

B2B - Emails and Logs

Last Modified on 02/26/2024 1:51 pm EST

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 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 displays the Order Time interface. On the left, a sidebar titled 'Recent Records' lists several items, with 'Hello Kitty' selected. The main area shows a 'Quote - 4' record. The 'Activity History' tab is active, and the '+Send Email' button is highlighted. The record details include:

General	Bill Address	Ship Address	Summary
No. 4 Customer: ABCCom Date: 2/13/2018 Promise Date: 2/27/2018 Contact	COMP1 123 4 MIAMI, FL 45778 US	COMP1 123 4 MIAMI, FL 45778 US	Subtotal: 0.00 Ship 01: 20.00Tax Discount \$: -0.00Tax TaxRec1 (0.500 %): 0.10 Total Amount: 20.10

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 includes a 'Contact' dropdown menu, an 'Additional To' field containing 'abccom@email.com;', and empty fields for 'CC:' and 'BCC:'.

- In addition, *Additional To*, *CC* and *BCC* are links which allows you to choose your addressees by selecting from the Display picklist :
 - Users - company users
 - Contacts - Customer or Lead Contacts
 - Record - Other Email addresses associated with the current record

Send Email

Email Addresses

Only contacts with stored email addresses are displayed in the box below.

Display: Record

For: Additional To

Jack Frost

abccom@email.com

Add

Remove

Done Cancel



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.

Template: Generic Email

Subject:

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**.

Send Email

Contact:

Additional To:

abccom@email.com;

CC:

BCC:

Template:

Subject:

Body:

Attachment:

Attach File

FILE:

SIZE:

ACTION:

Send

Cancel

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.

OrderTime

Search

ADOEMO Staging

Login

Home

Sales

Purchasing

Production

Rentals

Repairs

Warehouse

Reports

Admin > Company Info

Company Info

General

Address

Email Addresses

Add Logo

Company

ADOEMO Staging

Phone

(855)278-243

Fax

(800)278-243

Website

https://www.orderstime.com

Time Zone

(GMT-05:00) Eastern Time (US & Canada)

Home currency

United States Dollars

Name/Company

All Orders Demo

Street

4651 Sheridan St

Floor/Suite

City

Hollywood

State/Prov./Reg.

FL

Zip/Postal Code

33021

Country

US

Email

contact@orderstime.com

Default from email

support@orderstime.com

2FA is required for all users

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.

OrderTime

Admin > Company Preferences

Company Preferences

Section: General, Activities, Doc #s, Items, Inventory, Sales, Shipping, Payments, Purchasing, Receiving, Production, Lot / Serial #s, Repair Orders, Rentals, Mobile, Mail and Calendar Integration

Record updated successfully

Activities

- ☒ Enable calendar events
- Add due date days: 0
- ☒ Send Email On Create
- ☒ Send SMS On Create
- ☐ Set Alarm On Create

When sending emails

- ☐ 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.
- ☐ When you create an email from Order Time, add the option to select the Company Email or Default Company Email as the 'From' email.

Save Reset

- 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.

OrderTime

Sales > Sales Orders > Sales Order

Sales Order - 10270 From Quote 207

General

No. 10270

Customer: Mike Moore (2 test w/serialized items) Change

Date: 9/5/2023

Promise Date: 9/5/2023

Customer PO

Contact

Total Margin: 19,600.00

Total Margin: 56.0 %

Percentage

Bill Address map

MM TEST COMPANY THREE

1957 HURRICANE AVENUE

CORAL GABLES, FLORIDA 33316

USA

Ship Address map

MM TEST COMPANY THREE

1957 HURRICANE AVENUE

CORAL GABLES, FLORIDA 33316

USA

Summary Revision: 1

Subtotal: 35,000.00

Ship Amount: 0.00

Discount Amount: -0.00

Taxes: 0.00

Total Amount: 35,000.00

Paid: -0.00

Balance: 35,000.00

Send Email

From: Ian Benoitel

Contact: Default Company From Email

Address: Company Email

CC:

BCC:

Template:

Subject:

Body:

Attachments: Attach File

FILE: SIZE: ACTION:

Send Cancel

ASSIGNED TO: Ian Benoitel

ACTIONS: [icon] [icon]

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.

The screenshot shows the 'Quote - 4' interface. On the left, a 'Recent Records' list is highlighted with a red box, containing items like '4', 'Hello Kitty', 'Service Provider 1', 'ABCCom', 'Service Provider 1 PITM', 'Emailto', 'Bell Inc.', 'Plumbing101', and 'HKService'. The main area shows the 'Activity History' tab selected, also highlighted with a red box. Below the tabs, there are icons for 'Send Email' and '+Add Log', with the '+Add Log' button highlighted by a red box. The top right shows the status 'Processing'.

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**.

The screenshot shows the 'Add/EditLog' form. It has fields for 'Assigned To' (a picklist), 'Contact' (a picklist), 'Activity Type' (a picklist with 'Log' selected), 'Subject' (a text field with 'Weekend Collect'), 'Due Date' (a date and time picker), and an 'Alarm' checkbox. There is a large 'Description' text area. At the bottom, there is a 'Custom' section with a text field. The 'Save' and 'Cancel' buttons are at the bottom right.

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