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SBE Manual V7.5

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Special Forms - Personal Emails

Klinger wanted their Order Acknowledgements to be immediately directed back to customers via a PDF Email, and wanted the person responsible for the order to be the "From" email address. Klinger believes this both enhances communication as well as keeping the Klinger staff members "in the loop" with their clients.

In FormTrap this is simple, PROVIDED two pieces of data are present in the incoming data. These are:

either the Client Email address or the **Client Number** (see below) to select the email address for the client;

and the Klinger Employee email address or **Employee Identification** (see below) to select the From email address. In Klinger's case this is the employee initials. Substitution uses known data to access and insert other data (identified by the known data). In this case Client Email is identified by the Client Number and Sender Email is identified by Employee Initials. These are typical examples, showing the actual screen shots from the FormTrap Developer's Kit that provides the data source to FormTrap:

Text object Definition Format Position Fo ##A#SMTPTo## <u>CustNos#</u> ##A#SMTPFrom## <u>Empl-Inits</u> ##		ation Fo get email a and "From	Associated File items are these (they do not print and are used by SMTP to get email addresses "To" and "From")					
	k telecton .	Link al.						
Linked	records:			ā				
Sample	e text	Field name	Edit link	Ē				
	e text	Field name bilto no salesper[1]	Edit link	1				
Sampk CustNo Empl-In	e text) ats	bilto no	-					
Sampk CustNo Empl-In	e text) ats	bilto no	Delete link					
Sample CustNo Empilie	e text) ats field	bilto no salesper[1]	Delete link					
Sample CustNo Empilie	e text hits field Dilto no	bilto no salesper[1]	Delete link		SMTP	To-122	334.txt	🛄

"billto no" is inserted between prefix and suffix to give file name: SMTPTo-122334.txt (for Customer 122334), content is the email address of the client.

Similarly, Employee Initials are used to form a file name containing the correct Email Address for SMTPFrom as shown below:

A#SMTPFrom# <u>«Empl-Inits</u> »#		
Linkselection	1	8 10 17
ed records mple text Field name	Edit link	<u>1</u>
tNo bilitono	Edk ink.	N
pl-Inits salesper[1]	Delete link	-
to field	2 🔀	
d: 🗈 salesper[1] 💌	. ОК	
	Cancel	
C. [M	file name for the substitution	
sk at: Custom		
K:		
•		- \
uppression		
fix .bd		

"salesper[1]" is inserted between prefix and suffix giving this as the file name: SMTPFrom WPG.txt (from WPG as sales person's initials).

Populating the required substitution files for both the client email addresses and the Klinger staff email addresses completes the exercise. Email address are simple .txt files and can be automatically transferred from other systems.

The result for Klinger is a personalized email, from their sales staff, member, produced and sent within seconds of completing the order. This provides better customer service, early detection of errors and their correction and better intercompany communications – and all **fully automatic** under FormTrap's control.

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