How to send a report as an attachment to email.

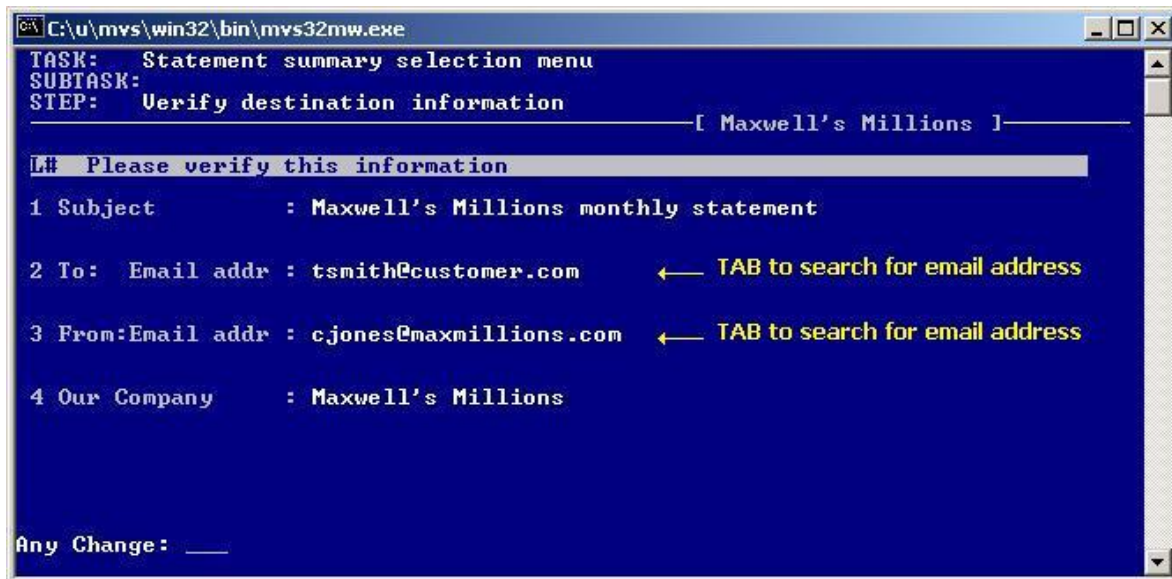## *Step by step instructions.*

Step 1. Choose the menu task that normally creates the document you want to email. This could be an invoice, statement or report.
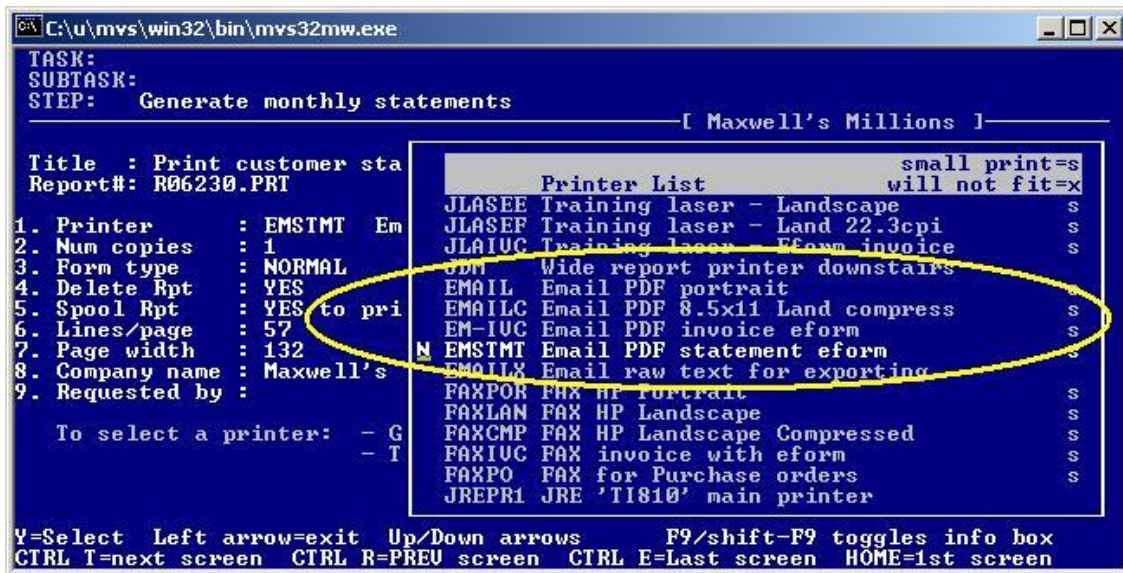
Step 2. When it asks for a printer, choose an EMAIL printer appropriate for the type of document being sent; portrait, landscape, invoice, statement, etc.

Step 3. After the program creates the document the above screen will request additional email information. The cursor always stops at the 1st three fields so you can enter the subject and email addresses.

TAB search for Email Address:

You can press TAB at the "To:" and "From: " email address fields (2 and 3) to search by name for email addresses you might have stored in any of the following files:

       A/R Customer master and O/E alternate ship-to file
       A/P Vendor master   and P/O alternate order-from file
       O/E Salesperson file

The TAB key will search the memo notes of the master files looking for specially entered lines that contain email addresses. If it finds more than one email address in the memo note then it will pop up a window and let you choose one.
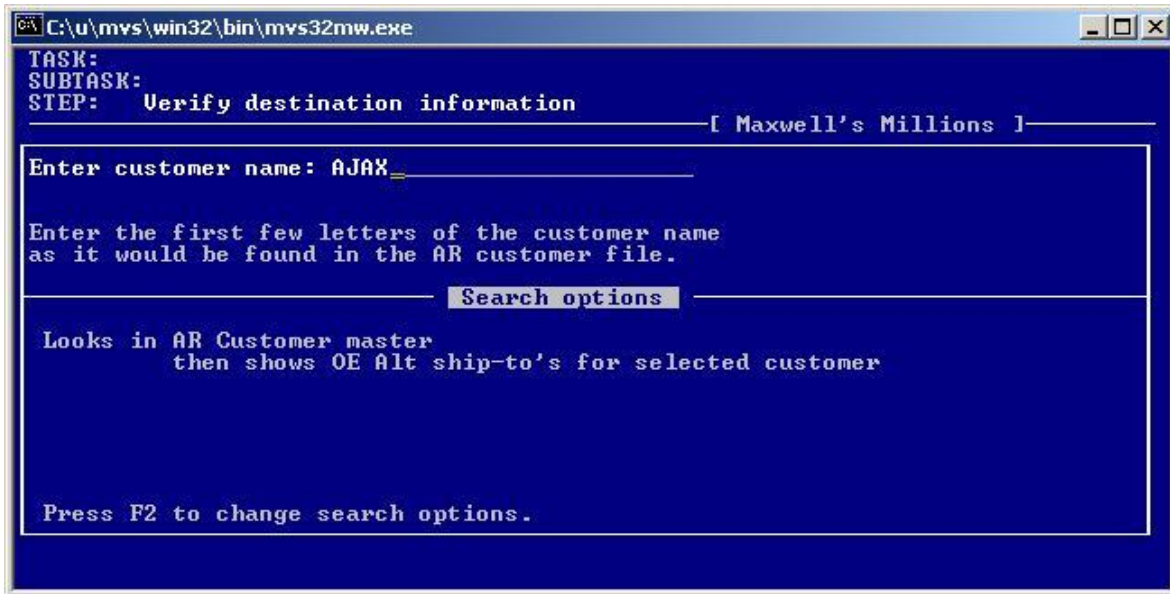
A TAB search will display the above screen so you can enter the company name that should receive the email. This example will search the A/R customer master memos for email addresses of individuals within that company, but you could choose a different file by pressing F2 and picking another file from a list.

See the section on "**How to save email addresses in memo notes:**" for details on how to correctly enter the email addresses into the memo notes of these master files so they will be accessible by the TAB search.

```
================================================================================
Please see the attached file.


. . . . . . . . . . . . . . . . . . . . . . .
Powered by Profits Plus from MV Software ( http://www.mvsoftware.com )
================================================================================

Do you want to edit the above email message? [y/n,q] default=n :
```

Step 4. The program displays a brief message that it will insert into the body of the email. It will ask if you want to edit the message.

       Answer y to edit the message.
       Answer n to send it as shown.
   Answer q to quit and cancel the email.

You will not be able to edit the actual report because it will be sent as a separate file attachment.

After the body of the message is approved the email will be sent.

Note: You can change the above default message that every email starts with. See "*How to change the default email message*" on the next page.

How to change the default email message.

The email program lets you compose a brief message to send to the recipient before you
send the email. You can edit the starting message for every email in Software
Maintenance task # "31. Email maintenance".
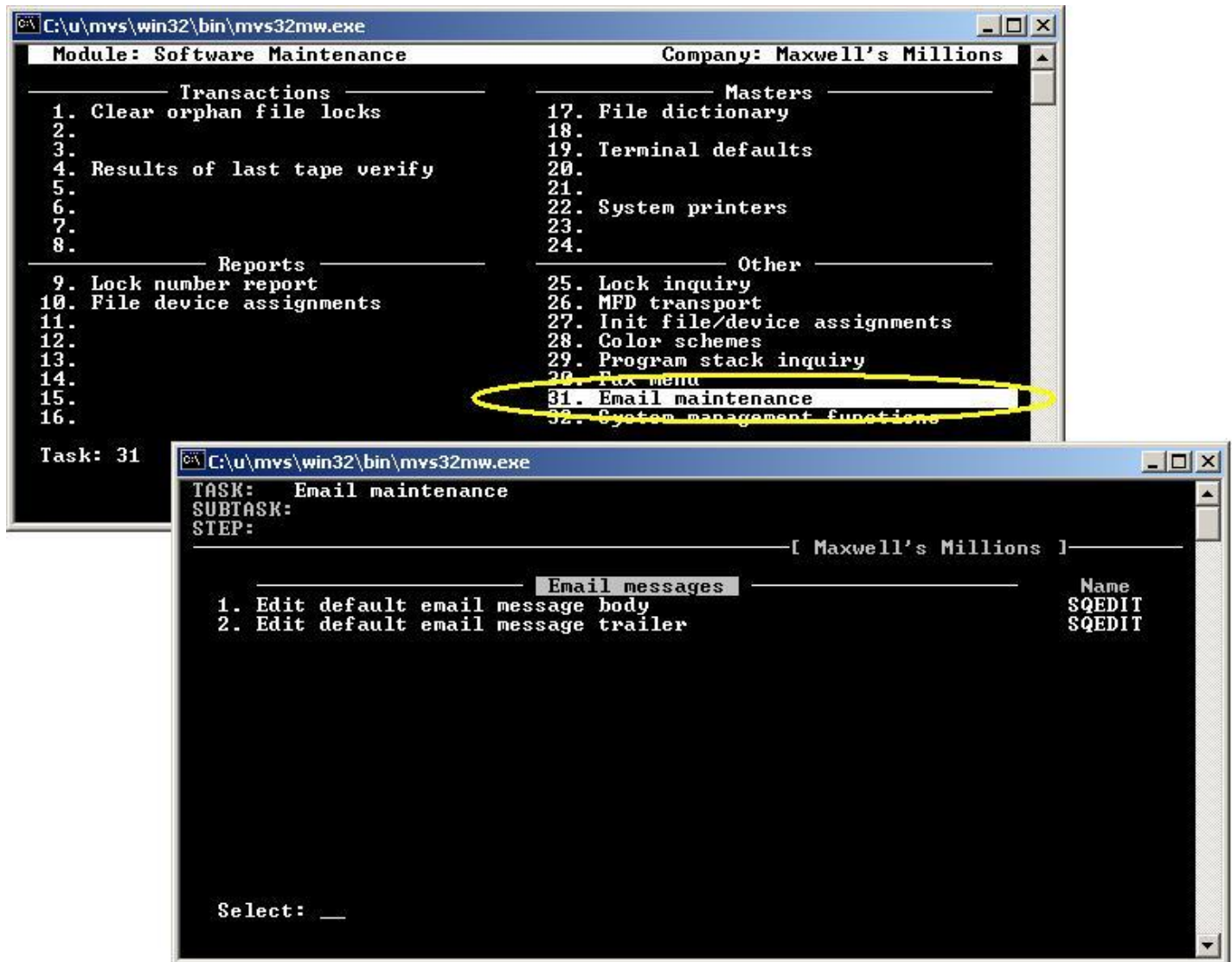
The default message is separated into two sections. The body and the trailer. Choose
task #1 to edit the body or choose task #2 to edit the trailer.

How to save email addresses in memo notes.

You can keep email addresses in master files so you can do a tab search for them when sending emails. You can enter searchable email addresses into memo fields of the following master files.

- A/R Customer master
- A/P Vendor master
- O/E alternate ship-to file
- O/E Salesperson file
- P/O alternate order-from file
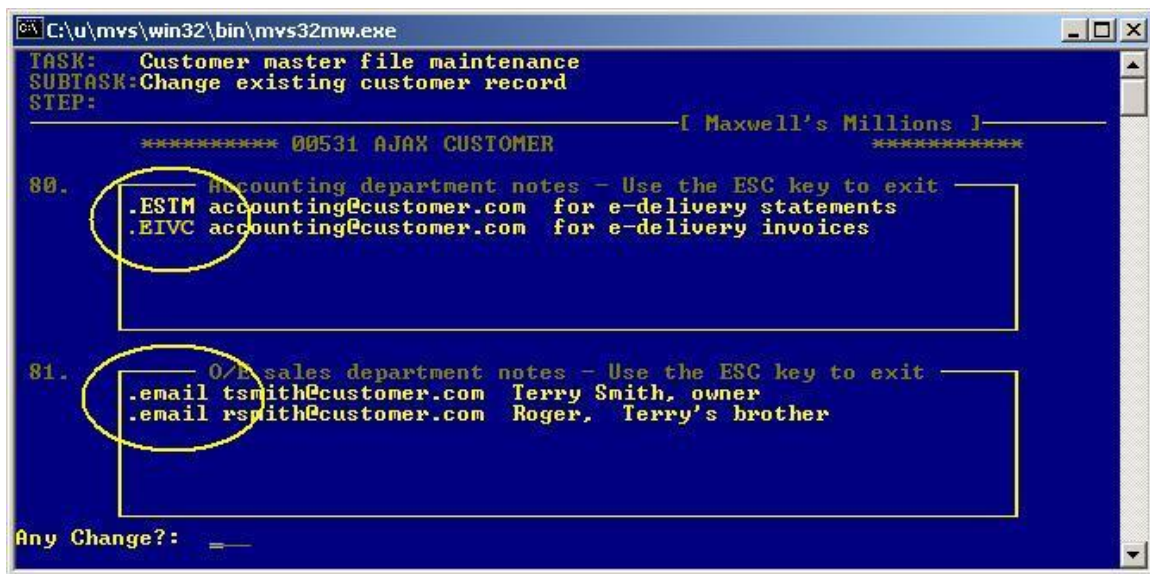
A memo note line that starts with ".email" or ".EMAIL" will be recognized as an email address during an email TAB search.   The e-delivery statement and invoice email memo prefixes (like .ESTM or .EIVC) will also be recognized as an email address.
Notice how comments can follow the email address. If multiple email addresses are found then a window pops up during the TAB search to let you select one of them.
If a record has more than 1 memo boxes in a record, you can put email addresses in any of them.

Frequently asked questions:

Can I send the same report to multiple addresses?

No. Only 1 email address per report.   If you need to send a report to multiple people then send the report to yourself first, and then use your PC email to forward the report to multiple addresses.

Can I attach more than 1 report to an email?

No. Only 1 report per email. If you need to send multiple reports attached to the same email then email them separately to yourself first, then use your PC to compose a new email with multiple attachments.

Am I notified if the email fails?

Yes, failure notifications will be sent back to the email address you entered as the "from" address. This is normally your personal email account.

Known Problems:

It doesn't let me edit the message.

PC's that use both STEP and FacetTerm will not be able to edit the message body.   The email will be sent with the default message and report correctly but for some reason the screen that offers you to edit the message does not stop for a response. You will see the message text quickly scroll by on the screen before returning to the subtask menu.

If you need to edit the message, then you should use a terminal that doesn't use STEP and FacetTerm at the same time.

FacetTerm is the UNIX software that allows a user to switch between multiple windows using the CTRL-W key. If you can't switch between multiple windows then you probably don't use FacetTerm and you shouldn't experience this problem.

STEP is a terminal emulator program used on Windows PC's to display UNIX screens.