ACTIVANT

Eclipse Outbound E-Mail

Release 8.6.3 (Eterm)

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Outbound E-mail Overview

Outbound E-mail is a companion product that allows you to e-mail paperwork rather than only printing or faxing. It is available everywhere faxing is, and, in addition, you can set it to send automatic e-mail responses to certain events using the Activity Trigger function. For example, if a customer places an order using Web Commerce, you can set up Outbound E-mail to automatically e-mail a response, such as an acknowledgement or a copy of their sales order. For more information on activity triggers and how to set them, see Assigning Activity Triggers.

Use the following procedures to create, schedule, and send e-mails:

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Setup Requirements for Outbound E-mail

Following are the control maintenance records and authorization keys used for Outbound E-mail.

Control Maintenance Records

Set the following control maintenance records:

E-Mail Defaults

- Default E-mail From Name
- Default E-mail Print Styles
- MBX Default Customer If Not Found
- MBX Default Product If Not Found
- MBX Default Sales Source

E-Mail General

- Branch-Specific E-mail HTML Logos
- Corporate Customer
- E-Mail Body For Orders Sent As Tiff Attachments
- E-Mail Body For Orders Sent As Tiff Attachments
- E-Mail Footer Text
- E-mail HTML Logo
- E-mail Message On Bids
- E-mail Request - Subject Of Response For WOE Login/Password
- E-mail Request - Text of Response For WOE Login/Password
- Outbound E-mail Logging BCC
- Print All Open Gens Of An Order On First Print Of Acknowledgment
- Require E-mail And Phone Number In WOE
- Show Customer Part # On E-mail P/O For Directs
- Show Page Breaks On Text E-mails
- E-mail Request - Subject Of Response For WOE Login/Password
- E-mail Request - Text Of Response For WOE Login/Password
- Use E-Mail Footer Text
- Valid E-mail Preference

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- Valid E-mail Types
- Validate Name In "Ordered By" Field Against Customer Contact

Authorization Keys

Assign the following authorization keys:

- EMAIL.LOG.BCC
- EMAIL.SEND

See Also:

Outbound E-mail Overview

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Sending E-mails

Use the Send E-mail screen to create and send e-mails from within the system. You can either send the e-mail right away, or set it to send when triggered by the occurrence of an event. For more information on activity triggers and how to set them, see Assigning Activity Triggers.

You can access the Send E-mail screen from any of the following locations:

- **System** > **Custom** > **Send Email**
- **Files** > **Customer** > **Add'l Info** hot key > **Activity Trigger** hot key **>** **Properties** hot key
- **Orders** > **Printing** > **Reprint Picking Ticket** > **Order Reprinting Options** > **E-mail** hot key
- **A/R** > **Print Statements** > **E-Mail** hot key.
- **Files** > **User Activity Log Entry** > **Print** hot key **>** **E-mail option**
- **Files** > **Printers** > **All Hold Entries** > **Spooler Control** **>** **Print** hot key > **E-mail** hot key
- **Files** > **Contact** > **Contact Maintenance** > **WWW** hot key **>** **Internet Information Maintenance** > **Send E-mail** hot key
- **Files** > **Vendor** > **Vendor Maintenance** > **WWW** hot key **>** **Internet Information Maintenance** > **Send E-mail** hot key
- **Files** > **Customer** > **Customer Maintenance** > **WWW** hot key **>** **Internet Information Maintenance** > **Send E-mail** hot key

E-mails for orders that are printed or reprinted contain the order generation number in the subject line of the e-mail.

To send an e-mail:

1. From any of the locations above, access the Send E-mail screen.
2. In the **To** field, enter the e-mail address of the person to whom you are sending this message.

   When you assign an e-mail activity trigger to a customer, you have the option of setting an automatic e-mail address. For more information, see Assigning Activity Triggers and Flagging Entities to Inherit Triggers.

   Note: The system does not accept e-mail addresses that do not include the @ (at) symbol. You can enter and edit information in this field, however, the system does not let you advance if you have entered an invalid e-mail address. You can enter e-mail addresses either by using the **Dist List** hot key or by entering e-mail addresses manually. The system accepts either commas (,) or semi-colons (;) for entering multiple e-mail addresses.

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3. In the **CC** field, enter the e-mail address for each person to whom you want to send a carbon copy of this message.

   The addresses listed in the **CC** field display in the e-mail sent to the people in the **To** field.

   Note: You can enter and edit information in this field, however, the system does not let you advance if you have entered an invalid e-mail address. You can enter e-mail addresses either by using the Dist List hot key or by entering e-mail addresses manually. The system accepts either commas (,) or semi-colons (;) for entering multiple e-mail addresses.

4. In the **BCC** field, enter the e-mail address for each person to whom you are sending a blind carbon copy of this message.

   The addresses in the **BCC** field do not display in the e-mail sent to the people in the **To** field.

   Note: You can enter and edit information in this field, however, the system does not let you advance if you have entered an invalid e-mail address. You can enter e-mail addresses either by using the **Dist List** hot key or by entering e-mail addresses manually. The system accepts either commas (,) or semi-colons (;) for entering multiple e-mail addresses.

5. To send this message to multiple recipients in either the **To**, **CC**, or **BCC** fields, place the cursor in any of those fields and use the **Dist List** hot key to display the TO Distribution List screen, where you can create a list of multiple recipients. For more information, see Creating E-mail Distribution Lists.
6. In the **Subject** field, enter a brief description of the subject of the e-mail.
7. Depending on the application from which this screen was accessed or the event that triggers the e-mail, the system populates the **Attachments** field.
8. In the space below the header fields, enter the text of the e-mail message.
9. Use the following hot keys as necessary to process the e-mail:

Hot Key	Function
Sel User Comments	Displays the User / Company (*) Defined Comments screen, which lists user defined comments, followed by company defined comments. Select a comment and press **Enter**. The comment is added to the message area of your e-mail. Define comments in the User Comments Maintenance screen. For more information, see Defining User or Company Comments.
Print	Prints a copy of this screen to your default printer.
Edit Usr Cmts	Displays the User Comments Maintenance screen, where you can create or edit standard user- and company-defined comments that you can add to tracker appends, tracker closing comments, fax memo comments, and e-mail messages. For more information, see Defining User or Company Comments.

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Hot Key	Function
Options	Displays the Send E-mail Options screen, where you can set up additional fields and parameters for the e-mail you are sending. For more information, see Defining E-mail Options.
Dist List	Displays the To Distribution List screen, where you can create, build, edit, and save distribution lists of names and e-mail addresses for future use. For more information, see Building E-mail Distribution Lists.

10. Press **Esc** to send the e-mail and clear the screen.
11. Press **Esc** to exit the screen.

See Also:

Outbound E-mail Overview

Assigning Activity Triggers

Flagging Entities to Inherit Triggers

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Sending Internet E-mail Messages

Use the Internet e-mail function to send short e-mail messages. This option works best if you have only one person to send the message to, no attachments, and only a short message.

To send an internet e-mail message:

1. From the **System** > **Custom** > **Add-on Products** > **Outbound Email** menu, select **Email Internet Out** to display the Internet Mail Message Send screen.
2. In the **To** field, enter the e-mail address of the person to whom you are sending the message.

   Note: The system does not accept e-mail addresses that do not include the @ (at) symbol.

3. In the **Subject** field, enter a brief description of the subject of the e-mail.
4. In the **Message** area, enter the text of the e-mail message.
5. Use the **Send** hot key to send the message.

See Also:

Sending E-mails

Outbound E-mail Overview

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Defining User or Company Comments

Use the User Comments Maintenance screen to create and edit user-defined and company-defined comments that you can use in tracker append messages, tracker closing comments, and fax memo comments.

You can access the User Comments Maintenance screen in any of the following ways:

- From a tracker's Append Message screen, use the **Edit Comment** hot key.
- From a tracker's Closing Message screen, use the **Edit Usr Cmts** hot key.
- From the Send E-mail screen, use the **Edit Usr Cmts** hot key.
- From the Fax Memo screen, use the **Edit User Comments** hot key.

To define a user or company comment:

1. From the **System** > **Custom** > **Add-on Products** > **Outbound** Email menu, select **Email Send** to display the Send E-mail screen.
2. Use the **Edit Usr Comments** hot key to display the User Comments Maintenance screen.
3. In the **User ID** field, do one of the following:
   - Accept the default of the user ID displayed in this field.
   - Use the **Company Cmts** hot key to change the user ID to the company ID.

   Note: To change the information in the **User ID** field back to your ID, use the **User Cmts** hot key.

4. In the **Comment ID** field, press **F10** and do one of the following:
   - Select **New** and enter an ID up to 15 alphanumeric characters long.
   - Select an existing ID name.
5. In the message area, enter new information or edit existing information that displays in the space below the header information in tracker append messages, tracker closing comments, and fax memo comments.
6. Use the following hot keys as necessary to process the comment:

Hot Key	Function
Append Cmt	Adds the displayed comment to one of the following screens, depending upon where it was accessed from: • Append Message screen. • Closing Message screen. • Fax Memo screen.
Delete Cmt	Deletes the displayed comment, and prompts you to confirm the deletion.
Copy Cmt	Copies the displayed comment to another new or existing comment ID.

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7. Press **Esc** to save this information and exit the screen.

See Also:

Outbound E-mail Overview

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Defining E-mail Options

Use the Send E-Mail Options screen to define additional properties associated with an e-mail that you want to send. For example, you can define the return e-mail address for all messages that you send, or you can enter a recipient for a blind carbon copy (BCC).

To define an e-mail option:

1. From the **System** > **Custom** > **Add-on Products** > **Outbound Email** menu, select **Email Send** to display the Send E-mail screen.
2. Use the **Options** hot key to display the Send E-mail Options screen.

   The system populates the **From** field with your default e-mail address, based on the following hierarchy of information:

   - The system first uses the information in the **E-mail** field on the Outgoing E-mail Parameters screen for your user ID. For more information, see Entering User Outgoing E-mail Parameters.
   - If the **E-mail** field on the Outgoing E-mail Parameters screen is blank, the system then uses the information in the Default E-mail From Name control maintenance record.

   Note: We recommend that you set the Default E-mail From Name control maintenance record. This e-mail does not display in the **From** field on the Send E-mail Options screen, but does display in the e-mail that is sent.

   - If the Default E-mail From Name control maintenance record is blank, the system uses your user ID from your company's domain name.
   - To override the e-mail address in the **From** field, type over the displayed address.

   Note: The **From** field can contain only one e-mail address.

3. Use any of the following options to determine how and to whom to send the e-mail:

To...	In this field...	Do the following...
have a blind carbon copy of this e-mail sent to you	**Sender BCC**	Enter your e-mail address. **Note:** To set up either or both of the **Sender BCC** and **Sender BCC Prefix** fields to automatically populate, set a default entry for your user ID in the Outgoing E-mail Parameters screen. For more information, see Entering User Outgoing E-mail Parameters.

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To...	In this field...	Do the following...
append the Subject line of the blind carbon copy being sent to you	**Sender BCC Prefix**	Enter an identifying prefix. **Note:** To set up either or both of the **Sender BCC** and **Sender BCC Prefix** fields to automatically populate, set a default entry for your user ID in the Outgoing E-mail Parameters screen. For more information, see Entering User Outgoing E-mail Parameters.
include the company name of the customer or vendor to whom you want to send the e-mail	**Customer/Vendor**	Type a company name and press **Enter**. If more than one version of that entity exists, select from the list of customers or vendors and press **Enter**. The Available E-mail Addresses screen displays. Do one of the following: • If e-mail addresses exist, based on information entered in the Internet Information Maintenance screen, select an e-mail address or **All** and press **Enter**. • If e-mail addresses do not exist, based on information entered in the Internet Information Maintenance screen, press **Enter**. The system does not populate this field with the addresses, but the entity name displays in the **Customer/Vendor** field. **Note:** For more information, see Entering Internet and E-mail Information.

specify a person to whom this e-mail should go	**Contact**	Do one of the following:
		• Enter the full name or e-mail of the person to whom you want this e-mail to be sent.
		• Enter the partial name or e-mail of the person to whom want this e-mail to be sent, and then select from the list of contacts.
		• Press **F10** to display the Available E-mail Addresses screen, which displays a list of active contacts.
		  • If e-mail addresses exist, based on information entered in the Internet Information Maintenance screen, select an e-mail address or **All** and press **Enter**.
		  • If e-mail addresses do not exist, based on information entered in the Internet Information Maintenance screen, press **Enter**.
		
		Note: For more information, see Entering Internet and E-mail Information.

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To...	In this field...	Do the following...
apply an .html template to your e-mail	**HTML Header Template**	Do one of the following: • Enter the name of the template. • Press **F10** and select from a list of templates. You must have the custom add-on for HTML-based letterhead to use this field. **Note:** For information on how to create html letterhead, see Building E-mail Templates.
send an attachment that is embedded in the body of the e-mail	**Send Attachment in Body (Y/N)**	Enter **Y**. **Note:** For more information about how to create and upload attachments, see Attaching Documents to E-mails.
send an attachment that is external to the body of the e-mail	**Send Attachment in Body (Y/N)**	Enter **N**. **Note:** For more information about how to create and upload attachments, see Attaching Documents to E-mails.

The **Attachment Type** field displays the of file, if any, that you have attached to the e-mail. You can attach any of the following types of documents:

- .txt – Sends the attachment as a text file that displays in simple text format, such as in Notepad.
- .html – Send the attachment as an HTML file that displays in a web browser.
- .pdf – Send the attachment as an PDF file.

This field is view-only. For more information, see Attaching Documents to E-mails.

4. Press **Esc** to save this information and exit the screen.

See Also:

Outbound E-mail Overview

Setting User Outgoing E-mail Parameters

Internet Information Maintenance

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Building E-mail Templates

Use the e-mail template to create a unified look for your company's mass-mailings. You can create an .html template that you can apply to any e-mail you send out. You can create a look in keeping with your company theme or concept, and include company logos, URLs.

> **Note:** You can apply e-mail templates only to those e-mails in .html format.

For more information on activity triggers and how to set them, see Assigning Activity Triggers.

To build an e-mail template:

1. From the **System > Custom > Add-on Products > Outbound Email** menu, select **Email Template Maint** to display the Email Template Maintenance screen.

   Note: You can also display the Email Template Maint screen by using the **Options** hot key on the Send E-mail screen, and then by using the **Email Template Maint** hot key on the Send E-mail Options screen.

2. In the **Template Name** field, do one of the following

   - Enter **New** to create a new template. At the prompt, type the name of the template.
   - Press **F10** and select from a list of templates.

3. In the **Background Color** field, do one of the following to determine the background color of your template:

   - Enter the .html code.
   - Press **F10** and select from the Email Colors list.

   Note: We recommend that you use light backgrounds and dark fonts, as research indicates that these are easier to read. Dark backgrounds and light fonts create too much contrast and are difficult to read.

4. In the **Link Color** field, do one of the following to determine the color of the links in your e-mail:

   - Enter the .html code.
   - Press **F10** and select from the Email Colors list.

5. In the **Logo Image Path** field, enter the file path where your logo image is located.

   Note: This path must be publicly accessible from the internet.

6. In the **Font Face** field, select one of the following to determine the type of font for your template:

   - **Arial –** This is a sample of Arial font.
   - **Times –** This is a sample of Times font.

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- **Courier** – `This is a sample of Courier font.`

7. In the **Link** column, to include a link in your e-mail, enter the name of the link. The information you enter in this column defines how the link displays in your e-mail.
8. In the **Link URL Path** column, if you entered a name in the **Link** column, then enter a corresponding URL.
9. Press **Esc** to save the template and exit the screen.

More Options for Building E-mail Templates

The Email Template Maintenance screen also offers these options:

To...	Use this hot key...
display the template as it would appear to your customers to determine if it looks appropriate	**Test HTML**
expand the amount of space available to enter URLs	**Expand**
delete the template from the system	**Delete This Template**
insert a default URL when you enter information in the **Link** column but not in the **Link URL Path** column	**Default URL**

See Also:

Defining E-mail Options

Outbound E-mail Overview

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Editing E-mail Appearances

Web developers can edit the appearance of web commerce e-mails. For example, you can change the alignment or color of e-mails. You can also undo edits.

You can edit the following email types:

- Edit the appearance of general e-mails by changing the E-mail Template.
- Edit sales order entry e-mails by changing the SOE E-mail Order template. These e-mail documents include bids, order acknowledgements, and invoices.
- Edit purchase order entry e-mails by changing the POE E-mail Order template. These e-mail documents include purchase orders, and purchase orders for direct shipments.

Edit by opening an e-mail template from the Web Email HTML Maintenance screen. You can open the template's programming code for viewing or editing.

Before editing, make sure you have a solid understanding of the following:

- HTML (HyperText Markup Language) tags and coding.
- Eclipse features, variables, and editing techniques.

To edit e-mail appearance:

1. From the **System** > **Custom** > **Add-on Products** > **Outbound Email** menu, select **Email HTML Maint** to display the Web Email HTML Maintenance screen.
2. Place your cursor on a line item in the **Description** column to select a template that you want to work on. For example, you would use the SOE Email Order template to edit the e-mails for bids, orders, and invoices.
3. The **HTML** column indicates whether the code is original, as provided by Eclipse, or has been modified. For example, the word *Site* indicates the SOE Email Order template was modified by someone at your site. Site displays whenever a template is opened for editing, whether or not any editing occurs.
4. Use one of the following hot keys:
    - **View Original –** Opens the original e-mail template code for viewing only. Press **Esc** to close the viewing screen. No changes are saved.
    - **Edit –** Opens the template's programming code for editing. Press **Esc** to close the editing screen and save your changes.
5. Press **Esc** to close the Outbound Email Maintenance screen.
6. Test edited forms immediately to ensure they appear as expected. For example, trigger test e-mails by sending them to yourself.

To undo an edit:

1. From the **System** > **Custom** > **Add-on Products** > **Outbound Email** menu, select **Email HTML Maint** to display the Web Email HTML Maintenance screen.

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2. Use the cursor to select an e-mail template.
3. Use the **Undo Custom** hot key to display one of two Undo Changes prompts.
4. Respond to whichever of these prompts displays:
    - **Undo Changes to <template file name> (Y/N)**. This prompt displays if the template has only been edited one time. Enter **Y** to revert to the original template code. The **HTML** field indicator changes back to Original.
    - **Undo <template name> Ver# <revision number>/All Versions/Nothing? (V/A/N)**. This prompt displays if the template has been edited more than one time. Enter **A** to revert to the original template code, undoing all versions, or enter **V** to only undo the version number listed in the prompt.

      For example, the prompt displays the file name for the SOE Email Order template, which was edited on site. Entering **V,** in this example, only undoes the third editing session. Entering **A** undoes the edits from all three editing sessions. Entering **N** leaves all the edits, aborting from the prompt.

      After you undo all changes, the **HTML** field indicator changes back to Original.

See Also:

Outbound E-mail Overview

Setting Up for Web Commerce

Editing Web Pages

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Attaching Documents to E-mails

Use these procedures to upload a text, HTML (hypertext markup language), or PDF (portable document format) document to Eclipse, and then send the document as an attachment. The only type of attachments that you can attach to Eclipse-based e-mails are the ones that you have uploaded into the Eclipse system. After you have uploaded a document, you can attach it to an e-mail, either internally or externally.

- An internal attachment is one where the user sees the message in the body of the e-mail when they open the message.
- An external attachment is one where the user clicks an icon to access the text.

To upload a document:

1. Create a text document and save it to your hard drive. Be sure and save it with one of the following file extensions:
   - .txt for text documents.
   - .html for HTML documents.
   - .pdf for PDF documents.

   Note: You must save HTML-based documents in the "Web Page, html only" format in order to be formatted properly when the recipient views the e-mail.
2. From the **System** > **Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
3. Use the **Upload** hot key to display the Select File window.
4. Browse to the location of your document and double-click it.

   The path of the document displays at the Enter DOS Path Name prompt.
5. In the **Enter Spooler Title** field, enter a name to describe this hold entry that you can identify it by later. For example, enter Sales Document or Budgeting Attachment.
6. Press **Enter**.

   When the document has been uploaded, the following message displays: Transferred to Host.
7. Press **Enter**.

   The Spooler Control screen displays with the hold entry that you named earlier displayed in the **Report Title** column, showing that you have uploaded the document.

To create an internal attachment:

1. From the **System** > **Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.

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2. Use the **Arrow Key** to move the cursor to the line item that contains the document you have uploaded.
3. Use the **Print** hot key to display the Print Options screen.
4. Use the **E-mail** hot key to display the Send E-Mail screen.
5. Use the **Options** hot key to display the Send E-Mail Options screen.
6. Use the **Down Arrow** key to move the cursor to the **Send Attachment in Body (Y/N)** field.
7. Type **Y** and press **Enter**.
8. In the **Attachment Type** field, the system displays the type of document that you have selected to e-mail as one of the following:
   - .txt
   - .html
   - .pdf
9. Press **Esc** to return to the Send E-Mail screen. The **Attachments** field displays the name of the hold file entry and how it will be sent.
10. In the **To** field, enter the e-mail address of the person to whom you want the message sent.
11. To send a message in addition to the attachment, use the **Down Arrow** key to move to the message area and enter additional text. For more information, see Sending E-mails.
12. Press **Esc** to send the message, and return to the Spooler Control screen.
13. Press **Esc** to exit this screen.

To create an external attachment:

1. From the **System > Printers** menu, select **Your Hold Entries** to display the Spooler Control screen.
2. Use the **Arrow Key** to move the cursor to the line item that contains the document you want to upload.
3. Use the **Print** hot key to display the Print Options screen.
4. Use the **E-mail** hot key to display the Send E-Mail screen.
5. In the **To** field, enter the e-mail address of the person to whom you want the message sent.
6. Use the **Options** hot key to display the Send E-Mail Options screen.
7. Use the **Down Arrow** key to move the cursor to the **Send Attachment in Body (Y/N)** field.
8. Type **N** and press **Enter**.

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9. In the **Attachment Type** field, the system displays the type of document that you have selected to e-mail as one of the following:
    - .txt
    - .html
    - .pdf
10. Press **Esc** to return to the Sent E-Mail screen. The **Attachments** field displays the type of attachment you are sending.
11. In the **To** field, enter the e-mail address of the person to whom you want the message sent.
12. To send a message in addition to the attachment, you can use the **Down Arrow** key to move to the message area and enter it.
13. Press **Esc** to send the message. For more information, see Sending E-mails.
14. The Spooler Control screen displays. Press **Esc** to exit this screen.

See Also:

Outbound E-mail Overview

Sending E-mails

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Creating and Editing E-mail Distribution Lists

Use the To Distribution List screen to manually create and edit a distribution list of multiple e-mail addresses. Use the manual method of creating an e-mail distribution list when you have a group of recipients who do not have any parameters in common such as file name, or e-mail type. For example, you can create a distribution list based on recipients who are in the plumbing or heating industries.

Keep in mind that once you add an e-mail address to a distribution list, the only place you can edit it is on the To Distribution List screen.

You can use the distribution list in any of the following e-mail fields:

- To
- CC
- BCC

Note: You can enter and edit information in any e-mail address field, however, the system does not let you advance if you have entered an invalid e-mail address.

You can enter e-mail addresses either by using the **Dist List** hot key or by entering e-mail addresses manually. The system accepts either commas (,) or semi-colons (;) for entering multiple e-mail addresses.

To create an e-mail distribution list:

1. From the **System** > **Custom** > **Add-on Products** > **Outbound Email** menu, select **Email Send** to display the Send E-mail screen.
2. Use the **Dist Lis**t hot key to display the To Distribution List screen.
3. In the **Email Address** column, enter the e-mail address for the individual.

   Note: The system does not accept e-mail addresses that do not include the @ (at) symbol.

4. In the **Recipient** column, enter the name of the person associated with the e-mail address.
5. Repeat steps 3 and 4 until you have listed all the e-mail addresses needed.
6. To save the list, use the **Save** hot key and do one of the following:
   - Press **F10** and select from a list of distribution list names.
   - Enter a name up to 15 characters long.
7. At the prompt, type a name by which to identify this list and press **Enter**.

   The name of the list appears in the upper left corner of the screen.

8. Press **Esc** to display the Send E-mail screen.

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The word *Multi* displays in the **To** field, indicating that a distribution list has been selected.

9. Do one of the following:
   - If you want to create an e-mail to send, use the Sending E-mails procedure.
   - If you do not want to create an e-mail, press **Esc** to save the distribution list and exit the screen.

To edit an existing list:

1. From the **System** > **Custom** > **Add-on Products** > **Outbound Email** menu, select **Email Send** to display the Send E-mail screen.
2. Use the **Dist List** hot key to display the To Distribution List screen.
3. Use the **Recall** hot key to display the Recall List prompt.
4. Press **F10** and select a distribution list.
5. Edit the list as necessary, using the **Tab** key to move between the columns.
6. Use the **Save** hot key to display the Save list as prompt.
7. At the Save list as prompt, do one of the following:
   - Press **Enter** to save the list under the given name.
   - Type a new name and press **Enter**.
8. Press **Esc** to exit the screen.

   The Send E-mail screen displays with the word *Multi* in the **To** field, indicating that a distribution list has been selected.
9. Do one of the following:
   - If you want to create an e-mail to send, use the Sending E-mails procedure.
   - If you do not want to create an e-mail, press **Esc**.
10. Press **Enter**.

See Also:

Outbound E-mail Overview

Sending E-mails

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Populating E-mail Distribution Lists Using Mass Load

Use the Build a Distribution List screen to build distribution lists of multiple e-mail addresses or fax numbers based on user-defined selection criteria and using the selection capabilities of the Eclipse Report Writer/Mass Load program. You can, for example, build a list based on the e-mail addresses of a company, or based on e-mail addresses for customers only.

Keep in mind that once you add an e-mail address to a distribution list, the only place you can edit it is on the To Distribution List screen.

> **Note:** You can enter and edit information in any e-mail address field, however, the system does not let you advance if you have entered an invalid e-mail address.

You can enter e-mail addresses either by using the **Dist List** hot key or by entering e-mail addresses manually. The system accepts either commas (,) or semi-colons (;) for entering multiple e-mail addresses.

To build an e-mail distribution list:

1. From the **System** > **Custom** > **Add-on Products** > **Outbound Email** menu, select **Email Send** to display the Send E-mail screen.
2. Use the **Dist List** hot key to display the To Distribution List screen.
3. Use the **Build** hot key to display the Build A Distribution List screen.
4. In the **Customer/Contact** field, select one of the following to determine from where you want to select e-mail addresses or fax information:
   - **Contact** selects addresses from the Contact file.
   - **Customer** selects addresses from the Entity file.
5. Press **Enter**.
6. In the **E-Mail Type** field that displays, do one of the following:
   - Press **F10** and select from a list of e-mail types, as defined in the Valid E-mail Types control maintenance record.
   - Leave blank to include all addresses listed for the entity designated in the **Contact/Customer** field.
7. In the **Design ID** field, do one of the following to define a name that identifies the list:
   - Press **F10** and select from a list of design IDs.
   - Enter a name up to 18 characters long.
8. In the **File Name** field, press **F10** and select a file name. This parameter identifies the name of the file containing the information to be used to construct the list.
9. In the **Title of List** field, enter a title to assign to the displayed list.

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10. Use the following hot keys as necessary to process the list:

Hot Key	Function
Selection Build	Displays the Report Writer/Mass Load Selection screen, where you set the criteria for selecting the records whose e-mail addresses can then be selected for the distribution list. For more information about this screen, see Report Writer/Mass Load Overview.
Save Work ID	Saves the displayed screen under a work ID.
Delete Work ID	Deletes the displayed work ID.
Edit List	Displays the Distribution List screen, where you can edit the entries on the list For more information, see Creating E-mail Distribution Lists.

See Also:

Outbound E-mail Overview

Report Writer/Mass Load Overview

Creating E-mail Distribution Lists

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Using E-mail Distribution Lists

When you are ready to send an e-mail message, you can enter the name of a distribution list and send your message to multiple recipients at the same time. You can access any distribution lists that you have created from the Send E-mail screen.

Keep in mind that once you add an e-mail address to a distribution list, the only place you can edit it is on the To Distribution List screen.

> **Note:** You can enter and edit information in any e-mail address field, however, the system does not let you advance if you have entered an invalid e-mail address.

You can enter e-mail addresses either by using the **Dist List** hot key or by entering e-mail addresses manually. The system accepts either commas (,) or semi-colons (;) for entering multiple e-mail addresses.

To use an e-mail distribution list:

1. From the **System > Custom > Add-on Products > Outbound Email** menu, select **Email Send** to display the Send E-mail screen.
2. Use the **Dist List** hot key to display the To Distribution List screen.
3. Use the **Recall** hot key to display the Recall List prompt.
4. Enter the name of the list you want to use and press **Enter**.

   The e-mail addresses of the list that you have chosen display in the **Email Address** column. The names of the recipients display in the **Recipient** column.
5. To use a different list than the one you have chosen, use the **Clear List** hot key to remove the current list. Then use the **Recall** hot key to select a different list.
6. Press **Esc** to return to the Send E-mail screen.

   The word ***Multi*** displays in the **To** field, indicating that you have selected a distribution list.
7. Create and send the e-mail. For more information, see Sending E-mails.

See Also:

Outbound E-mail Overview

Sending E-mails

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