eCHEMPAX: MANAGING E-MAIL

eChempax includes numerous options that allow users to communicate with customers, prospects, suppliers, and co-workers using e-mail. eChempax also has the capability to generate and distribute e-mail notifications and reminders automatically. In this newsbreak, we will highlight several of these features and tools.

eCHEMPAX GENERATED E-MAIL

eChempax has the ability to automatically generate e-mail based on specific events:

- Contact Change Request
- Comments & Suggestions
- Customer Service Correspondence
- Export Notification
- Login Support
- New Customer Request
- Non-processed Orders
- Old Customer Requests
- Order Notification
- Parked Orders
- Price Quotes
- Sample Requests
- Supplier
- Technical Support

EMAIL NOTIFICATIONS

- **Order Confirmation (on by default):** Email is sent to customers after an order has been processed in Chempax.
- **Customer Order Notification (off by default):** Email is sent to customers after the order is entered in eChempax.
- **Note & Task Update:** Email is sent to the owner of the note or task when it has been updated.
- **Task Approaching Due (off by default):** Email sent to assignee once each evening, based on lead days.
- **Opportunity Close Date Alert:** Email sent to owner once each evening, based on lead days.
- **Opportunity Owner, Employee Update Alert:** Email sent to owner and/or employees at time of update.
- **Price Sheet Update:** Email sent to owner at time of update.
- **Price Sheet Awaiting Approval:** Email sent to manager at time of update or hourly (priority).
DEFINING RECIPIENTS FOR eCHEMPAX E-MAIL

Recipient lists for eChempax generated emails are defined within eChempax Administration:

1. Log into eChempax Administration.
2. Select Mail Options on the Content Menu.
3. Select the Delivery tab.
4. Select the Change option that corresponds to the e-mail type that is to be updated.
5. Update the values.
6. Click the Enter button at the bottom of the page to save the changes.

If a distribution list and an explicit list of recipients are defined, the e-mail is sent to everyone.
If the recipient list is empty, the e-mail will be sent to the system default e-mail address, which is stored in a configuration file on the server and can only be updated by eChempax Support staff.

MAIL HISTORY

Email history is available at various levels throughout the application. It includes everything that is sent from eChempax, and any email that is imported from Outlook via eChempax Traveler:

eChempax Administration > Mail > Sent Mail
• All mail sent by eChempax.
• All mail imported from Outlook via eChempax Traveler.

Home > E-Mail
• All eChempax e-mail associated with the current user e-mail address (sent and received).
• E-mail imported from Outlook via eChempax Traveler where the current user e-mail address is a sender or recipient.

Customer, Prospect, Supplier, Contact > E-Mail
• All eChempax e-mail associated with the company or contact.
• E-mail imported from Outlook via eChempax Traveler where the company/contact e-mail address is a sender or recipient.

Note Form > View Associated E-Mail
• Note e-mail sent from eChempax.
• E-mail imported from Outlook via eChempax Traveler where the note ID is found in the e-mail.
NOTE E-MAIL

Notes can be used to send email to colleagues, customers, prospects, and suppliers regarding any number of topics such as call reports, tasks, pricing, samples, SDS, etc. The subject of the note email can be specifically configured within eChempax Administration:

1. Log into eChempax Administration.
2. Select the Notes option on the Content Menu.
3. Select the E-Mail Subject tab.
4. Enter desired text and insert any pre-defined field values using the Add Field drop down. For example, a supplier note subject may look like this:
   Call Report: [note-type] / [customer-name]
5. Click the Enter button at the bottom of the page to save the changes. Subsequent note e-mail will have a subject line based on this definition.

NOTE E-MAIL TEXT ONLY FORMAT

The Note Text Only format can be used to send the note email without all of the standard eChempax formatting, such that it includes the note text only, and appears as if it were sent using any other mail client such as Outlook.
CHEMPAX DOCUMENTS & eCHEMPAX REPORTS

Users can easily attach any Chempax document or eChempax report to a note using the eChempax clipboard feature. Simply copy the Chempax document(s) or eChempax report(s) to the eChempax clipboard, then paste the clipboard items on a note to add them as an attachment. Attached documents such as SDS, eChempax customer price lists, and Chempax price change letters can then be sent directly to customers or suppliers using the note e-mail.

CREATING MAILING LISTS

Users can dynamically generate target contact lists for specific mailing campaigns using various tools within eChempax and eChempax Traveler. Mailing lists can be segmented and built based on a combination of sources including purchased lists, prospects, customer products, suppliers, products, notes, opportunities and personalized columns. For example, one can send a targeted email blast to a list of prospects that belong to a specific industry.
EXPORTING MAILING LISTS
Mailing lists can be downloaded to Excel from eChempax or eChempax Traveler and used to send mail from other programs such as MS Word and Outlook.

OUTLOOK E-MAIL
Stay informed and up-to-date on relevant information regarding customers and prospects. Transfer certain e-mails in Outlook to eChempax Traveler by creating a set of rules that will choose specific Outlook folders from which to import. This will actually read in the e-mail, index it, and allow you to share emails that you had with a customer or prospect with other people in your organization. You may also choose just to read e-mail from Outlook in an organized list for customers, suppliers, and contacts based on the set of rules you create to control which Outlook mail folders are scanned. An e-mail tab will be visible in eChempax Traveler preview area displaying all associated e-mails.

eCHEMPAX TRAVELER – OUTLOOK ADD-IN
The eChempax Traveler Outlook Add-In provides easy access to eChempax and eChempax Traveler directly from Outlook. It allows a user to perform various tasks including:

- Collecting Outlook e-mails for transfer to eChempax
- Displaying e-mail contact information
- Creating notes and opportunities from Outlook email and contacts
- Importing Outlook contacts
- Displaying notes and opportunities associated with Outlook e-mail
- Displaying eChempax customer, prospect and supplier summary pages associated with Outlook e-mail and contacts.

EXPORTING MAILING LISTS
Mailing lists can be downloaded to Excel from eChempax or eChempax Traveler and used to send mail from other programs such as MS Word and Outlook.

UPCOMING INDUSTRY EVENTS
Meet a Datacor representative at an upcoming industry event.

- Mar. 4th - 6th  PPC Spring Meeting
- Mar. 25th - 27th  AFPM International Petrochemical Conference
- Mar. 26th  NACD & Datacor’s Happy Hour Fiesta @ AFPM

ANY QUESTIONS?
If you have any questions, please e-mail echempax-support@datacor.com or call us at (973) 822-1551.

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