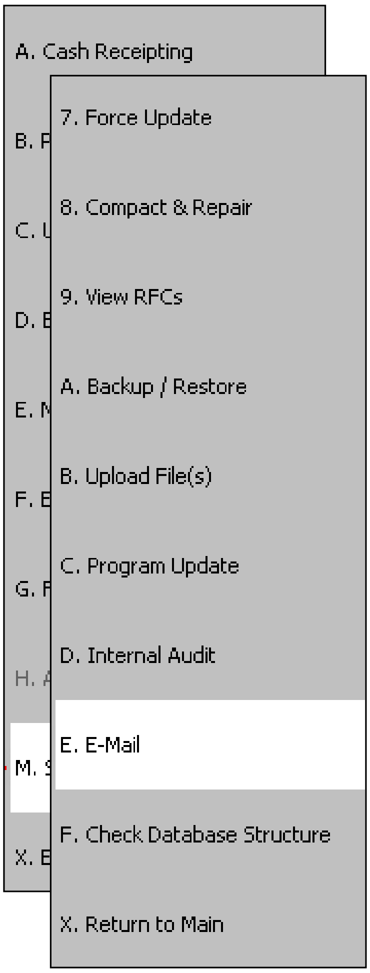
A Division of Harris Computer Systems

GENERAL ENTRY: E-MAIL

TRIO has the ability to send e-mails from within the software. This feature can be used in two different ways. The first is through the new **E-mail** option in the **System Maintenance** menu in General Entry, and the second is from the print preview of many of the reports in the program.



Configuring the System

1. From the General Entry menu select **M. System Maintenance > E. E-mail**. This will display the *E-mail* screen.
2. On this screen select the *Configuration Settings* button towards the top right of the screen. This opens a screen asking for the SMTP Server name, User Name, and Password, as well as the E-mail Address to show as the return address on sent messages.
3. Enter this information for all users in the *Default Settings* section of the screen, or for individual users in the bottom section of the window. Entering information for the currently logged in user allows for different e-mail addresses to be used, depending on who is sending the message.
4. If nothing is entered into the individual user's settings section, the system will use the information entered in the *Default Settings.*
5. The system requires at least an e-mail address to be filled out in order to send e-mail. The SMTP Server, User Name, and Password are not required pieces of information for every network and are not required fields in the system. Leaving these fields blank may lead to problems with mail delivery, however. If issues arise with e-mails not being received, SMTP server information can be found by contacting your e-mail provider or administrator. Note that if SMTP information is filled out, all three of the fields (SMTP Server, User Name, and Password) should have information entered as they would all be required by the e-mail provider.
6. Once all of the information is entered, press **F12** to save these settings.

Managing Signatures

A signature is a set of predefined text that can be added to the end of an e-mail message. In TRIO's E-mail system there are three types of Signatures:

- **Personal** – This can be set up per user so that each person using the e-mail system can have their own signature.
- **Company** – This signature is the same for all users and is typically set up with the town's name and contact information.
- **Disclaimer** – This is a legal warning that by default is added to the end of every e-mail sent. The default message entered by TRIO states that the e-mail being sent is intended for the person it is sent to. By default, the system will automatically check this option off for each e-mail created.

All three can be edited by selecting the *Signatures* button at the top of the E-mail screen. Clicking on this will open a screen with four buttons at the top. The first button is for saving the current signature; the other three are for editing the different types of signatures. Select the signature to edit, make any changes, and click the *Save* button to save the changes.

General Entry: E-mail *Continued*

Creating / Maintaining Contacts

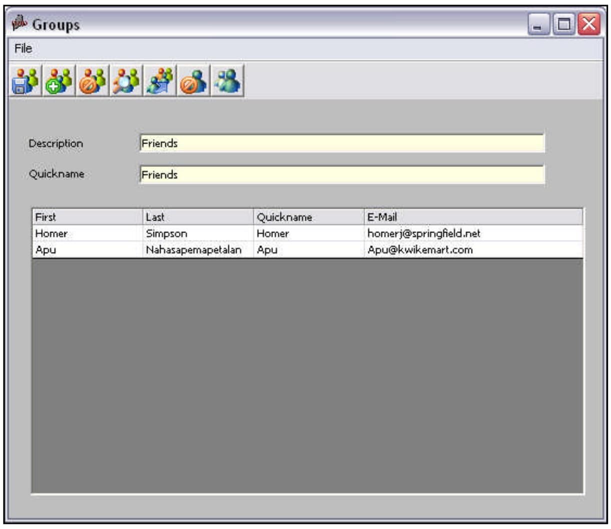
1. From the E-mail screen select the *Contacts* button. This will display a small screen listing any existing contacts.
2. The top line on this screen will always be *Add New* followed by any existing contacts. Double-click on *Add* New to display a blank Contact screen. Double-click on an existing contact to edit / modify that contact's information.
3. If adding a new contact, fill in all of the available information for this contact. The *E-mail Address* and *Quickname* fields must be filled out in order to save the contact. Once all of the information has been entered, press **F11** to save or **F12** to save and exit this screen. Exiting this screen will re-display the E-mail screen, which will now display the new or updated contact.

Contact Screen Buttons

	Saves the current contact without exiting the Contact Screen
	Opens a blank contact screen so that a new contact can be added
	Deletes the current contact
	Opens the contact listing allowing for the selection of a different contact
	Adds the current contact to an existing group
	Opens the Group Listing Screen

Creating / Maintaining Groups

1. From the E-mail screen, select the *Groups* button at the top of the screen. This will display a small screen listing any existing groups.
2. The top line on this screen will always be *Add New* followed by any existing groups. Double-click on the *Add New* line to display a blank Group screen. Double-click on an existing group to edit / modify that group's descriptions, or to add or remove contacts from that group.
3. Once on a group's screen, fill in the *Description* and *Quickname* fields. Please note that this must be a unique quickname, meaning that it cannot match an existing quickname for another group or contact.
4. Once the group's description and quickname have been entered, select the *Add Contacts to Group* button at the top of the screen. This will display a screen showing all of the existing contacts.



5. Check the box to the left of all of the contacts that should be included in this group and press **F12**. This will bring you back to the Group screen. Press **F12** again to save this group.

There are several buttons at the top of this screen, much like there is at the top of the Contact screen. These buttons work exactly the same on this screen as they do on the Contact screen, with the exception of the sixth button, which is used to delete contacts from the currently displayed group.

General Entry: E-mail *CONTINUED*

Sending an E-mail from General Entry

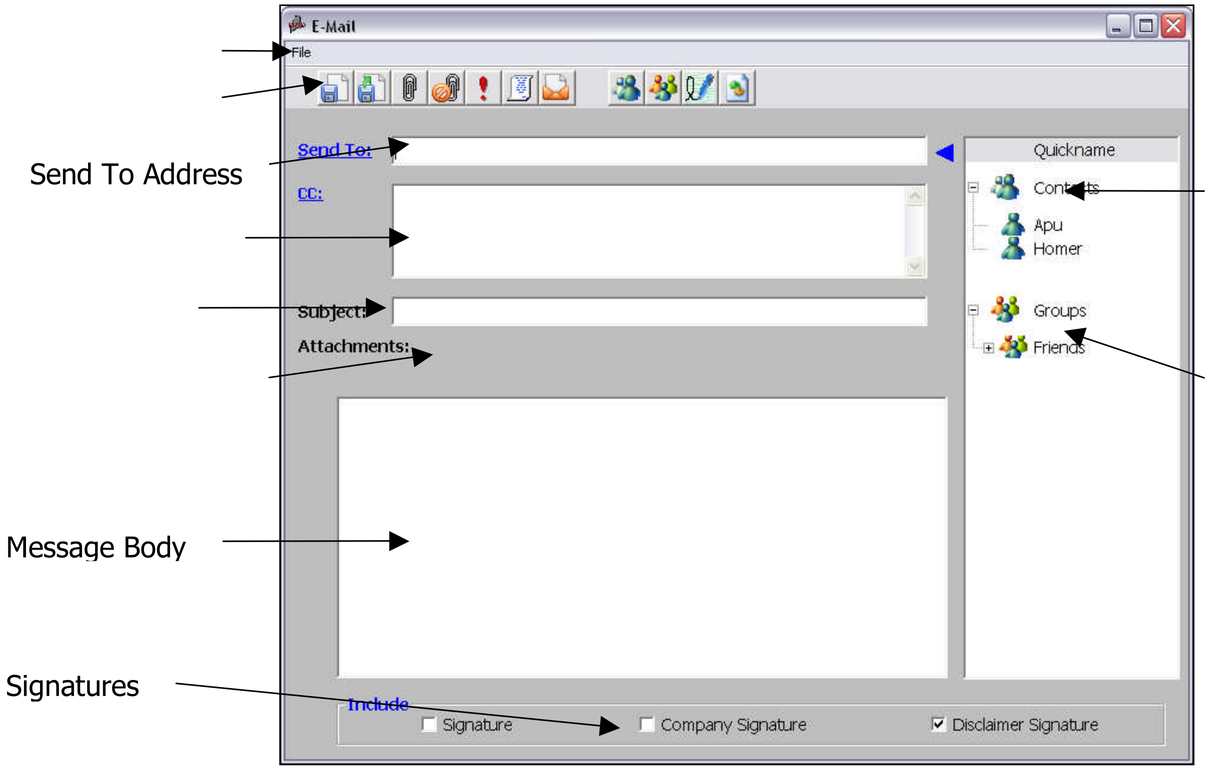
1. From the General Entry main menu select **M. System Maintenance > E. E-mail**. This will display the *E-mail* screen.
2. Enter the main recipient's address in the *Send To* field. This can be entered as an e-mail address such as support@triosoftwarecorp.com or can be entered as a quickname that has been set up for a contact such as TRIO.
3. If this e-mail needs to be CCed to anyone, enter their address or quickname into the *CC* field.
   - There will be an arrow to the right of either the *Sent To* or *CC* field. This arrow indicates which field is currently active. Clicking on a contact or group from the *Contact List* on the right hand side of the screen will add that contact/group to the field with the arrow next to it.
4. Enter in the subject of the message in the *Subject* field.
5. If a file needs to be sent with (attached) to this message, select the *Attach a File* button at the top of the screen. This will display a file window showing all of the files in your TRIO data directory. Find and highlight the desired file and click **Open**.
6. Type the body of the message.
7. Select which *Signatures*, if any, need to be on this message. By default *Disclaimer* is checked off, but this can be unchecked for each message. Refer to the *Managing Signatures* section at the beginning of this document for instructions on editing the signatures files.
8. Once the message has been composed, click on the *Send* button at the top of the screen to send the message.
   - Messages can be saved as a draft for future use either by selecting the *Save as Draft* option in the *File* menu, pressing the **F11** key on the keyboard, or clicking the *Save as a Draft* button at the top of the screen.
   - Drafts can be loaded at a later time by selecting *the Load Saved Draft* option from the *File* menu or by clicking the *Load Saved Draft* button at the top of the screen. Clicking on this option will display a listing of all saved drafts for this user. Only the user that saved the draft can load it again. Double-click on a draft to load it.
   - Drafts can also be deleted, instead of being sent, by selecting the *Delete Saved Draft* option from the *File* menu. Selecting this option will show a listing of this user's saved drafts. Double-click on a draft to delete it.

Sending an E-mail from a Report

1. Generate the print preview of the report to e-mail.
2. From the *File* menu, select *E-mail*. It is possible to e-mail reports as either Adobe Acrobat .pdf documents or as Rich Text files. Under the *E-mail* menu, select the format to send the report as.
3. The program will then automatically load the same e-mail window that comes up when accessing E-mail through General Entry. Note that the report is automatically showing as an attachment on the e-mail.
4. Continue sending the e-mail using the steps outlined in the *Sending an E-mail from General Entry* section above.

General Entry: E-mail *CONTINUED*

E-mail Message Screen



E-mail Message Buttons

- Save the current message as a draft
- Load saved draft messages
- Attach files to the e-mail
- Remove attached files from the e-mail
- Flag the e-mail as high priority
- Request a read receipt from the recipient of the e-mail
- Send the e-mail
- Access the Contacts screen
- Access the Groups screen
- Loads the Edit Signatures screen
- Access e-mail configuration settings