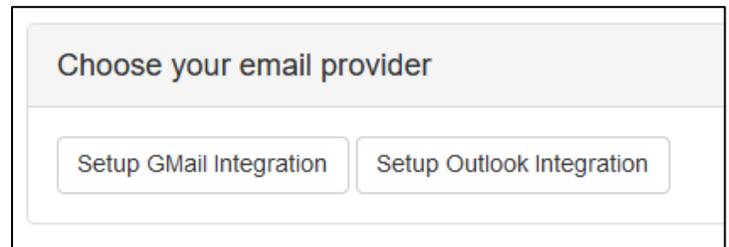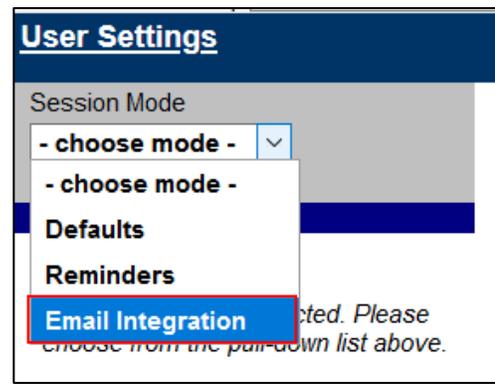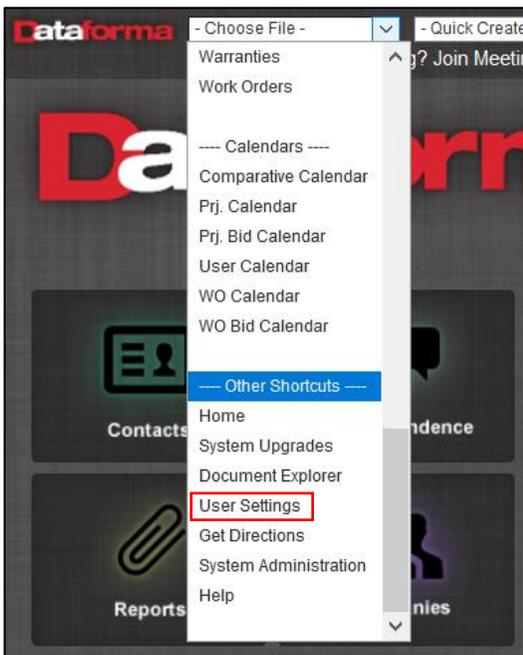# Advanced Email Functionality

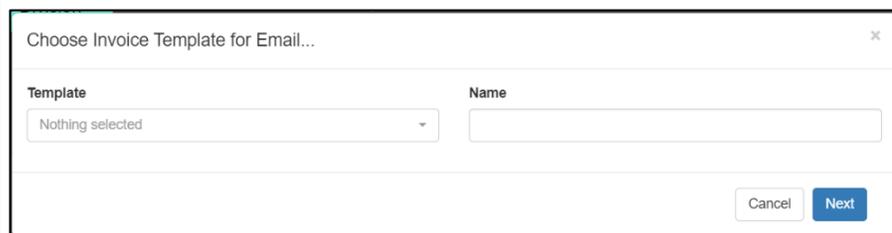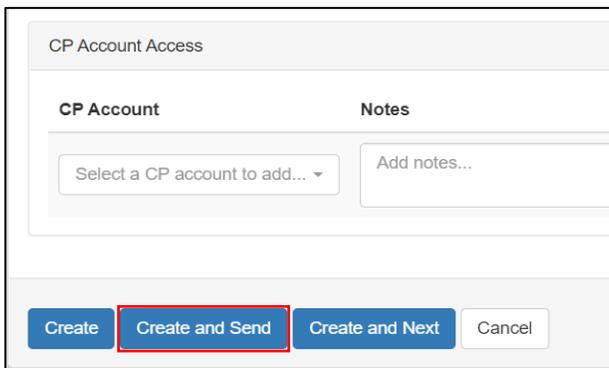Send a Dataforma Accounts Receivable Invoice using your own email client

Adding an Email

Dataforma is beginning to integrate with email services such as Outlook and Gmail. We currently allow one email per user. This allows you to securely connect Dataforma with your email client. Steps to add an email: Go to "user settings" from the - Choose File - drop down → Select "Email Integration" as the Session Mode → Choose one of the two options to add an email → Input your credentials and allow Dataforma to have access your email.

Sending an Email

This feature is currently only available through an Accounts Receivable Invoice. When creating an Invoice, the user will have a choice to "Create and Send" the Invoice to any Contact in your Dataforma database. First, the user will be able to choose from existing A/R templates to include as an attachment to the email (will default from quick print if the user has this setup).

After selecting the template and customizing the file name, the user is directed to the email detail form. Here the user can enter the following: To Contact, any CC Contacts, Email Subject Email Body, and any additional attachments. To further streamline the communication process with the customer and track that communication, the user then has the option to create a correspondence all within the same form. After hitting send, the email and attachments are sent through the integrated email client and a Correspondence is created if there are no errors with sending the email. The user can then refer to their email client to see the communication in their sent folder and see any replies from the customer.