Contact

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*, *Sent 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.

**Email Account Setup**

**Select Account** [Dropdown] Refresh Set as Default

ReturnAddress	alisha@tempworks.com	
ReturnName	Alisha Arnold	
EmailAccountType	User Account	
EmailProtocol	POP	
IncomingMailServer		(Eg. company.com)
OutgoingMailServer		(Eg. smtp.company.com)

CheckMailFrequency 5 minute(s)

Email Signature:

UseAuthentication

UserName alisha

Password

WordWrap

WordWrapLength 80

SpellCheckBeforeSend

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.

The screenshot displays the TempWorks Email interface. At the top, the title bar reads "TempWorks Email" and "EmailGroupID 1177". Below the title bar, there are several input fields and a toolbar. The "Recipients" field contains "Barnes, Stephen" and "sbarnes@notrealemail.com", with a "To" dropdown menu set to "Employee". The "Subject" field contains "Great career opportunity!". The "Return Email" field contains "alisha@tempworks.com". The toolbar includes icons for address book, attachments, spell check, text messaging, and sending. Below the toolbar, there are four checked checkboxes: "Send Separate Email", "Use Plain Text", "Log as Message", and "Email Merge". A tabbed interface at the bottom shows "Text Body" selected, with other tabs for "Recipients", "Attachments", "Template", "History", and "Account Setup". The main text area contains the following text: "I have an immediate opening for a Human Resources assistant in your area. Please give me a call if you are interested." followed by "Thanks, Susan". To the right, an "Email Note" field contains the text: "Opportunity for Human Resources assistant, call if interested".

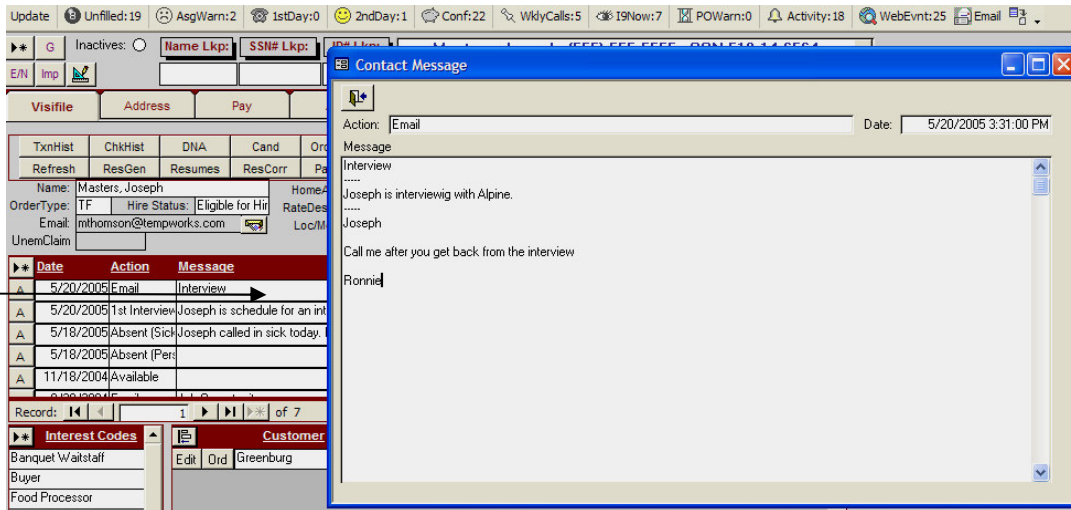
Once all of the information has been entered for the email the user can utilize the buttons and check boxes at the top to check and send the email. The *Address* (open book icon) button will open the **Recipients** tab. The *Attach documents from documents form* (index card and push pin icon) button 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.

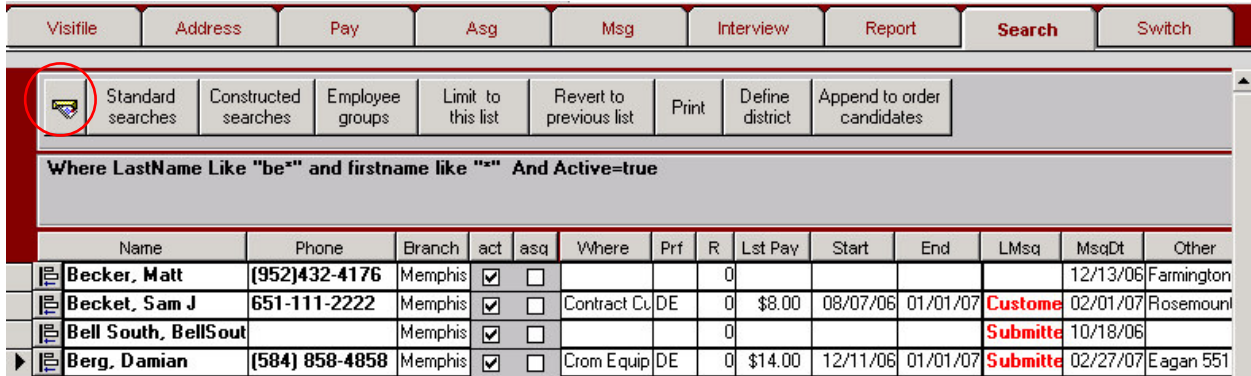
There are four check boxes that are applied to an email by default. The first is *Send Separate Email*. When this is checked the recipients of the email will not see any of the other recipients that the email was sent to. Below that is *Log as Message*. This check box ensures that the email will be logged 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.

▶* G Inactives: <input type="radio"/> Customer Lkp: <input type="text"/> Cust# Lkp: <input type="text"/>		Crom Equipment 10623 (666) 466-7788x Primary	
Departments: <input type="radio"/> <input type="text"/> <input type="text"/>			
Visible	<b>Address</b>	Invoicing	Message
Misc	Search	Switch	
Basic		Sales and Service Information	
<b>Customer</b> Parent ID: <input type="text"/> Customer Id: <input type="text" value="10623"/> Status: <input type="text" value="Active"/> Customer: <input type="text" value="Crom Equipment"/> Department: <input type="text" value="Primary"/> Date Created: <input type="text" value="12/06/01"/> Active Date: <input type="text" value="03/01/02"/>		<b>Billing Address (if Different)</b> <input type="button" value="Copy Main Address"/> ATTN: <input type="text"/> Street1: <input type="text" value="3300 Enterprise Drive"/> Street2: <input type="text"/> City: <input type="text" value="Fort Pierce"/> State: <input type="text" value="FL"/> Zip: <input type="text" value="34950"/> Country: <input type="text"/> Phone: <input type="text" value="(666) 466-7788x"/> <input type="button" value="Change Phone and Email"/> Fax: <input type="text"/> E-mail: <input type="text" value="dalyce@tempworks.com"/> Website: <input type="text" value="www.cromeq.com"/>	
<b>Main Address</b> Street1: <input type="text" value="3300 Enterprise Drive"/> Street2: <input type="text"/> City: <input type="text" value="Fort Pierce"/> State: <input type="text" value="FL"/> Zip: <input type="text" value="34950"/> Country: <input type="text"/>		<b>Default Sales Taxes</b> Sales Tax Goods: <input type="text"/> Sales Tax Serv: <input type="text"/>	
		<b>Default WorkSite</b> Worksite: <input type="text" value="Warehouse"/> <input type="button" value="See"/>	

\*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.

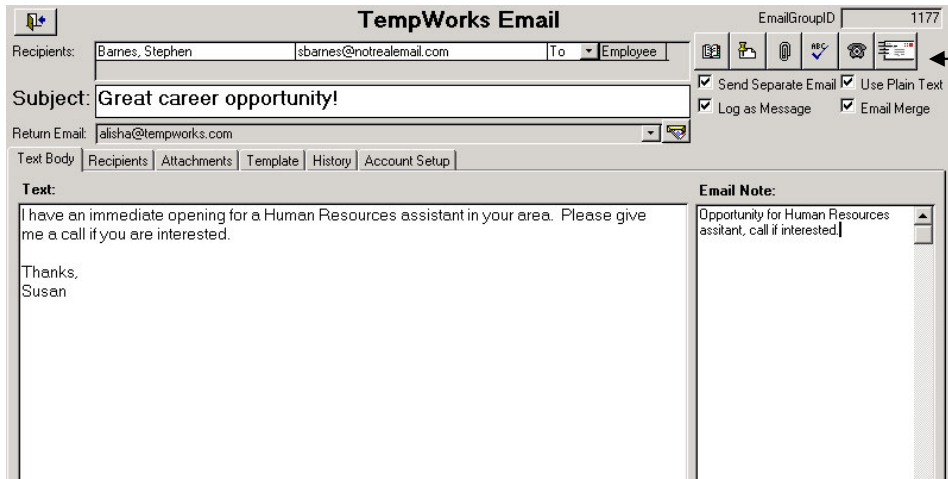
The screenshot shows the Tempworks software interface for a customer record. At the top, there are search filters for 'Customer Lkp:' and 'Cust# Lkp:' with the value 'Alpine Inc 778763 (456) 788-8897x Primary'. Below this is a navigation bar with tabs: 'Visifile', 'Address', 'Invoicing', 'Message', 'Misc', 'Search', and 'Switch'. The main area contains a table with columns: 'Date', 'Action', 'Contact', 'Message', 'Rep', 'Date Due', and 'Completed?'. The table lists several records, including '5/20/2005 1st Interview Shah, Chris' and '5/18/2005 Absent (Sick) shah, cris'. Below the table is a 'Department List' and a 'Customer Contacts' table. The 'Customer Contacts' table has columns: 'Last Name', 'First', 'Title', 'Phone', and 'Dept'. The contact 'Jamison, Jack' is highlighted with a red circle.

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 screenshot shows the Tempworks software interface for a contact record. At the top, there are search filters for 'Company Lkp:' and 'Last Name Lkp:' with the value 'Jamison, Jack Alpine Inc'. Below this is a navigation bar with tabs: 'Visifile', 'Address', 'Message', 'Misc', 'Report', 'Search', and 'Switchboard'. The main area contains a table with columns: 'Msg Date', 'Action', 'Message', 'Rep', 'Date Due', and 'Completed?'. The 'Visifile' tab is active, and the 'Email' button (envelope icon) is circled in red. Below the table is a 'Contact Methods' section with fields for 'Company', 'Branch', 'Email', 'Status', 'Date', and 'Title'.

The Tempworks email will open.

*\*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 contact’s record click on the Chg #s button to open the Contact Methods form.*



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.

