Email Messaging

A new setting in User Maintenance allows users to specify the POP3/IMAP mail server type along with the server name, port number, user name, and password so they can monitor their mailbox via E2 and see emails from Customer and Vendor Contacts.

Go to File | System Maintenance | User Maintenance and select your User ID. On the E-Mail Settings tab, go to Incoming Email and complete all the fields per your company's mail setup.

Once your UserIDs are set, go to File | Email Messaging and the Server set for the user logged in will access the specified account and load all the emails that have an address matching a Customer or Vendor Contact.


Notice the checkbox for Show Only Emails in E2 Contacts. It is checked by default so that only those pertinent emails for E2 will display and associate them with the Object of CUST or VEND and the corresponding Customer or Vendor Code. If you would like to see the full contents of your email Inbox, uncheck it and click Refresh to reload the grid. Once it refreshes, you will see new emails, but the Object will display with TODO instead of CUST or VEND.

To View the full message of an email, select the message, then click the View Email button.
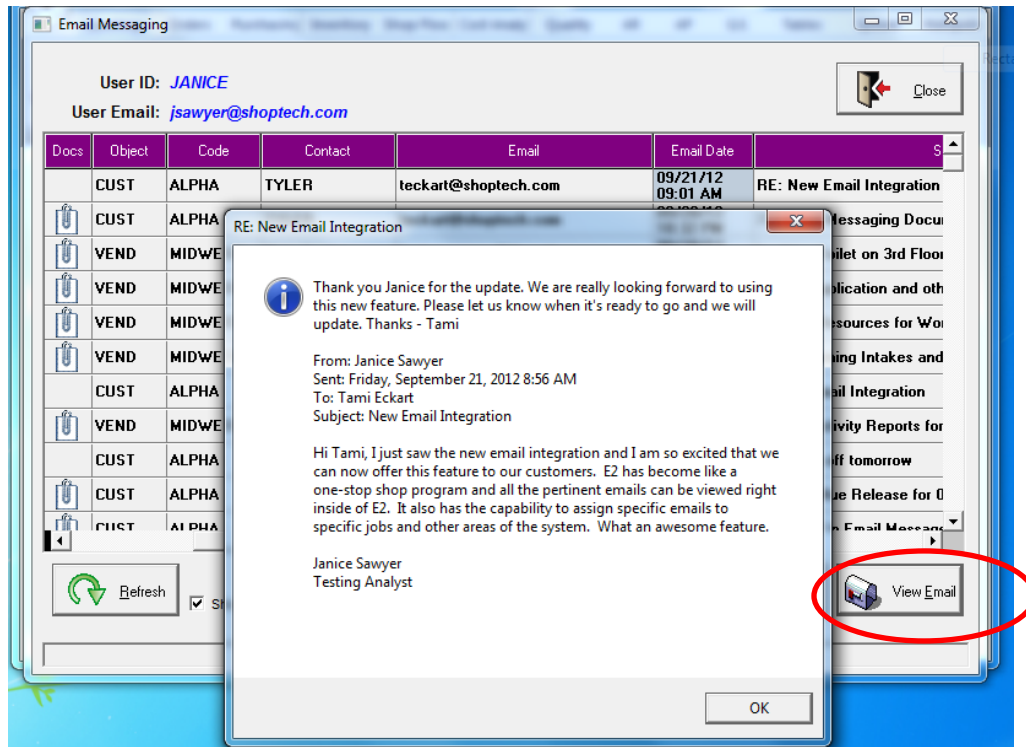

To delete an email from the grid, simply select it and click the Delete button. This will remove the email from this grid as well as from your email inbox. The grid will clear and refresh automatically after clicking the okay button.
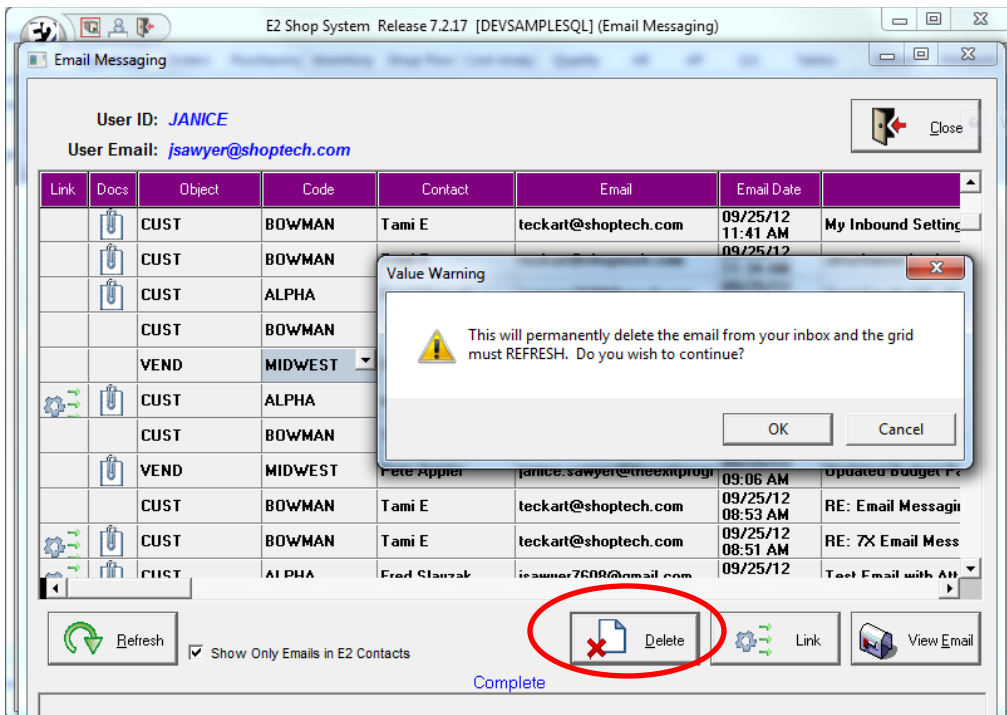
If an email has attachments, you will see the paper clipped sheet icon in the Docs column. When you link the email to the selected Object, the attachments will display in the Documents tab.

To link an email to a specific form, select the email and click the drop down list in the Object field to choose the form you want to link.
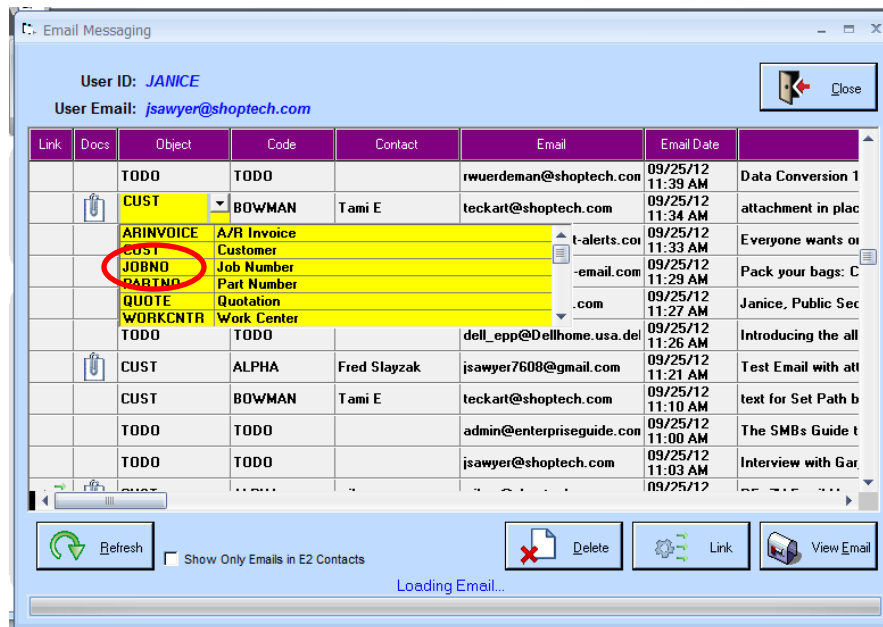

Select the form and then press the Tab key to move to the Code field. The selection screen displays where you can pick the appropriate form and click OK. That form's ID will now display in the Code field.
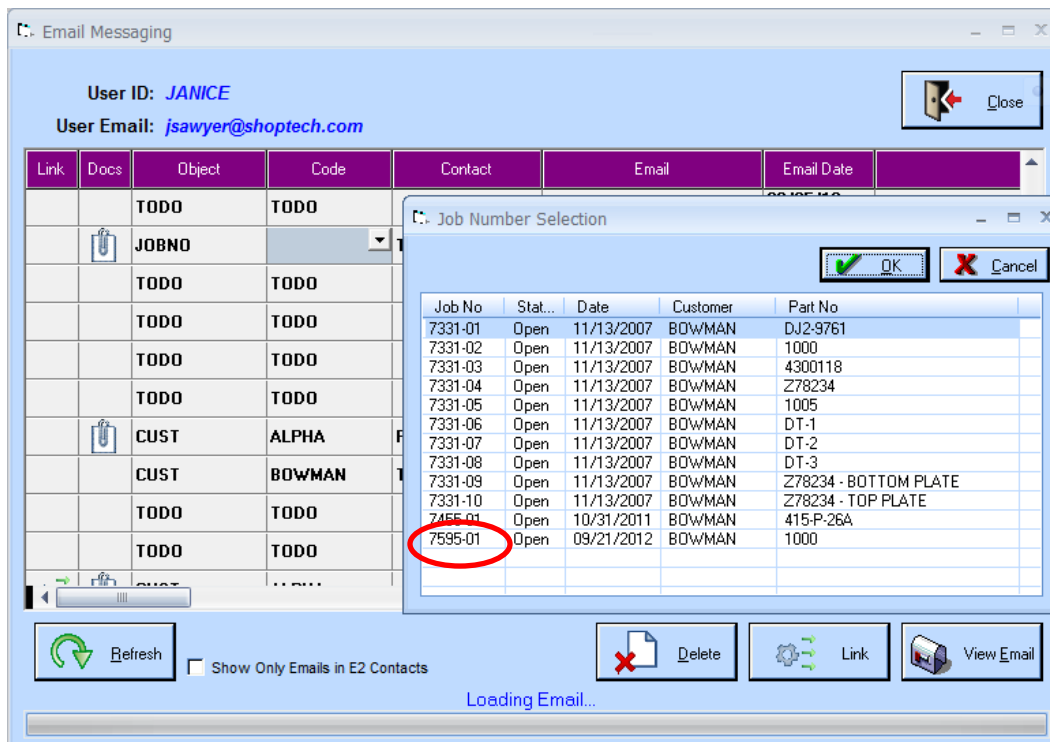
Now you're ready to connect the email with its attachments to the form. The attachments cannot be viewed from this screen. Just click the Link button and you will receive a Save Attachments window advising the user to Set the Path. Once an email is linked, a saved attachment window will display where the user must set a path for each attachment into the selected Object. The document is then saved to the special object, Documents tab and can be viewed there.
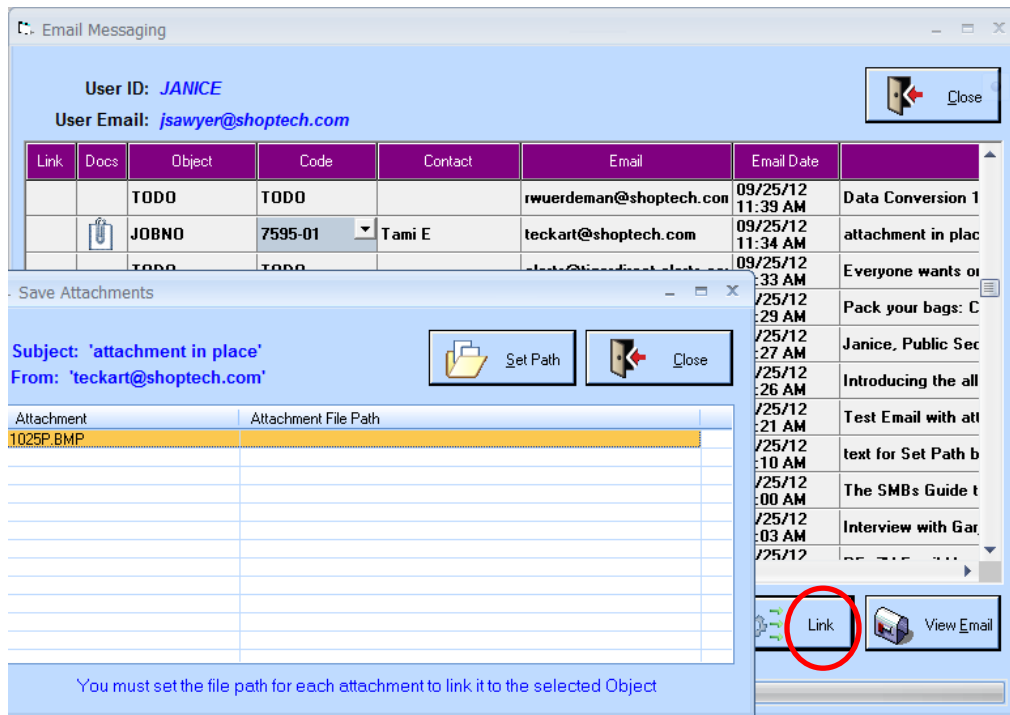
After the path has been set, the attachments file path will update in the Save Attachments window.
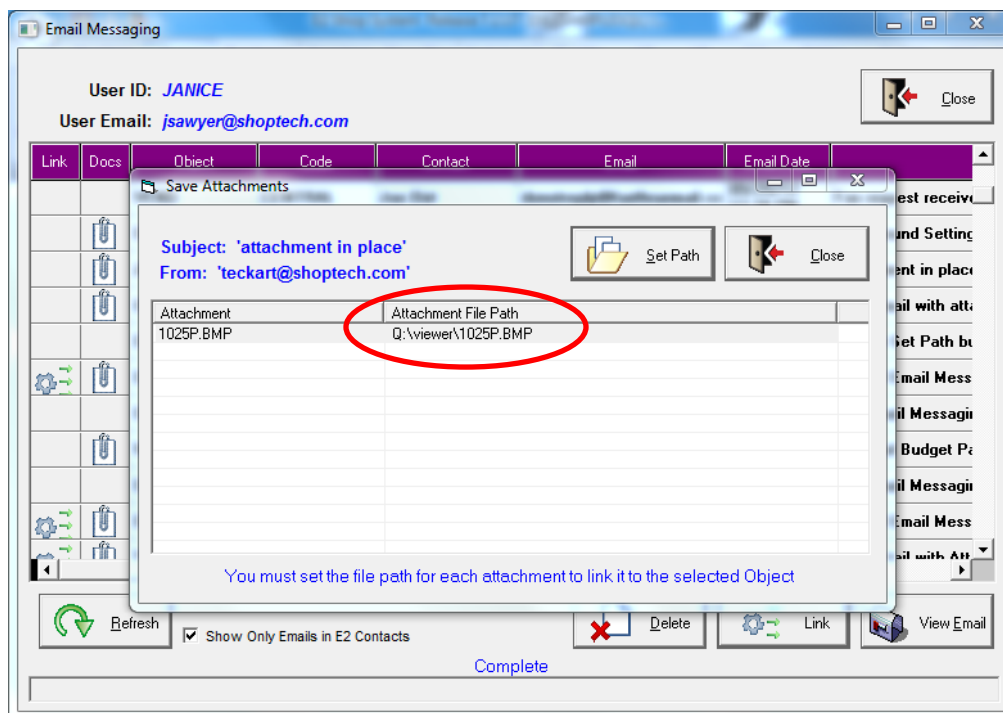
The user will simply click Close and an Attachments In Place message displays advising that the email has been Linked to the object. Click OK and the user will return to the Email Messaging form.
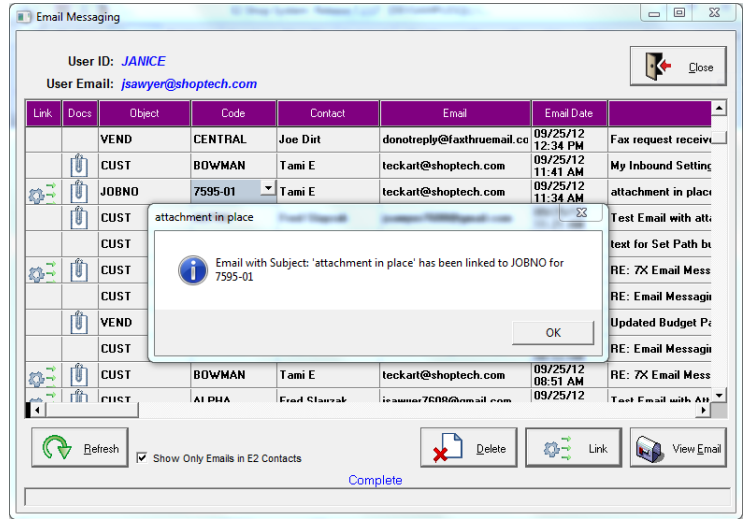

The message can be viewed in the Contacts Tab of the Object in the notes section. With the email now linked to the selected form, you can close the Email Messaging form, edit the specific job that was linked to the email and view the message through the Contacts tab of the specific Job Number.

You can click the Notes icon to get to the Comment Detail of the email. And from here, you can click the Comments to display the full body of the message.
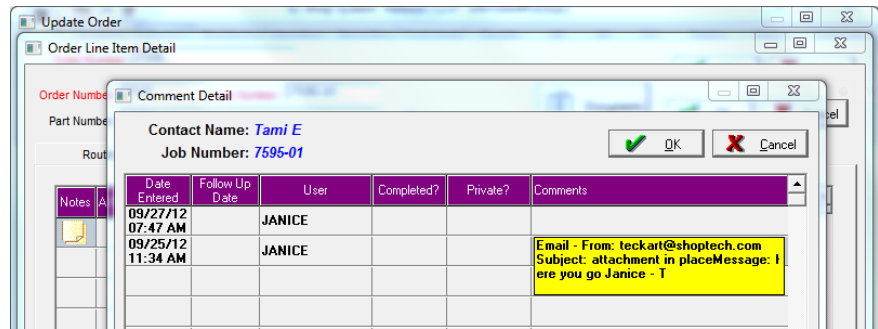

The same holds true for viewing the document. If the user has emails with attachments that are NOT associated with E2 contacts, the user will need to go to their primary email program (i.e., outlook, etc.) and view those attachments. With the email now linked to the selected form, you can close the Email Messaging form, edit the specific job that was linked to the email and view the document through the Documents tab of the Job.

The document can be viewed in the Documents tab of the Object. The user will go to the specific object (in this case, the job) that was linked to the email and view the document through the documents tab of the Job Number on the Order.
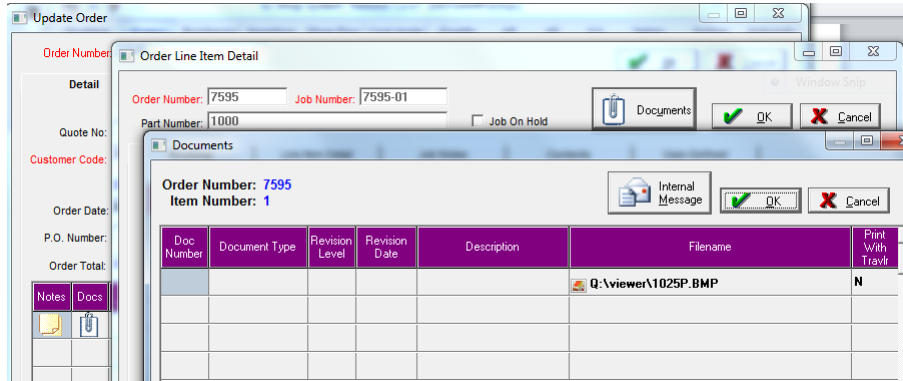
If you need to break a link you can return to Email Messaging and select the linked email in the object field. This will change the Link icon to Delete Link and you can easily click that button and you will be prompted that the email link has been removed. Click OK and notice the Link icon is removed. Also, if you refresh, the system will reassign Customer (or Vendor) to the Object and the Customer Name (or Vendor Code) to the code fields once the refresh is clicked.
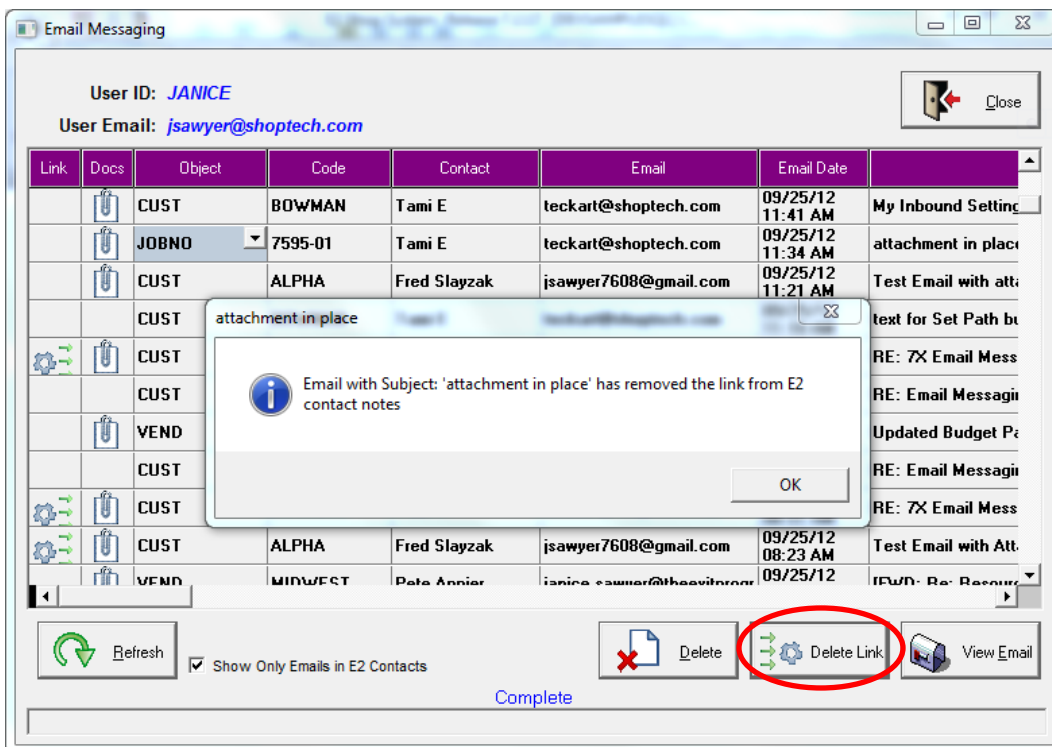
To verify the link was broken, just edit the Job again and look at the Contacts tab. You'll see Tami is still a contact, but the Notes icon has been removed. The document does not get deleted with the Delete Link button. It will still be attached to the job. The user will need to manually go into the documents tab and delete the document.