

The Communications Edit Form

Some versions of the Orixá App include built in systems for management of communications such as emails and letters.

If your App includes these, details of how to use them are laid out below.

Developers can extend your App to add these features to it if they are not present by simply adding scripts to the BusinessObjects system-table.

The screenshot shows a web-based form for editing a communication record. At the top, there is a toolbar with various icons, labeled with a red circle '1'. Below the toolbar, the form is titled 'Communications data' and 'Communications: data ID: 37,460'. The form contains several sections: 'DateSent' (09/07/2020 13:03), 'Title', 'OrganisationsID', 'StatusID' (03. Email Sent), 'StaffID', and 'Admitt' (labeled with a red circle '2'). There are also fields for 'WhoTo' and 'WhoFrom'. Below these is an 'EmailCCList' field. The main content area is split into 'PlainContent' and 'HTMLContent' tabs, with the 'HTMLContent' tab selected, showing a large text area (labeled with a red circle '3'). Below the content area is a 'Link Record' section with a 'View' button (labeled with a red circle '4'). At the bottom is a 'FileAttachments' section with 'Add', 'Remove', and 'Open' buttons, and a list of attachments (labeled with a red circle '5'). The bottom of the form has a 'DateCreated' field (09/07/2020 12:49:15) and several checkboxes: 'Important', 'Outgoing', 'Sent', and 'Complete'.

Communications Edit Form

1. The Main Menu, which is detailed below.
2. Edit-fields for key data relating to each communication: who it is being sent to, who it is from, its status, title, cc-list etc.
3. The content area of the communication.
4. Key system fields for the communication, including a "link record" if this communication is linked to some other part of the system such as a Sales Invoice data-record, or Inspection data-record.
5. File Attachments, showing files linked to the email, and sent with it.

The Communications Edit Form Main Toolbar



Communications Edit Form Toolbar

The standard navigation, insert, post and delete buttons

These menu-buttons are standard across the whole system, and their use is detailed elsewhere in the Help.

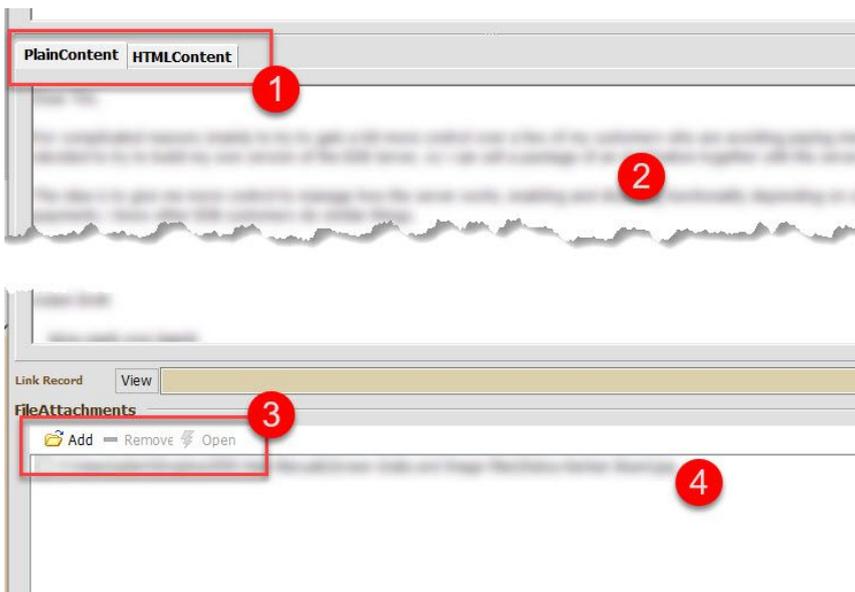


Communications Edit Form Toolbar Actions

The Action, Print and Send Email buttons

1. Actions: Click to execute actions such as linking the current communication to another record in the database.
2. Print: Click to print the current communication.
3. Add / View Links: This allows you to link this email to any other record in your App, depending on the settings for Linkages.
4. Send Email: Click to see a selection of mail-related options including "Add Attachment", "Send Email" etc.

Plain Content and HTML Content



Communications Edit Form Content Management

1. The Communications Edit Form includes the ability to display both the "plain text" copy of any email, and the "HTML content", each are displayed in separate tabs in the edit form. HTML Content can include web-links, images, bold font etc., Plain Content can only include text.
2. If an email includes "web content" it will be displayed here. Note that to increase the security of operation of the system web content is stripped of risky elements that might infect your system with a virus when they are downloaded.
3. Add / Remove / Open file attachments: Click here to process any on-disk files linked to the communication.
4. All File Attachments will be listed in this area of the screen.

