SQLWorks

Title of document	How to send emails from SQLWorks and use email templates
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Purpose

This procedure explains how to utilise pre-designed templates for sending out emails to customers. These templates can be created ahead of time and saved to be sent from specific areas in the system for certain types of emails.

Scope

This procedure applies to all Lineal Software Solutions staff, as well as any prospective customers or clients who intend to utilise SQLWorks within their business environment. The procedure is aimed at all users, who will be operating the SQLWorks client.

Change History:

Date	Version	Created by	Description of change	Approved by
31.10.22	1	Naomi Joachim		Will Adkin

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Where can emails be found

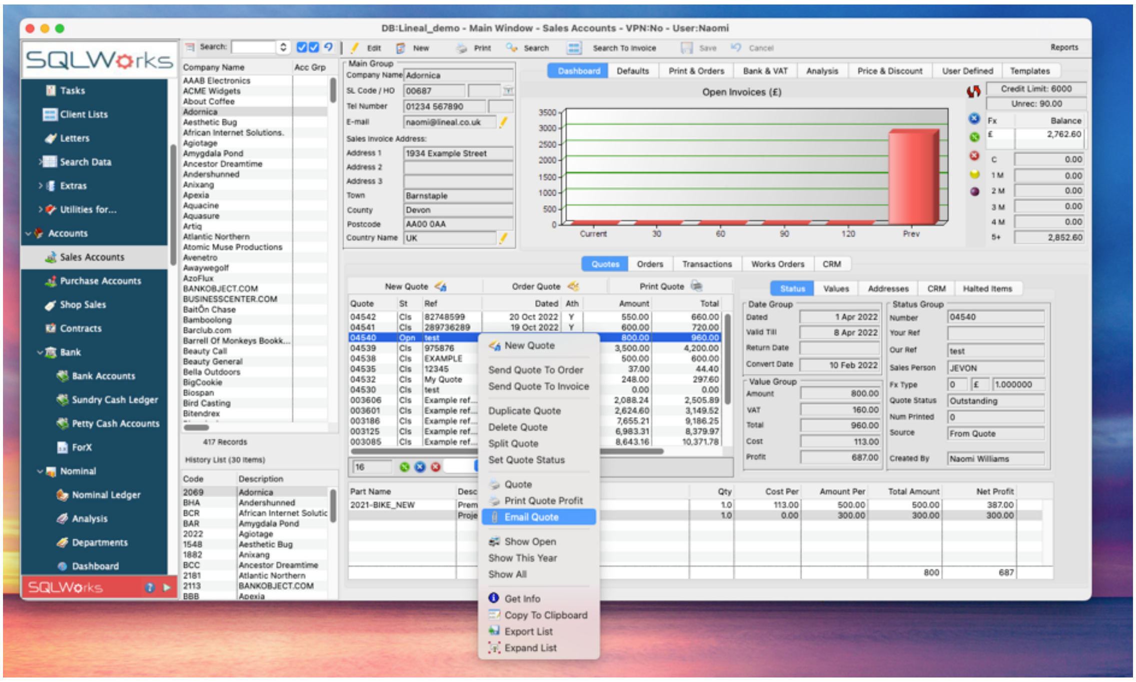
SQLWorks has an inbuilt email system that can be integrated with your own email inbox. Emails are stored and saved within the system keeping an audit trail that other users in the organisation can view and access if necessary.

Emails can be sent from various areas in the system via a right click option, and all emails saved and found under the CRM Emails section of the master navigation menu. Emails are also saved for each company on the emails tab as well as saved under the CRM tab if emails have been sent directly from the Sales or Purchase ledger. The most common reason for emailing directly from SQLWorks is to send documentation, such as quotes, orders, invoices, and statements.

Each type of email can have pre-set templates associated with it that can pull in certain information relating the actual record being sent. Using database fields, tables and images within an email can have enormous benefits.

Opening a new email

As mentioned above one of the most common reasons for wanting to send an email is to send a quote. Once a quote has been created via a right click is the option to email the quote.


SQLWorks
Tasks
Client Lists
Letters
Search Data
Extras
Utilities for...
Accounts
Sales Accounts
Purchase Accounts
Shop Sales
Contracts
Bank
Bank Accounts
Sundry Cash Ledger
Petty Cash Accounts
ForX
Nominal
Nominal Ledger
Analysis
Departments
Dashboard
Edit
New
Print
Search
Search To Invoice
Save
Cancel
Reports
Dashboard
Defaults
Print & Orders
Bank & VAT
Analysis
Price & Discount
User Defined
Templates
Open Invoices (£)
3500
3000
2500
2000
1500
1000
500
0
Current
30
60
90
120
Prev
Quotes
Orders
Transactions
Works Orders
CRM
New Quote
Order Quote
Print Quote
Status
Values
Addresses
CRM
Halted Items
New Quote
Send Quote To Order
Send Quote To Invoice
Duplicate Quote
Delete Quote
Split Quote
Set Quote Status
Quote
Print Quote Profit
Email Quote
Show Open
Show This Year
Show All
Get Info
Copy To Clipboard
Export List
Expand List

DB:Lineal_demo - Main Window - Sales Accounts - VPN:No - User:Naomi

Main Group
Company Name: Adornica
SL Code / HO: 00687
Tel Number: 01234 567890
E-mail: naomi@lineal.co.uk
Sales Invoice Address:
Address 1: 1934 Example Street
Address 2:
Address 3:
Town: Barnstaple
County: Devon
Postcode: AA00 0AA
Country Name: UK

Credit Limit: 6000
Unrec: 90.00

Fx	Balance
£	2,762.60
C	0.00
1 M	0.00
2 M	0.00
3 M	0.00
4 M	0.00
5+	2,852.60

Quote	St	Ref	Dated	Ath	Amount	Total
04542	Cls	82748599	20 Oct 2022	Y	550.00	660.00
04541	Cls	289736289	19 Oct 2022	Y	600.00	720.00
04540	Opn	test			800.00	960.00
04539	Cls	975876			3,500.00	4,200.00
04538	Cls	EXAMPLE			500.00	600.00
04535	Cls	12345			37.00	44.40
04532	Cls	My Quote			248.00	297.60
04530	Cls	test			0.00	0.00
003606	Cls	Example ref...			2,088.24	2,505.89
003601	Cls	Example ref...			2,624.60	3,149.52
003186	Cls	Example ref...			7,655.21	9,186.25
003125	Cls	Example ref...			6,983.31	8,379.97
003085	Cls	Example ref...			8,643.16	10,371.78

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Date Group
Dated: 1 Apr 2022
Valid Till: 8 Apr 2022
Return Date:
Convert Date: 10 Feb 2022

Value Group
Amount: 800.00
VAT: 160.00
Total: 960.00
Cost: 113.00
Profit: 687.00

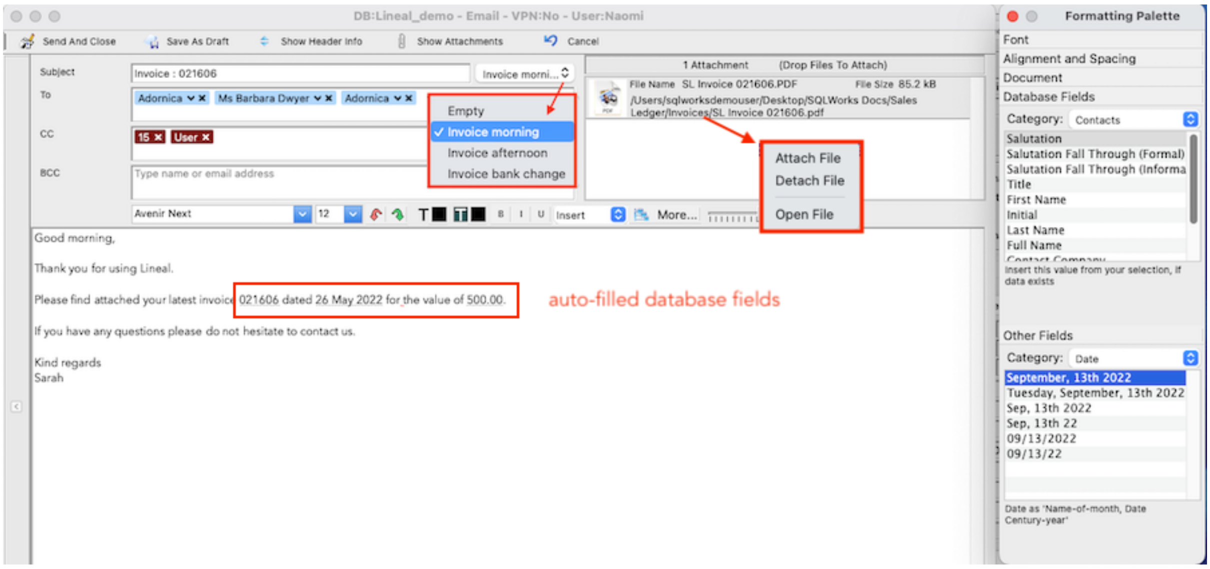
Status Group
Number: 04540
Your Ref:
Our Ref: test
Sales Person: JEVON
Fx Type: 0 £ 1.000000
Quote Status: Outstanding
Num Printed: 0
Source: From Quote
Created By: Naomi Williams

Part Name	Desc	Qty	Cost Per	Amount Per	Total Amount	Net Profit
2021-BIKE_NEW	Prem	1.0	113.00	500.00	500.00	387.00
	Proje	1.0	0.00	300.00	300.00	300.00
					800	687

The email will automatically attach the relevant document, the quote in this instance, and if there has been an email template created for this type of email it will open a pre-filled email design window for editing. For help on how to create templates for admin users see our guide - How to create email templates, and for guidance on how to use the tools available in the design window - How to use the design window and formatting tools. Both guides available on the Help page of our website: https://www.sqlworks.co.uk/help/.

New email window

The email window if a template has been saved by default to the type of email being sent will open as below.


DB:Lineal_demo - Email - VPN:No - User:Naomi
Send And Close
Save As Draft
Show Header Info
Show Attachments
Cancel
Empty
✓ Invoice morning
Invoice afternoon
Invoice bank change
Attach File
Detach File
Open File
Formatting Palette
Font
Alignment and Spacing
Document
Database Fields
Other Fields

Subject: Invoice : 021606 — Invoice morni...

To: Adornica, Ms Barbara Dwyer, Adornica

CC: 15, User

BCC: Type name or email address

1 Attachment (Drop Files To Attach)

File Name SL Invoice 021606.PDF File Size 85.2 kB
/Users/sqlworksdemouser/Desktop/SQLWorks Docs/Sales Ledger/Invoices/SL Invoice 021606.pdf

Good morning,

Thank you for using Lineal.

Please find attached your latest invoice 021606 dated 26 May 2022 for the value of 500.00.

If you have any questions please do not hesitate to contact us.

Kind regards
Sarah

auto-filled database fields

Category: Contacts
Salutation
Salutation Fall Through (Formal)
Salutation Fall Through (Informa
Title
First Name
Initial
Last Name
Full Name

Insert this value from your selection, if data exists

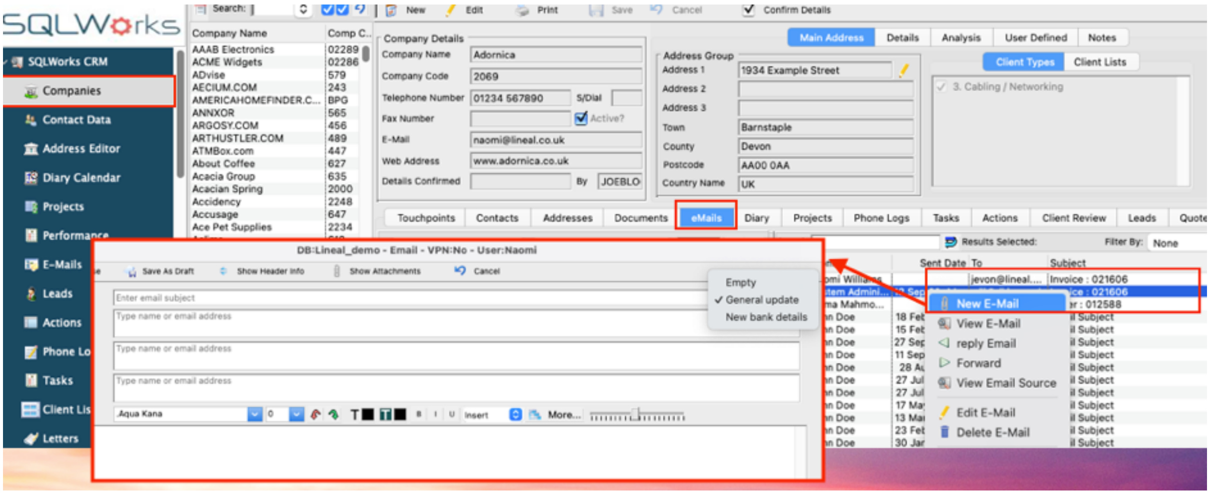
Category: Date
September, 13th 2022
Tuesday, September, 13th 2022
Sep, 13th 2022
Sep, 13th 22
09/13/2022
09/13/22

Date as 'Name-of-month, Date Century-year'

In this example an invoice is being emailed to a customer, a pdf of the invoice has automatically attached which can be opened and viewed directly from here or removed if not needed. Additional files can also be attached if needed from elsewhere. The default text is from the template set by default - Invoice morning. However, there are additional templates that have been created for this type of email and these can be selected from the dropdown. The Empty option if chosen will display a blank window for editing. You can right click on the selection to save the current email as a new template if you want.

If any database fields have been included in the email design template these will auto-fill as shown above – invoice number, invoice date, and value.

If a new email is created from the emails tab from companies directly as shown below, the templates available will be only those that have been designed and not saved to an email type – this is explained more in the How to create email templates guide.


SQLWorks
SQLWorks CRM
Companies
Contact Data
Address Editor
Diary Calendar
Projects
Performance
E-Mails
Leads
Actions
Phone Lo
Tasks
Client Lis
Letters
New
Edit
Print
Save
Cancel
Confirm Details
Main Address
Details
Analysis
User Defined
Notes
Client Types
Client Lists
Touchpoints
Contacts
Addresses
Documents
eMails
Diary
Projects
Phone Logs
Tasks
Actions
Client Review
Leads
Quote
DB:Lineal_demo - Email - VPN:No - User:Naomi
Save As Draft
Show Header Info
Show Attachments
Cancel
Empty
✓ General update
New bank details
New E-Mail
View E-Mail
reply Email
Forward
View Email Source
Edit E-Mail
Delete E-Mail

Company Details
Company Name: Adornica
Company Code: 2069
Telephone Number: 01234 567890
Fax Number: ☑ Active?
E-Mail: naomi@lineal.co.uk
Web Address: www.adornica.co.uk
Details Confirmed: By JOEBLO

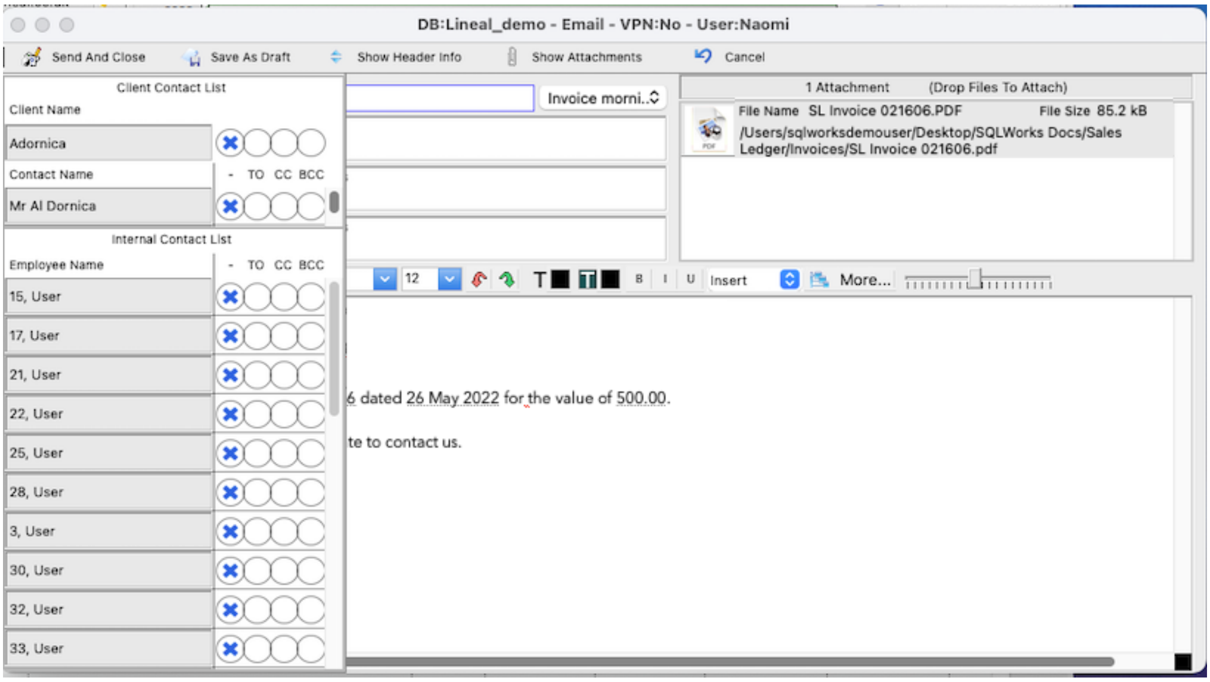
Address Group
Address 1: 1934 Example Street
Town: Barnstaple
County: Devon
Postcode: AA00 0AA
Country Name: UK

3. Cabling / Networking

Results Selected: Filter By: None

Adding contacts to an email

Any contact email addresses that have been saved in the Default email addresses section on the Print & Orders tab of an account, for the type of email being sent i.e., invoices, will automatically appear in the To, CC and BCC fields. Other contacts within the company can be added to the email, by either starting to type the name in one of the address sections and selecting from the dropdown options, or a full contacts list can be opened from expanding the list from the left (move the mouse to the left of the window to open this menu).


DB:Lineal_demo - Email - VPN:No - User:Naomi
Send And Close
Save As Draft
Show Header Info
Show Attachments
Cancel
Client Contact List
Client Name
Contact Name
- TO CC BCC
Internal Contact List
Employee Name
- TO CC BCC
Invoice morni..
1 Attachment
(Drop Files To Attach)
12
B
I
U
Insert
More...

Adornica

Mr Al Dornica

15, User
17, User
21, User
22, User
25, User
28, User
3, User
30, User
32, User
33, User

File Name SL Invoice 021606.PDF File Size 85.2 kB
/Users/sqlworksdemouser/Desktop/SQLWorks Docs/Sales Ledger/Invoices/SL Invoice 021606.pdf

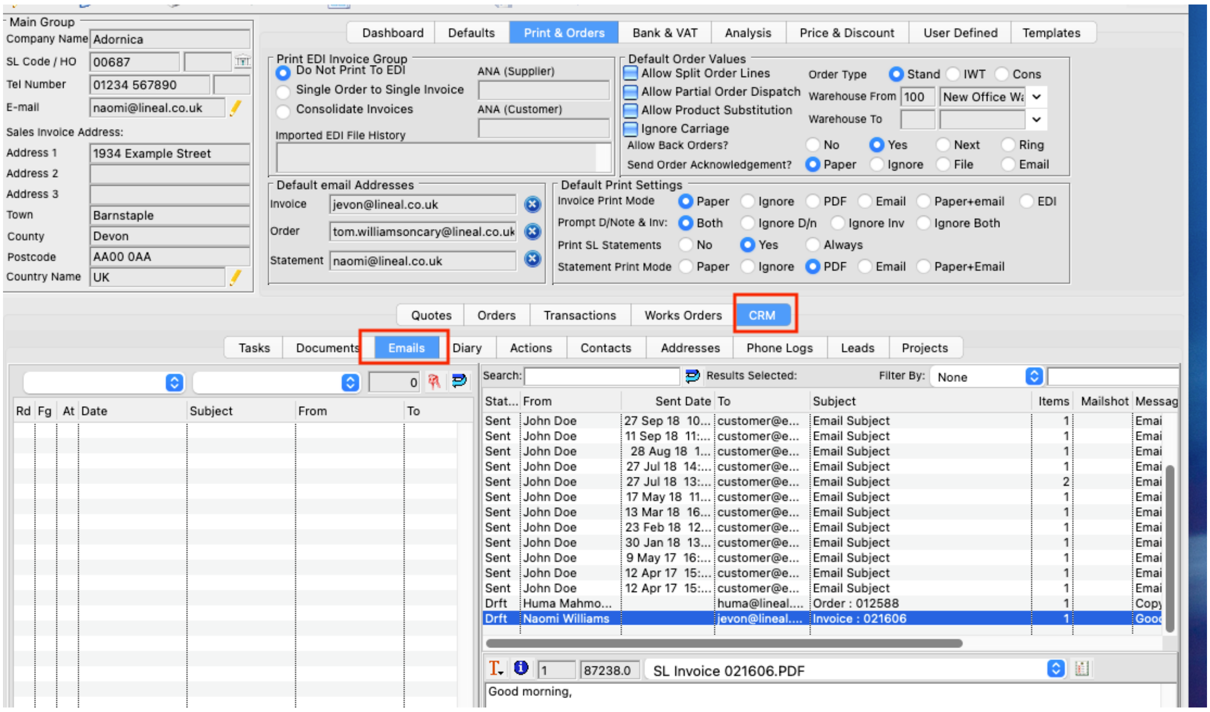
6 dated 26 May 2022 for the value of 500.00.

te to contact us.

Any contacts saved to the client/account can be selected from the top section and other users internally from inside the company, selected from the bottom section.

Where to find sent or saved emails

Emails can be sent directly by clicking ‘Send And Close’ or be saved as a draft to send later. All emails either sent or saved as a draft will save automatically to the relevant account and can be found by navigating to the relevant ledger – CRM – Emails.



Main Group
Company Name: Adornica
SL Code / HO: 00687
Tel Number: 01234 567890
E-mail: naomi@lineal.co.uk
Sales Invoice Address:
Address 1: 1934 Example Street
Address 2:
Address 3:
Town: Barnstaple
County: Devon
Postcode: AA00 0AA
Country Name: UK

Print EDI Invoice Group
● Do Not Print To EDI
○ Single Order to Single Invoice
○ Consolidate Invoices
ANA (Supplier):
ANA (Customer):
Imported EDI File History

Default email Addresses
Invoice: jevon@lineal.co.uk
Order: tom.williamsoncary@lineal.co.uk
Statement: naomi@lineal.co.uk

Default Order Values
☐ Allow Split Order Lines
☐ Allow Partial Order Dispatch
☐ Allow Product Substitution
☐ Ignore Carriage
Order Type: ● Stand ○ IWT ○ Cons
Warehouse From: 100 New Office Wa
Warehouse To:
Allow Back Orders? ○ No ● Yes ○ Next ○ Ring
Send Order Acknowledgement? ● Paper ○ Ignore ○ File ○ Email

Default Print Settings
Invoice Print Mode: ● Paper ○ Ignore ○ PDF ○ Email ○ Paper+email ○ EDI
Prompt D/Note & Inv: ● Both ○ Ignore D/n ○ Ignore Inv ○ Ignore Both
Print SL Statements: ○ No ● Yes ○ Always
Statement Print Mode: ○ Paper ○ Ignore ● PDF ○ Email ○ Paper+Email

Search:
Results Selected:
Filter By: None

Stat...	From	Sent Date	To	Subject	Items	Mailshot	Messag
Sent	John Doe	27 Sep 18 10...	customer@e...	Email Subject	1		Emai
Sent	John Doe	11 Sep 18 11:...	customer@e...	Email Subject	1		Emai
Sent	John Doe	28 Aug 18 1...	customer@e...	Email Subject	1		Emai
Sent	John Doe	27 Jul 18 14:...	customer@e...	Email Subject	1		Emai
Sent	John Doe	27 Jul 18 13:...	customer@e...	Email Subject	2		Emai
Sent	John Doe	17 May 18 11...	customer@e...	Email Subject	1		Emai
Sent	John Doe	13 Mar 18 16...	customer@e...	Email Subject	1		Emai
Sent	John Doe	23 Feb 18 12...	customer@e...	Email Subject	1		Emai
Sent	John Doe	30 Jan 18 13...	customer@e...	Email Subject	1		Emai
Sent	John Doe	9 May 17 16:...	customer@e...	Email Subject	1		Emai
Sent	John Doe	12 Apr 17 15:...	customer@e...	Email Subject	1		Emai
Sent	John Doe	12 Apr 17 15:...	customer@e...	Email Subject	1		Emai
Drft	Huma Mahmo...		huma@lineal....	Order : 012588	1		Copy
Drft	Naomi Williams		jevon@lineal....	Invoice : 021606	1		Gooc

1 87238.0 SL Invoice 021606.PDF

Good morning,

The tab will show a list of emails with the status of that email, and in the box below the selected line the email content and attachments if there are any. Drafts can be opened for editing and sending from here as well as other functions via the right click menu.

lineal®
systems • support • software

Gold
Microsoft Partner
Microsoft

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