

12 Mailing Form Templates

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Mailing Form Templates

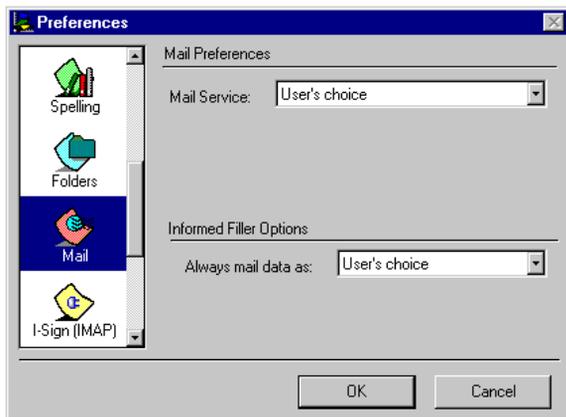
An electronic mail system provides services for sending and receiving information electronically, making it an effective tool for moving information throughout an organization. In this chapter you'll learn how to send form templates with Informed Designer. In particular, you'll learn about the Mail panel of the Preferences dialog box, and how to use the Send command.

Choosing Your Mail System

Informed Designer accesses your e-mail system through an Informed mail plug-in. If you have more than one mail plug-in installed, you should use Informed Designer's Preferences command to specify your preferred mail system. Otherwise, you'll see a dialog like the one below asking you to select a mail system each time you send a form template.



To specify your preferred mail system, choose **Preferences...** from the Edit menu and click the Mail icon in the scrolling list. The dialog box changes to show the Mail Preferences panel.

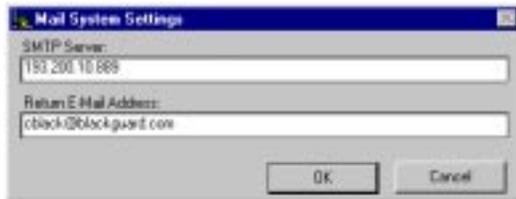


Click the 'Mail Service' drop-down list and make a selection from the available choices. The choices in the 'Mail Service' drop-down list correspond to the mail plug-ins you have installed in your Plug-ins folder.

Depending on which mail system you select, the Mail Preferences panel will change to display one or more extra buttons, allowing you to configure mail settings or edit your personal address book.



If you click the 'Settings' button, Informed will display a mail settings dialog appropriate for your selected mail system. The Mail System Settings dialog for Internet Mail is shown below.



If you select the 'Address Book' button (Internet Mail only), you'll see the Address Books dialog.



Click 'New' to add a new recipient address. To edit or remove an address, select the name in the scrolling list, then click the 'Edit' or 'Remove' button.

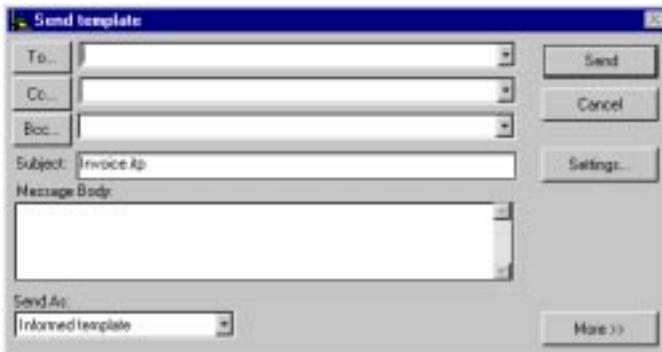
The Send Command

To mail a form template, choose **Send...** from the File menu. If your template contains any unsaved changes, you'll be warned that the template must be saved before continuing.



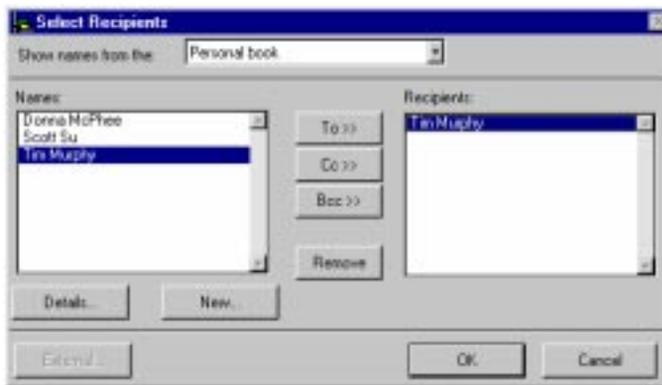
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Click ‘Save’ to save the template and continue. The Send Template dialog appears.



Specify one or more recipients, the subject, and the format in which to send the template. You can also click the ‘More’ button to display controls for adding an attachment to your mail message.

The addressing dialog and method of selecting recipients varies depending on which mail system you use. For example, if you’re using a VIM or SMTP compliant mail system, you’ll see this addressing dialog when you click the ‘To’ button to select a recipient.



Select one or more recipients, then click ‘OK’ to return to the Send Template dialog. Click ‘Send’ to send the template.

Details about the addressing dialogs for other mail systems can be found in the “Mail Plug-ins” topic of Informed Designer’s on-line help system.

In addition to mailing form templates, you can also configure suggested routes using Informed Designer’s Routing command. Suggested routes aid the Informed Filler user in addressing and mailing completed forms. For more information, see Chapter 5 of your *Informed Designer Forms Automation* manual.