

### **Address Book dialog box**

You can pick names of persons to receive your mail message from one of your address books.

1. Select an address book from the "Address Books" list.
2. Select the recipient name from the "Name" list.
3. Click OK.

## TeamMail dialog box: Basics panel

### Recipient

Specify the names of the people to receive the message. Use your e-mail system's required format for the recipient names. For example, type the first name first for Lotus Notes; type the last name first for cc:Mail. Press ENTER to add another recipient.

To look up a name in one of your e-mail system directories, click the address book icon at the right of the Recipient text box.



You must specify at least one recipient for each message.

### Individual message

You can specify unique messages for some or all recipients.

### Send mode

You can send the message to all recipients at one time. Or you can elect to route the message sequentially from one address to the next, so that each recipient receives the message only after the person listed before that recipient has received it and sent it on.

### Delivery priority

Select the priority for sending the mail message. These priorities depend on your e-mail system.

### Subject

You can specify a subject for this message that will be sent to all recipients.

### General message

You can send a general message with the current document that will be sent to all recipients.

### Route information

You can "Save" the recipient list you have entered and then, using "Open," copy the saved list file into another TeamMail message at any later time. You can also "Clear" the currently entered recipient list.

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## **Login dialog box**

Use this dialog box to log in to your electronic mail system.

1. Specify your password and any other information that your e-mail system may require.

This information depends on your e-mail system and may include your user name and the path to your mail box.

2. Click OK.

## TeamMail dialog box: Options panel

### Return document to originator when done

You can specify that the current document returns to you after the last recipient has received the mail message. If you select this option, Return to Originator is added to the last recipient's File - TeamMail cascade menu.

### Allow recipients to modify route

If you select this option, recipients can add, delete, or modify names for succeeding stops.

This option is available only when you route e-mail from one address to the next, rather than sending it to all at once.

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## TeamMail dialog box: Tracking panel

### To track document progress

The following three options are available only when you route e-mail sequentially from one address to the next, rather than sending it to all at once.

### Send message to originator when document is forwarded

You can have your mail system notify you each time a recipient forwards the current document. Use this option to track the progress of the document and determine the source of a delay.

### Send message to alternate when document is forwarded

You can have your e-mail system notify a person you specify each time a recipient forwards the current document. Use this option to track the progress of the document and determine the source of a delay. If you want to look up a name, click the address book icon on the right-hand side of the text box to access one of your e-mail system directories.

### Include routed document with tracking messages

If you select either or both of the first two options on the Tracking panel, you can also have your e-mail system send you (and/or the alternate you specified) a copy of the document as it exists at each stop on the route. Use this option to track changes in the document.

### To notify sender of message receipt

#### Send return mail receipt when mail message is opened

You can have your e-mail system notify you when each recipient opens the forwarded mail message.

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## Editing the route of a message sent to you

If a message is sent to you and other recipients sequentially, rather than all at once, you can change the message route before sending the message on to the next recipient.

1. In your e-mail system, open the routed message.
2. Open the TeamMail attachment.
3. Choose File - TeamMail and then from the cascade menu choose "Edit Route," or in Approach, "Route."



If this menu option is dimmed, you are not authorized to edit the route.

4. Edit the route as necessary.  
You can add, delete, or change the recipients who have not yet received the routed message.
5. Click Send to send the message to the next stop.

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## Saving routing information

If you know you often route e-mail to the same recipients, you can save this information and use it again.

1. Choose File - TeamMail.



2. In Approach, select the desired Send option and click Route.  
In Freelance Graphics, select a Send option other than "Message only" and click OK.  
In Word Pro, select the Send option "Current document, as an attachment" and click OK.
3. Specify your password and any other required e-mail information and click OK.
4. Click the TeamMail Basics panel tab if necessary.
5. In the Recipient list, specify the route you want.
6. Click Save or Save As.  
TeamMail saves the route information in the file you specify.

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## Details: Sending a message with an attachment

### Selecting materials to send

In Word Pro, you can select existing text in a document to send just that portion of the document. You make this selection before choosing File - TeamMail.

In Freelance Graphics, you can select specific pages of a presentation to send just those pages. You make this selection after choosing File - TeamMail and specifying what to send.

In Approach, you can attach a file with or without data, and a snapshot of the current view. You make this selection after choosing File - TeamMail.

### Specifying file names for attachments

The file you attach may have a long file name, but TeamMail will only transmit 8 characters for the file name and 3 for the extension to the recipients of your message.

### Specifying what to send

In Word Pro, you choose from these options:

- Message only  
Sends a message without an attachment.
- Message with current selection's text as message body  
Sends the current selected text as the attachment.
- Current document, as an attachment  
Sends the entire document as an attachment.

In Freelance Graphics, you can choose to send:

- Message only  
Sends a message without an attachment.
- Specified pages, as an attachment  
Sends pages you specify after clicking OK to choose what to send.
- Current presentation, as an attachment  
Sends the entire presentation as an attachment.
- Attach Mobile Screen Show Player, too  
Includes the screen show player with the presentation, for those recipients who do not have Freelance Graphics installed on their systems.

In Approach, you can send the following:

- Message only  
Sends a message without an attachment.
- All databases attached  
Includes all databases, with data, in the current Approach file.
- Blank databases attached  
Includes joins in the current databases, but no records.
- Either the current view of the attached databases, or all views
- A snapshot of the current view of the attached databases

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## Sending a message with an attachment

You can attach a Word Pro document or selected text in a document, a Freelance Graphics presentation or certain pages of a presentation, or an Approach database view along with your message.

1. Open the document and choose File - TeamMail.

If the document was routed to you, choose "Send New Message" (Word Pro or Approach) or "Create New Message" (Freelance Graphics) from the cascade menu.



See [details](#)

In Word Pro, you can send selected text in your document by selecting text before choosing File - TeamMail.

2. Select the type of attachment to send.

See [details](#)

3. Click OK (Word Pro or Freelance Graphics) or Route (Approach) to go on to specify other TeamMail options. In Approach, you can also click Mail to go straight to your e-mail system, skipping the TeamMail options.
4. Specify your password and any other required e-mail information, and click OK.
5. In the TeamMail Basics panel, specify the name of a person that you want to receive this message in the Recipient box. To select the name from an address book, click the recipient icon at the right of the Recipient box.



6. To send individual remarks to this person, press TAB and type the remarks.
7. To send this message to others, press ENTER and repeat steps 5 and 6 for each person that you want to receive this message.
8. Under "Send mode," select whether to send the message to all recipients simultaneously or route it sequentially.
9. Select other desired options on the Basics panel.

See [TeamMail Basics panel](#)

10. To be notified when the message is received, click the Tracking tab and select "Send return mail receipt when mail message is opened."
11. To have the document returned to you, click the Options tab and select "Return document to originator when done."
12. Click Send.

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## **Sending a message using TeamMail**

In Word Pro and Freelance Graphics, you can send a text-only message without leaving the application.

1. Choose File - TeamMail.



If the current document was routed to you, choose "Send New Message" (Word Pro) or "Create New Message" (Freelance Graphics) from the cascade menu.

2. Select "Message only" and click OK.
3. Specify your password and any other information that your e-mail system may require and click OK.
4. Specify the names of the people who should receive this message.
5. Type the message subject.
6. Specify the message you want to send.
7. Click Send.

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S ;H\_EDITING\_MESSAGE\_ROUTE\_STEPS',0)} [See related topics](#)

## **Sending a routed message to the next recipient**

If a message with a TeamMail attachment has been sent to you and other recipients sequentially, rather than all at once, you can send the message on to the next recipient after reading it yourself.

1. In your e-mail system, open the routed message.
2. Open the attachment.
3. Choose File - TeamMail and then choose "Send to Next Stop" from the cascade menu.



If you are the last recipient and the message originator requested the return of the document, choose "Return to Originator" from the cascade menu.

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## Overview: TeamMail dialog box

You can create a simple text message and send it by itself or with part of a document (Word Pro document, Freelance Graphics presentation, or Approach database) to one person or a group of people. You can also attach the current document to a message and send it to all recipients at the same time (broadcast) or route it from one recipient to the next.

If you often route messages to the same people, you can save the routing information that you enter and later reuse it to complete the recipient options quickly. This is very useful if you often send messages to a long list of recipients.

You can track the receipt of your message along the route by selecting tracking options for sender notification.

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## Overview: TeamMail

TeamMail works with your electronic mail system to allow you to send and reroute mail messages from within a Lotus application. Using TeamMail you can:

- Send a simple text message and distribute it to one or more people.
- Send a message with part or all of a Word Pro document, Freelance Graphics presentation, or Approach database.
- Route a document from one person to the next.
- Track the progress of a routed message by having a mail message sent to you each time a recipient forwards your document to the next recipient.
- Save a distribution route and use it to quickly send messages to people on frequently used mailing lists.
- Distribute an entire document to members of a workgroup using TeamReview. Available from Word Pro and Freelance Graphics, TeamReview gives you access to review and comment tools.

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## Routing a message using saved route information

You can use saved route information to specify the recipients and dialog box options for your message.

1. Choose File - TeamMail.



2. Select a Send option.
3. Click OK in Word Pro or Freelance Graphics. Click Route in Approach.
4. Specify your password and any other required e-mail information and click OK.
5. Click Open.
6. Specify the desired file (\*.SFR) with the saved route information, and click OK.  
TeamMail uses the file to automatically complete the appropriate TeamMail dialog box options.
7. (Optional) Modify the dialog box options to change the way the current message is sent.  
This information is not saved for future use unless you explicitly save it with the Save or Save As command.
8. Click Send.

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{button ,AL('H\_SAVING\_ROUTING\_INFO\_STEPS',0)} [See related topics](#)

