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

- 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.