

# Emails and Logs

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## Overview

Order Time is like a one-stop shop that aids you in putting together tasks, transactions, correspondences and other day-to-day undertakings. You can communicate with other contacts or parties directly from the system and you can record note-worthy movements and actions for a particular record.

Email sending is disabled by default during the 30 day trial period. Contact us at [support@ordertime.com](mailto:support@ordertime.com) and we can verify your identity to enable this feature in your trial sandbox.

## Email

### Sending Email

You can send an email directly from Order Time. This an efficient way of handling communication because correspondents are centralized in one system and you do not have to change from one interface to another.

**Below are the steps below to send an email from Order Time:**

1. Click the record that you want to open from the list on the left side of the screen.
2. When the record opens up, go to the **Activity History** tab. Click the **+Send Email** button.

The screenshot shows the Order Time interface. On the left, a sidebar lists 'Recent Records' with a red box around the list. The main area displays a 'Quote - 4' record with tabs for 'General', 'Bill Address', 'Ship Address', and 'Summary'. The 'Activity History' tab is selected, and a red box highlights the '+Send Email' button. Below the tabs, there is a table with columns: ACTIVITY TYPE, SUBJECT, CLOSED DATE, DESCRIPTION, ASSIGNED TO, and ACTIONS.

3. In the pop-up form, select a **Contact**.
4. Enter values, as needed, in the following fields: **Additional To**, **CC** and **BCC**.

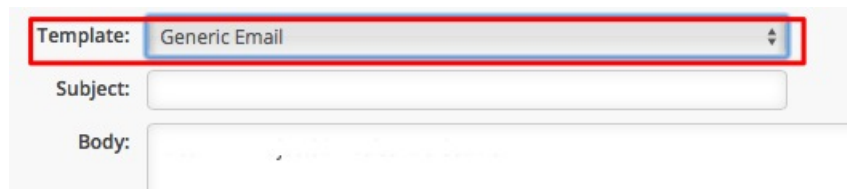
The 'Send Email' pop-up form is shown. It has a 'Contact:' dropdown menu. Below it, there are three text input fields: 'Additional To:', 'CC:', and 'BCC:'. The 'Additional To:' field contains the email address 'abccom@email.com;'. The 'CC:' and 'BCC:' fields are empty.

- In addition, *Additional To*, *CC* and *BCC* are links which allows you to choose your addressees by selecting from the Display picklist :
  - Users
  - User Group
  - Contacts
  - Employee
  - Record

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**Contacts are only available for Customer, Leads and Sales Transactions - sales orders, quotes, ship docs and customer returns.**

5. Select the appropriate *Template* from the picklist.



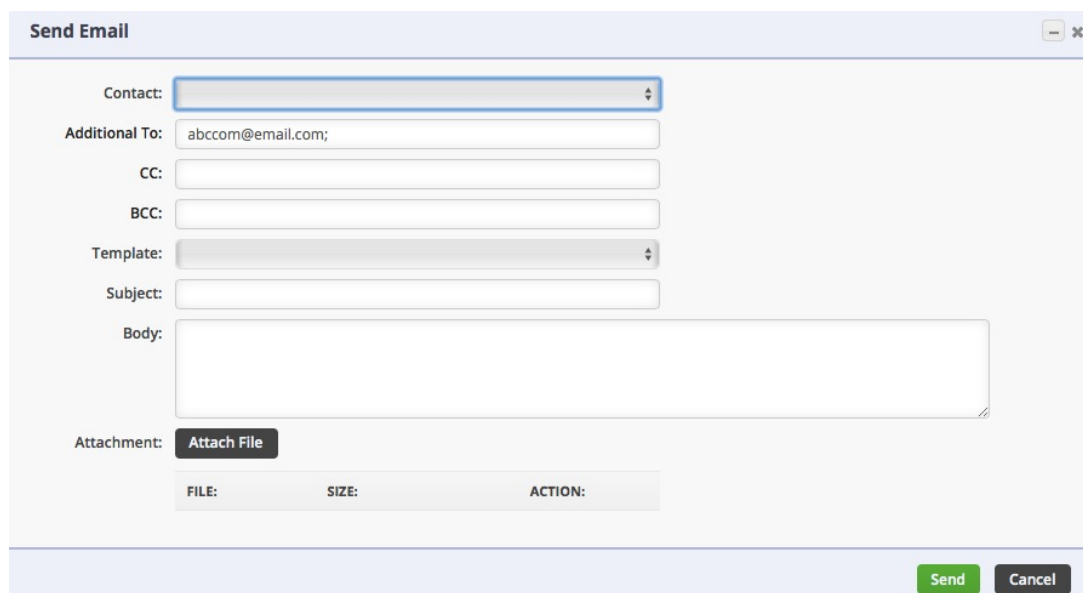
The screenshot shows a portion of an email composition form. The 'Template:' dropdown menu is open, and 'Generic Email' is selected. Below it are fields for 'Subject:' and 'Body:'.

6. Put a *Subject* in the field.

7. Fill-out the *Body*.

8. Click the **Attach File** button if you have an attachment to send.

9. Click **Send**.



The screenshot shows the 'Send Email' dialog box. It contains the following fields and elements:
 

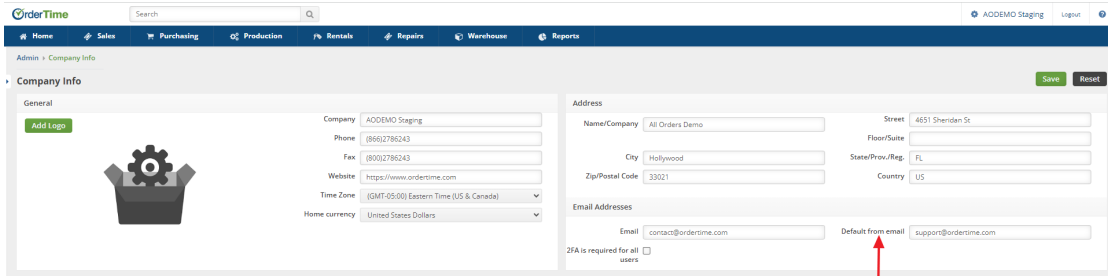
- Contact:** A dropdown menu.
- Additional To:** A text field containing 'abccom@email.com;'.
- CC:** A text field.
- BCC:** A text field.
- Template:** A dropdown menu.
- Subject:** A text field.
- Body:** A large text area.
- Attachment:** A section with an 'Attach File' button and a table with headers 'FILE:', 'SIZE:', and 'ACTION:'.
- Buttons:** 'Send' (green) and 'Cancel' (grey) buttons at the bottom right.

## Email Preferences

Order Time allows for the ability of outbound, or "From" emails, to be determined by the Default Company From Email, the current User, or the Company email.

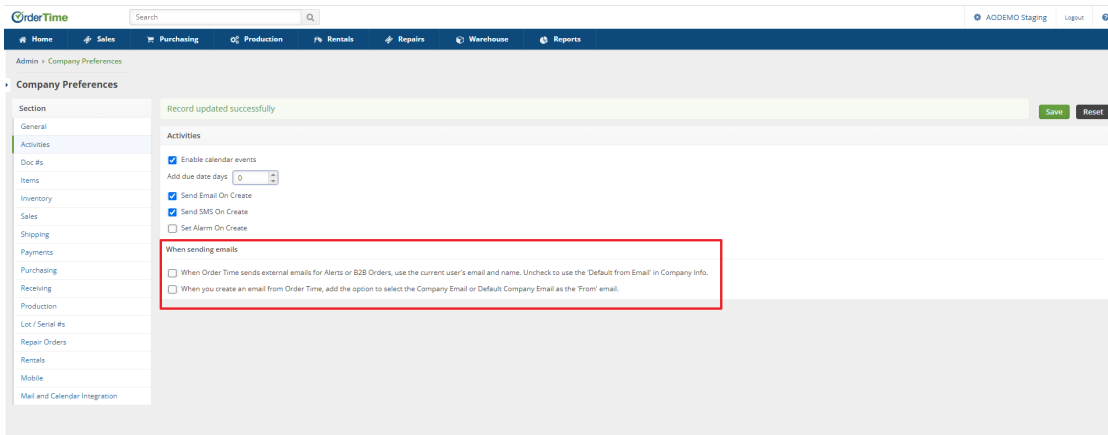
## Default Company From Email

The Default Company From Email should have been created upon the Company set up. However, if there is a need to change or update the Default Company From Email you can access the information by going to Company Info from the Admin screen. Within the Address section is the field for Default From Email.



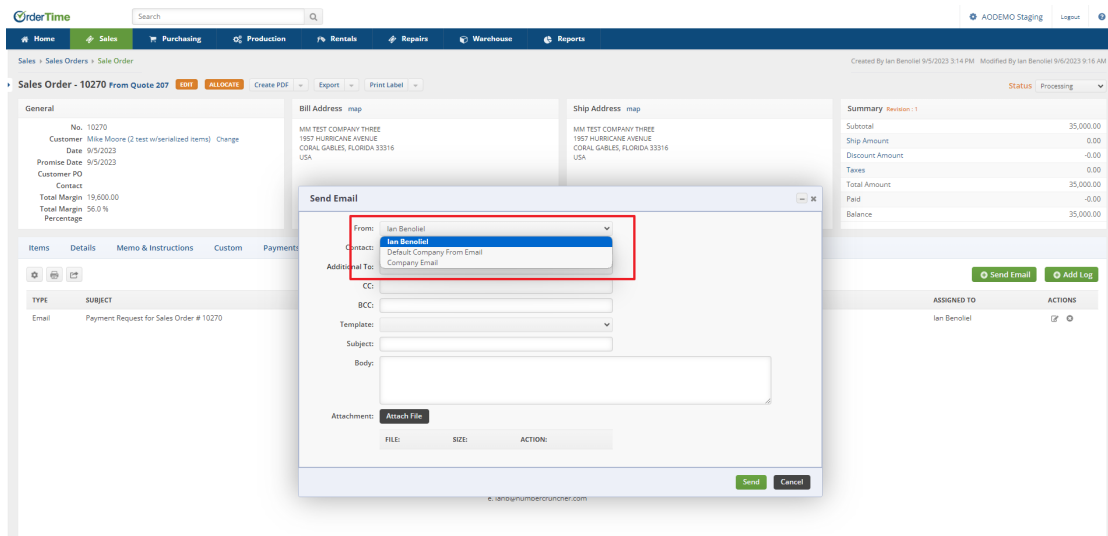
If you have a need to have outgoing emails reflect a different email address than the Default Company From Email you have that preference capability within Order Time. You have the ability for outbound emails to reflect the User's email address or to select a custom "From" email. You need to ensure, dependent upon your business needs, that one of the two boxes are checked within Company Preferences/Activities.

**It is important to note that these Preferences do not apply if you have enabled the email integration with either Gmail or Office365/Outlook. Our mail and calendar integrations supersede these preferences.**



- If both boxes are left unchecked Order Time will use the default From email address. If no default From email address has been entered then the system will use the **Company email** address.
- If the "When Order Time sends external emails for Alerts or B2B Orders, use the current user's email and name. Uncheck to use the 'Default from Email' in Company Info." box is **checked**, then the current user's email address will be used. If it is **unchecked** then Alerts and B2B orders are unchanged from using the default From email address.
- If the second preference: "When you create an email from Order Time, add the option to select the Company Email or Default Company Email as the 'From' email." box is **checked**, then the drop-down options between using the **current user**, the **Company email** or the **Default From email** will be presented for sending emails from all

documents such as Sales Orders, Purchase Orders, etc. This is used when sending an email from those documents via the **Send Email** button.



## Log

### Adding/Editing Log

Adding logs allows you to record movements, actions or communication that are relevant to the record. When a log is created it is tagged as closed.

Follow the steps below to add/edit a log:

1. Click the record that you want to open from the list on the left side of the screen.
2. When the record opens up, go to the **Activity History** tab. Click the **+Add Log** button.



3. Select a value from the *Assigned To* picklist.
4. Choose the appropriate *Activity Type* from the picklist.
5. Enter a *Subject* in the field.
6. Set the *date* and *time*. **Note:** You may also set an *Alarm*.
7. Select a *Contact*.
8. Fill-out the *Description* field.
9. Click **Save**.

Add/EditLog

Assigned To

Contact

Activity Type

Log

Subject

Weekend Collect

Due Date

☐ Alarm

Description

Custom

Save

Cancel

[More about Customer Management with Order Time](#)