

# Email from DDS on Mac Workstations

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## Introduction

This document describes how to set email up to work from the Datacon system on a Mac workstation. You can send email to anyone in the system that has an email address, such as a patient, a referral source, or a user defined list entry with the email address in a user defined field in notes.

Required:

- pcLink for Mac dated 3-5-11 or later.
- The native Mac mail application, “Mail”, which comes on all new Macs.
- An email address that supports sending and receiving through the Mail program.

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## Prerequisites

Before you can email from Datacon on a Mac workstation, you must do the following:

- Make sure that the native Mac mail program, called Mail, is working on its own on each Mac workstation. The Mail program is in the Applications folder and its icon is a postage stamp. Test the Mail program outside of Datacon to make sure it is configured properly and is working to send and receive emails.
- Install pcLink for Mac dated 3-5-11 or later on each Mac workstation.
- Configure the Go Menu on each Mac workstation for emailing the patient, referral source, etc. (see below.)
- Enter valid email addresses in DDS for anyone that we'll be sending an email to.

## Configuring pcLink for Mac for Sending Email

Email is configured on the Go Menu. You can email from anywhere in Datacon where an email address is available, such as a patient, account, referral source, or a user defined list with the email address in a user defined field in notes. For the purpose of this document, we will set up emailing to a patient and to a referral source.

Options for emailing from different places require separate Go Menu items because of the differences in the script references to the merge fields. To configure the Go Menu items, do the following on each Mac workstation:

- Launch pcLink.
- Open the Go Menu configuration page.
  - From the Apple Menu Bar, click pcLink>Preferences
  - Click the Go Menu segment control button.
  - Click an available user defined function.
- Enter the configuration as illustrated below for the patient and/or the referral source (if setting up both, set up one Go Menu item for each.)
  - Check the **Go menu item enabled** check box.
  - **Item description:** This is what will display on the Go menu.

- **Hint:** This is what displays if you hover over the button on the pcLink toolbar.
- **Document name:** Not used.
- **Application name:** /usr/bin/osascript
- **Command-line arguments:** Must match the **Passfile name** field.
- Check the **Create passfile** checkbox.
- **Passfile name:** the passfile is a temporary file and you can specify it to be stored anywhere, and name it whatever you want. For this example we'll call it mail.scpt. To choose a location and name for the passfile:
  - Click the ... button to the right of the **Passfile name** field, and navigate to the folder where you want to store the passfile.
  - Enter a name in the **Save As:** box, such as mail.scpt. Be sure to include the .scpt extension.
    - Note: the .scpt extension is not required. However, it is useful to document the reason for the file as well as to limit the chances for conflict with other files.
  - Click the **Save** button.
  - Copy and paste the contents of the **Passfile name** field onto the first line of the **Command-line arguments** box.
  - Note that you can use the same passfile for multiple Go Menu items.
- **Script:** See Figure 1 and Figure 2 below for examples of scripts for emailing a patient or referral source. Copy and paste the script text provided in the Figures below into the big blank box after **Passfile name**, or carefully type it in.
  - The email's subject and body can be customized in the script, see the **Customize the email's subject and body** section below.
  - The script is also where you change the merge field to get the correct email address. Note that, unlike merged documents, this application requires the merge field to have the file ID as the first component. For example "pa\_" or "rp\_". The focus could be an appointment, referral, patient, account, or any other file. See the

**Customize the email recipient's address** section below.

- **Patient focus required:** Checking this box causes the system to check that the email Go Menu item is only used when the user is looking at a patient. It is recommended that you do check this box.
  - Checking the **Patient focus required** box will cause an error to display ("You need to be looking at a patient!") if someone isn't looking at a patient when they click the email option, and the Mail program will not open.
  - If the **Patient focus required** box is *not* checked and the user is not looking at a patient when they click the email option, the Mail program will open anyway.

#### **Customize the email's subject and body:**

The email's subject and body are enclosed in quotes. Note that the subject and body are customizable and can be changed or extended as with any merged document. To customize, change the contents (shown in bold here) in quotes in the following line from our example:

```
set theMessage to make new outgoing message with properties  
{visible:true, subject:"A message from your dentist...",  
content:"Dear [pa_first_name],"}
```

#### **Customize the email recipient's address:**

The recipient's email address is specified in the following line from the referral source example. To change the source of the email address, change the fields shown in bold here:

```
make new to recipient at end of to recipients with properties  
{name:"[pa_src_name]", address:"[pa_src_email]"} }
```

## **Add the Email Button to the pcLink Toolbar**

It is optional to add the new email button to the pcLink Toolbar. To do so:

- Click Window>Customize Toolbar on the pcLink Menu Bar and drag the newly-defined icon to the pcLink Toolbar.
- Or, right-click on the pcLink toolbar and click Customize Toolbar. Then drag the newly-defined icon to the pcLink Toolbar.

## Sending Email from a Mac Workstation

How you initiate sending the email depends on how you set up the Go Menu item. In our first example we are emailing a patient, so we need to initiate the email from a patient record. In our second example we are emailing a referral source and referencing the patient's name in the email. For this example we need to navigate to the referral source through the patient to initiate the email.

### To send an email to a patient:

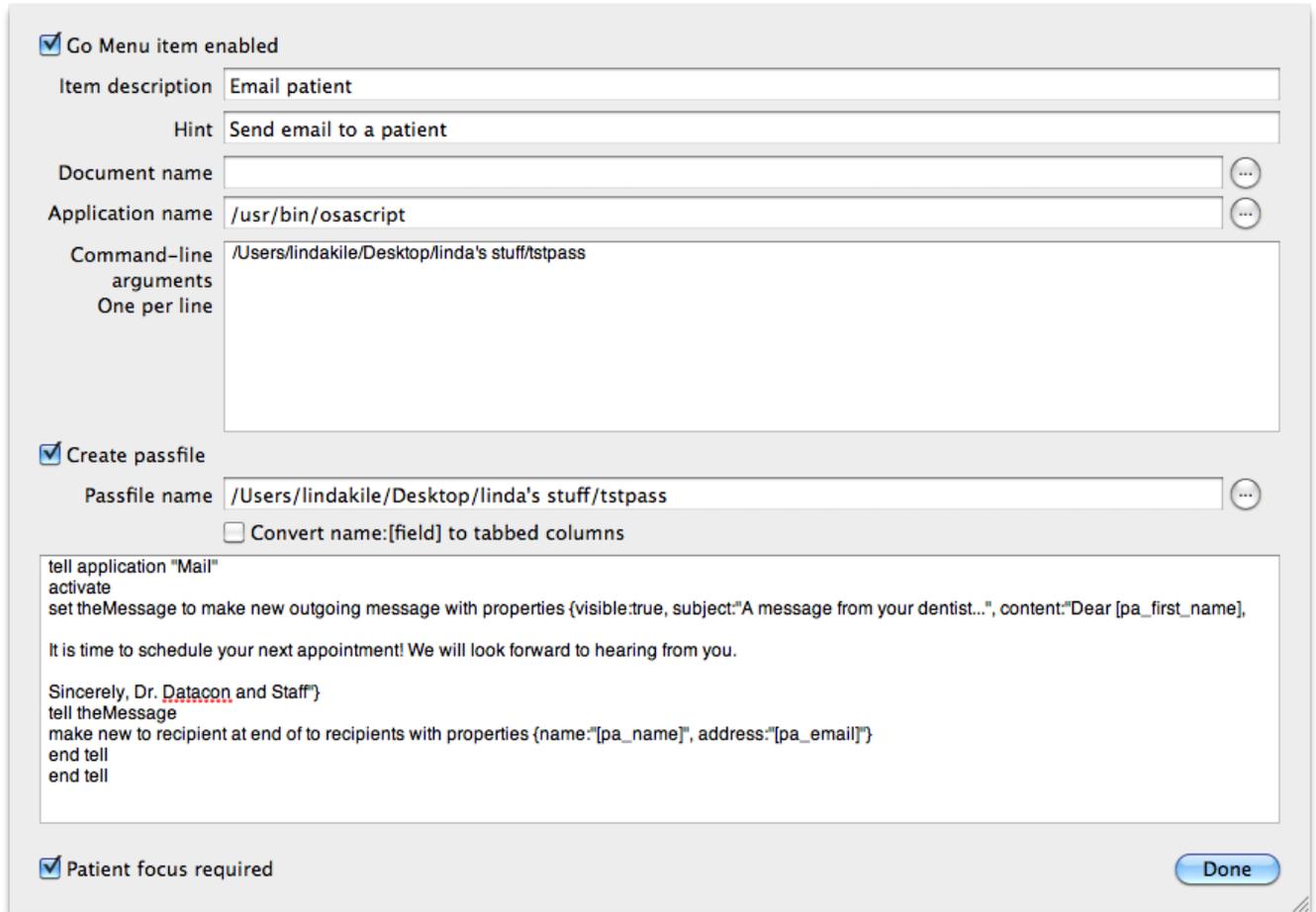
- Navigate to the *Patient information* screen.
- Click Go>Email Patient on the Apple Menu bar, where “Email Patient” is the **Item description** from the Go Menu setup. Or, click the button on the pcLink toolbar if you put one there.
- The Mail program will open, and a new mail message will open with the patient's email address and the subject and content filled in (as specified in the configuration settings.)

When sending the email, if an error occurs stating that “... does not appear to be a valid email address”, check that the email address for the patient in Datacon is filled in and is formatted as a valid email address.

### To send an email to a referral source:

- Navigate *through the patient* to the **Patient referrals detail** screen.
  - Note: when emailing a referral source you must do it through a patient record. The patient name will be referenced in the email.
- Click Go>Email Referral Source on the Apple Menu bar, where “Email Referral Source” is the **Item description** from the Go Menu setup. Or, click the button on the pcLink toolbar if you put one there.
- The Mail program will open, and a new mail message will open with the referral source's email address, a subject referencing the patient, and “Dear (first name)” filled in.
- When sending the email, if an error occurs stating that “... does not appear to be a valid email address”, check that the email address for the referral source in Datacon is filled in and is formatted as a valid email address.

**Figure 1: Go Menu Configuration for Emailing a Patient**



Go Menu item enabled

Item description

Hint

Document name

Application name

Command-line arguments  
One per line

Create passfile

Passfile name

Convert name:[field] to tabbed columns

```
tell application "Mail"
activate
set theMessage to make new outgoing message with properties {visible:true, subject:"A message from your dentist...", content:"Dear [pa_first_name],

It is time to schedule your next appointment! We will look forward to hearing from you.

Sincerely, Dr. Datacon and Staff"}
tell theMessage
make new to recipient at end of to recipients with properties {name:"[pa_name]", address:"[pa_email]"}
end tell
end tell
```

Patient focus required Done

Use the following text to copy and paste to the configuration settings for emailing a patient:

/usr/bin/osascript

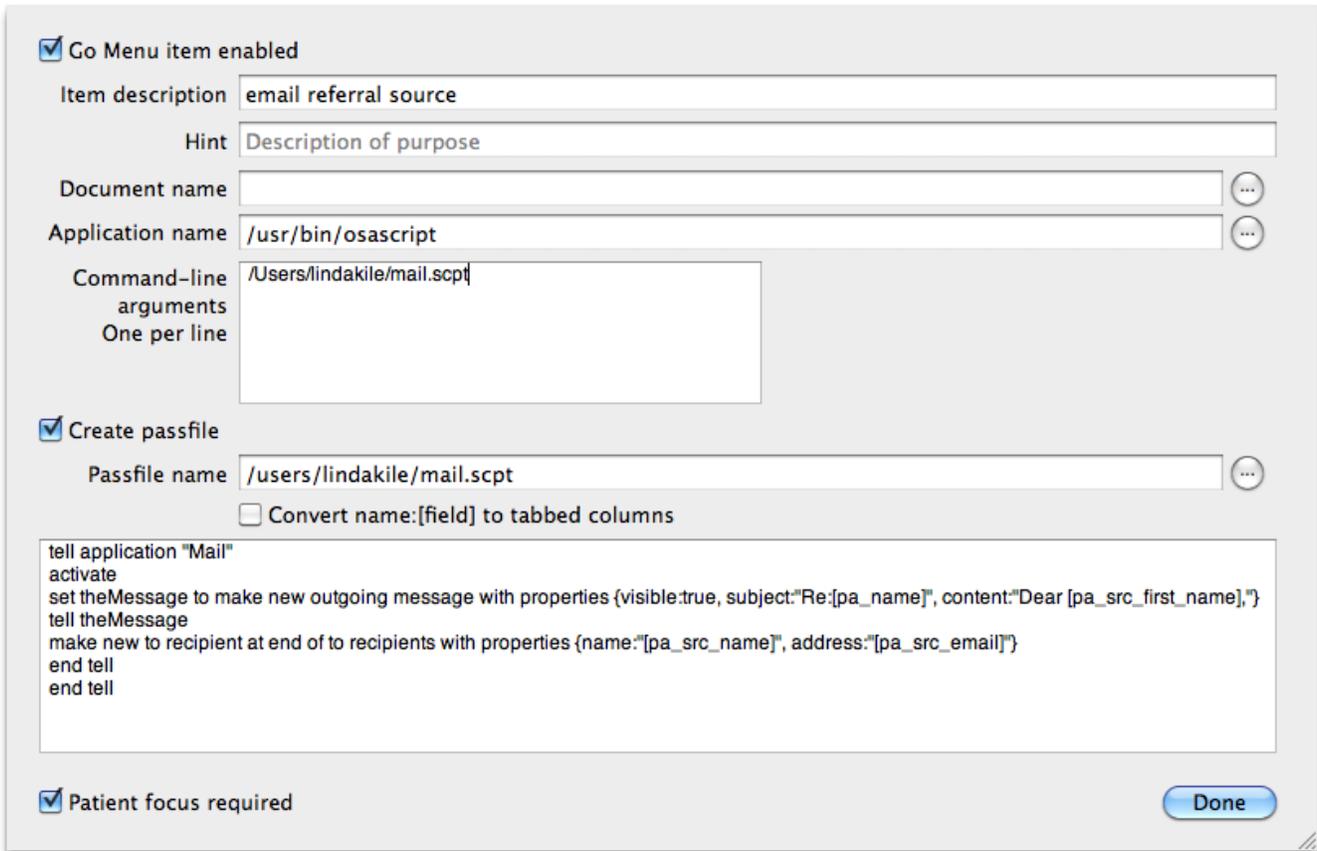
```
tell application "Mail"
activate
set theMessage to make new outgoing message with properties {visible:true, subject:"A message from your
dentist...", content:"Dear [pa_first_name],"}
tell theMessage
make new to recipient at end of to recipients with properties {name:"[pa_name]", address:"[pa_email]"}
end tell
end tell
```

To customize the subject or body, change the contents between the quotes in the “set theMessage” line. **For example:** set theMessage to make new outgoing message with properties {visible:true, subject:"It's time for your dental appointment", content:"Dear [pa\_first\_name],

Your dental visit is due! Please call our office to schedule an appointment. We look forward to hearing from you!

Sincerely,  
Dr. Datacon and Staff }

**Figure 2: Go Menu Configuration for Emailing a Referral Source**



The screenshot shows a configuration window with the following fields and options:

- Go Menu item enabled
- Item description:
- Hint:
- Document name:
- Application name:
- Command-line arguments:
- Create passfile
- Passfile name:
- Convert name:[field] to tabbed columns
- Script content:
 

```
tell application "Mail"
activate
set theMessage to make new outgoing message with properties {visible:true, subject:"Re:[pa_name]", content:"Dear [pa_src_first_name],"}
tell theMessage
make new to recipient at end of to recipients with properties {name:"[pa_src_name]", address:"[pa_src_email]"}
end tell
end tell
```
- Patient focus required
- 

Use the following text to copy and paste to the configuration settings for emailing a referral source:

/usr/bin/osascript

```
tell application "Mail"
activate
set theMessage to make new outgoing message with properties {visible:true, subject:"Re:[pa_name]",
content:"Dear [pa_src_first_name],"}
tell theMessage
make new to recipient at end of to recipients with properties {name:"[pa_src_name]", address:"[pa_src_email]"}
end tell
end tell
```

To customize the subject or body, change the contents between the quotes in the “set theMessage” line. **For example:** set theMessage to make new outgoing message with properties {visible:true, subject:"Thank you!!", content:"Dear [pa\_src\_first\_name],

Thank you for your referral of [pa\_name]. We truly appreciate your confidence.

Sincerely,  
Dr. Datacon and Staff }