

Sending Emails from a Message

Last Modified on 09/09/2019 11:46 am CDT

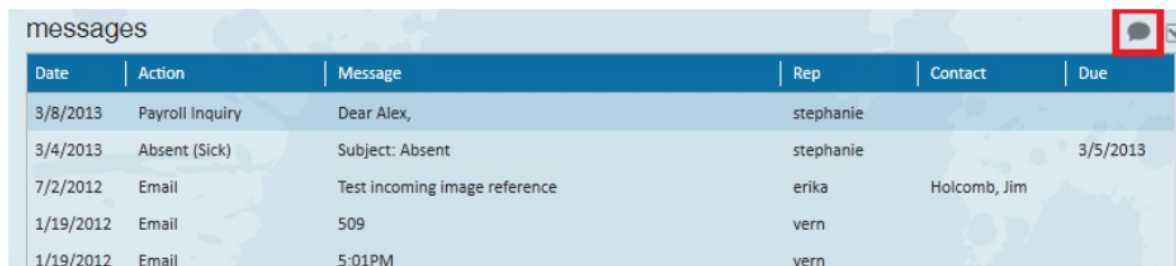
Sending Emails from Messages

Why do double the work when you don't have to? When logging a message in Enterprise, you have the option to send the message out as an email at the same time!

Note In order for users to send emails through Enterprise, their email must first be set up in the system. Check out [SMTP Email Setup](#) or [Gmail Email Setup](#) for more information.

How to Send an Email from Messages:

1. On the **Visifile** of the record, log a message by clicking on the message bubble highlighted in red below:



messages					
Date	Action	Message	Rep	Contact	Due
3/8/2013	Payroll Inquiry	Dear Alex,	stephanie		
3/4/2013	Absent (Sick)	Subject: Absent	stephanie		3/5/2013
7/2/2012	Email	Test incoming image reference	erika	Holcomb, Jim	
1/19/2012	Email	509	vern		
1/19/2012	Email	5:01PM	vern		

2. Write up your message
 - Choose a **message action code** from the dropdown that fits the reason for the message.
 - Add in the body of the email under the message notes section:

message

Action Absent (Sick) Import from Email Inbox

Dear Alex,

I am sorry to hear you are sick today. Please let me know when you will be able to return to work as soon as possible. Thank you!

Best Regards,
Stephanie

Details | Email | Attachments

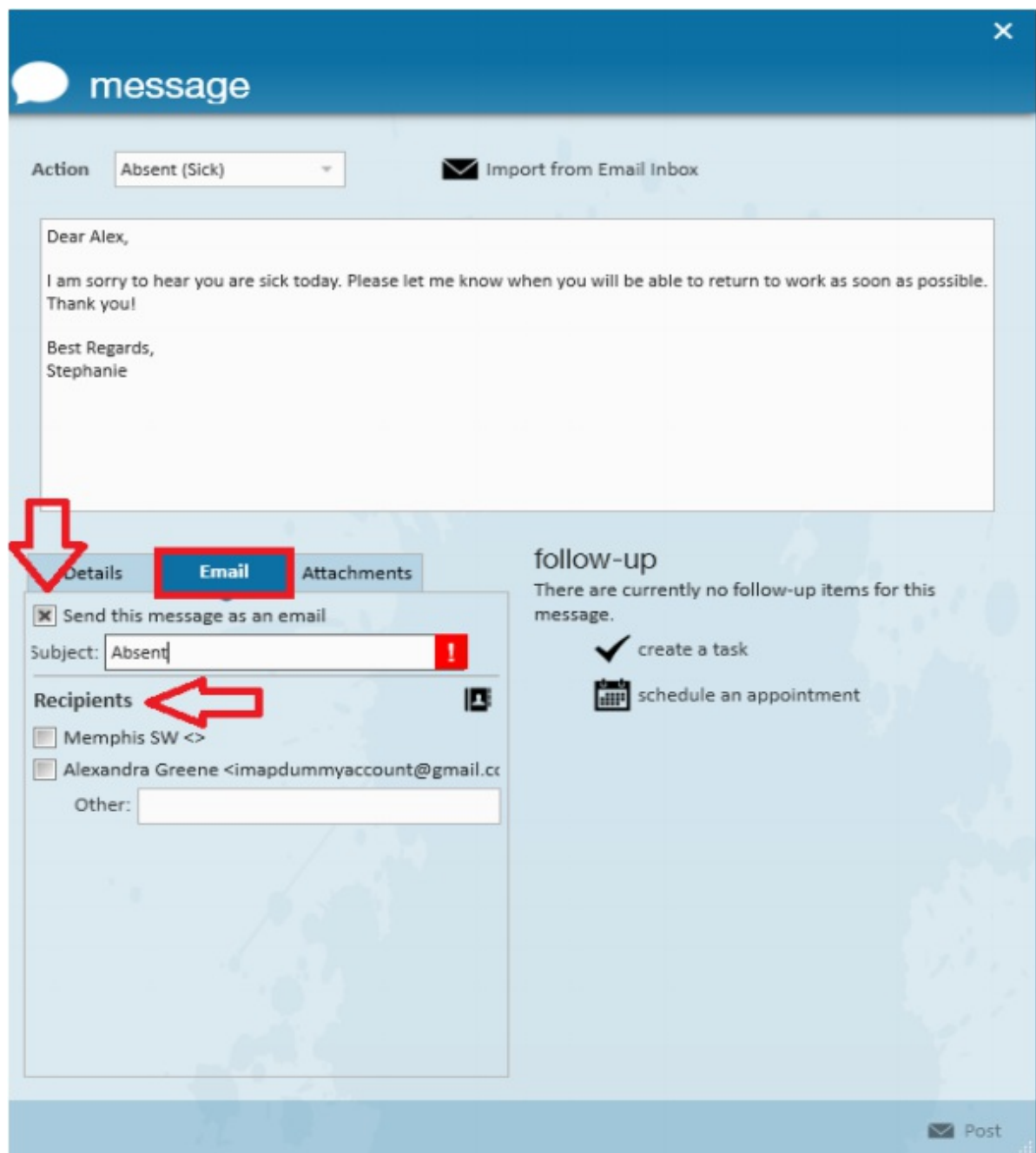
Date/Time	4/30/2013 11:10:55 AM
Rep Name	stephanie
Link Employee	Greene, Alexandra N
Link Contact	
Customer	Cubs Inc.
Link Order	5547
Link Assignment	6629

follow-up
There are currently no follow-up items for this message.

- create a task
- schedule an appointment

Post

3. Select the Email tab

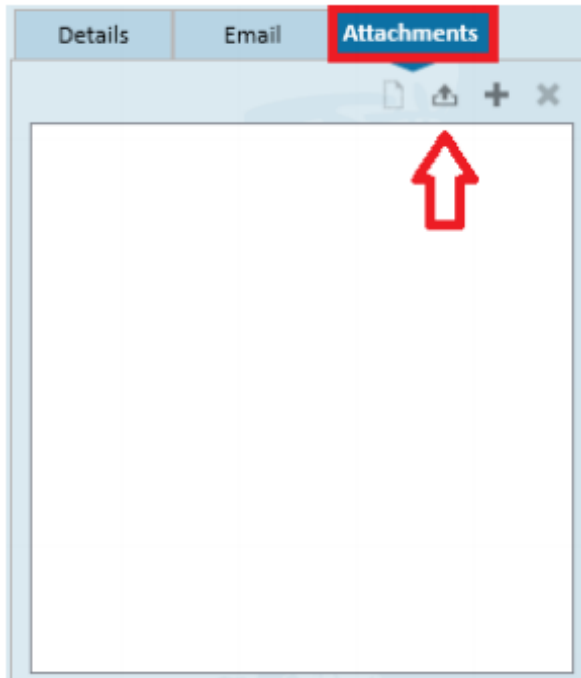



4. Enter the following information

- Check the box next to 'Send this message as an email'
- Enter Subject for the email
- Under **recipients** you will have the option to send it to the person whose record you are on currently logging the message on.
 - You will also have the option to send the message as an email to the branch the record is associated with.
 - Any miscellaneous recipients will need to be added in the **other** field.

5. *Optionally*, add attachments by selecting the attachments tab and uploading any

documents you need attached to the email being sent



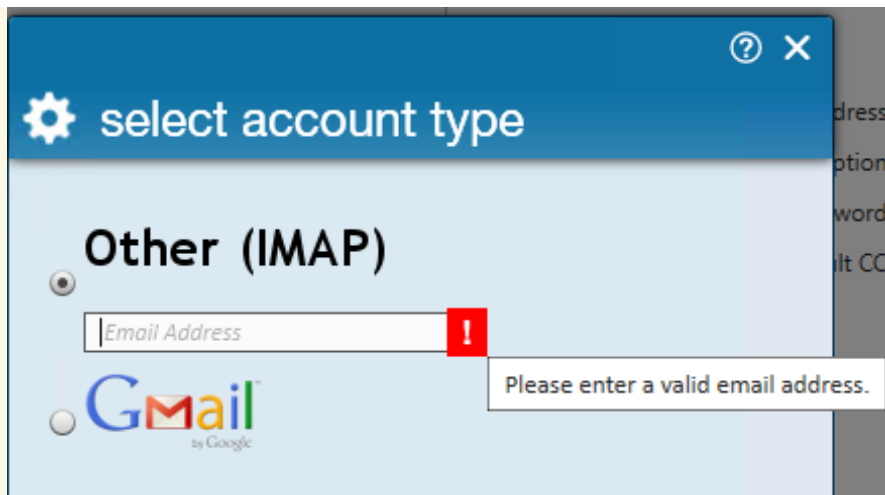
- Once you are in the attachments tab, click on the  button to choose the file.
6. Click Post in the lower right once you are ready to send

The screenshot shows a 'message' window with a blue header. Below the header, there is an 'Action' dropdown menu set to 'Absent (Sick)' and an 'Import from Email Inbox' button. The main content area contains a message from Stephanie to Alex, expressing sympathy for his illness and offering to help with work. Below the message is a 'Details' section with tabs for 'Details', 'Email', and 'Attachments'. The 'Details' tab is active, showing fields for Date/Time (4/30/2013 11:10:55 AM), Rep Name (stephanie), Link Employee (Greene, Alexandra N), Link Contact, Customer (Cubs Inc.), Link Order (5547), and Link Assignment (6629). To the right of the details is a 'follow-up' section with the text 'There are currently no follow-up items for this message.' and two options: 'create a task' (checked) and 'schedule an appointment'. At the bottom right, there is a 'Post' button with an envelope icon, highlighted with a red box.

Logging Messages From Your Inbox

If you are looking to log an email you received as a message on a record in Enterprise, you can pull emails from your inbox right from the messages section.

Note In order to use this feature, you must have your IMAP email setup. Navigate to the E menu > Options > Email. Select Add Account and choose Gmail or IMAP options.



Looking for another option? Check out our [Outlook Add-in](#) to log messages from your email in Outlook.

How to log an incoming email as a message:

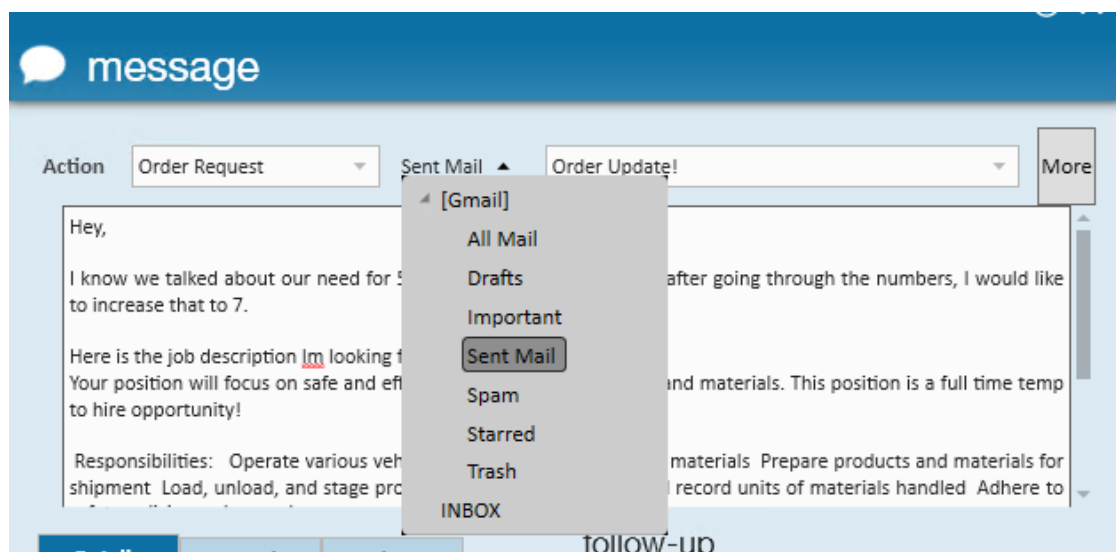
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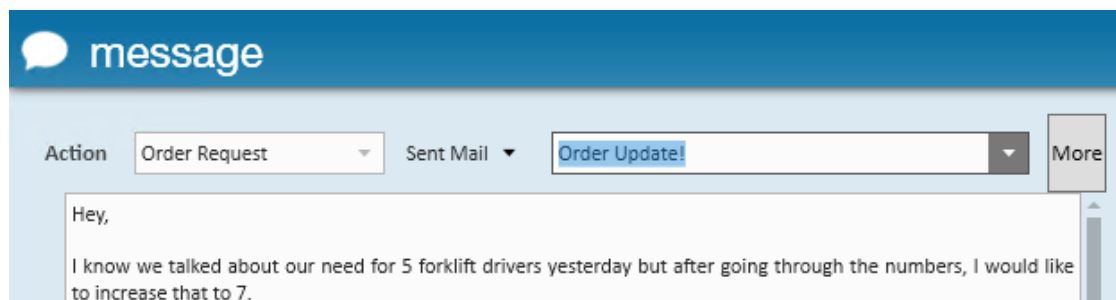
2. Write up your message
 - Choose a **message action code** from the dropdown that fits the reason for the message.
 - Add any additional notes needed in the message notes
3. Select the Import from Email Inbox option



- In the first drop down, choose the folder from your email that you are looking to save:



- In the second drop down, select the email from the subject line:



4. Click Post in the lower right once you are ready to save the message:

message

Action Order Request Sent Mail Order Update! More

Hey,

I know we talked about our need for 5 forklift drivers yesterday but after going through the numbers, I would like to increase that to 7.

Here is the job description [I'm](#) looking for:
Your position will focus on safe and efficient movement of products and materials. This position is a full time temp to hire opportunity!

Responsibilities: Operate various vehicles for storage or removal of materials Prepare products and materials for shipment Load, unload, and stage products and materials Track and record units of materials handled Adhere to

Details Email Attachments

Date/Time	9/9/2019 11:35:25 AM
Rep Name	amelia.stout
Link Employee	<input type="text"/>
Link Contact	Zanders, Amy
Customer	Buy N Large
Link Order	<input type="text"/>
Link Assignment	<input type="text"/>

follow-up
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0 Post

Related Articles