



***On-line Tutorial Series***

***Module Ten***

***Transactional Record Emails***

**This module covers emails generated from the transactional record and using the record's Communications Tab.**

**System generated workflow task emails are not covered in this tutorial but rather are addressed in application-specific training sessions.**

**Please see your BuildSA Change Agent or supervisor if you have questions about system generated emails.**

**Emails are part of the historical referencing of a record and are not to be deleted.**

**A deleted email cannot be retrieved.**

# Accessing Emails

Record ID: ADDR-COD-17-000063

Menu New Delete Help

Showing 1 of 1

| <input type="checkbox"/> | Title   | Type   | From               | To                 | Sent                | Status | Event              |
|--------------------------|---|--------|--------------------|--------------------|---------------------|--------|--------------------|
| <input type="checkbox"/> | <a href="#">Receipt Confirmation for Certifica...</a> | E-mail | noreply@sananto... | larry.odis@sana... | 12/20/2017 15:49:37 | Sent   | APPLICATION REC... |

Page 1 of 1 < >

Payment History

Communications

**1. Retrieve the Record.**

**2. From the Record's navigation bar, click the Communications Tab.**

Record ID: ADDR-COD-17-000063

Menu New Delete Help

Showing 1 of 1

| <input type="checkbox"/> | Title   | Type   | From               | To                 | Sent                | Status | Event              |
|--------------------------|---|--------|--------------------|--------------------|---------------------|--------|--------------------|
| <input type="checkbox"/> | <a href="#">Receipt Confirmation for Certifica...</a> | E-mail | noreply@sananto... | larry.odis@sana... | 12/20/2017 15:49:37 | Sent   | APPLICATION REC... |

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Payment History

**Communications**

**3. Click on the hyperlink title of the email you wish to view.**

Forward

Cancel

Help

Communication Detail

Related Entities

Importance

Normal

From

noreply@sanantonio.gov [noreply@sanantonio.gov]

Sent

12/20/2017 15:49:37

To

larry.odis@sanantonio.gov

Cc

Bcc

Title

Receipt Confirmation for Certificate of Determination - ADDR-COD-17-000063

Attachment(s)

Content

Greetings,

This email confirms that the City of San Antonio has received your application for Certificate of Determination - ADDR-COD-17-000063.

For your convenience, you may track the progress of your application on-line at [Customer Portal](#).

Thank you for your business.

Sincerely,

Development Services Department

Partnering with our community to build and maintain a safer San Antonio.

Please take a moment and tell us how we are doing by taking our survey.

Comments

Event

APPLICATION RECEIVED

Status

Sent

4. The Communication Detail page displays for viewing.

# Forwarding Emails

LAND-PLAT-1

Menu New ~~Delete~~ Help

Showing 1-5 of 6

| <input type="checkbox"/> | Title   | Type   | From               | To                 | Sent                | Status | Event              |
|--------------------------|---|--------|--------------------|--------------------|---------------------|--------|--------------------|
| <input type="checkbox"/> | <a href="#">Land Entitlements Admin Support Le...</a> | E-mail | noreply@sananto... | caryn.moore@san... | 03/28/2018 08:37:50 | Sent   | LOC NOTIFICATION   |
| <input type="checkbox"/> | <a href="#">Land Entitlements Admin Support Le...</a> | E-mail | noreply@sananto... | caryn.moore@san... | 03/28/2018 08:37:50 | Sent   | LOC NOTIFICATION   |
| <input type="checkbox"/> | <a href="#">Habitat Compliance Form for Major ...</a> | E-mail | noreply@sananto... | caryn.moore@san... | 03/09/2017 13:43:43 | Sent   | HABITAT COMPLIANCE |
| <input type="checkbox"/> | <a href="#">Habitat Compliance Form for Major ...</a> | E-mail | noreply@sananto... | caryn.moore@san... | 03/09/2017 13:43:43 | Sent   | HABITAT COMPLIANCE |
| <input type="checkbox"/> | <a href="#">Receipt Confirmation for Major Pla...</a> | E-mail | noreply@sananto... | caryn.moore@san... | 01/04/2017 08:15:31 | Sent   | APPLICATION REC... |

Page 1 of 2

Payment History

Communications

/commons/communication/cmInRecordList.do?mode=search&listByCap&boxType=InRecordList

**1. Click on the hyperlink title of the email you want to forward.**

< Record ID: ADDR-COD-17-000063

Forward Cancel Help

Communication Detail

Related Entities

Importance  
Normal  
From  
noreply@sanantonio.gov [noreply@sanantonio.gov]  
Sent  
12/20/2017 15:49:37  
To  
larry.odis@sanantonio.gov  
Cc  
  
Bcc  
  
Title  
Receipt Confirmation for Certificate of Determination - ADDR-COD-17-000063  
Attachment(s)  
  
Content  
Greetings,

2. From the Communication Detail page, click the Forward button.

3. The email template form displays. Complete fields as applicable.

< Record ID: ADDR-COD-17-000063

Send Reset Attach Cancel Help

Communication Detail

Related Entities

From \*  
noreply@sanantonio.gov

Importance  
Normal

Designated Send Date

Time  
00 : 00

To  
patricia.cavazos@sanantonio.gov  
Cc  
gmurphy@yahoo.com  
Bcc

Title  
Receipt Confirmation for Certificate of Determination - ADDR-COD-17-000063

Attachment(s)

Content \*  
Arial 1 (8 pt) **B** *I* U

Greetings,  
This email confirms that the City of San Antonio has received your application for Certificate of Determination - ADDR-COD-17-000063.  
For your convenience, you may track the progress of your application on-line at [Customer Portal](#).  
Thank you for your business.  
Sincerely,  
Development Services Department  
check spelling

Comments  
Type comments here | check spelling

4. Click the hand icon to display the Record ID #, the Contact, Owner, Professional and Public User email information associated with the Record.

Record ID: ADDR-COD-17-000063

Send Reset Attach Cancel Help

Communication Detail

Related Entities

From \*  
noreply@sanantonio.gov

Importance  
Normal

Designated Send Date

Time  
00 : 00

To

Cc

Bcc

Title  
Receipt Confirmation for Certificate of Determination - ADDR-COD-17-000063

Attachment(s)

Content \*  
Arial 1 (8 pt) **B** *I* U [List Icons]

Greetings,  
This email confirms that the City of San Antonio has received your application for Certificate of Determination - ADDR-COD-17-000063.  
For your convenience, you may track the progress of your application on-line at [Customer Portal](#).  
Thank you for your business.  
Sincerely,  
Development Services Department

Comments

Record  
ADDR-COD-17-000063  
Contact  
Larry Odis  
larry.odis@sanantonio.gov  
Larry odis  
Owner  
Professional  
PublicUser

**5. Type email address or select an email address by using the hand icon.**

**6. Click Send.**

# **Add an Attachment to an Email you Want to Forward**

**\* Use Internet Explorer when attaching files to an email you want to forward.**

Record ID: ADDR-COD-17-000063

Menu New Delete Help

Showing 1 of 1

| <input type="checkbox"/> | Title   | Type   | From               | To                 | Sent                | Status | Event              |
|--------------------------|---|--------|--------------------|--------------------|---------------------|--------|--------------------|
| <input type="checkbox"/> | <a href="#">Receipt Confirmation for Certifica...</a> | E-mail | noreply@sananto... | larry.odis@sana... | 12/20/2017 15:49:37 | Sent   | APPLICATION REC... |

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Payment History

**Communications**

**1. Click on the hyperlink title of the email you wish to forward.**

Record ID: ADDR-AVAA-17-000011

Forward Cancel Help

**Communication Detail**

Related Entities

Importance  
Normal  
From  
noreply@sanantonio.gov [noreply@sanantonio.gov]  
Sent  
02/28/2017 10:55:32  
To  
rfoggo@accela.com  
Cc

Bcc

Title  
Address Change for Address Verification and Assignment/Assignment of a New Attachment(s)

Content  
Greetings,  
An addressing issue has been brought to our attention; there  
The address(es) of:

Comments

Event  
NOTIFICATION OF ADDRESS CHANGE  
Status  
Sent

**2. The Communication Detail page displays. Click Forward.**

Record ID: ADDR-AVAA-17-000011

Send Reset **Attach** Cancel Help

**Communication Detail**

Related Entities

From \*  
noreply@sanantonio.gov

Importance  
Normal

Designated Send Date  
03/01/2018

Time  
11 : 00

To  
Angela Simmons [angela.simmons@sanantonio.gov];

Cc

Bcc  
angela.simmons@sanantonio.gov [angela.simmons@sanantonio.gov];

Title  
Address Change for Address Verification and Assignment/Assignment of a New Add

Attachment(s)

Content \*  
Arial 1 (8 pt) **B** *I* U [Rich Text Editor Icons]

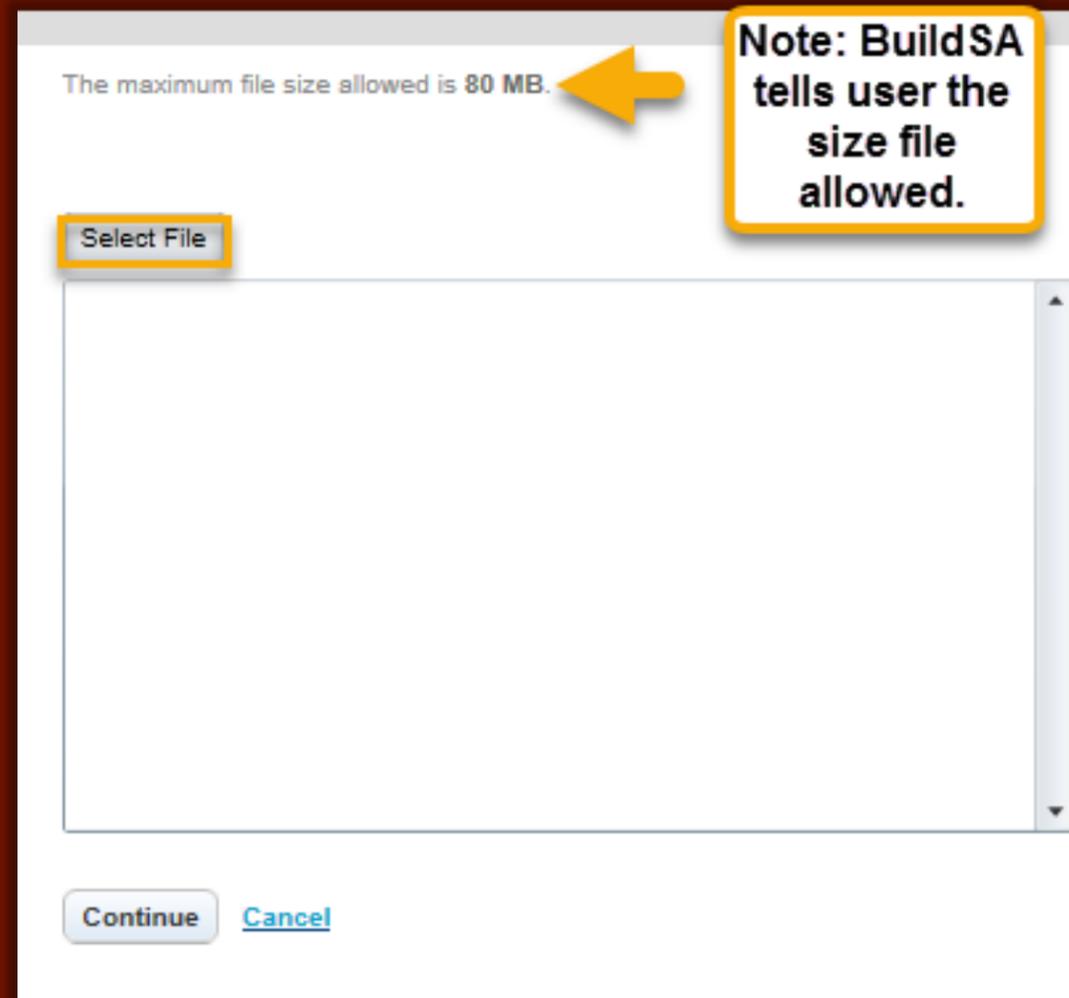
Greetings,  
An addressing issue has been brought to our attention; therefore, the following address(es) have been corrected or changed.  
The address(es) of:  
Primary Address null null ,null null null

check spelling

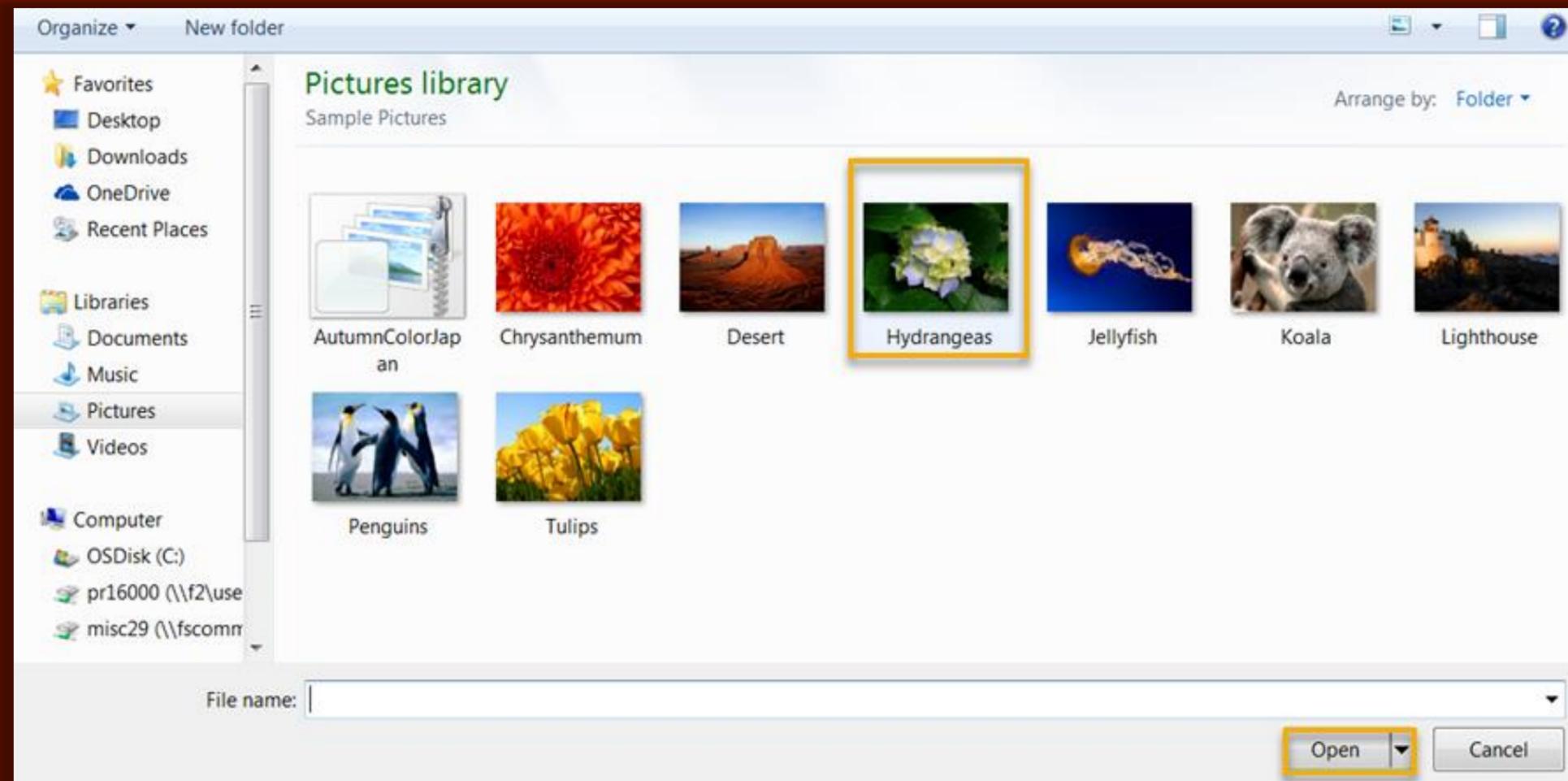
Comments  
Please see attachments.

check spelling

**3. The body of the email message displays. Click Attach.**

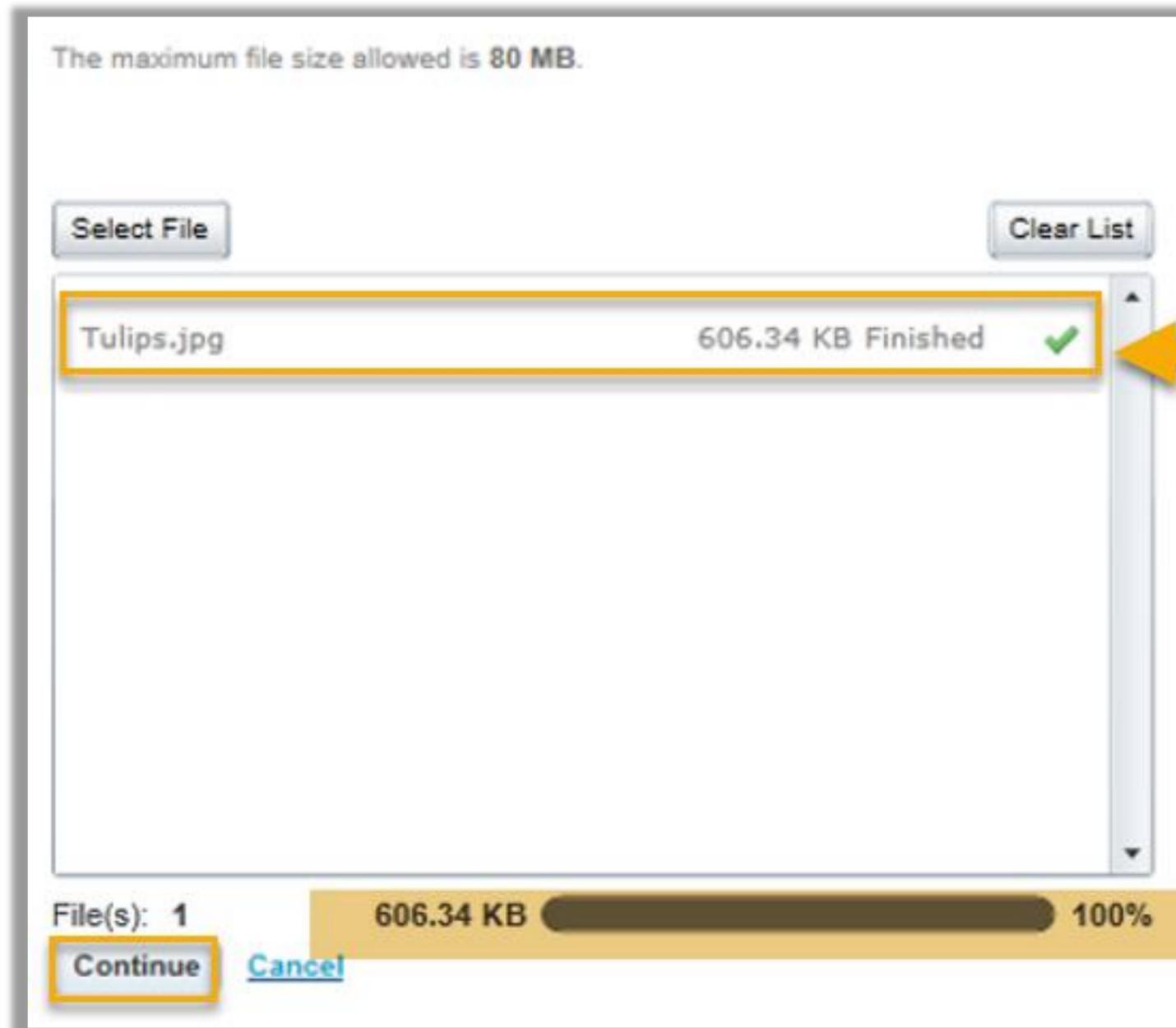


**4. The File Upload page displays. Click Select File.**



**5. The Windows Explorer window displays. Select file(s) to attach.**

**6. Click Open. Note: More than one file may be selected and uploaded.**



BuildSA displays Finished green check mark when file is uploaded.

Also displays a percentage upload.

**7. Click Continue.**

< Record ID: LAND-RD-16-000016

Send Reset Attach Cancel Help

Communication Detail

Related Entities

From \*  
noreply@sanantonio.gov

Importance  
Normal

Designated Send Date

Time  
00 : 00

To  
patricia.rosas@sanantonio.gov

Cc

Bcc

Title  
Military Notification -Receipt Confirmation for Rights Determination - LAND-RD-16-00

Attachment(s)  
001\_RecordApplicationRecordTemplate\_V1\_20161018\_084326.pdf(77.44 KB) DSD\_BuildSALogo.jpg(11.48 KB)

Content \*

Arial 1 (8 pt)

Please An application has been received for Rights Determination - LAND-RD-16-000016. Please contact the assigned case manager, null null if you have any questions.

Thank you for your business.

Sincerely,  
Development Services Department  
Partnering with our community to build and maintain a safer San Antonio.

check spelling

Comments  
This is a test

check spelling

Attachments display here.

**8. Uploaded file(s) are attached to email.**

**9. Click Send.**

Record ID: LAND-RD-16-000016

Menu New Delete Help

Message created successfully.

Showing 1-3 of 3

| <input type="checkbox"/> | Title   | Type   | From               | To                 | Sent                |
|--------------------------|---|--------|--------------------|--------------------|---------------------|
| <input type="checkbox"/> | <a href="#">Additional Material Requirements</a>      | E-mail | noreply@sananto... | patricia.rosas@... | 03/01/2018 13:13:03 |
| <input type="checkbox"/> | <a href="#">Receipt Confirmation for Rights De...</a> | E-mail | noreply@sananto... | Michael.Fierros... | 10/18/2016 08:43:27 |
| <input type="checkbox"/> | <a href="#">Military Notification -Receipt Con...</a> | E-mail | noreply@sananto... | rfoggo@accela.c... | 10/18/2016 08:43:27 |

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Payment History

Communications

**10.The forwarded email displays on the transactional Record's Communications tab.**

Record ID: LAND-RD-16-000016

Forward Cancel Help

**Communication Detail**

Related Entities

Importance  
Normal  
From  
noreply@sanantonio.gov [noreply@sanantonio.gov]  
Sent  
03/01/2018 13:31:47  
To  
patricia.rosas@sanantonio.gov  
Cc

Bcc

Title  
Additional Material Requirements  
Attachment(s)  
[BuildSA Poster\\_FINAL.jpg\(7.97 MB\)](#)

Content  
This is a test email.  
Comments  
Additional information required. This is a test email.  
Event

Status  
Sent

**Attachment  
hyperlink.**

**11. Communication Detail of the forwarded email. Note the hyperlink for the attachments sent.**

# New Email

Record ID: ADDR-COD-18-000126

Custom Lists  
Inspections  
Conditions  
Conditions of Approval  
Fee

Menu ▾ New ▾ Delete Help

E-mail  
SMS

Showing 1 of 1

| <input type="checkbox"/> | Title | Type   | From               | To                 | Sent                |
|--------------------------|-------|--------|--------------------|--------------------|---------------------|
| <input type="checkbox"/> |       | E-mail | noreply@sananto... | patricia.rosas@... | 02/28/2018 00:00:00 |

Page 1 of 1 < >

Payment History

Communications

- 1. From the Record's Communications page, click the *New* drop-down menu arrow.**
- 2. Select E-mail.**

Communication Detail

Related Entities

Send Reset Attach Cancel Help

Start with the From required field drop-down menu arrow (#1 shown) and complete all other fields.

From \*  
--Select--



Importance  
Normal

Designated Send Date  
|

Time  
00 : 00

To

Cc

Bcc

Title

Attachment(s)

Content \*  
Arial 1 (8 pt) B I U

[Large text area for content]

check spelling

Comments  
[Text area for comments]

check spelling

**3. Complete fields, as applicable.**

**4. Click Send.**

***Congratulations!***

***This concludes Module Ten***

# ***Transactional Record Emails***

***It is time to test your recall.....***

## TEST YOUR RECALL

1. Deleted transactional record emails are retrievable. \_\_\_\_True \_\_\_\_False
2. A transactional record email may be forwarded. \_\_\_\_True \_\_\_\_False
3. Several files may be uploaded and attached to an email being forwarded.  
\_\_\_\_True \_\_\_\_False
4. Accessing emails is done from the \_\_\_\_\_tab of the Record's Navigation bar.
5. Creating emails is done from the \_\_\_\_\_tab of the Record's Navigation bar.

***Answers on the next slide...***



**If you answered:**

- 1. False**
- 2. True**
- 3. True**
- 4. Communications**
- 5. Communications**

**You are correct!**

**Time to begin the next  
module...**

## **Organization Change Management Team Contact Information**

- [BuildSAOCMTeam@Sanantonio.gov](mailto:BuildSAOCMTeam@Sanantonio.gov)
- Patricia Cavazos, Sr. Special Projects Manager
- Office: 210-207-0547
- Caryn Moore, Sr. Special Projects Manager
- Office: 210-207-0027
- Patricia Rosas, Training Lead and Curriculum Developer
- Office: 210-207-0233