

AIS Technology's Give It A Try! Tip TAM® – The Red Paperclip

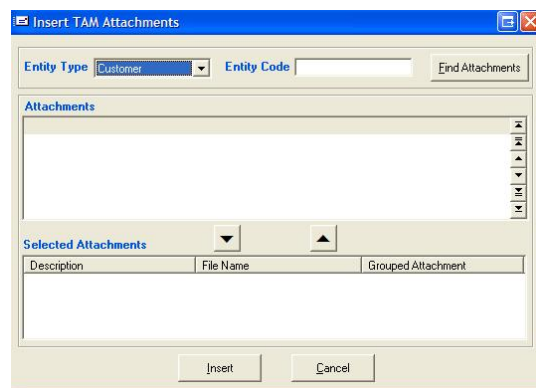
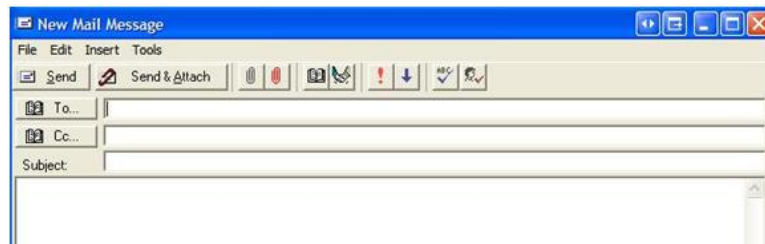
More and more people are attaching information in their management system every day and wanting to send that same information back out of their systems via e-mail... but not many people are familiar with the red paperclip. This little guy allows you to select and e-mail items that are found in a client's attachment list in TAM®.

In order to take advantage of the red paperclip, you must start the process of sending an e-mail from the management system. There are several ways to open a new e-mail message window in TAM®, for simplicity's sake, I will focus on the process from the homebase window.

Toward the top of the homebase screen, click on the New Mail Message button highlighted below.



This will open a TAM® integrated e-mail message window. (If you do not see red paperclip button seen below, contact your TAM® administrator. They will need to verify the system settings in TAM®.)



Type up your complete e-mail message, including the addressees and click on the red paperclip button at the top of the screen. (You have access to your normal address books in Outlook on this screen as well as the TAM® contact list.) That will bring you to screen on the left.

Enter the customer code where the attachments exist at the top of the screen and you will see every attachment for that client - that you have access to - in the Attachments window in the middle of the screen. Highlight the attachments you want to e-mail and click the down pointing arrow button in the middle of the screen. That will move your attachments to the Selected Attachments window at the bottom of the screen. (The attachments will ALWAYS remain attached to the customer; this process creates a copy of the attachments to go out via e-mail.) After you have selected all the attachments you wish to send click the Insert button at the bottom of the screen. This will take you back to the New Mail Message window where you can click the Send button at the top of the screen to send your e-mail.

And that's a quick way to e-mailing multiple attachments from TAM®, so...

Give It A Try!