



Email

Once the straightforward background data setup has been accomplished, sending emails to callers, call loggers and contractors with Fast Track Help Desk is virtually automatic. The call logging screen has checkboxes for caller, logger and contractor, which are automatically checked when the software detects that each of the three parties has an email address and the "send email" flag is set to "YES". When the user clicks the "Save" button, the email addresses are looked up, and sent (they will appear in the user's Outbox unless "send email immediately" is set in Outlook).

Background Data

The background data for Employees and Contractors is located (from the main menu) in the Background Data > People section, and the background data for Loggers is located at Configuration > User Names. Each of these three tables has columns for ID (employee_code, contractor and user_name), email_name and send_email. The send_email flag can be used to facilitate always, never or sometimes sending email.

The caller and logger names appear in the call logging detail area, and the contractor contact name is looked up from the contractor table. The emails can be seen in the Outlook Outbox or Sent Items folder.

Employee Code	Email Name	Send Email	D
ABALONE, DAVID	david.abalone@iisfm.com	YES	FA

Employee/Caller/Requestor Email Data

User Name	Email Name	Send Email
SMITH, PETER	peter.smith@iisfm.com	YES

Logger/User Name Email Data

Contact Managers

Building contact managers can also receive job emails, but there is no checkbox for them on the call logging screen - if a building has a contact manager, and his or her email is set up (with a YES for send_email), he or she will be sent email.

Contact Manager	Email Name	Send Email
Bill Phillips	bill.phillips@iisfm.com	YES
Peter Markworth	peter.markworth@iisfm.co	YES

Site Code	Building Code	Contact Manager
CARDIFF	CARDIFF	Bill Phillips
LONDONCITY	CORNHILL	Peter Markworth
UK	NOTTINGHAM	Peter Markworth
UK	SWANSEA	Bill Phillips

Contact Managers are recorded with their email data, and then assigned to rows in the Buildings background data view.

How are Contractors Chosen?

There are four ways that the contractor code is chosen for the call logging screen:

1. A building and a work type are chosen which have a row in the "Work Types by Building (Building SLA's)" view; the contractor in this row is used.
2. There is no row in the work types by building view, so the contractor is looked up from the "Work Types (Default SLA's)" view.
3. A user picks a contractor from the listbox.
4. A user picks a contractor from the Contractor Finder pop-up, as a manual choice.

MAPI and SMTP

Fast Track Help Desk can send emails using two different protocols - MAPI and SMTP. MAPI is the default, and no configuration is required to use MAPI email (that is apart from setting up the background data!). MAPI allows popular software such as Outlook and Outlook Express to be used to send emails, record sent items, etc. If you wish to use SMTP to send emails, perhaps because of corporate standard, please contact iiS or your iiS agent. Fast Track Help Desk's application objects control certain behavioural factors, but the objects all have defaults which means the software works out-of-the-box. The application object which determines if the software uses MAPI or SMTP is "FN_USE_REMOTE_SMTP" - the default values for this object (as when using MAPI, Outlook, etc.) is "DISALLOW".

The location of the views which determine selection of contractor.

Company	Application Object	Allow Default
MASTER	FN_USE_REMOTE_SMTP	DISALLOW