

ArtfulBits Email Web Part

for Microsoft® SharePoint®



User Guide

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Overview

ArtfulBits Email Web Part allows sending e-mail messages directly from SharePoint site. You can notify task assigned users, send gratitude or just send regular e-mail message, etc.

The screenshot shows the 'ArtfulBits Email Web Part' interface within a SharePoint web part editor. The top ribbon has 'INSERT' and 'WEB PART' tabs. Below the ribbon, there are icons for Paragraph, Styles, Text Layout, and Markup. The main area contains the email form with fields for To, Cc, Subject, and Attached. The Subject field is pre-filled with 'SharePoint Notification'. The Attached section has links for 'Attach SharePoint files' and 'Attach local files'. The email body contains a header with the ArtfulBits logo and icons, followed by a personalized message template using placeholders like {FIRST}, {LAST}, and {PRODUCT}. At the bottom right, there are 'Send' and 'Cancel' buttons.

ArtfulBits Email Web Part

To:

Cc:

Subject: SharePoint Notification

Attached: [Attach SharePoint files](#)
[Attach local files](#)

Dear {FIRST} {LAST},

Thank you for the interesting in our {PRODUCT} product.

This e-mail is sent to you because you have requested the trial key for {PRODUCT}. With this trial key you will be able to try our product and decide whether you want to buy it.

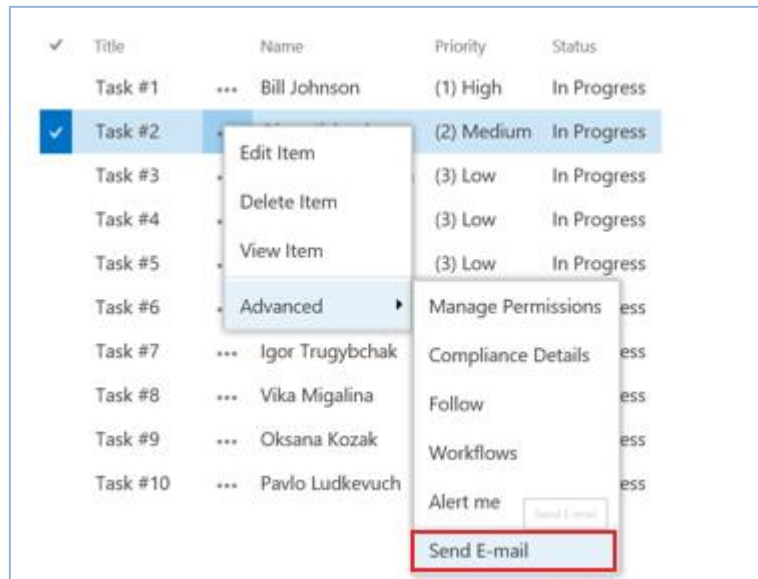
If you have any questions about this product, future releases or have any other inquiries, please

Send Cancel

ArtfulBits E-mail Web Part provides useful ability to send e-mail directly from List Item. E-mail fields To, Subject and body can be auto populated with column item values.

The screenshot shows the context menu for a list item in SharePoint. The 'VIEW' tab is selected. The 'Send E-mail' option is highlighted with a red box. Below the menu, the list item details are displayed in a table.

	Title	Task #1
Name	Bill Johnson	
Priority	(1) High	
Status	In Progress	



Feature List

Feature	SharePoint 2010	SharePoint 2013	SharePoint 2016
Send e-mail directly from SharePoint site	✓	✓	✓
Add actions to send e-mail directly from List Item	✓	✓	✓
Auto-populated e-mail To, Subject and body with item column values	✓	✓	✓
E-mail Attachments support [PRO]	✓	✓	✓
Ability to store outgoing e-mails in SharePoint list [ENT]	✓	✓	✓
Customizable e-mail From and Reply To fields	✓	✓	✓
Supports Active Directory users, SharePoint users, SharePoint groups, Distribution Lists as e-mail recipients	✓	✓	✓
Supports selection of e-mail recipients from SharePoint lists [ENT]	✓	✓	✓
Supports direct e-mail addresses	✓	✓	✓
Ability to expand distribution lists and send e-mail directly to its members	✓	✓	✓
Supports e-mail templates	✓	✓	✓
Permissions management (restrict users to send e-mails)	✓	✓	✓
User friendly UI (Outlook like pickers for To, Cc, Bcc e-mail boxes, html message editor)	✓	✓	✓
Language pack support (desired localization could be added by request)	✓	✓	✓

[PRO] – Professional and Enterprise edition only

[ENT] - Enterprise edition only

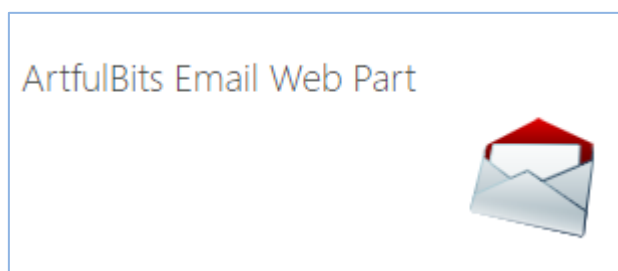
Why ArtfulBits Email Web Part?

ArtfulBits Email Web Part is a simple to use and powerful tool that provides e-mail sending functionality directly from SharePoint web site. Web Part is fully customizable providing ability to configure it to your personal needs.

How to Use

How to Use Email Web Part

ArtfulBits Email Web Part has intuitive user-friendly interface. Create new mail message by clicking email web part image:

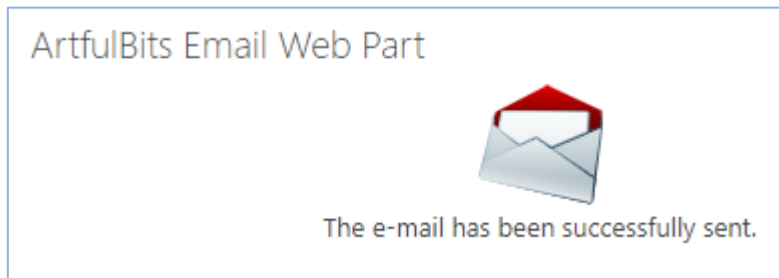


Specify necessary fields: choose recipients (To, Cc, Bcc) using People Picker dialog (some fields can be disabled by site administrator), type e-mail subject and e-mail message body (html or simple text), attach files (from SharePoint Web site or from local disk depending on web part settings):

The screenshot shows the SharePoint ribbon with the "WEB PART" tab selected. Below the ribbon, the "ArtfulBits Email Web Part" is embedded. It features a form with the following fields:

- To:** A text input field with a People Picker icon on the right.
- Cc:** A text input field with a People Picker icon on the right.
- Subject:** A text input field containing the text "SharePoint Notification".
- Attached:** A section with two links: "Attach SharePoint files" and "Attach local files".
- Message Body:** A large text area containing a banner for "ArtfulBits" with several icons (envelope, up arrow, speech bubble, magnifying glass) and a pre-written email template. The template text is: "Dear {FIRST} {LAST},", "Thank you for the interesting in our {PRODUCT} product.", "This e-mail is sent to you because you have requested the trial key for {PRODUCT}. With this trial key you will be able to try our product and decide whether you want to buy it.", and "If you have any questions about this product, future releases or have any other inquiries, please".
- Buttons:** "Send" and "Cancel" buttons at the bottom right.

Click **Send** button. Following view will appear after successful e-mail sending:



Prior to sending e-mails, make sure that outgoing e-mail settings are configured correctly for the server (open *SharePoint Central Administration* → *Operations* → *Outgoing E-Mail Settings* and check SMTP mail server).

ArtfulBits Email Web Part settings view:

ArtfulBits Email Web Part

E-mail Settings

E-mail Permissions

Allows sending e-mail to:

☒ Users

☒ SharePoint Groups

☒ Distribution Lists

☒ External Users (direct e-mail address)

Who can send e-mail?

☒ All Users

☐ Specified Users & Groups

E-mail To

Default value:

☐ Select e-mail recipients from SharePoint list

☒ Allow 'To:' edit

E-mail Cc

☒ Add Cc box

Default value:

☐ Select e-mail recipients from SharePoint list

☐ Make 'Cc:' hidden

☒ Allow 'Cc:' edit

E-mail Bcc

☒ Add Bcc box

Default value:

☒ Select e-mail recipients from SharePoint list

List*:
E-mail Addresses (E-mail web-)

List view:
All Items

List column (e-mail addresses):*
Email address

☐ Make 'Bcc:' hidden

☒ Allow 'Bcc:' edit

E-mail Subject

SharePoint Notification

☒ Allow 'Subject:' edit

E-mail Attachments

☒ Allow to attach files from SharePoint

☒ Allow to attach files from local disk

E-mail Body

To type HTML source code, click **Source Editor**.

Source Editor...

E-mail From

☐ Current User

☒ Custom e-mail address

Anastasiya.Umrikhina@artfulbits.com

E-mail Reply To

☒ Email From value

☐ Custom e-mail address

Default View

Select startup default view:

☒ E-mail Web Part Image

☐ New E-mail Form

Store Outgoing E-mail

☒ Enable e-mail storage

Site:
Nastya Test

List:
Emails History

Content Type:
(None)

Columns Mapping:

E-mail To
E-mail To

E-mail Cc
E-mail Cc

E-mail Bcc
E-mail Bcc

E-mail Subject
E-mail Subject

E-mail Body
E-mail Body

☒ Store e-mail attachments

E-mail Strings

Email Web Part Image Tool-Tip:
New Mail Message

Message on e-mail sent:
The e-mail has been successfully sent.

Message on e-mail error:
The e-mail message cannot be sent.

+ Appearance

+ Layout

+ Advanced

OK

Cancel

Apply

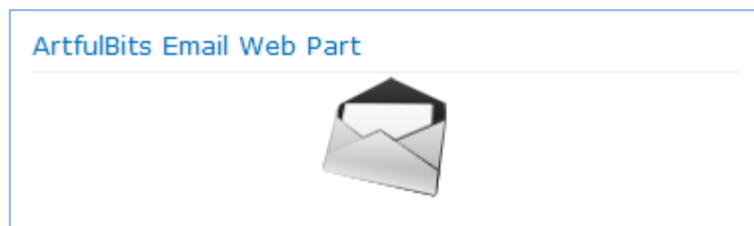
Following settings are available:

- **E-mail Permissions:** specifies e-mail recipients' audience.

Possible options:

- *Users* (SharePoint and Active Directory users)
- *SharePoint Groups*
- *Distribution List*
- *External Users* (direct e-mail addresses are available)

You can also set permission for users, which can send e-mail (all or specified users and SharePoint Groups). If a user does not have permission to send, following image will be shown:



- **E-mail To, E-mail Cc and E-mail Bcc:** you can show/hide boxes, set default values for them and enable/disable editing for users.
- **E-mail Subject** specifies default value for e-mail subject
- **E-mail Attachments:** ability to attach files from SharePoint Web site and/or from local disk to e-mail
- **E-mail Body** allows specifying e-mail message template. Rich Text Editor can be used to enter formatted text and graphics or Source Editor to type HTML source code (*notice that Rich Text Editor and Source Editor buttons are active only in IE*)
- **E-mail From** allows specifying e-mail from address (For example: *noreply@company.com* or *SharePoint Notification <notify@company.com>*)
- **E-mail Reply To** allows to indicate an address other than E-mail From address in order to reply to the messages (For example: *Name.Surname@company.com* or *Administrators <admins@company.com>*)
- **Default View** provides default view for Web Part (when page is opened). Possible options:
 - E-mail Web Part Image
 - New E-mail Form
- **Store Outgoing E-mails** allows to maintain outgoing e-mails history in SharePoint list. Specify SharePoint list, columns mapping and check "Store e-mail attachments" to store e-mail attachments in Attachments of list item.

Enabling Sending E-mails directly from List Item

To enable sending e-mails from custom List Item, navigate to List Settings page and select **E-mail settings** action under Communications tab

Tasks ▸ Settings

List Information

Name:

Tasks

Web Address:

http://srv01sp2016-2/nt/Lists/List item Email webpart/AllItems.aspx

Description:

General Settings

Permissions and Management

Communications

▣ List name, description and navigation

▣ Versioning settings

▣ Advanced settings

▣ Validation settings

▣ Audience targeting settings

▣ Rating settings

▣ Form settings

▣ Delete this list

▣ Save list as template

▣ Permissions for this list

▣ Workflow Settings

▣ Generate file plan report

▣ Enterprise Metadata and Keywords Settings


▣ Information management policy settings

▣ Column Permissions

▣ RSS settings

▣ E-mail settings

In List E-mail Settings page select **Yes** under **Enable e-mail features for this list** box. You can also specify to show or not **Send E-mail** action on Item Display Form and in Edit Item Menu in list view.

Enable List E-mail Features Enabling e-mail features will add 'Send E-mail' action for list item.	Enable e-mail features for this list <input checked="" type="radio"/> Yes <input type="radio"/> No
"Send E-mail" Action Settings	Show "Send E-mail" on Item Display form <input checked="" type="radio"/> Yes <input type="radio"/> No Show "Send E-mail" in item Drop-Down Menu on list view page <input checked="" type="radio"/> Yes <input type="radio"/> No Show "Send E-mail" in ribbon on list view page <input checked="" type="radio"/> Yes <input type="radio"/> No <input type="checkbox"/> Allow to send email selecting multiple items
E-mail Permissions Specify e-mail permissions.	Who can send e-mail? <input type="radio"/> All Users <input checked="" type="radio"/> Specified Users & Groups <div>SHAREPOINTBOX\ngorodenchuk; SHAREPOINTBOX\nmalynka;</div> 

To auto populate e-mail To address check appropriate checkboxes against column names in **Send To** section, thus E-mail addresses of SharePoint Users and users from SharePoint Groups based on data from these checked columns will be put automatically in e-mail To box. You can also specify other Users, Groups, Active Directory Groups, Distribution Lists or custom e-mail addresses, that will be auto populated to e-mail To address box. Cc and Bcc boxes add ability to specify e-mail addresses similar to the above. To add e-mail recipients from SharePoint list, it is needed to check **Select e-mail recipients from SharePoint list** option and specify the list source, list view (for filter recipients in list) and list column which contains e-mail addresses. **Allow editing** checkbox specifies whether user can edit certain e-mail box before sending e-mail. If you want to hide "Cc:" or "Bcc:" e-mail box from e-mail sender before sending e-mail, just check **Make hidden** checkbox in corresponding e-mail box section.

E-mail Recipients

Specify e-mail recipients.

Send To

Users & Groups based on data from the following columns:
☐ Created By
☐ Modified By
E-mail addresses from the following column:
(None) ▼
Add the following Users & Groups:

☐ Select e-mail recipients from SharePoint list
☒ Allow 'To:' edit

E-mail Cc

☒ Add Cc box
Add the following Users & Groups:

support@artfulbits.com;

☐ Paste email recipients from the column
☐ Select e-mail recipients from SharePoint list
☐ Make 'Cc:' hidden
☒ Allow 'Cc:' edit

E-mail Bcc

☐ Add Bcc box

E-mail Content section contains tools to customize e-mail Subject, attachments and e-mail body. You can use **[Column Name]** or **[USER.Column Name]** template keys to auto populate e-mail content with column item values or current user data. **E-mail From** allows specifying "e-mail from" address. Use Reply To option to indicate an address other than the E-mail From address in order to reply to the messages.

<div>E-mail Content</div> <p>You can use template fields in e-mail body and subject. Before sending e-mail, each of these fields will be replaced by appropriate column value of selected list item or by e-mail sender data.</p> <p>Template fields of list item: [App Created By], [App Modified By], [Attachments], [Created], [Created By], [ID], [ItemLink], [Modified], [Modified By], [Name], [Title]</p> <p>Templates fields of current user data: [USER.About me], [USER.Account], [USER.App Created By], [USER.App Modified By], [USER.Ask Me About], [USER.Department], [USER.First name], [USER.ID], [USER.Last name], [USER.Mobile phone], [USER.Name], [USER.Office], [USER.Picture], [USER.Picture Exchange Sync State], [USER.Picture Placeholder State], [USER.Picture Timestamp], [USER.SIP Address], [USER.Title], [USER.User name], [USER.Web site], [USER.Work email], [USER.Work phone]</p>	<div>E-mail Subject</div> <div>Tasks - [Title]</div> <div><input checked="" type="checkbox"/> Allow "Subject:" edit</div> <div>E-mail Attachments</div> <div><input checked="" type="checkbox"/> Attach current item Attachments</div> <div><input checked="" type="checkbox"/> Allow to attach files from SharePoint</div> <div><input type="checkbox"/> Allow to attach files from local disk</div> <div>E-mail Body</div> <div>Tasks: [ItemLink]</div> <div>Task is assigned to You. Please approve ordenied this task.</div> <div>[USER.Name] [USER.Department]</div> <div>Call: [USER.Work phone] Email: [USER.Work email] [USER.Web site]</div> <div><input checked="" type="checkbox"/> Allow body edit</div>
<div>E-mail From</div> <p>Please specified e-mail address of the sender. Example: noreply@company.com SharePoint Notification <notify@company.com></p>	<div>E-mail From</div> <div><input type="radio"/> Current User</div> <div><input checked="" type="radio"/> Custom e-mail address</div> <div>no-reply@artfulbits.com</div> <div>Reply To</div> <div><input checked="" type="radio"/> Email From value</div> <div><input type="radio"/> Custom e-mail address</div>

To store outgoing e-mails you should check **Enable e-mail storage** option and specify SharePoint Site and List. After that each e-mail will be added as a new list entry. If list allows management content type then it is possible to choose content type, the outgoing email should be stored as. In this section you can specify columns mapping and to specify whether to add e-mail attachments to list item attachments or not.

Store Outgoing E-mail

Allows to maintain outgoing e-mails history in SharePoint list.

☒ Enable e-mail storage

Site:

Home

List:

EmailHistoryTest

Content Type:

(None)

Columns Mapping:

E-mail To

Email To

E-mail Cc

Email Cc

E-mail Bcc

Email Bcc

E-mail Subject

Subject

E-mail Body

Email body

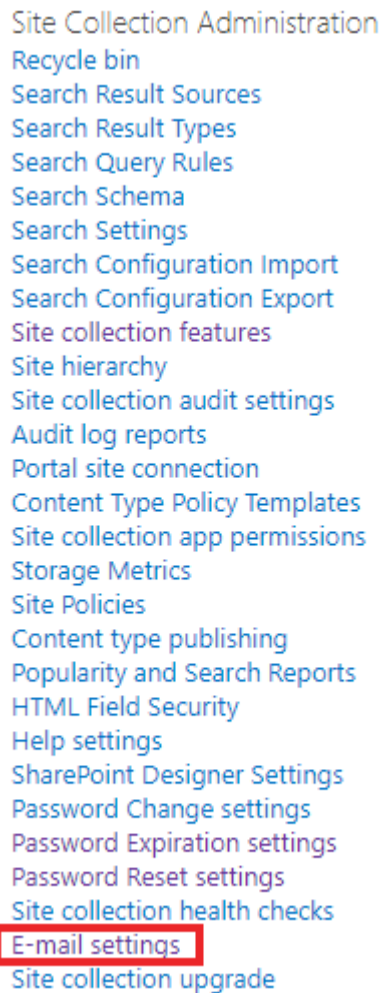
☒ Store e-mail attachments

Save

Cancel

Email Global Settings

In Email Settings page, you are able to specify additional global settings of Email Web Part such as custom SMTP settings and others (Site Settings → Site Collection Administration → E-mail settings).



A screenshot of the 'Site Collection Administration' menu in a SharePoint interface. The menu is displayed as a vertical list of links. The link 'E-mail settings' is highlighted with a red rectangular box. The other links in the menu are: Site Collection Administration, Recycle bin, Search Result Sources, Search Result Types, Search Query Rules, Search Schema, Search Settings, Search Configuration Import, Search Configuration Export, Site collection features, Site hierarchy, Site collection audit settings, Audit log reports, Portal site connection, Content Type Policy Templates, Site collection app permissions, Storage Metrics, Site Policies, Content type publishing, Popularity and Search Reports, HTML Field Security, Help settings, SharePoint Designer Settings, Password Change settings, Password Expiration settings, Password Reset settings, Site collection health checks, E-mail settings, and Site collection upgrade.

- Site Collection Administration
- Recycle bin
- Search Result Sources
- Search Result Types
- Search Query Rules
- Search Schema
- Search Settings
- Search Configuration Import
- Search Configuration Export
- Site collection features
- Site hierarchy
- Site collection audit settings
- Audit log reports
- Portal site connection
- Content Type Policy Templates
- Site collection app permissions
- Storage Metrics
- Site Policies
- Content type publishing
- Popularity and Search Reports
- HTML Field Security
- Help settings
- SharePoint Designer Settings
- Password Change settings
- Password Expiration settings
- Password Reset settings
- Site collection health checks
- E-mail settings**
- Site collection upgrade

In **Mail Settings** section you can specify SMTP mail server to use in Email Web Part. You can use default SharePoint e-mail settings or provide custom SMTP server settings, including SMTP server, port, credentials and usage of SSL.

Mail Settings

Specify the SMTP mail server to use in Email Web Part. You can use default SharePoint e-mail settings or provide custom SMTP server settings.

☐ Default SMTP

☒ Custom SMTP

SMTP Server:

Port:

Timeout (in seconds):

☐ Use default network credentials

☒ Custom credentials

Domain:

Username:

password:

☐ Enable Secure Sockets Layer (SSL)

In **Distribution Lists** section, one can specify how to send e-mails to distribution lists (DL) of Active Directory (AD). By default e-mail is send to DL address. In some cases, DL e-mail address cannot be resolved, for e.g. if you have Active Directory without Exchange server, and use some external SMTP server. In this scenario, Email Web Part can automatically expand DL and send email directly to its members. In order to do it, **Expand DL and send e-mail directly to it's members** option should be checked. Then, specify in **Active Directory Settings** section it's **Domain** and **AD account** that has a right to read members of distribution list in Active Directory.

Distribution Lists

Provide additional settings of e-mail for Active Directory distribution lists.

How to send email to AD distribution list (DL)?

☐ Send e-mail directly to DL address

☒ Expand DL and send e-mail directly to its members

Active Directory Settings

Provide domain and AD account that has a right to read members of distribution lists.

Domain:

AD account:

☐ Application Pool Identity

☒ Specified account

User name:

Password:

Release Notes

Version	Notes
v2.1 (May 16, 2017)	New Features: <ul style="list-style-type: none"> Added SharePoint 2016 support Added "edit subject" option Bugs Fixed: <ul style="list-style-type: none"> Fixed minor issues
v2.0 (March 11, 2013)	New Features: <ul style="list-style-type: none"> Added SharePoint 2013 support Added Russian and German localization Improvements: <ul style="list-style-type: none"> Improved performance
v1.91 (July 13, 2012)	Improvements: <ul style="list-style-type: none"> Improved outgoing email storing when backup and restore site
v1.9 (May 18, 2012)	New Features: <ul style="list-style-type: none"> Added custom SMTP settings support Added Reply To option
v1.8 (March 23, 2012)	New Features: <ul style="list-style-type: none"> Added ability to expand distribution lists and send e-mails directly to its members Added user template fields support in e-mail subject and body Bugs Fixed: <ul style="list-style-type: none"> Fixed minor issues
v1.71 (March 2, 2012)	New Features: <ul style="list-style-type: none"> Added ability to send email selecting multiple items [ENT] Added "Send E-mail" action in ribbon on list view page (SharePoint 2010 only) Improvements: <ul style="list-style-type: none"> Improved look & feel of Send E-mail dialog Bugs Fixed: <ul style="list-style-type: none"> Fixed minor issues
v1.6 (October 14, 2011)	New Features: <ul style="list-style-type: none"> Added ability to select e-mail recipients from SharePoint list [ENT] Improvements: <ul style="list-style-type: none"> Improved outgoing e-mail storage Added ability to disable e-mail To box Added SharePoint August CU update support Bugs Fixed: <ul style="list-style-type: none"> Fixed minor issues

v1.51 (September 14, 2011)	Bugs Fixed: <ul style="list-style-type: none"> Fixed Access Denied error when sender does not have permissions to view the membership of e-mail recipient group
v1.5 (August 31, 2011)	New Features: <ul style="list-style-type: none"> Added ability to attach files from local disk [PRO] Added ability to store outgoing e-mails in SharePoint lists [ENT]
v1.4 (August 11, 2011)	New Features: <ul style="list-style-type: none"> E-mail Attachments support [PRO] Added "To" box mapping with Single line of text column value (email addresses) Added ability to hide e-mail "Cc" and "Bcc" boxes from end users
v1.3 (June 01, 2011)	Improvements: <ul style="list-style-type: none"> Added support for new licensing model (ArtfulBits License Manager v1.4)
v1.2 (February 10, 2011)	Improvements: <ul style="list-style-type: none"> Added links to Attachments list item Added links to documents from Document Library
v1.11 (December 1, 2010)	Bugs Fixed: <ul style="list-style-type: none"> Fixed template value expansion in e-mail Subject
v1.1 (November 2, 2010)	New Features: <ul style="list-style-type: none"> Added ability to send e-mail from List Item Auto populated e-mail To, Subject and body with column item values Improvements: <ul style="list-style-type: none"> Improved e-mail look and feel
v1.0 (July 14, 2010)	Initial Release

[PRO] - Professional edition

[ENT] - Enterprise edition

See Also



[ArtfulBits Blog](#)

Professional Blog complements and extends SharePoint default functionality with the possibility of adding video or zoomable image and preview, providing tags for the blog entries, supporting the categorization and tags cloud, filtering the entries by category or tag, configurable global settings and many more.



[Cascaded Lookup Column](#)

Cascaded Lookup Column allows building relationship between parent and child columns, the data selected in one field will determine the options presented in another.



[Category Column](#)

Category Column allows tracking, organizing and grouping list items. Outlook 2007 approach for elements categorization, easy indicator color changing and using of advanced tooltip, provide a high professional component style.



[Column Data Adapter](#)

Column Data Adapter is an extension component providing ability to use ArtfulBits Columns in Microsoft Access forms, reports and Microsoft Excel.



[Column Permissions](#)

Column Permissions allows you to manage access to list content on column level. Permissions can be assigned for individual users and for SharePoint groups as well and are effective in forms and list views, as well as in the SharePoint Alerts, RSS, Datasheet and even during exporting to Excel and opening with Access.



[Discussion Column](#)

Need to organize well formatted conversation in the list item without enabling list versioning? Discussion Column is the right choice. Component allows entering rich text with formatting, images, tables, hyperlinks and other features.



[Email Web Part](#)

ArtfulBits Email Web Part allows sending e-mail messages directly from Microsoft SharePoint site. You can notify task assigned users, send gratitude or just send regular e-mail message, etc.



[Follow-Up Column](#)

Follow-Up Column enables due date flags similar to Outlook follow-up functionality. Applying of flags to the list item allows adding of visual reminder in a natural way.



[Image Upload Column](#)

Quick and simple way of uploading pictures. Image Upload Column provides with ability to select a picture using file browsing dialog, upload and display it in the list view.



KPI Column

KPI (Key Performance Indicator) Column is simple graphical scorecards that can be used to evaluate business data against business goals. With this column you reduce risk to overlook information about the status of value.



Link to Document Column

Link to Document Column allows referencing files and folders placed at Document Library and provides easy and intuitive way to download files directly from column. Use this column to provide a browsing interface that allows users to browse to an object to link to instead of typing a URL.



Parent Selector Column

Parent Selector Column is used for organizing hierarchical relations in SharePoint list. Picker dialog allows choosing data from large lists. Standard Lookup column can be easily converted to Parent Selector column and vice versa.



Password Change Web Part

Password Change Web Part allows users to change their own passwords from within the SharePoint environment using standard text box interface (current password, new password and confirm new password).



Password Expiration Web Part

Password Expiration Web Part enables Active Directory users to be notified via Web Part interface that their passwords are about to expire. It also automatically sends out email notifications to users before the password expiration date.



Professional Calendar Web Part

Professional Calendar Web Part provides following key benefits: it allows combining events from different SharePoint Lists, from any SharePoint Site, in one Calendar view; allows specifying different color sets for different event sources; supports on-the-fly AJAX-enabled editing features in Outlook like style; and other enhanced functionalities.



Progress Column

Progress Column provides users with the ability to make SharePoint lists more visualized by displaying numerical data on the page using percentage-based progress bar. Professional progress bar style will make your SharePoint list really modern and stylish.



Shopping Cart Web Part

ArtfulBits Shopping Cart is intended to provide ecommerce functionality. This web part provides a possibility to exhibit items for sale, its basic information, items images, and price, choose the size or other category of item, submit an order and save order in history.



Video

Video Column and Video Web Part are powerful controls made for uploading, managing, linking and playing video files. These controls support variety of video files that can be uploaded from computer, or linked from SharePoint library or streamed from direct URL.

Remarks

Information in this document may be outdated. Please, visit <https://www.sharepoint-artfulbits.com/> for the latest product version.