Spotlight - Email

Preparation

Preparation if using demo data attached:

1. Import Demo Data
2. Login with
   Standard ID: sample@hansaworld.com
   Passworld: Sample99

Preparation for creating your own demo data:

1. Import satandard UK Demo Data
2. Login with
   Standard ID: sample@hansaworld.com
   Passworld: Sample99
3. Module: Email and Conferences>>Settings: Mail Tags>>Create new>>Code: PROJ, Label: Projects
Quite client, log back in for Tags to take effect
4. Module: CRM>>Settings: Activity Classes>>Create new>>Code: PROJ, Colour: Green, Comment: Projects
Force Entry of: Project, Invoice Item, Customer, Time
Calendar: Time
Mark checkbox: Create Project Transaction
5. Module: CRM>>Settings: Activity Types>>Create new: Code: PROJ, Class: PROJ
Comments: Projects
6. Change price of Item 20203 on Item Card to 100 GBP
7. Create new Quotation for customer 001 with the following Items: 20105, 20206, 20203 and Save
8. From Inspect window >> Operations>>Create Project
Fill in Project Description: Building Project
Class: C
Update Start and End Date of Project and Save
9. Go back to Quotation>> Create >> Project Budget
Book Project Transactions against employees:
Person: AM
Description: Building Project
Type:PROJ
Time: 09:00 - 17:00
Project: 2001004
Item: 20105
Mark Activity as Done>>Save
Person: LD
Description: Project Management: Building Project
Type:PROJ
Time: 10:00 - 12:00
Project: 2001004
Item: 20203
Mark Activity as Done>>Save
10. Set up Standard ID for Leila and Audrey to be able to log in

Script

Welcome to this short demonstration of Standard ERP's email functionality.

Using emails for communication is an integral part of any successful business today. Improved communication leads to improved efficiency, and Standard ERP's built-in Email system is a powerful tool to help companies to achieve this.
All business communication can be kept and maintained in one place, and all internal emails are securely encrypted.

ACTION: Log in as Samuel Jaffacake (Sample@hansaworld.com, Sample99)

Let's look at how we can work together using the internal email function to communicate on a new project we are working on.

Let's log in as Samuel and send an email to Leila and Audrey who are on the project team to find out more about the project status.

ACTION: Create an email to Leila Dinnerplate and Audrey Munchkin. Subject: Building Project
Text: "How are we doing against the budget on this project?"
Add Signature with command+i. Save and Log out.
Log in as Audrey Munchkin (AM@hansaworld.com, no password), open the new mail so that it later shows up in history that Audrey has read it. Log out. (NOTE: This is not shown on the video)
Log in as Leila Dinnerplate (LD@hansaworld.com, no password)

When Leila logs in and opens her mailbox, she will see there is a new email from Samuel.

ACTION: Open the mailbox, show unread (red) envelope for an email from Samuel. Open email

Leila adds her comments, and a link to the project budget follow up report that Samuel needs to review.

ACTION: Add a comment in the email: "All good, please find the budget report attached."
Run Job Costing>Reports>Budget Follow Up Report>Link report to email by dragging paper clip on a report to Link Manager on email. Save

She can also check to see that Audrey has read the mail so there is no need to notify her of the boss's request.

ACTION: Show email history, pointing that Audrey Munchkin has read the email.
Log out and log in again as Samuel

Let's log back in as Samuel. He can see that Laila replied to his question, and can easily open the report straight from the email> He can send this report on to the customer after reviewing it.
Once he sends his email, he can tag all emails with the project number so that he can quickly find it in the future.

I can also use the search functionality for emails if I did not tag my email before. From the search window, I can choose from various options, searching only for emails with attachments for example.

While working with this customer, I remembered that I also need to send their statement for the month.

Using a shortcut on my Personal Desktop, I can open the "Create Open Invoice Customer Statement email" maintenance routine. Because I would only like to send this customers statement, I will enter their customer number in the 'Customer' field. I will now enter today's date, and chose if the email should be sent automatically or saved as a draft in my mailbox. The e-mail will be sent to the address specified on Customer's contact, but our email also allows for additional email recipients to be defined.

I hope you can see how powerful our e-mail functionality is, and how can it increase your efficiency with internal and external communication.