

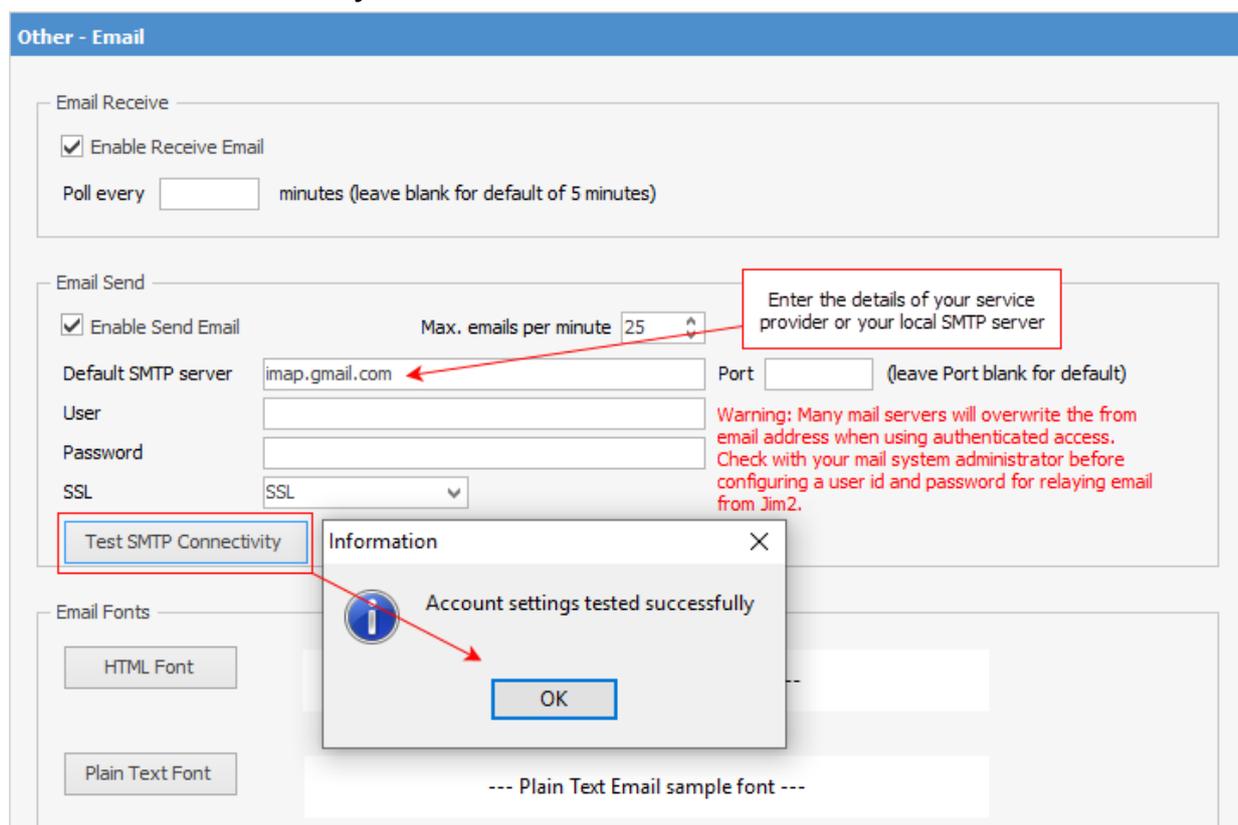
How to Send and Receive Emails from Jim2®

The following information is to assist with the required setups and procedures to send emails from Jim2. The concepts discussed in this document are that you wish to:

- Send a normal non-templated email from Jim2.
- Search for email contacts.
- Create related emails.
- Email comments.
- Create a template for emails from Jim2.
- Create email lists.
- Add tags and folders to filter emails in lists.

Setup: (after adding a Jes instance in Jim2 Configuration Manager)

1. Tools > Options > Email (global Jim2 email settings)
 - Tick **Enable Receive Email**.
 - Tick **Enable Send Email** and enter the Default SMTP server details. As some ISPs view batch emails as spam and then filter these emails, consider setting the Max. emails per minute.
 - Click **Test SMTP Connectivity**. If all works, click **OK**.



2. Tools > Setups > Email Accounts (specific email account settings, per email address)
 - Click **Add**.
 - Enter name and email address (for generic email addresses, such as sales@ or service@).
 - Enter POP3 information and click **Test**.
 - Enter SMTP information and click **Test**.
 - Save and Close.

Account	Email Address	POP3 Enabled	POP3 Server	SMTP Enabled	SMTP Server
Training	training@gmail.com	<input checked="" type="checkbox"/>	imap.gmail.com	<input checked="" type="checkbox"/>	smtp.gmail.com

Name: Training Email Address: training@gmail.com
 POP3 Enabled SMTP Enabled
 Server: imap.gmail.com Server: smtp.gmail.com
 User: training@gmail.com User: training@gmail.com
 Pwd: ***** Pwd: *****
 SSL: SSL SSL: SSL

Test incoming mail setup Test outgoing mail setup

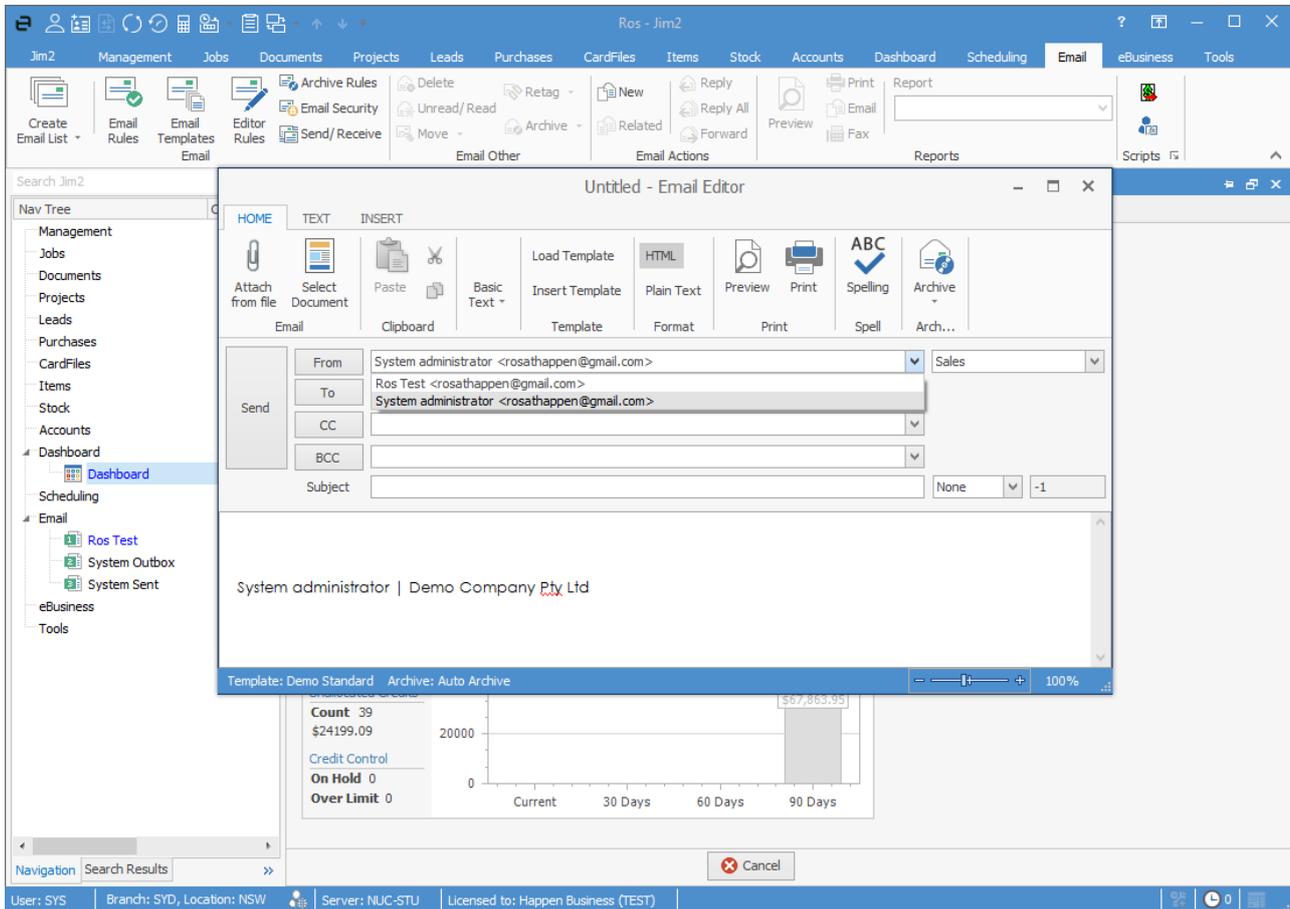
Information: Test successful - there are 8 emails waiting to be moved into Jim2
 Information: Account settings tested successfully

3. Each user card file has a Jim2 email address associated with the user. This is set in the User tab. This email address is the default **From** email address, until other information is added to email templates. This **From** address can be amended in the email message to select the email address added in step 2 (above).

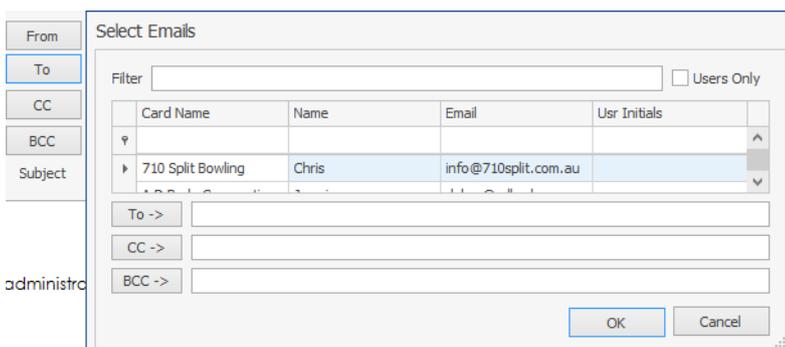
Creating a new email from Jim2

To create and send an email from Jim2

- Click on **Email** tab
- Click **New**. The email interface will open and display tabs and ribbons associated with the email function. The **From** field can be edited to display your **From** options.



- In the **To** field, type the specific email address for the email to be sent to, or click **To** which will bring up a search box allowing you to search for email addresses stored within Jim2. This search function can be used to locate email addresses by entering search criteria such as the contact name, CardFile name, part of the email address, etc. Selecting the email address in this manner allows you to search and double click on the required contact to select them for the email, then continue if more recipients are required for the email. When all recipients have been included, click **OK**. Repeat the process for the **CC** and **BCC** fields as required.

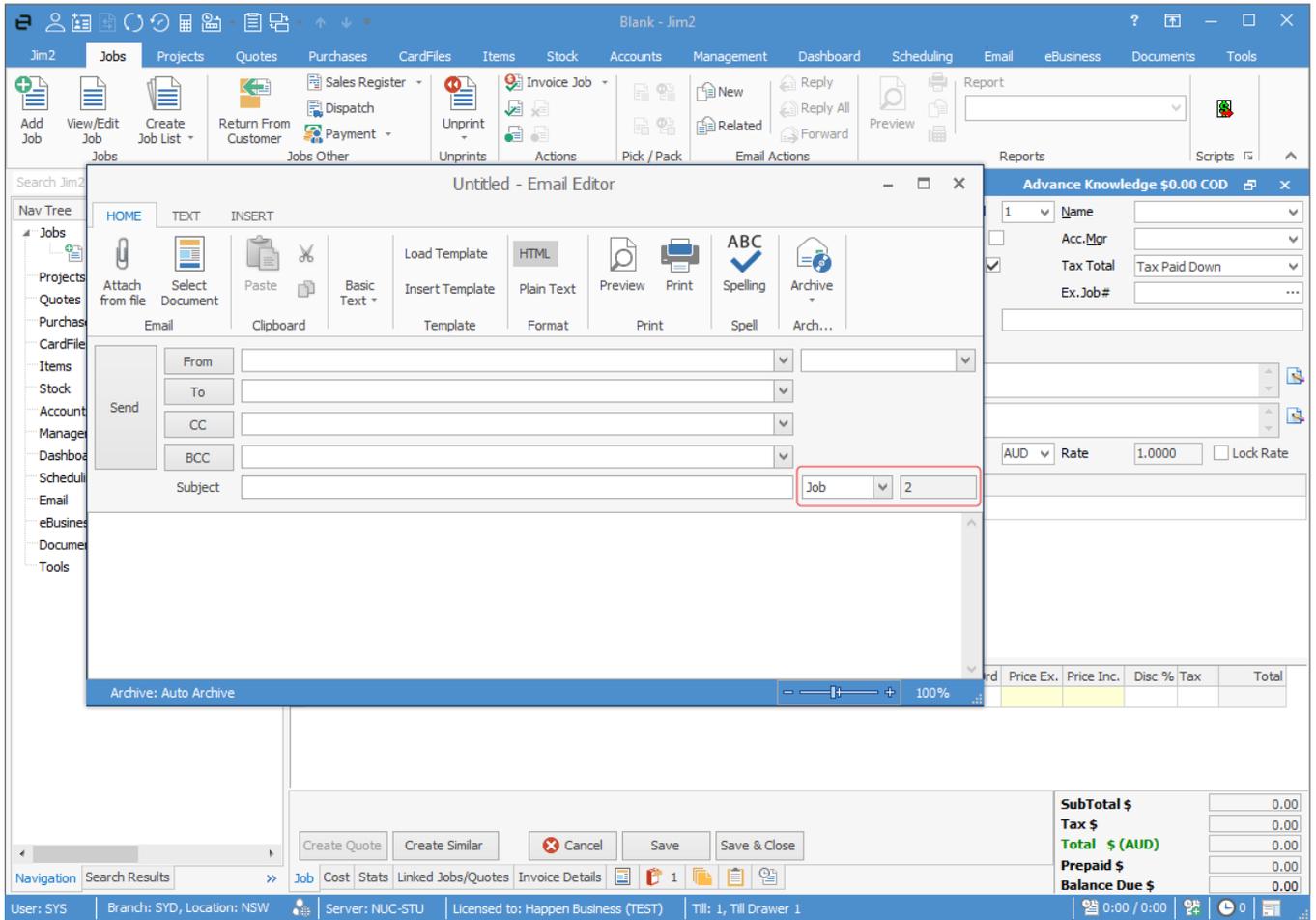


- Enter the subject and the message. The email also supports attachments, and by attaching a file, a copy of this file will be stored within Jim2. Use the **Attach File** button on the ribbon to search for files.
- Format the email body text, using the format tools available in the ribbon (font type, size, colour, etc).

Creating a related email from Jim2

To send an email that is related to a job, purchase order or quote in Jim2

- Open the relevant job, purchase order or quote.
- Click on the **Related** button on the ribbon.

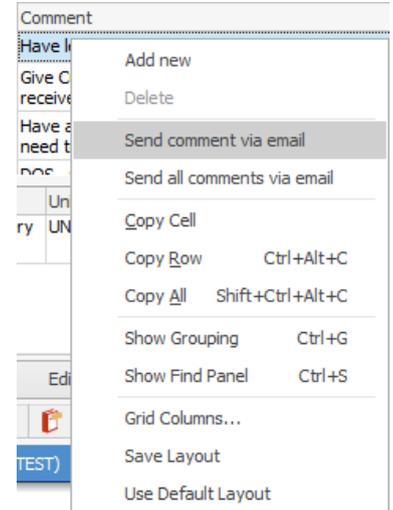


- The Email Editor window now displays the job, purchase order or quote number that it is related to, adjacent to the Subject field.
- Edit and Send the email.

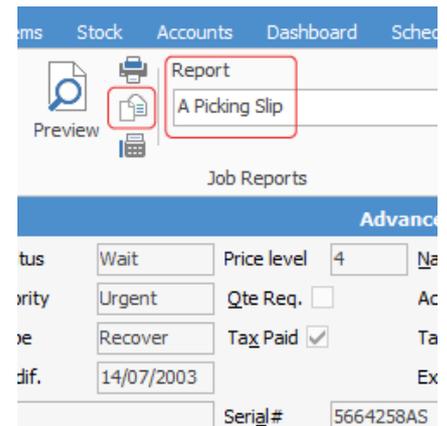
Emailing comments from Jim2

Comments within jobs, purchase orders and quotes can be emailed from within Jim2, as can Jim2 reports (job sheets, purchase orders, etc).

1. Emailing a Comment from a job, purchase order or quote
 - Open the relevant Jim2 object.
 - Right click on the comment to be emailed.
 - Select **Send comment via email**.
 - Jim2 will then open the Email Editor to allow you to select recipients, edit and send the email.



2. Emailing a Report from Jim2
 - Open the relevant Jim2 object.
 - Select the report required from the **Report** menu in the ribbon.
 - Click **Email** on the ribbon, select the recipients and edit the email as required.
 - Click **Send**.

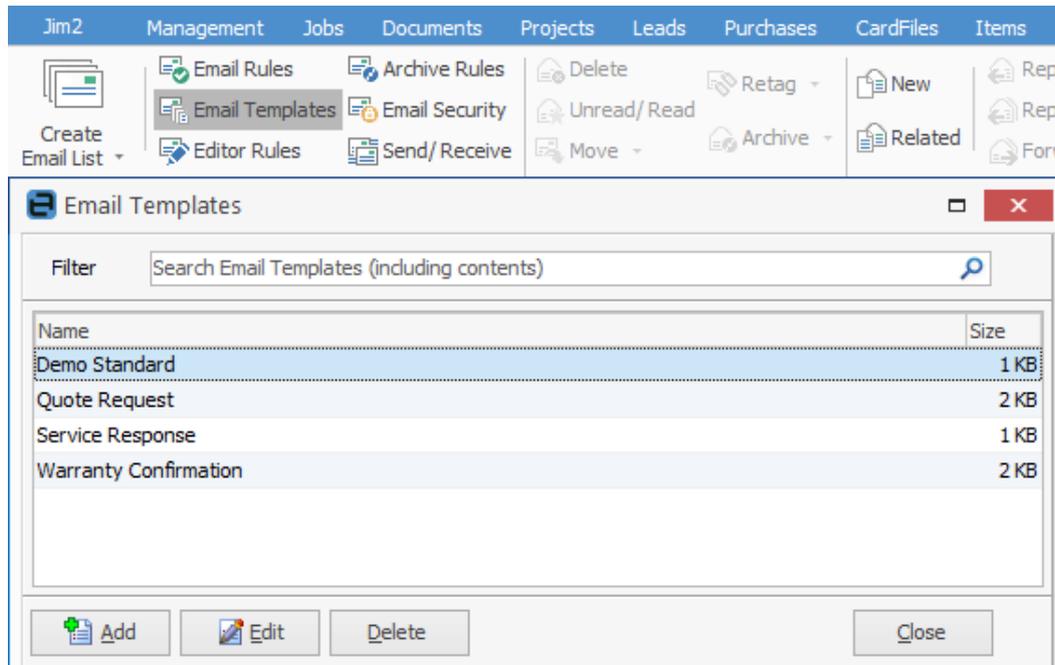


Creating an email template

Email templates can be stored within Jim2, and selected as required for sending to recipients. These templates can include formatting, specific text, macros (system driven variables) and attachments.

Email templates can also be selected as the default template to be used any email circumstance, for example, always use the **Standard** template when adding an email, or the **Reply** template when replying to an email.

1. Creating an Email template
 - Go to Email > Email Templates on the ribbon.
 - Click **Add**.
 - Enter a name for the template, then enter format and content as required.
 - Click the **Save** button on the ribbon.
2. Selecting a default template for emails
 - Go to Email > Editor Rules on the ribbon.
 - In the **Default Template** window, select the first template to be used.
 - In the **Source** field, select the applicable email source (Email New, Email Reply, etc).



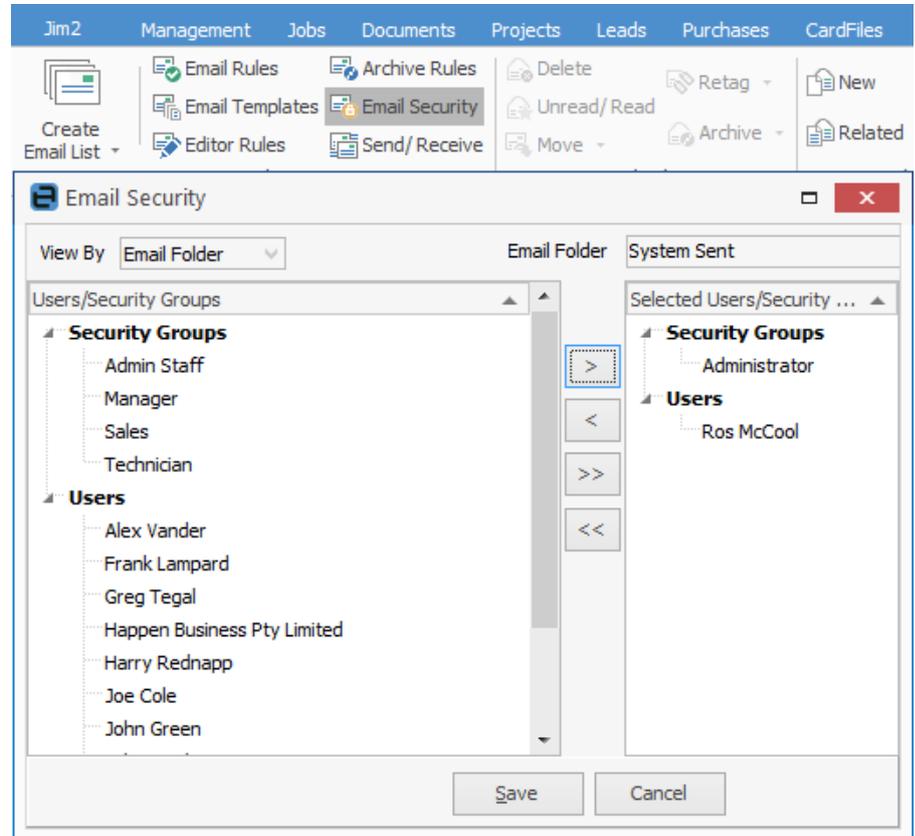
- Click **Save**.

Basic email security settings and viewing email lists

It is important that Jim2 users can see lists of emails that have been received and sent. Jim2 has a series of system folders, and depending upon the security settings, users will be able to create these lists.

1. Managing Email security

- Go to Email > Email Security on the ribbon.
- Select **View By Email Folder**, then select **System Sent** from the **Email Folder** field.
- Click **Edit**.
- Double click on either a security group, or an individual user, to allow them to see the **System Sent** emails in a list. When they are selected, they will appear on the right side of the Email Security window.
- Click **Save** when all choices have been completed.
- Repeat the edit and selection process as applicable to allow users to see each of the folders.

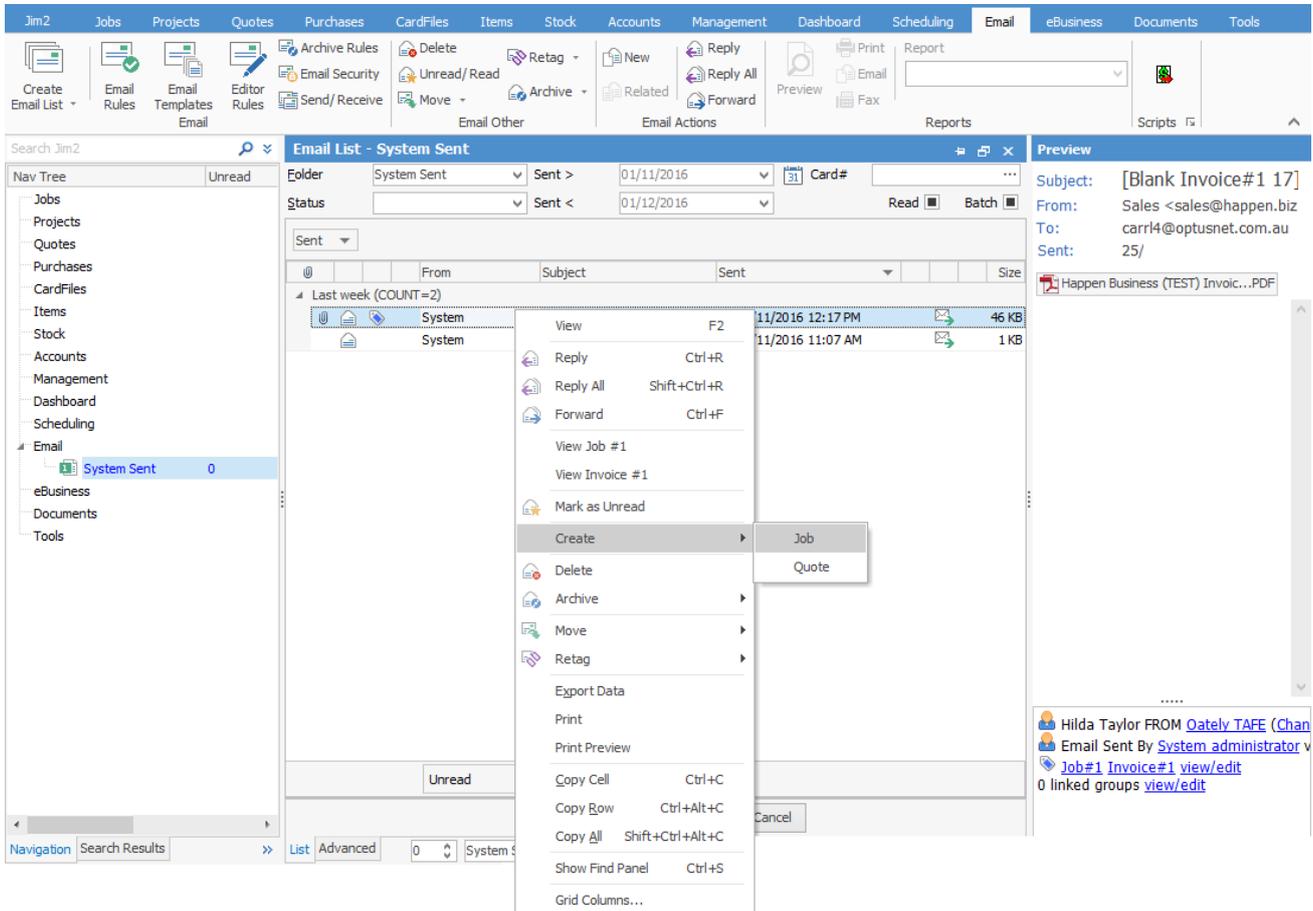


2. Creating Email lists

- Go to Email > Create Email List on the ribbon.
- In the Email List window, select the applicable folder (eg. System Sent, System Outbox, System Inbox).
- Enter applicable criteria and click **Run**. As this is a list view, filtering, sorting and grouping options are available. Ensure users review the Advanced List tab at the bottom of the window.
- A preview screen will open to the right side of Jim2. This can be used to view the email, however, double clicking on the email within the list will fully open the email on- screen.
- This list can be turned into a live list by entering a value into the number field, adjacent to the Advanced tab. This number can be from 1- 60, and reflects the number of minutes between the times the list is automatically run by Jim2.

Creating a job or quote from an email

1. When viewing an email list, a job or quote can be created by right clicking on the email.



2. The new job or quote appears on screen, and can then be edited. The email selected will automatically link to the new job or quote.

Linking an email to a job, purchase order or quote

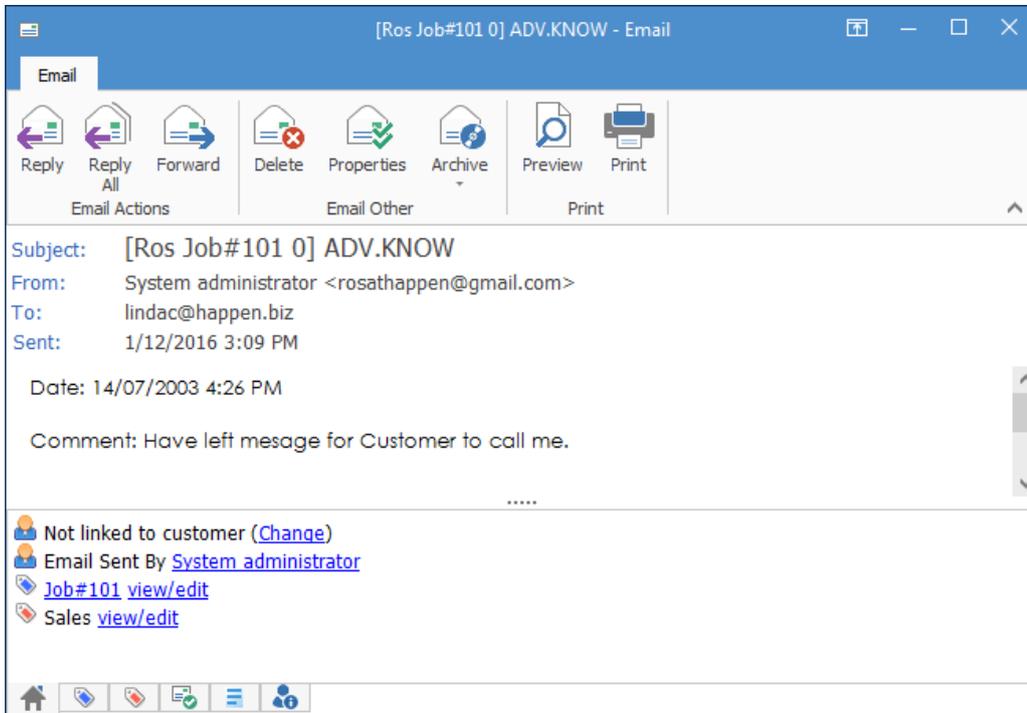
When an email arrives in the System Inbox, it can be linked to one or more current jobs, purchase orders or quotes. Where the email is a reply from an email sender, it may link automatically, based on the token the original email carried when it was sent. The token is an entry in the subject line of an email that holds information such as the database name, the object type (job, purchase, etc), the document number of the object.

When Jim2 receives a reply email that carries the token, it links the email reply to the object. Unread emails attached to objects, cause those objects to appear in bold type within a list, making it easy to see which objects have emails linked that have not been read. Setting up Job lists with filters to specify **show me jobs with unread email** allows the user to concentrate on those jobs where information has been added automatically.

When a new email arrives, it can be linked to a Jim2 object, either via an email rule, or by manual intervention.

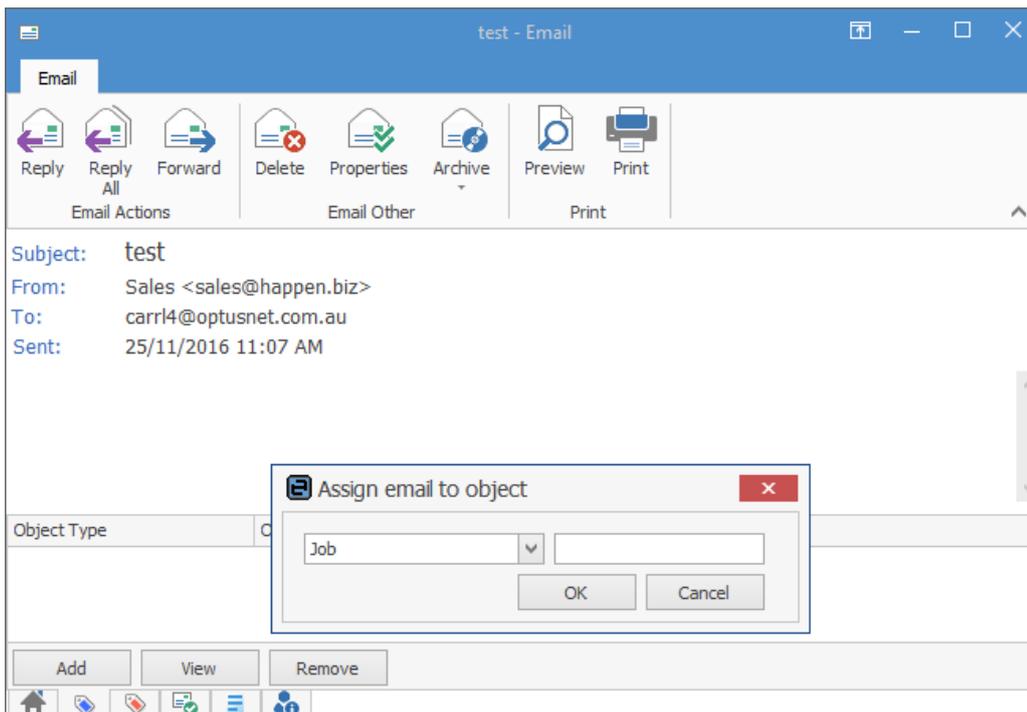
Automatically linking an email to a job from the email subject token

- Below, you will notice the token of [Demo Job#101 0] ADV.KNOW. This token ensures this reply email is linked to the original job.



Manually linking an email to a job

- Open the email
- Click on **View/Edit** in the footer of the email
- Click **Add** and the **Assign email to object** window appears.



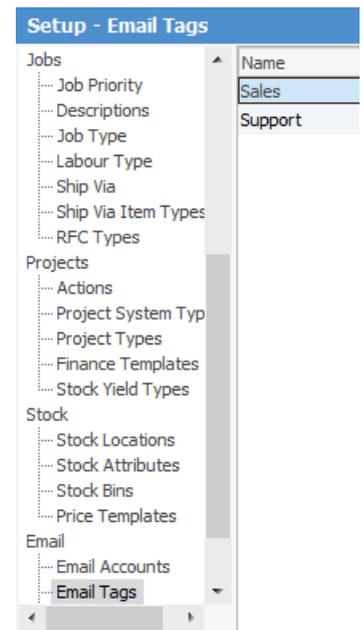
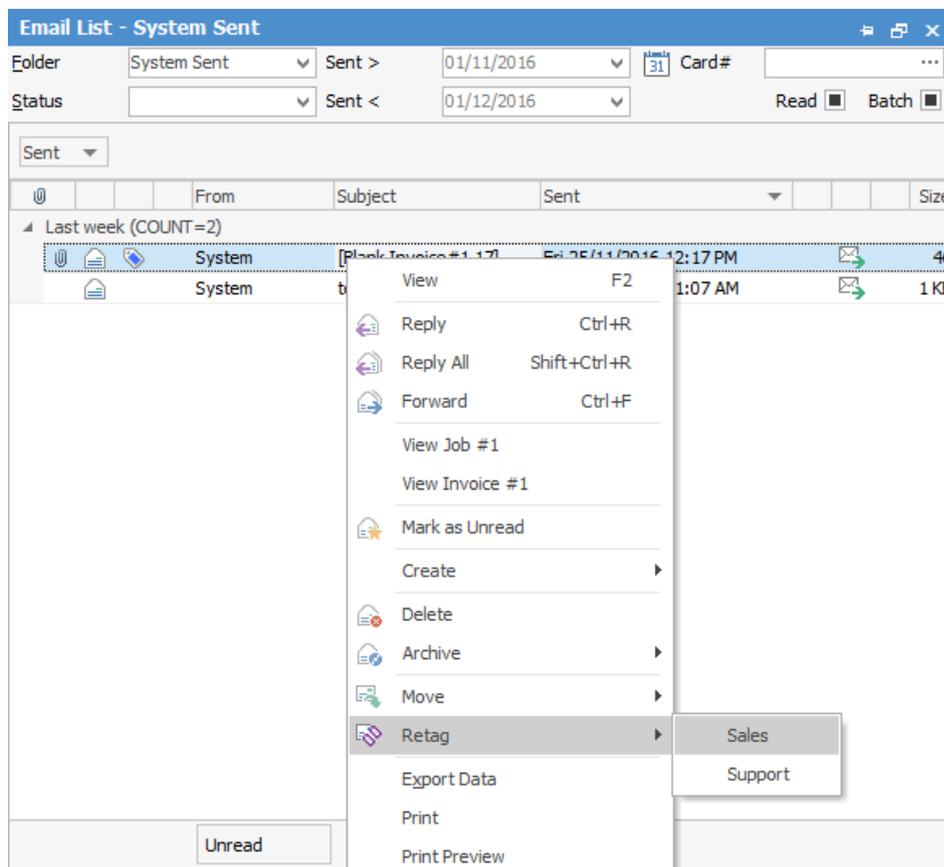
- Select Job and enter the job number the email is to be assigned to. One email can be assigned to many objects.

Many automated features for email and object creation/linking are available by utilising Email Rules and Macros. These rules are based on conditions and actions.

Adding Folders and Tags

Folders can be added to assist in managing email. These folders are used in email lists, allowing you to associate or tag an email to a specific folder. Jim2 can store all tagged emails in nominated folders (eg: all support emails coming in can be included in the same folder as those support emails going out). Emails can have multiple tags, which, in turn, allow them to be seen in numerous folders.

1. Tags can be added in Tools > Setups> Email Tags.
2. Emails can be tagged manually once they arrive.
 - Right click on the email in the list and select **Retag**.



3. Folders can be added in Tools ->Setups > Email Folders.
 - In the Folder Name, enter the preferred name for the new folder.
 - In the Email Group field, select from the applicable tags – emails with these tags will then appear in this new folder.
 - Note: There is no need to populate the other fields.
 - Select the applicable tag. The email will now appear in a list of emails for the applicable folder.

For further assistance or information please call Happen Business 02 9570 4696 or email support@happen.biz