# Email Selected Reports from within SFH

This feature allows for emailing selected reports directly from within Software for Hardware. However, Microsoft Outlook must be installed on your workstation and functioning as the default email application for this enhancement to work. If you want to use this new feature, but do not have Outlook set as your primary email, you will need to contact your IT department to install and configure the application on your workstation.

The following can be emailed directly from SFH: Sales Orders, Sales Proposals, RGAs, Purchase Orders, Picking Tickets, Packing slips, Correspondence and all reports located on the Contract Job/Quotes *Reports* menu.

How it works:

1. Launch Software for Hardware.
2. In this example, we will demonstrate emailing a report from within a Contract Job. Regardless of access method, or screen, the program is identical in functionality.
3. Open a *Contract Job*.
4. Select the *Reports* menu selection.
5. The *Reports* screen appears.
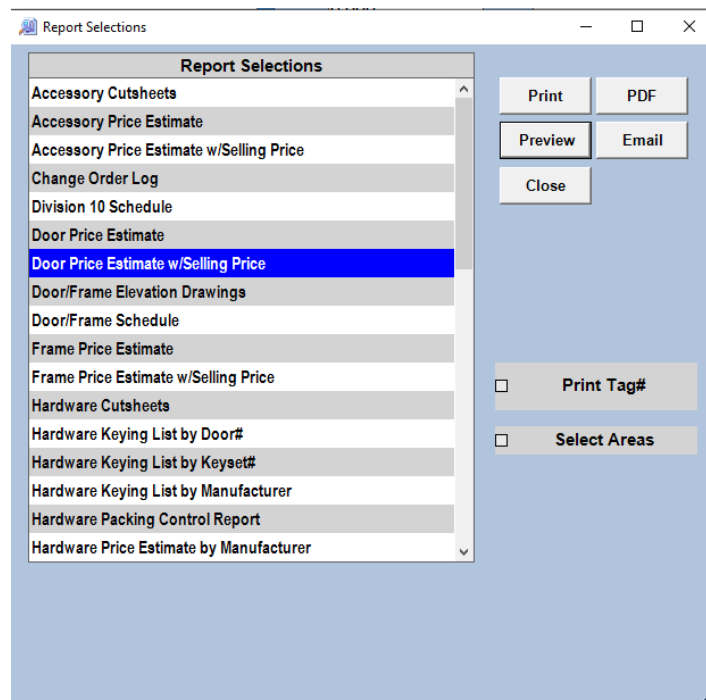
6. Select a report.
7. A new button in the upper right appears, entitled *Email*.
8. To email the selected report click the *Email* button.

9. In the background SFH is generating the selected report, converting it to a PDF file then attaching it to a new email form. See image below:
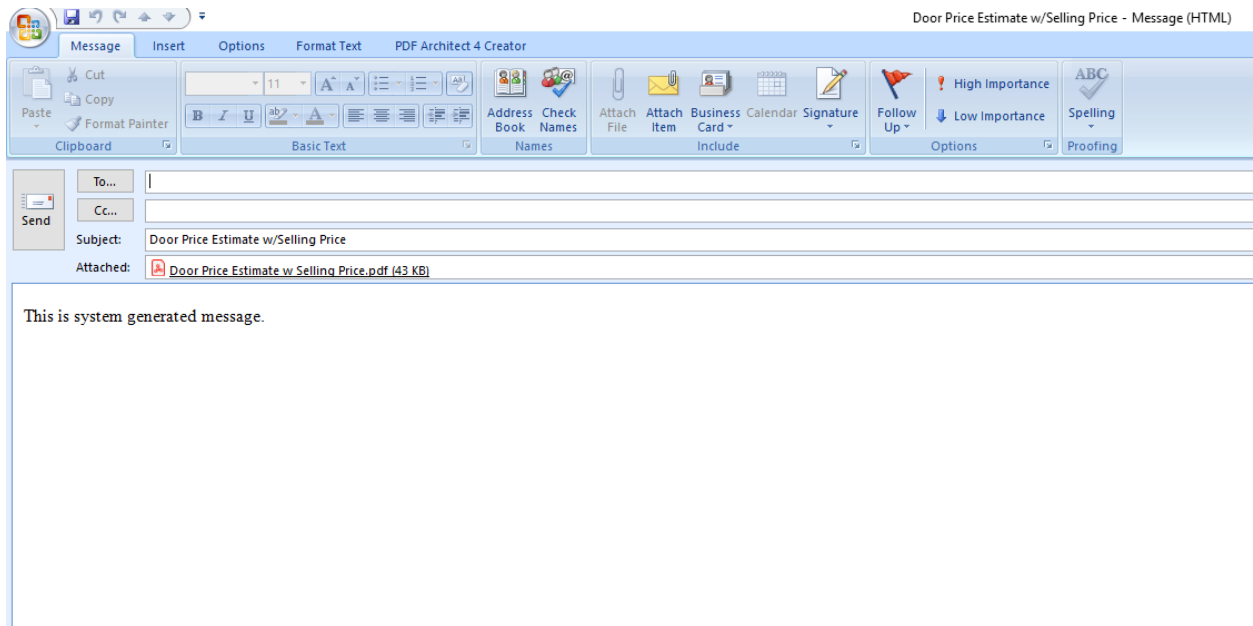
10. All you need do is enter the email address you are sending the report to along with any text you desire.
11. When ready to email click the *Send* button.
12. Your email will be sent and your screen will return to the SFH *Reports* menu.
13. To email from a Purchase Order, open any PO and click the *Preview Report* menu selection.
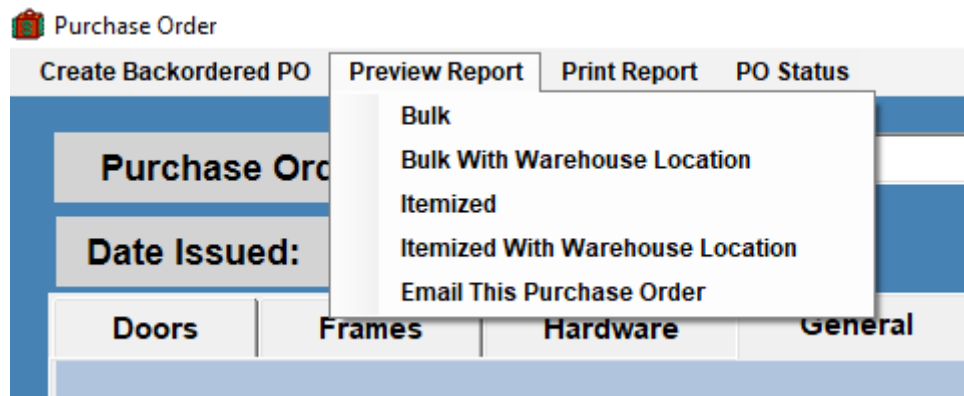
14. Note the menu choice of *Email This Purchase Order*.
15. There are also email options on both the Picking Ticket and the Packing Slip *Preview* menus.
   a. **NOTE** – You cannot email from the *Preview* menu choice in the PO, Picking Ticket or Packing Slip listing grids. You must open the PO, Pic or Pac to email.

16. To email from a Sales Order, open any order and click the *Preview* menu selection.

17. Note the menu choice *Email this Sales Order#: 163*.
18. There are also email options on both the Sales Proposal and RGA *Preview* menus.
19. You can also email from the Correspondence screen.

20. Fill in the form then click the *Email* button.