



Summary

This page covers the basics of how to email out of Orchestrated in the OnDemand environment.

Step 1: Add email address to user login

In order to email a document out of Orchestrated, the main requirement is an email address on the user login. First go to Administration > Setup > General > Users. **It will, by default, come up in Add-Mode for you to add a new user.** But you can either switch to Find Mode (CTRL + F) or use the green scroll keys at the top icon bar to scroll through the users and find the user login you are using. Once you arrive at the correct user login, click in the "E-Mail" field and add in a valid email address (see screen shot below). This will be the address that shows up as the sender when a user sends an email from this login.

The screenshot shows the 'Users - Setup' dialog box. The 'E-Mail' field is highlighted with a red oval. The 'Employee' field is set to 'Anderson, Mark'. The 'Password' field is masked with '****' and has a 'Show/Hide' button. The 'Location' dropdown is set to '2'. There are 'OK', 'Cancel', and 'Copy Form Settings' buttons at the bottom.

Step 2: Add email address on to a Business Partner

While this is not required, it saves time in that you won't have to manually add a row and fill out the recipient's email address.



You'll need either an address on the General tab (see below)

Business Partner Master Data

Code: Manual C1005 Customer
Name: Pacific Distributing Inc.
Foreign Name: _____
Group: Contract Brewer
Currency: US Dollar
Federal Tax ID: _____

Account Balance: 25,244.00
Deliveries: 0.00
Orders: 152,290.88
Opportunities: _____

Local Currency: _____

General | Contact Persons | Addresses | Payment Terms | Payment Run | Accounting | Properties | Remarks | Attachments

Tel 1: 220-555-5188
Tel 2: 693-555-3443
Mobile Phone: _____
Fax: 343-555-8902
E-Mail: _____
Web Site: _____
Shipping Type: _____
Password: _____
Factoring Indicator: _____
BP Project: _____
Industry: _____
Business Partner Type: Company

Contact Person: Mike Kay
ID No. 2: _____
Remarks: _____
Sales Employee: Daniel Wilson

BP Channel Code: _____
Technician: _____
Territory: _____

Alias Name: Pacific
GLN: _____

Active
 Inactive
 Advanced

From: _____ To: _____ Remarks: _____

OK Cancel You Can Also

OR you'll need an email address on a Contact Person. Either one will suffice to be able to email the business partner effectively.

Business Partner Master Data

Code: Manual C1005 Customer
Name: Pacific Distributing Inc.
Foreign Name: _____
Group: Contract Brewer
Currency: US Dollar
Federal Tax ID: _____

Account Balance: 25,244.00
Deliveries: 0.00
Orders: 152,290.88
Opportunities: _____

Local Currency: _____

General | **Contact Persons** | Addresses | Payment Terms | Payment Run | Accounting | Properties | Remarks | Attachments

John
Mike Kay
Portal Pacific
Define New

Set as Default

Contact ID: Mike Kay
First Name: Mike
Middle Name: _____
Last Name: Kay
Title: _____
Position: _____
Address: _____
Telephone 1: _____
Telephone 2: _____
Mobile Phone: _____
Fax: _____
E-Mail: mike.kay@pacificdist.net
Pager: _____
Password: _____
Web Temporary Password: _____

Active

OK Cancel You Can Also