

## 6587: New Prospect Trigger Email

### United Tool & Mold

#### Overview:

- Project will send an email to the Production Administration security group (PA) when a new prospect is added.
- Email will let users know to follow up w this prospect

#### Details

- Accounts Receivable > File > Prospects > New

Prospect Maintenance - Add

PLA

Type: Prospect

Bill To Address ☐ Non US

Ship To Address ☐ Non US

Name

Address 1

Address 2

Address 3

Address 4

Address 5

City, State, Zip

Country, County

Attention

Country Phone

Country Fax

Email

URL

Last Updated: 01/01/1980

Last Updated By

Options Comments

Alpha Sort

Currency: USD

Catalog Currency: USD

Language

SIC

Price Category

Configurator Discount

Use Single Group Seq Quoting

Normal G/L Account

Credit Limit

Sort

Sales Rep

Loc

Area

Branch

Ship Via: BEST WAY

Terms

BI Quote ID

Freight Zone

External ID

Ship FOB Message

Commission

Carrier

Service Type

CRM Restriction Level: None

CRM Assigned User/Group

Save

Contacts

Order Notes

Taxes

Script 1

Script 2

Script 3

PROSPECT - PSM001

GAB IS ACTIVE

.NET

CRM004 - 012422.0959

- Once prospect is added (type drop down box should say prospect), hitting save will automatically send the email to the entire PA security group
- Email contents are:  
"Prospect \_\_\_\_ has been created by \_\_\_\_\_. Please follow up to gather any additional information required to set them up as a Customer."

#### Assumptions

- Courier should be set up and running (script will display error if it does not detect this running).

- Group PA should be set up in System Support > File > Group Security Maintenance, and should contain at least one member with a valid email address.