How to Use E-Mail in SAP Business One

Solutions from SAP

SAP Business One 2005 A SP01

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Contents

How to Use E-Mail in SAP Business One

Purpose

This document explains how to utilize the e-mail capabilities of SAP Business One.

The application enables you to:

- Send e-mails directly from a document
- Create recipients
- Automatically insert predefined contact information of business partners
- Create distribution lists
- Add attachments

Sending an E-Mail

Use

You use the *Send Message* window to write your message, specify recipient details, attach your documents, access the *Add Recipient* window, and send the message.

You can send your e-mail message to any number of recipients.

Prerequisites

- You are using SAP Business One Release 2005 A SP01.

- The SBO Mail Server is configured for use. For more information, see the installation guides for *DB2, SQL,* and *Sybase* on the release-specific documentation pages of the SAP Business One Customer Portal at http://channel.sap.com/sbocustomer/documentation.
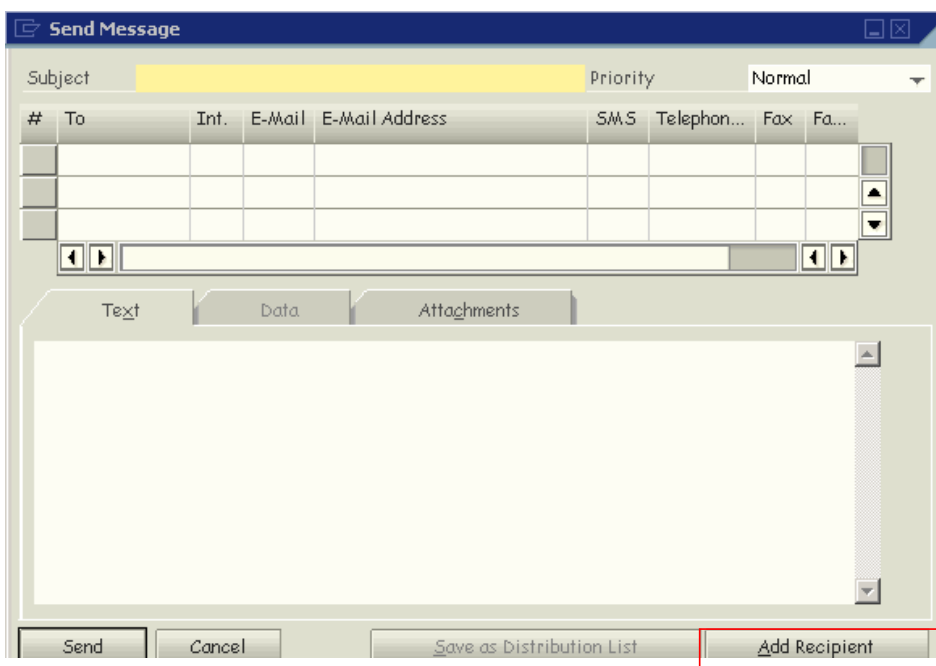
    If you are an SAP Business One partner, you can watch an expert empowerment session on the SBO mailer in the SAP Business One Channel Partner Portal.

- You have an e-mail address defined in the *User - Setup* window.

- You have defined the attachment path: *Administration → System Initialization → General Settings → Path → Attachments*.

Procedure

1. To open the *Send Message* window, do one of the following:

    o From the menu bar, choose *File → Send → E-Mail*.

    o When a marketing document is open, choose the e-mail icon from the icon toolbar.

2. Specify each recipient to whom you need to send the message. For information, see *Adding Recipients*, further in this document.

3. Attach any necessary documents.

    o   If you open the window through the *File* menu, use the *Attachments* tab. For information, see *Adding Attachments*, further in this document.

    o   When you open the window from an open document, the application prompts you to attach the current document to the e-mail message. Choosing `Yes` automatically adds the document as a JPG file, while simultaneously saving it to the predefined attachments path.

4. Specify the remaining details:

    o   In the *Subject* field, specify a title.

    o   Select the correct *Priority* option.

    o   To send your message to an e-mail address, select the appropriate checkboxes in the *E-Mail* column.

    o   To send your message internally, select the appropriate checkboxes in the *Int* column.

    o   On the *Text* tab, type in the body of the message.
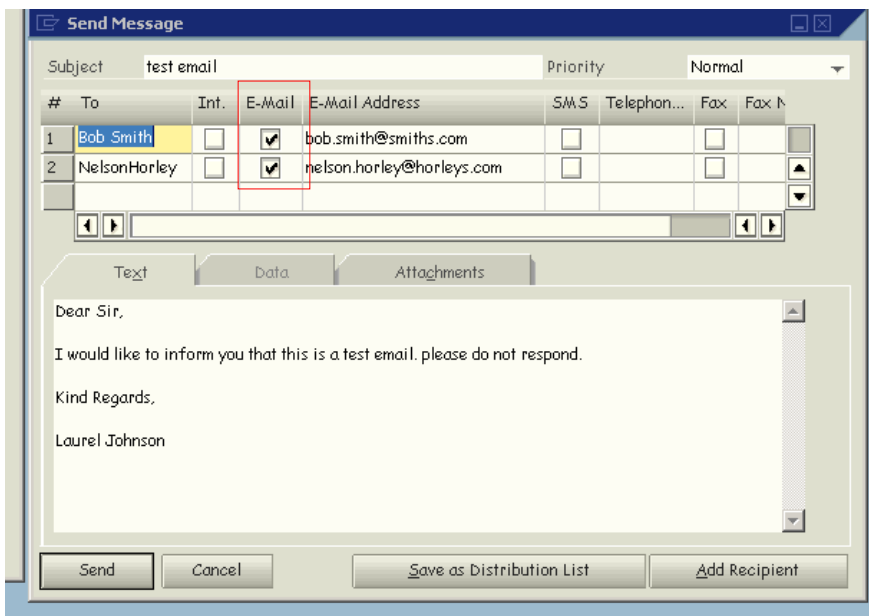
5. If necessary, edit any field in order to change the information, for example, you can change the name in the *To* field.

6. Choose *Send.*

Adding Recipients

Use

You can add the e-mail addresses of recipients either manually or by inserting them from the *Users*, *Contact Persons*, and/or *Distribution List* tabs of the *Add Recipient* window.

Procedure

Adding Recipients Manually

1. In the *Send Message* window, on the *Data* tab, choose *Add Row*.

    This activates the first row for usage.

2. Specify values for the *To* and *E-Mail Address* fields.

3. Repeat as needed.

### Using the Add Recipient Window

1. In the *Send Message* window, choose *Add Recipient*.

    The *Add Recipient* window opens, displaying three tabs.

2. Add recipients from the tabs, as needed, according to the instructions provided below for each tab.

3. Choose *OK*.

    The selected recipients are added to the *Send Message* window.

Users Tab
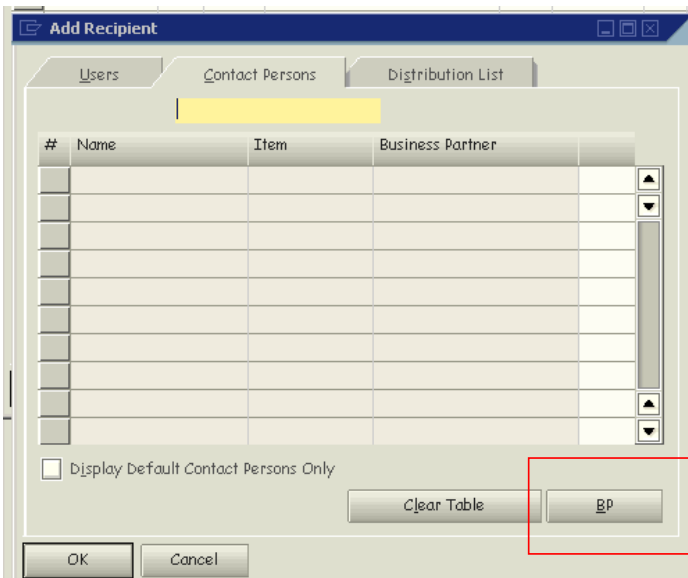
The entries in the *User Name* column are users with an e-mail address defined in *Administration → Setup → General → Users*.

To choose a user, select the checkbox corresponding to the user name.
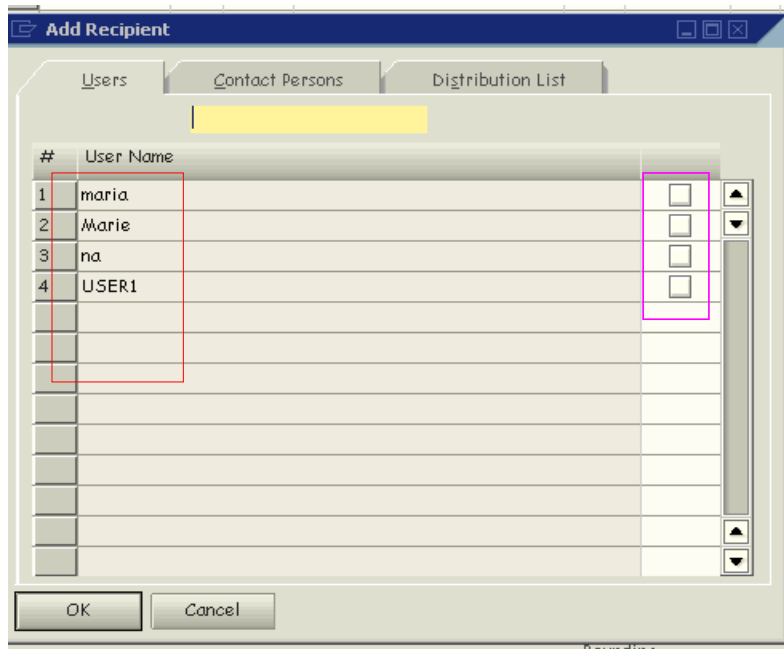
Contact Persons Tab

This tab displays all the contacts of the business partners defined in the database.


1. To select a business partner contact, choose *BP*.

    The *Choose BP* dialog box opens.

2. In the *Code* fields, press TAB in the *From* and *To* fields to open the *List of Business Partners* window.

   Only business partners with defined contacts appear in the list.

3. Select the required business partners and choose *OK*. The contacts of the chosen business partners are added to the *Contact Persons* tab.

4. To add the contacts to the recipients list, select their corresponding checkboxes.

    If a contact has no defined e-mail address, only the name appears in the *Send Message* window. You need to specify manually the value for the *E-Mail Address* field.
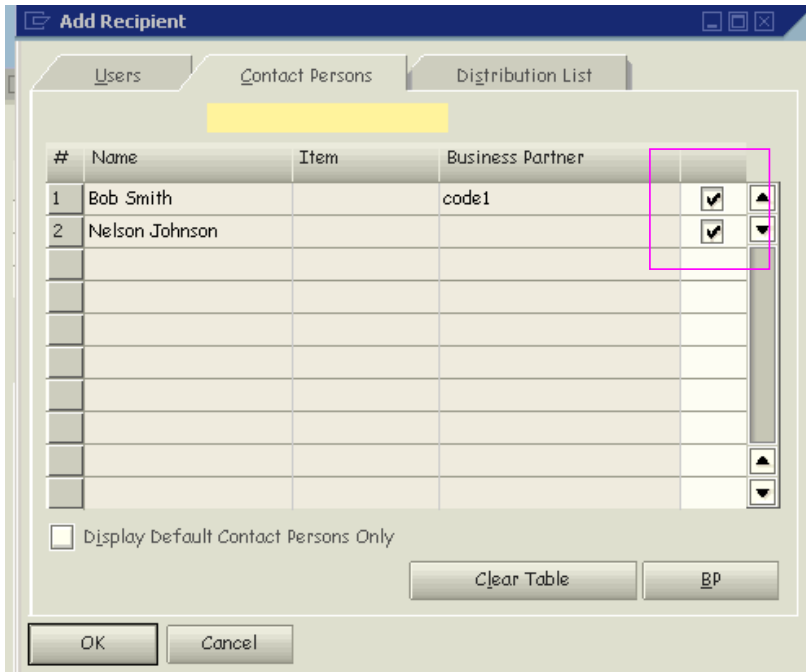
- o If the *Display Default Contact Persons Only* checkbox is selected, only those contacts that are defined as default for the chosen business partners are displayed.
- o If a business partner has more than one contact, all of these are displayed.
- o To delete all the contacts displayed on this tab, choose *Clear Table*.

Distribution List Tab

To choose a distribution list, select its corresponding checkbox.
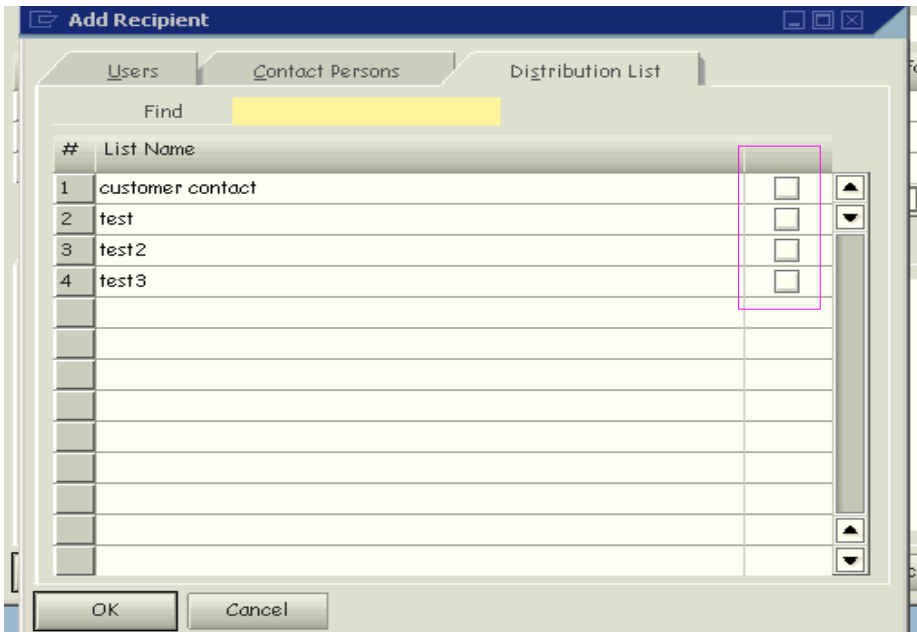
All of the contacts in a distribution list populate the *Send Message* window.

To create a new distribution list, see *Creating a Distribution List*, further in this document.

Creating a Distribution List

A distribution list comprises all the selected entries in the *E-Mail Address* column of the *Send Message* window.

To create a distribution list:

1. In the *Send Message* window, select all the rows you want to include in the distribution list.
2. Choose *Save as Distribution List*.

    The *Save as Distribution List* window opens.
3. In the *List Name* field, specify a name for the distribution list, and choose *Save*.

To remove a distribution list, highlight the name and choose *Remove*.

Adding Attachments

On the *Attachments* tab in the *Send Message* window, choose *Browse*, and select the file from its saved location. The file is displayed in the first available row.

*   To view an attachment before sending it, highlight the document and choose *Display*.
*   To remove an attachment, highlight the row and choose *Delete.*

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