8Quanta Email Automation for Transactions

Overview

This application is for automatically emailing the PDF of a transaction to selected individuals.

- There are five Classes of individuals:
  - Customer Contacts
  - Lead/Prospect Contacts
  - Vendor Contacts
  - Employees
  - Partner which is an Individual, or Partner Contacts
- For each Class there is a customizable list of Categories.
- On a transaction you select the Category(ies) from the Class(es) to which you would like the transaction emailed.
- The email is sent to the individuals in the Categories when the transaction is saved.
- The email is sent using a standard, customizable, NetSuite Email Template
- In the Setup you select which Class(es) you would like to to show for each transaction type.
- The Classes available to select from is dependent on the type of transaction.
- This does not apply to Customers, Leads/Prospects, and Vendors which are an Individual.
- If a Partner is a Company, not an Individual, this applies only to its Contacts.
- Contacts and Employees are assigned to Categories on the respective Edit page. An Individual Partner is assigned to Categories on the Partner Edit page. See below for two other options.

Setup

Setup > Custom > 8Q Email Automation Setup

- Email Templates
  On each transaction you may select which email template should be used. These are standard NetSuite Email Templates. This link at the top of the page goes to
  Documents > Templates > Email Templates
- Check Send From Sales Rep
  See below, Send From Sales Rep
- Email Sender Roles
  On each transaction you may select the Employee who is the Sender of the email. On the setup page you select the Employee Roles of which Employees should be included in the Email Sender selection drop down.
- Transaction Type Selections
  There are four Transaction Groups. For each you should choose which Classes you would like to be available from which to select on each transaction type. Which Classes are available depends on the Transaction Group.
  Available Classes for each Group are:
  - Customer: Customer, Employee, Partner
  - Lead/Prospect: Lead/Prospect, Employee, Partner
  - Employee: Employee
  - Vendor: Vendor, Employee, Partner

  <u>Default Email Template</u>
  You may select which Email Template should be selected by default for each Transaction Type.
  <u>Default Email Sender</u>
  You may select which Employee should be selected by default for each Transaction Type.

- Email Categories
  - There are five Classes of Email Categories. This is where you add or remove the Categories you would like for each Class. These are standard NetSuite custom lists, however they may be edited only here.
  - You may name the Categories anything you like.
  - These are the Categories for each Class from which you may select on each transaction. The PDF for the transaction will be emailed to each individual in each selected Category

Send From Sales Rep
If there is a Sales Rep on the transaction, which is either an individual or one individual in either a Sales Rep Group or on the Team Sales list, there will be a check box SEND FROM SALES REP.

- If the Sales Rep is changed so it is not an individual, the checkbox will be removed.
- If the Sales Rep is not an individual and it is changed so it is an individual the checkbox will be restored.
- If checked, the EMAIL SENDER dropdown selection will be removed.
- If there is a selection in the EMAIL SENDER dropdown, and this box is checked, the selection will be restored if the box is unchecked
- On the setup page you may check a box which will make this box checked by default, if applicable.

Adding Contacts/Employees to Categories
There are three ways to add a Contact to Category.

- Editing the Contact or Employee
- On the transaction, as noted below in the Transactions section.
- When editing a company. See Company Contacts below.

Transactions
The 8Q Email Automation selections will be on one of these three tabs, depending on which is available for the transaction type: Communication, Messages, 8Q Email Automation.

- Select Category(ies)
  - Each Category Class selected at Setup for the transaction type appears as a multi-select. You may select multiple Categories from each Class.
  - As you select the Categories, the individuals in the Category will be added to the 8Q Email Category Selection sublist (see below).
- Send Record to Selected Email Category Contacts
  - This box must be checked for the PDF to be sent to the individuals on the Category Selection sublist.
  - When an individual is added to the Category Selection sublist this box is checked automatically.
  - When you Save, if you have individuals on the Category Selection sublist and this box is not checked, you will be asked if you want it to be checked for you, or save without it being checked
- Email Template
  The Default Email Template, if selected at Setup, is chosen by default. You may select another template. Your selection will **not** be saved. Each time you come to the transaction type, the default will be chosen.

- Send From Sales Rep
  See above
- Email Sender
  The Default Email Sender, if selected at Setup, is chosen by default. You may select another sender. Your selection will **not** be saved. Each time you come to the transaction type, the default will be chosen.
- Send to Sales Rep
  If there is a Sales Rep on the transaction, whether it is an individual or Employees on the Sales Team tab (if you have that option enabled), you may check this box to have the PDF also sent to the Sales Rep(s).
  - If the selection in the Sales Rep dropdown is a Sales Rep group it will be sent to each Employee in the group.
    See Lists > Relationships > Groups
  - If Sales Teams is enabled, it will be sent to each Employee on the Sales Team tab on the transaction.
- Important Note
  This is a summary of some of the information in this document.
- 8Q Email Category Selection sublist
  This is a list of the individuals to whom the PDF will be emailed. They are added to the list as you select the Category(ies) in the Classes. You may add lines to the sublist if there is someone to whom it should be sent who is not in any Category. Each time the transaction is loaded the list is blank. Your selections are not saved, since you may not want it sent every time you Save the transaction.
  - Duplication
    If an individual is in more than one of the selected Categories they will be on the list for each category they are in. They will receive only one email.
  - Include
    When an individual is added to the list the Include box is automatically checked. You may uncheck it if you do not want the PDF sent to that individual when you Save.
  - Update Contact
    If you change any of the information for an individual (see below) this box will automatically be checked. When you Save the contact record will be updated.
    - You should uncheck the box if you do not want it updated.
    - If the same individual is on the list more than once because of being in more than one Category, and Update Contact is checked on any of those lines, the information from the first instance in the list will be used.
  - Name
    This is a list of all contacts to whom the PDF may be sent.
    - All contacts of the Customer or Vendor selected for the transaction will be included.
    - All Employees in any Employee Category will be included, if the Employee Class categories are shown.
    - All contacts of Partners, or an Individual Partner, listed on the Partners subtab of the transaction will be included. If you add or remove Partners from the Partners subtab, the Name (contacts) dropdown will be update accordingly in real time.

    - Category dropdowns
        - If an individual is added to the list when a Category is selected, that Category will be selected in this dropdown. For individuals added this way you may not change the Category.
        - If you select a Contact which has not been automatically added by selecting Categories, and you select a Category under the related dropdown, that individual will be added to that Category when you Save the transaction.
    - Contact Information
      Email, Phone, Mobile Phone, FAX, and Alt Email are shown in these boxes. As noted above, if you change any of the informaton, the contact record will be updated when the transaction is saved.
- 8Q Email Automation History
    - A record of emails sent will be listed, with each Class Category to which they were sent.
    - A list of the history, with more information, is available on the Classic Center at Lists > Relationships > 8Q Email Automation Send History
    - You may not add to, nor edit, the history list.

Company Contacts

When editing a Customer, Lead/Prospect, Vendor, or Partner you may add their contact(s) to one or more Email Categories on the 8Q Email Categories tab.

- Only contacts which have this company selected as their company are listed.
- The contact is added to the category as soon as you make the selection.
- If you add or remove a contact on the NetSuite Contacts tab, the contact will be added to or removed from the 8Q Email Categories tab when the browser page is refreshed or Saved. It is not possible for code to be triggered when a contact is added or removed.
- If you remove a contact from a company's Contact list, NetSuite does not delete the contact. However NetSuite does remove the company from the contact's Company field. If you refresh the browser page or Save the contact will be removed from the 8Q Email Categories tab. This will not remove them from any Categories they are in.