

## *Appendix H*

# Having T.O.M. Automatically Send Emails During Key Events.

T.O.M. has a powerful feature that allows you to designate key events that will cause an Email message to automatically be created and sent to up to three Email address for each field trip. T.O.M. allows you to select which events out of a list of predefined events are to cause email messages to be sent. T.O.M. also lets you define which type of Email address should receive the email message when the event occurs. Further, T.O.M. let's you define how the email message is to be composed and what information concerning the field trip it is to contain using T.O.M.'s Email Templates. Finally, you can enter up to three default email addresses per customer that are *stamped* on each new field trip added for that customer. You may then change or remove those email addresses on the individual field trip screen. Below is a detailed discussion of how you would setup and use this powerful feature in T.O.M. and where you may find additional information on the various subjects discussed.

**NOTE: This T.O.M. Feature will only work if your default email client on your computer uses a 'MAPI' email standard. This feature will not work if your default email client uses another standard besides MAPI such as 'POP3'. T.O.M. will automatically try and send these emails using whatever email client you have designated as your 'default email client' on your computer.**

### Telling T.O.M. When You Want An Email Sent

T.O.M. has a set of predefined events that occur to field trips that you can select to have emails sent to field trips. T.O.M. allows you to specify which of these events will cause an email to be sent and to which or the up to three email addresses the email is to be sent to. To work with these settings you must click on the Email Options button in the District Options Screen (Figure H. 1). This will cause the Email Options screen to display (Figure H. 2). For more information about T.O.M.'s Email Options see Chapter 4 – District Options in your [Getting Started Manual](#).



District Options

General Assignment Hours Averaging Billing Other Schools / WebTrips Map

District Name: PARADISE VALLEY SCHOOL DISTRICT

Transportation Title: DEPARTMENT OF TRANSPORTATION

Address #1: 20621 North 32nd Street

Address #2:

City / State: Phoenix AZ Zip: 85024

Phone: 493-6320

District Logo:

PARADISE VALLEY SCHOOLS

General Assignment Options

Replace Cancellations:

Replace Auto Skips / Makeups:

Log Assignment Activity:

Drop / Return Trip Standard Hours: 2.0

Auto Fill Field Trip Lists:

Auto Fill Field Trip Request Lists:

Default Vehicle Type: [Dropdown]

Custom Fields Garage Checklist Email Options Exit

Figure H. 1- Accessing the Email Options From the District Options Screen

Click on the Email Options Button.



**Email Options**

**Email Options**

**Requestor:**

- Status changes in Web Trips:
- Accepted by Transportation Department:
- Denied by Transportation Department:
- New Trip entered into dispatch database:
- Trip Assigned a driver and vehicle:
- Trip Canceled:
- Trip Billed:
- Trip paid:

**Administrator:**

- Status changes in Web Trips:
- Accepted by Transportation Department:
- Denied by Transportation Department:
- New Trip entered into dispatch database:
- Trip Assigned a driver and vehicle:
- Trip Canceled:
- Trip Billed:
- Trip paid:

**Approver:**

- Status changes in Web Trips:
- Accepted by Transportation Department:
- Denied by Transportation Department:
- New Trip entered into dispatch database:
- Trip Assigned a driver and vehicle:
- Trip Canceled:
- Trip Billed:
- Trip paid:

**Exit**

Figure H. 2 – The Email Options Screen



## Telling T.O.M. How You Want Your Emails to be Composed

When composing the automatic Email messages T.O.M. uses a set of predefined Email Templates that you can modify. These Email Templates allow you to specify what text is to be included in the email and what information is to be included about the specific field trip is to be included as well. There is a template for each predefined event that can cause T.O.M. to send an email. To work with these Email Templates you would select File / Other / Templates / Email Templates from the main T.O.M. menu (Figure H. 3). From here you may select one of these templates and instruct T.O.M. the composition of the automatically generated email message (Figure H. 4 and Figure H. 5). For more information about working with the Email Templates see Chapter 12 – Email Templates of the [Getting Started Manual](#).

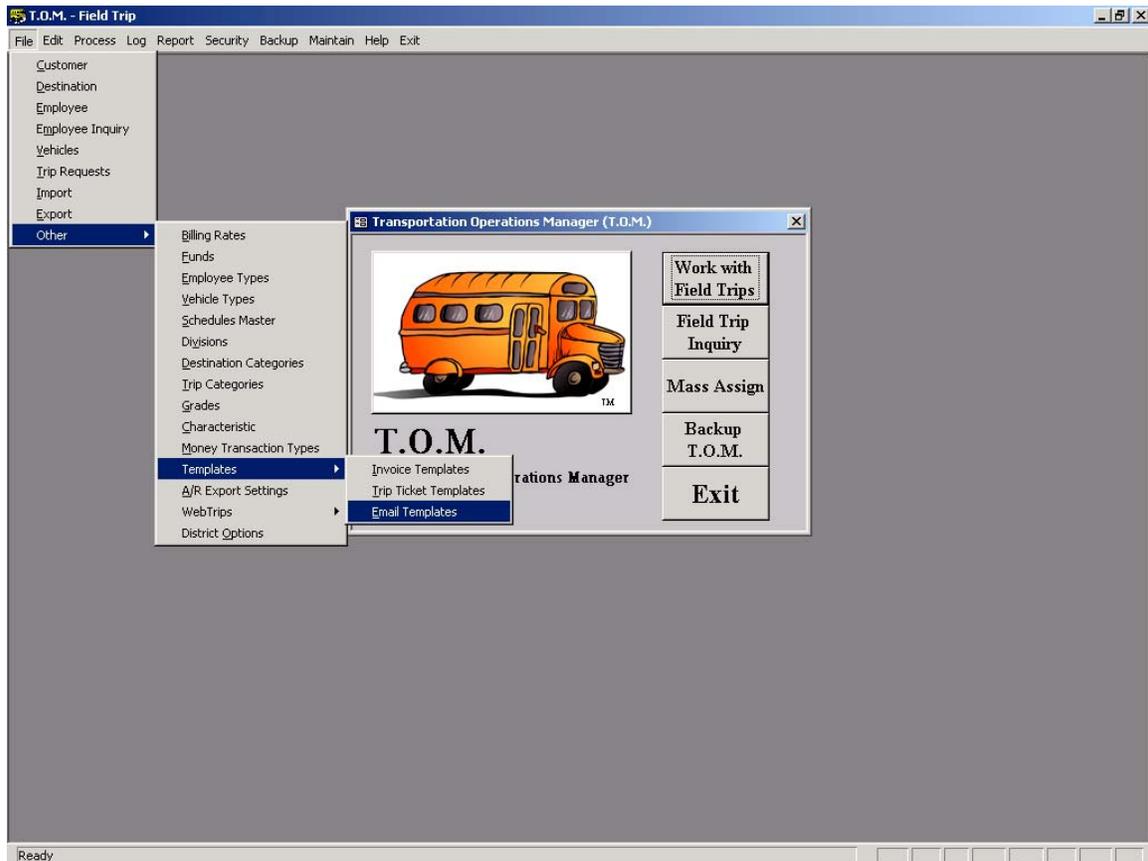


Figure H. 3- Accessing the Email Templates Option from T.O.M.'s Main Menu

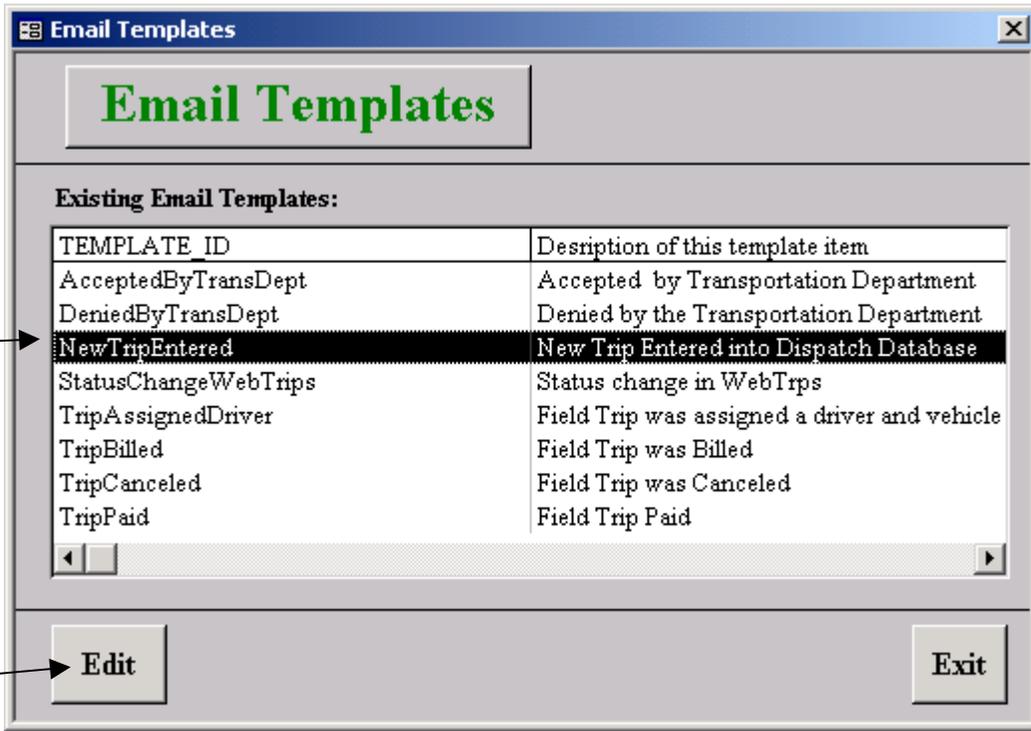


Figure H. 4 – The Email Templates List Screen

Click on a predefined Email Template and then Click the Edit button or double click on the desired Email Template.



**Email Template**

Template ID:

Description:

**Email Text** | Customer / Destination | Dates / Times | Other | Miles/Hours/Passengers | Trip Requests

Subject of Email:

Text at Beginning of Email:

Text at End of Email:

Show: Title:

Trip #:

OK Exit

Figure H. 5 – The Detailed Email Template Screen

### How Do You Tell T.O.M. Who to Email To?

T.O.M. allows you to specify up to three default Email addresses per customer (Figure H. 6). These Email addresses are then *stamped* on both new Field Trip Requests and new Field Trips as they are entered into T.O.M. (Figure H. 7). The user may then change these email addresses for the individual Field Trip Request and Field Trip. For more information about setting a customer’s default Email Addresses see Chapter 5 – Customers in your [Getting Started Manual](#).



The screenshot shows a window titled "CUSTOMER" with a close button in the top right corner. Below the title bar is a header area with the word "Customer" in a large, purple, serif font. Underneath is a text field for "Customer #" containing the number "37". There are four tabs: "General", "Billing", "Instructions", and "Other". The "General" tab is selected. The form contains several fields: "Assumed Veh. Capacity:" with a dropdown menu set to "High"; "Cust. Internal #:" with an empty text field; "Division:" with a dropdown menu; and "Approval Path:" with a dropdown menu. A dashed rectangular box highlights three email address fields: "Trip Requestor Email:" with the value "brett@geckoms.com", "Trip Administrator Email:" with the value "lisa@geckoms.com", and "Trip Approver Email:" with the value "demo@geckoms.com". To the right of these fields is a checkbox labeled "Active:" which is checked. At the bottom of the window are four buttons: "OK", "Approval Paths by Trip Categories", "Funds", and "Exit".

Figure H. 6 – Setting the Default Email Addresses for a Customer

Customer's  
Default Email  
Addresses.



**T.O.M. - Transportation Operations Manager**

 **Field Trip**      **Field Trip Request #:** 2577      **Assigned**

General    Instructions    Assignment    Billing    **Other**

**Internal Field Trip Number:**

**Field Trip Category:**

**Grade:**

**Trip Requestor Email:**

**Trip Administrator Email:**

**Trip Approver Email:**

OK    Save    Addit. Trip Dates    Auto Assign Drivers    Trip Driver Info    Print Trip Ticket    Print Est.    Bills and Pymts    Bill Trip    Cancel Trip    Exit

Figure H. 7- Email Addresses for a Field Trip

Three Email Addresses available for a field trip.