



## Smart Event - New Customer Email

**This Smart Event sends an email when a new Customer is created in Sage Intacct. My customers have asked for this when they want the sales department to know that the new customer is now created and a sales order or quote can now be created.**

Navigate to the Smart Event Wizard either by Customisation Services or Platform Services > Smart Events > Add

The wizard guides you through the process of designing your smart Event

Step 1 Choose object to extend Step 1 of 3

Owner object

\* Required

**Step 1** Choose object to extend | Owner object **Select** Customer | **Click** Next

Step 2 Select event properties Step 2 of 4

Action

Events \*

Condition

Note: Use the yyyy.mm.dd format for date values

\* Required

**Step 2 a.** Select event properties **Action Select** Email | **b.** Events **Select** Add | **c.** Condition **Enter** `{!CUSTOMER.CUSTOMERID!} <> ""` | **Click** Next



## Step 3 Select email properties

Step 3 of 4

Select email properties

« Back

Next »

Email \*

{!CUSTOMER.AR\_LPH\_CONTACT\_EMAIL}

Subject \*

{!CUSTOMER.CUSTOMERID!} {!CUSTOI

Attach PDF

Body

The above new customer has been created and is available to use.

Best regards

Finance

\* Required

### Step 3 Select Email Properties **Email Enter** The email address\* | **Subject**

{!CUSTOMER.CUSTOMERID!}{!CUSTOMER.NAME!} Created | **Body** Enter the Text for the body of the Email | **Click** Next

## Step 4 Select deployment options

Step 4 of 4

Save

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Done

Smart link ID \*

AR\_NEW\_CUSTOMER\_EMAIL

Description

Email re new customer creation

Status

Active

\* Required

### Step 4 Select deployment options **Smart link ID Enter** AR\_NEW\_CUSTOMER\_EMAIL |

**Description** Email sent when a new customer is created | **Status** Active | **Click** Save

\*In a later blog we will look at using dynamic rather than static email addresses.