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.

Available Companies	E-Mail Settings	Misc Settings
General Incoming Email	Outgoing Email	
Server Type: P0P3	Incoming Email	
	Server:	rijo.SHOPTECHcorp.COM
	Port Number:	110
	Timeout	60
	Encryption Type:	Default
	User ID:	teckart
	Password	****
		Change Password

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.

k Docs		shoptech.con	Contact	Email	Email Date	Subject
ik Diocs	CUST	ALPHA	mike	mikes@shoptech.cor	09/20/12	BE: Inbound email
				·	04:34 PM 09/20/12	
	CUST	ALPHA	mike	mikes@shoptech.cor	03:42 PM	RE: Inbound email
Û	VEND	ART IRON	Vivian Carmichael	vcarmichael@shopte	09/20/12 03:09 PM	Weekly Status
	CUST	ALPHA	mike	mikes@shoptech.cor	09/20/12 07:36 AM	FW: Email
	CUST	ALPHA	angie asher	aasher@shoptech.cc	09/19/12 03:46 PM	RE: 8.0.1209.1403 Good t
	CUST	ALPHA	angie asher	aasher@shoptech.cc	09/19/12 01:08 PM	RE: Vendor RFQs from Job
	CUST	ALPHA	mike	mikes@shoptech.cor	09/18/12 01:11 PM	RE: 7.X Email Integration
	CUST	ALPHA	angie asher	aasher@shoptech.cc	00/10/12	RE: Scrap issue
	CUST	ALPHA	angie asher	aasher@shoptech.cc	09/18/12 11:41 AM	Aspec Packing List Updat
	CUST	ALPHA	angie asher	aasher@shoptech.cc	09/17/12 04:55 PM	Aspec - critical issue not b
	CUST		annia ashar	aachar@chantach.cc	09/17/12	FW- Pieces Good/Scrap

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 <u>E</u>mail 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.

	ि ्र I Messa	•	E2 Shop System		AMPLESQL] (Email Messagin	g)								
Us		ID: JANICE ail: jsawyer@s	hoptech.com											
Link	Docs	Object	Code	Contact	Email	Email Date	_							
	Û	сият	BOWMAN	Tami E	teckart@shoptech.com	09/25/12 11:41 AM	My Inbound Setting							
	Û	CUST	BOWMAN	Value Warning		09/25/12	×							
	Û	CUST	ALPHA											
		CUST	BOWMAN	must REFERSH. Do you wish to continue?										
	-65-	VEND	MIDWEST 💆		er kesni. Do you wish to com	unde.								
ø∃	Ű	CUST	ALPHA	-		ОК	Cancel							
	Î		BOWMAN											
	8			Tete Applei	lauice.sawyer@ineexitproi	09:06 AM								
		CUST	BOWMAN	Tami E	teckart@shoptech.com	08:53 AM	RE: Email Messagii							
an a ∃	Û	CUST	BOWMAN	Tami E	teckart@shoptech.com	09/25/12 08:51 AM	RE: 7X Email Mess							
<u>~</u>	ĥ	CUST		Frad Glauzak	ieauuar7608@amail.com	09/25/12	Taot Email with Att							
C		fresh 🔽 Show	Only Emails in E2 Co	intacts Comi		Ø ≓ Lin	k View <u>E</u> mail							
				Com	01010									

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.

	ID: JANICE ail: jsawyer@sh	ontech com				_ = X
Link Docs	Object	Code	Contact	Email	Email Date	^
	TODO	TODO		rwuerdeman@shoptech.com	09/25/12 11:39 AM	Data Conversion 1
Û	CUST -	BOWMAN	Tami E	teckart@shoptech.com	09/25/12 11:34 AM	attachment in plac
		/R Invoice ustomer		t-alerts.co	09/25/12 11:33 AM	Everyone wants or
	JOBNO JO	ob Number art Number		-email.com	09/25/12 11:29 AM	Pack your bags: C
		uotation		com	09/25/12 11:27 AM	Janice, Public Sec
	WORKCNTR W TODO	/ork Center TODO		dell_epp@Dellhome.usa.del	09/25/12 11:26 AM	Introducing the all
Û	CUST	ALPHA	Fred Slayzak	jsawyer7608@gmail.com	09/25/12 11:21 AM	Test Email with atl
	CUST	BOWMAN	Tami E	teckart@shoptech.com	09/25/12 11:10 AM	text for Set Path b
	TODO	TODO		admin@enterpriseguide.com	09/25/12 11:00 AM	The SMBs Guide t
	TODO	TODO		jsawyer@shoptech.com	09/25/12 11:03 AM	Interview with Gar
			i .		09/25/12	
Re	efresh 🗖 Show C	only Emails in E2 Co	ntacts Loading	Email	🕼 🗧 Link	View <u>E</u> mail

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.

Email Mes	saging							- = ×
	ID: JANICE nail: jsawyer@s	hoptech.com						
Link Docs	Object	Code		Contact		Ema	ail	Email Date
	TODO	TODO	ſ	🕽 Job Num	nber Sel	ection		_ = X
Û	JOBNO		-1					
	TODO	TODO						V <u>OK</u> Cancel
	TODO	TODO		Job No 7331-01	Stat Open	Date 11/13/2007	Customer BOWMAN	Part No DJ2-9761
	TODO	TODO		7331-02 7331-03	Open Open	11/13/2007 11/13/2007	BOWMAN BOWMAN	1000 4300118
	TODO	TODO		7331-04 7331-05	Open Open	11/13/2007 11/13/2007	BOWMAN BOWMAN	Z78234 1005
(Û)	CUST	ALPHA	F	7331-06 7331-07	Open Open	11/13/2007 11/13/2007	BOWMAN BOWMAN	DT-1 DT-2
	CUST	BOWMAN	1	7331-08 7331-09	Open Open	11/13/2007 11/13/2007	BOWMAN BOWMAN	DT-3 Z78234 - BOTTOM PLATE
	TODO	TODO		7331-10 7455-01	Open Open	11/13/2007	BOWMAN BOWMAN	Z78234 - TOP PLATE 415-P-26A
	TODO	TODO	+(7595-01	Open	09/21/2012	BOWMAN	1000
.⇒Le®n	01107		+					
B	efresh	Only Emails in E2 (Contact		ding Em	ail	<u>D</u> elete	Cink View Email

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.

🗈 Email Mess	aging					_ = X
	ID: JANICE ail: jsawyer@sł	hoptech.com				
Link Docs	Object	Code	Contact	Email	Email Date	^
	TODO	TODO		rwuerdeman@shoptech.com	09/25/12 11:39 AM	Data Conversion 1
Ű	JOBNO	7595-01 💆	Tami E	teckart@shoptech.com	09/25/12 11:34 AM	attachment in plac
	торо	торо		-l	09/25/12 33 AM	Everyone wants or
- Save Attachme	ents			_ = 3	/25/12 :29 AM	Pack your bags: C
Subject: 'atta	chment in place	e'		et Path	/25/12 :27 AM	Janice, Public Sec
From: 'teckar	t@shoptech.co	m'			/25/12 :26 AM	Introducing the all
Attachment		Attachment File Patl	n		/25/12 :21 AM	Test Email with atl
1025P.BMP					/25/12 :10 AM	text for Set Path b
					/25/12 :00 AM	The SMBs Guide t
					/25/12 :03 AM	Interview with Gar
					/25/12	lae are arr ▼
					Link	View <u>E</u> mail
You m	iust set the file pa	ath for each attac	hment to link it to th	ne selected Object		

After the path has been set, the attachments file path will update in the Save Attachments window.

E	mail Messa	ging	10.000	Control Patrician (1997)	and the second		
		ID: JANICE ail: jsawyer@sho	optech.com				Close
Lir	nk Docs	Obiect	Code	Contact	Email	Email Date	_
		B. Save Attachm	ents	tes file	And address of the		
	Û						und Settinc
	Û	-	tachment in pl art@shoptech.		🗾 <u>S</u> et Path		ent in place
	Û	Attachment		Attachment File Path			ail with atta
		1025P.BMP	(Q:\viewer\1025P.BN			iet Path bu
0	្ដ 🕅						mail Mess
							il Messagiı
	Û						Budget Pa
							il Messagiı
10	, : 🕅						mail Mess
	nîn 🗧						sil with Att
		You	must set the file	path for each attac	chment to link it to the selec	ted Object	
	🕀 Ве	fresh	nly Emails in E2 Co	ntacts	Lelete	🕼 🔁 Link	View <u>E</u> mail
			,	Comp	blete		

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.

.ink	Docs	Obj	ect	Code	Contact	Email	Email Date	
		VEND		CENTRAL	Joe Dirt	donotreply@faxthruemail.co	09/25/12 12:34 PM	Fax request receiv
	Ŵ	CUST		BOWMAN	Tami E	teckart@shoptech.com	09/25/12 11:41 AM	My Inbound Setting
ΣĒ	Ŵ	JOBNO		7595-01	Tami E	teckart@shoptech.com	09/25/12 11:34 AM	attachment in plac
	Û	CUST	attach	ment in place	Post Days	proper Williams - on	23	Test Email with att
		CUST						text for Set Path b
ΣĒ	Ŵ	CUST		Email with 7595-01	Subject: 'attachmer	nt in place' has been linked to JOB	NO for	RE: 7X Email Mess
		CUST						RE: Email Messagi
	Ŵ	VEND					ок	Updated Budget Pa
		CUST					UK	RE: Email Messagi
2≓	Ŵ	CUST		BOWMAN	Tami E	teckart@shoptech.com	09/25/12 08:51 AM	RE: 7X Email Mess
	nîn.	CUST .			Fred Slauzak	ieauuar7609@amail.com	09/25/12	Toot Fmail with Att

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.

Order Line I	tem Detail						23
Order Numbe	Comment	t Detail	1.00.0				
Part Numbe Rout		ct Name: i Number: i				🖌 OK 🔀 Cancel	cel
Notes A	Date Entered	Follow Up Date	User	Completed?	Private?	Comments	ī
	09/27/12 07:47 AM		JANICE				
	09/25/12 11:34 AM		JANICE			Email - From: teckart@shoptech.com Subject: attachment in placeMessage: ere you go Janice - T	

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.

🔟 Update Order		_										
Order Number	Orc	der Line Ite	em Detail					<u> </u>				
Detail	Order	r Number:	7595 Jo	b Number:	7595-01		Vindow	Snip				
Quote No:	Par	t Number:	1000	_		Job On Hold	Documents V DK X (
Customer Code:		Docum	ents	-		areas 1 to						
Order Date:		Order Number: 7595 Item Number: 1										
P.O. Number: Order Total:		Doc Number	Document Type	Revision Level	Revision Date	Description	Filename	Print With Travlr				
Notes Docs							🛃 Q:\viewer\1025P.BMP	N				
						1	1					

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.

nk Docs	ОБј	ect	Code	Contact	Email	Email Date						
Û	CUST		BOWMAN	Tami E	teckart@shoptech.com	09/25/12 11:41 AM	My Inbound Settir					
Û	JOBNO	-	7595-01	Tami E	teckart@shoptech.com	09/25/12 11:34 AM	attachment in plac					
Û	CUST		ALPHA	Fred Slayzak	jsawyer7608@gmail.com	09/25/12 11:21 AM	Test Email with att					
	CUST	attach	ment in place	hard	Indust@ideglicit.com	23	text for Set Path I					
30												
CUST Email with Subject: 'attachment in place' has removed the link from E2 RE: Email RE: Email												
۱Ü	VEND						Updated Budget F					
	CUST					ок	RE: Email Messag					
, <u>3</u> 🗓	CUST					UK	RE: 7X Email Mes					
30	CUST		ALPHA	Fred Slayzak	jsawyer7608@gmail.com	09/25/12 08:23 AM	Test Email with Al					
nn -	VEND		MIDWEST	Pote Appier	ianice samuer@theevitoro	09/25/12						

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.

Order Line Item De	tail							-		X
Order Number: 7595 Job Number: 7595-01 Part Number: 1000 Job On Hold										
Routing	Line Item	Detail	Job Notes		Conta		User-Def	ined		
Notes A/P Active	Name	Title	Phone Number	Ext	Cell Phone Number	FAX Number	EMail Address	Mobile EMail	Conferencing Server	1
\bigvee	Tami E	Buyer	859-111-1111				teckart@sho		ils.microsoft.	