# Enterprise - Sending Emails from a Message

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### **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	ì
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:

Action Absent	(Sick)	-	$\sim$	Import from Email Inbox
Dear Alex, I am sorry to hea Thank you! Best Regards, Stephanie	ar you are sic	k today. Please le	t me kr	ow when you will be able to return to work as soon as possibl
Details	Email	Attachments		follow-up There are currently no follow-up items for this
ate/Time	4/30/2013	11:10:55 AM		message.
p Name	stephanie			
nk Employee	Greene, Ale	exandra N		schedule an appointment
ik Contact			-	0
nk Order	Cubs Inc.		-	0
nk Assignment	5570			0

3. Select the Email tab

tion Absent (Sick)  Absent (Sick)  Dear Alex,  It 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 youl Best Regards, Stephanie  Details Email Attachments Beed this message as an email bject: Absent  Details Cother:  Details Cother:  Details De					
tion Absent (Sick) ■ Import from Email Inbox  Dear Alex, I am sory 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 Send this message as an email bject: Lobsent	) n	nessage			
Dear Alex, I an 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 Send this message as an email bject: Absent ecipients	ction	Absent (Sick)	-	nport 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 Send this message as an email bject: Absent I Memphis SW <> Alexandra Greene <imapdummyaccount@gmail.cc Other:</imapdummyaccount@gmail.cc 					
an 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 Send this message as an email bject: Absend ecipients Comparison of the send Alexandra Greene <imapdummyaccount@gmail.cc Other:</imapdummyaccount@gmail.cc 	Dear Al	ex,			
Best Regards, Stephanie	l am soi Thank y	rry to hear you are s you!	ick today. Please let me knov	when you will be able to return to work as so	on as possible.
Stephanie	Best Re	gards,			
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	Oth	ier:			

- 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

Details	Email	Attachments
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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

Action Absent	(Sick)	Ŧ		port from Email Inbox
Dear Alex, I am sorry to hea Thank you! Best Regards, Stephanie	ir you are sici	k today. Please let i	me know	when you will be able to return to work as soon as possible.
Details bate/Time lep Name ink Employee ink Contact ustomer	Email 4/30/2013 : stephanie Greene, Ale Cubs Inc.	Attachments	- 8 - 8	follow-up There are currently no follow-up items for this message. ✓ create a task IIII schedule an appointment
ink Order ink Assignment	5547 6629		• € • €	

## 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.

	@ ×
🔅 select account typ	De dress
• Other (IMAP)	ption word ilt CC
C C C Cacage	Please enter a valid email address.

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:

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

messag	ges				1		1
Date	Action	Message	Rep	Contact	Due		î
3/8/2013	Payroll Inquiry	Dear Alex,	stephanie	1º 1.		-	
3/4/2013	Absent (Sick)	Subject: Absent	stephanie		3/5/201	3	
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 any additional notes needed in the message notes
- 3. Select the Import from Email Inbox option

🗩 m	essage		? ×	<
Action	Order Request	<ul> <li>▼</li> </ul>	Mort from Email Inbox	
Deta Date/Tin	<b>Is Email</b>	Attachments :45:22 AM	follow-up There are currently no follow-up items for this message.	1

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

🗩 message		
Action Order Request 🔻	Sent Mail  Order Updat	e! More
Hey,	All Mail	<b>^</b>
I know we talked about our need to increase that to 7.	for 5 Drafts Important	after going through the numbers, I would like
Here is the job description Im looki Your position will focus on safe and to hire opportunity!	ing f Sent Mail d efi Spam	Ind materials. This position is a full time temp
Responsibilities: Operate various shipment Load, unload, and stage	veh Trash	materials Prepare products and materials for record units of materials handled Adhere to
	TOILOW	/-มุต

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

2	m	essage				
А	ction	Order Request	-	Sent Mail 🔻	Order Update!	More
	Hey, I know to incr	v we talked about ou ease that to 7.	r need fo	r 5 forklift drivers	; yesterday but after going through the numbers, I would I	ike

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

mess	age			⑦ ×
Action Order Hey, I know we tal to increase th Here is the jol Your position to hire opport Responsibiliti	Request ked about our n at to 7. o description Im will focus on saf unity! es: Operate var	eed for 5 forklift looking for: e and efficient m	ail 🔻	Order Update! More vesterday but after going through the numbers, I would like t of products and materials. This position is a full time temp or removal of materials Prepare products and materials for
Details Date/Time Rep Name Link Employee Link Contact Customer	Email 9/9/2019 11:3 amelia.stout Zanders, Amy Buy N Large	Attachments	<ul> <li>₽</li> <li>₽</li> <li>₽</li> <li>₽</li> </ul>	follow-up There are currently no follow-up items for this message. ✓ create a task ischedule an appointment
Link Order Link Assignmen	t		<ul> <li>- €</li> <li>- €</li> </ul>	
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