

Lesson 6.1, 6.2 – Create and Send Emails Using SAP



Objective

At the end of this lesson, you should be able to:

- Create and Send Emails Using SAP



Summary

Create and send e-mails with an external address list by using the Mail From. An External Address List is a list of members belonging to a buying group that is identified by external identifiers.



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Creating and Sending Emails

Tab Navigation: SAP Portal >> Mail Form



<<INSERT SCREEN CAPTURE>>

1. The **Edit Mail Form** screen appears.
2. On the **Edit Mail Form** screen, click on the **Create** button (insert screen shot of this button) it's the piece of paper icon) or press **F5** on your keyboard
 The **Create Mail Form** dialog box appears.
3. Enter the Mail Form Name in the *Mail Form* field.
 The Mail Form name must start with a "Y."
4. Click on the *Mail template* field and the drop down menu button will appear at the end of the field.
5. Click on the **drop down menu** to select an existing template.
 A **Template** dialog box appears with a list of E-mail templates.

These Templates need to be defined.

6. Click on the appropriate E-mail template from the list.
7. Click on the **green** checkmark to continue.
 The **Create Mail Form** dialog box reappears with the name of the selected template in the *Mail template* field.
8. On the **Create Mail Form [template name]** screen, in the *Form Usage* field, use the drop down menu to select the appropriate form usage.
 Five options appear
 - a. General usage
 - b. Internet Mail (SMPT)
 - c. Mail (letter)
 - d. Fax
 - e. SMS (pager Services)
9. Select Internet Mail (SMPT)
10. In the *Text Type* field, use the drop down menu to select the appropriate text type.
 Four options appear
 - a. Plain text

- b. HTML
- c. Multi MIME
- d. PDF

11. Select the **HTML** option.
12. On the **Form** tab on the left side of the screen, double click **TEXTBLOCK_1** in the **Mail** section.
 Your data is now populated in the text box on the right hand side of the screen.
13. Highlight the line and create a URL by clicking the button next to the '-' button.
([Insert a graphic of this button](#))
14. Enter the Tracking ID by clicking the **green '++'** button ([Insert graphic of this button](#))
15. Highlight the **Tracking ID line** and click on the **Make URL** button ([Insert graphic of this button](#)). The button is located before the '++' button.
16. On the **Form** tab, right click on **FIRST_PAGE** (located on the left hand side of the screen).
17. On the **Short Cut** menu, click on **Create >> Subject Line** to insert the Subject Line of your E-mail. A popup Text Box appears.
18. Enter the **Subject Line** of the E-mail Form in the **Text Box**.
Point this out in the screen shot.
19. Click on the  **Save** button to save your data.
20. On the **Form** tab, to attach a document to your E-mail, right click on '**FIRST_PAGE**' click on **Create >> Attachment**.
21. To preview the E-mail Form, select the **Mail Preview** button ([Insert a graphic of this button](#)). Note: The Mail Preview button is located next to the On/Off button.
22. A preview of your E-mail Form appears.
23. On the **Preview Mail [Template Name]** screen, click on the **Communication Channel Test button** (F8) ([Insert a graphic of this button](#)) to send a proof message.
24. The **Communication Channel Test Mail Form** dialog box appears.
25. On the **Communication Channel test: Mail Form** dialog box, on the **Communications Channel** tab, select the radio button in the *Recipient's E-mail Add.* field.

26. Enter the test e-mail address in the *Recipient's E-mail Add.* field.
27. On the **Test Procedure** tab, select the radio button in the *Test with Business Partners* field.
28. Enter the business partner number in the *Business Partner* field or click on the **possible entries** button to search for the number.
29. Click on the **Continue** button (green checkmark button).
30. Your E-mail Form will appear.
31. Open **MS Outlook** and check to make sure that you received the proof message.