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Pre-Email Script

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Overview

The *Pre-Email Script* setting allows users to run a script that can be used to edit report attachment names, change the subject line of a message, update user defined fields, or write an audit before an email is sent from within SalesPad. When an email is sent within SalesPad, the Pre-Email script will execute.

Usage

Pre-Email scripts will execute whenever an email is sent in SalesPad Desktop. Emails are sent from locations such as Sales Batch Processing and Sales Document Mass Update screens. Emailing can also be configured using Smart Printing. For documentation on how to set up emailing with these features, follow the links provided in this documentation, or search for the Smart Printing or Sales Batch Processing documentation on our website.

- [Smart Printing](#)
- [Sales Batch Processing](#)

For documentation on setting up emailing in SalesPad Desktop, click [here](#).

Setup

In the Settings screen, filter results by typing “email” in the filter search box. This will narrow results down to email related settings.

There are two scripts in the email settings for SalesPad Desktop, the On Load Email script and the Pre-Email script. Select the ellipsis icon in the empty text field on the Pre-Email setting to add a script. This will open the script editor. After you have added a script and it compiles, save, logout and then log back in.

The screenshot shows the SalesPad Settings window with the filter set to "email". The settings are organized into sections:

- Customer Search**: Search Email Address (False)
- Sales Document Entry**: Auto Prompt For Notification Email (False)
- Sales Email Confirmation**:
 - 1) Email Server hostname or IP address: smtp.gmail.com
 - 2) SMTP User: user@salespad.net
 - 3) SMTP Password: *****
 - 4) SMTP Port: 587
 - 5) Enable SMTP over SSL or TLS: True
 - Email To Fax Format String: {0}@hellofax.com
- Sales Entry**:
 - Use Billing Email From Customer: True
 - Use Shipping Email From Customer: True
- Sending Emails**:
 - Can Resend Emails: True
 - Default Bcc Email Address: False
 - Default Cc Email Address: False
 - Default Email Address: Billing
 - Default Purchasing Email Subject Line Format:
 - Default Purchasing Email Subject Line PO UDF:
 - Default Sales Document Email Subject Line Format:
 - On Load Email Script:
 - Pre Email Script**:
- Smart Printing**: Default Email Subject Line: SalesPad Auto Confirmation

The "Pre Email Script" field is highlighted with a red box, indicating where to click the ellipsis icon to add a script.