

X: The Challenge

The personal touch. In our modern world driven by Web 2.0 technologies, everyone expects the personal touch. And no one likes automated emails. But your business relies on email communication to share key information with business partners. Buying product. Acknowledging orders. Sending invoices. Emails are part of every business's life to communicate with outside business contacts. And those automated emails from SyteLine are so impersonal...



Solving for X = EmailX powered by SolutionsX

You need a way to make those automated emails a little less impersonal. EmailX extends the standard functionality built into your SyteLine ERP empowering you with full customization of every email sent by a customer or vendor document profile. No more generic DoNotReply@MyCompany.com emails. Need to communicate some key information to all of your customers? Want to include it with every invoice or order verification you send out? EmailX gives you the power to customize all those emails sent from your SyteLine ERP.

EmailX Works for YOU on YOUR Terms

Do you need the emails generated by purchasing to actually come from purchasing and the ones generated in sales to come from sales? We understand. EmailX makes it possible. Want that Order Verification Report to come directly from the sales rep without having to download and attach to a separate email. We get it. Wouldn't it be great if the invoice number was actually in the subject of the email? It's all possible with EmailX!

Key Features

- **Built on Document Profiles** EmailX uses the standard SyteLine Document Profile technology part of every SyteLine implementation.
- **Custom Sender** Customize the default from email address for each task with a preset address or dynamically set it based on the logged in user.
- **Dynamic Subject Lines** Set a custom subject line for each email including variables pulled straight from the report being sent.
- **Personalized Email Body** Configure a personalized message to include in the body of each email, unique to each task type. And update it any time you need to.

Technical Features

- **Customer Document Profiles** Support for the most used document profiles including the Order Invoicing/Credit Memo, Order Verification, Estimate Response Form, and Customer Statements reports.
- **Vendor Document Profiles** Support for the most used document profiles including the Purchase Order Report and Remittance Advice
- **Automatic Variables** Pull any data property from the primary IDO for each report.

Coming Soon

- **Rich Text HTML Emails** The option to design full HTML emails is coming in an upcoming release.
- **More Document Profile Tasks** Additional SyteLine standard document profile tasks are being added regularly. (Not all tasks are currently supported, contact us for a current list of supported tasks).
- **Any Report. Any Time.** Need the ability to send emails with reports not included in the standard Document Profile line up. We're working on adding support for this functionality with any SyteLine report.