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dataflow
e-mail Communications



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A Basic Guide to Using the e-mail Communications Module

1. INSTALLATION

Please refer to the readme.txt file included with the upgrade.

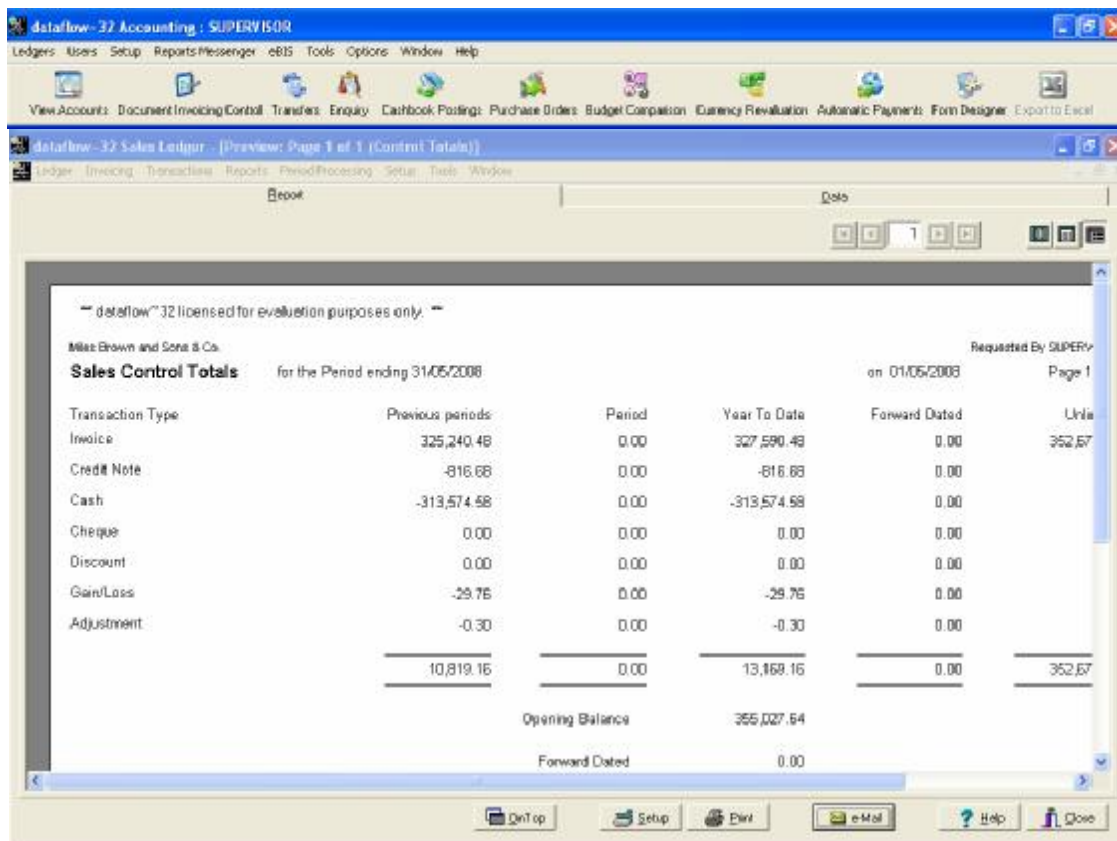
2. REPORTS

Any *dataflow* Report can be emailed internally or externally.

You may wish to save time running round your office by emailing reports to Colleagues directly or perhaps e-mail management reports to your Head Office overseas.

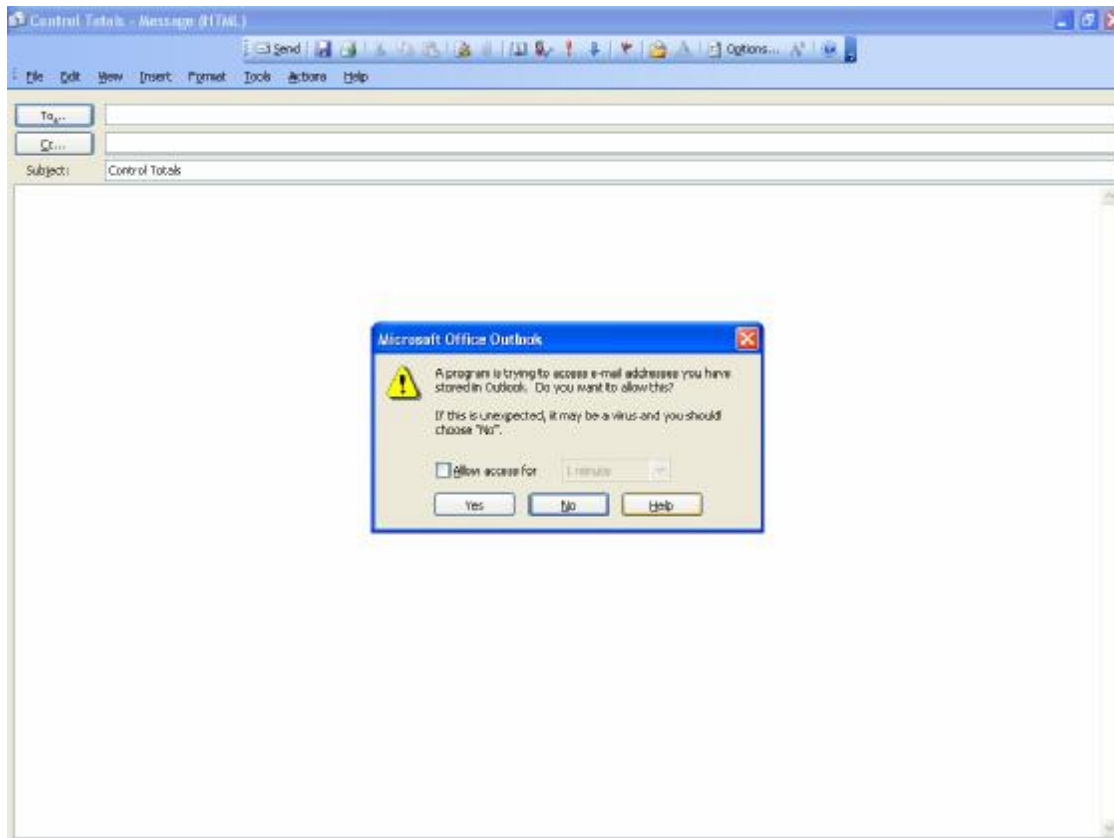
a) e-Mailing Reports

This does not require any setting up within the system. To e-mail any *dataflow* report, simply print it to screen first and click on the e-mail button.



b) Outlook Security

An Outlook security will prompt you to allow access to *dataflow*. Select yes and *dataflow* will insert the report as a PDF file attachment and you can select the recipient as normal and then send it.





3. DOCUMENTS

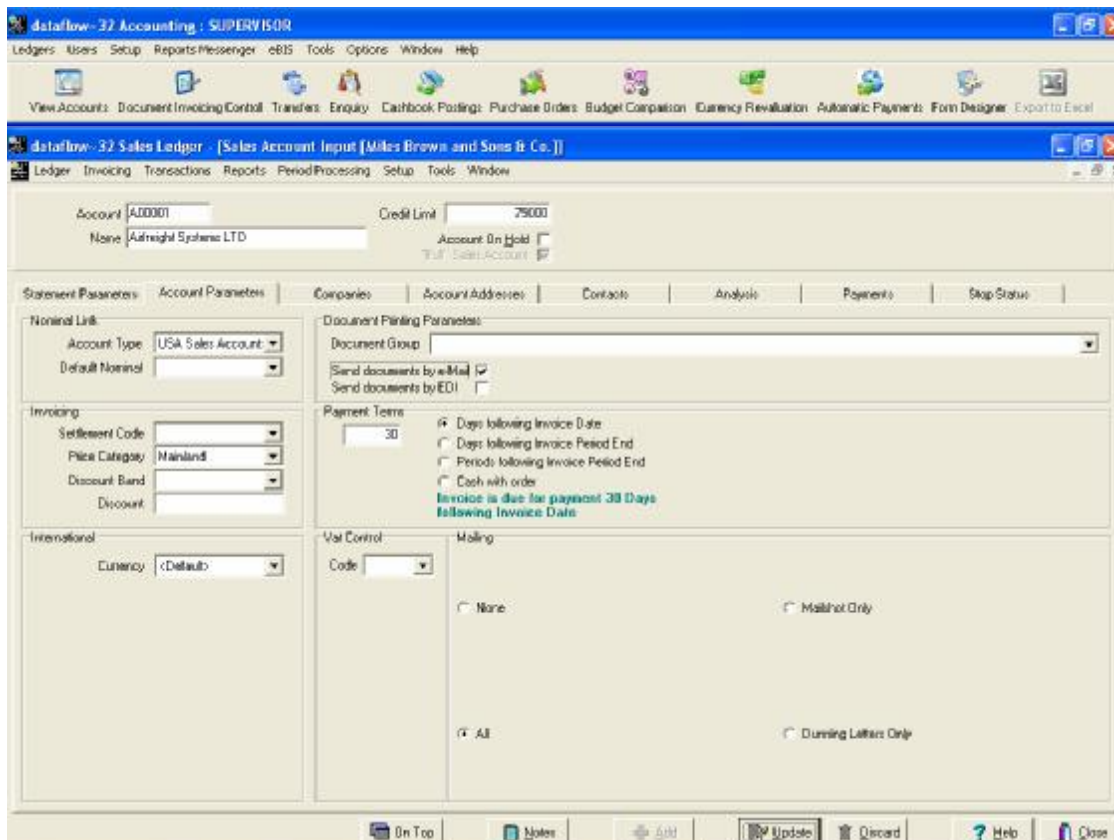
You can e-mail the following documents.

- Sales Ledger – Sales Invoices/Credits, Customer Statements
- Purchase Ledger – Remittance Advice Notes
- Sales Orders – Quotations, Orders, Deliveries, Invoices/Credits
- Purchase Orders – Orders, Receipts, Invoices

a) Sales/Purchase Account Setup

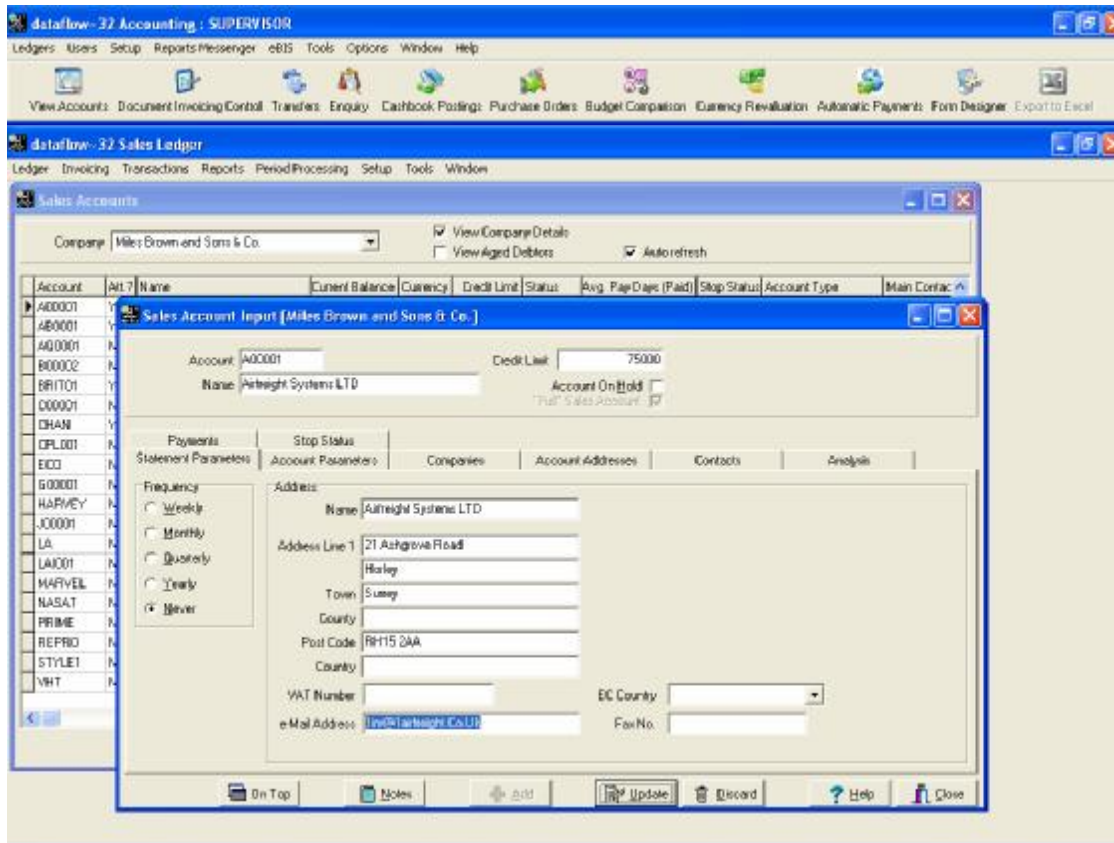
Accounts can be flagged to “send documents by email”. If this is ticked then the Document print run will send an email as opposed to just printing a hard copy.

You have an option to request a hard copy be printed also.

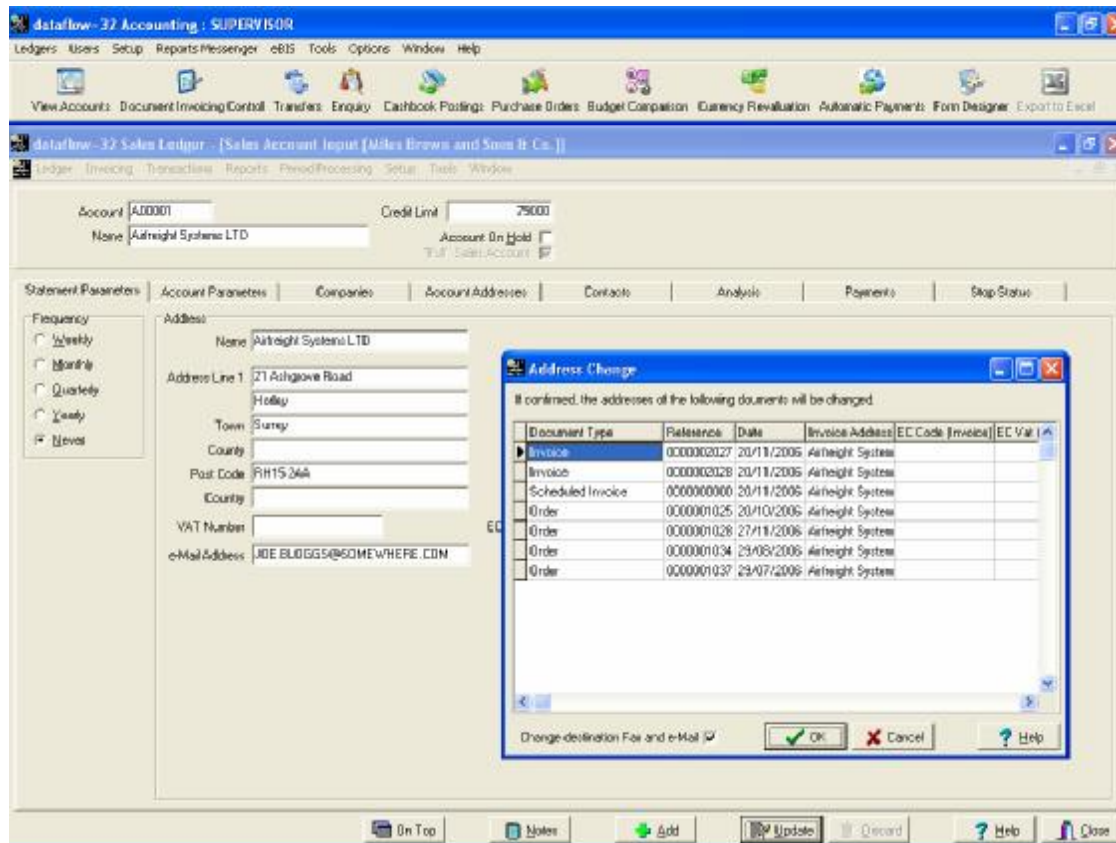


The email address must be entered against the Customer or Supplier Account as below.

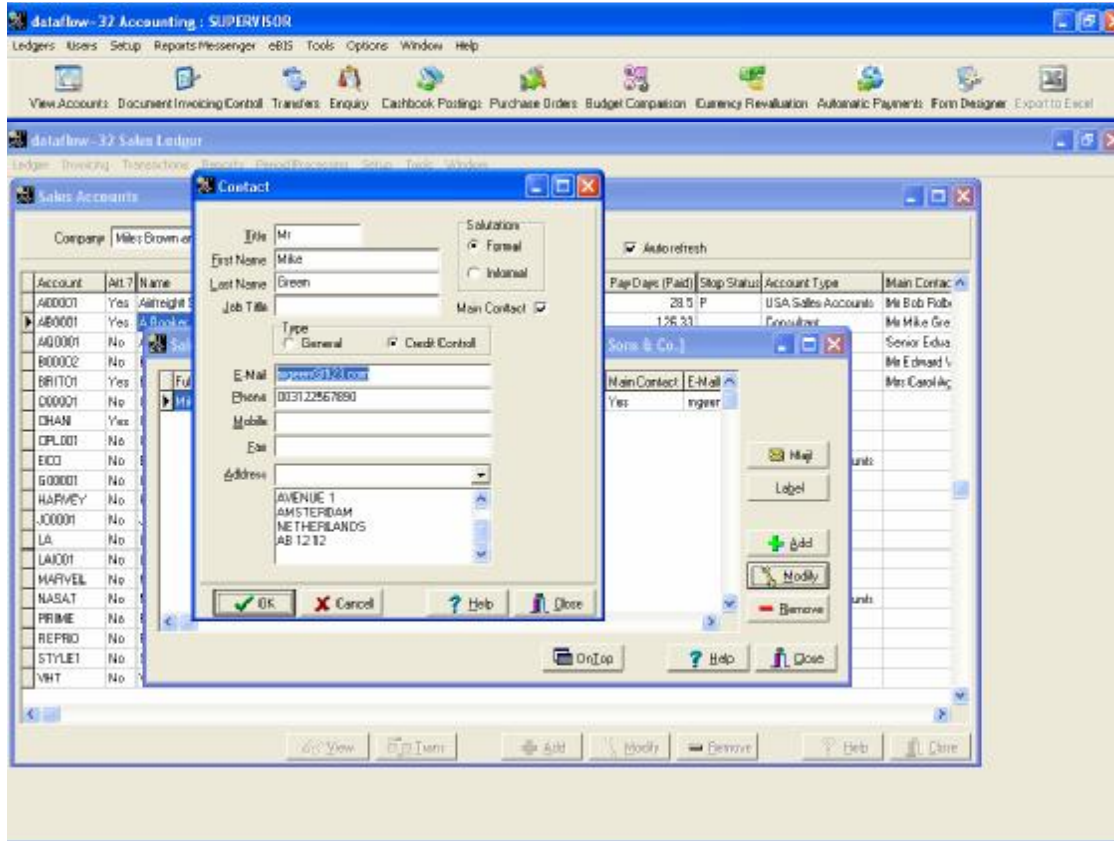
This will be used as the default for any document. If you wish the document to be sent to multiple addresses you can add more than one contact in the email address field separated by a semi colon. You will get a standard "undeliverable" bounce back message if any email address is incorrect.



If there are any documents in sales invoicing Document control waiting to be updated.
Then the system will automatically update the email details to the document header.



The e-mail address can also be added to contacts.





The email address of the "Main" contact will also be displayed on the enquiry screen. There are two new columns, "Document emailing" displays whether Document e-mailing has been enabled or not, and "e-mailing displays the Main Contact Email Address.

dataflow-32 Accounting : SUPERVISOR

Ledgers Users Setup Reports/Messenger eBIS Tools Options Window Help

View Accounts Document Invoicing/Control Transfers Enquiry Cashbook Postings Purchase Orders Budget Comparison Currency Revaluation Automatic Payments Form Designer Export to Excel

dataflow-32 Sales Ledger - [Sales Accounts]

Ledger Invoicing Transactions Reports Period Processing Setup Tools Window

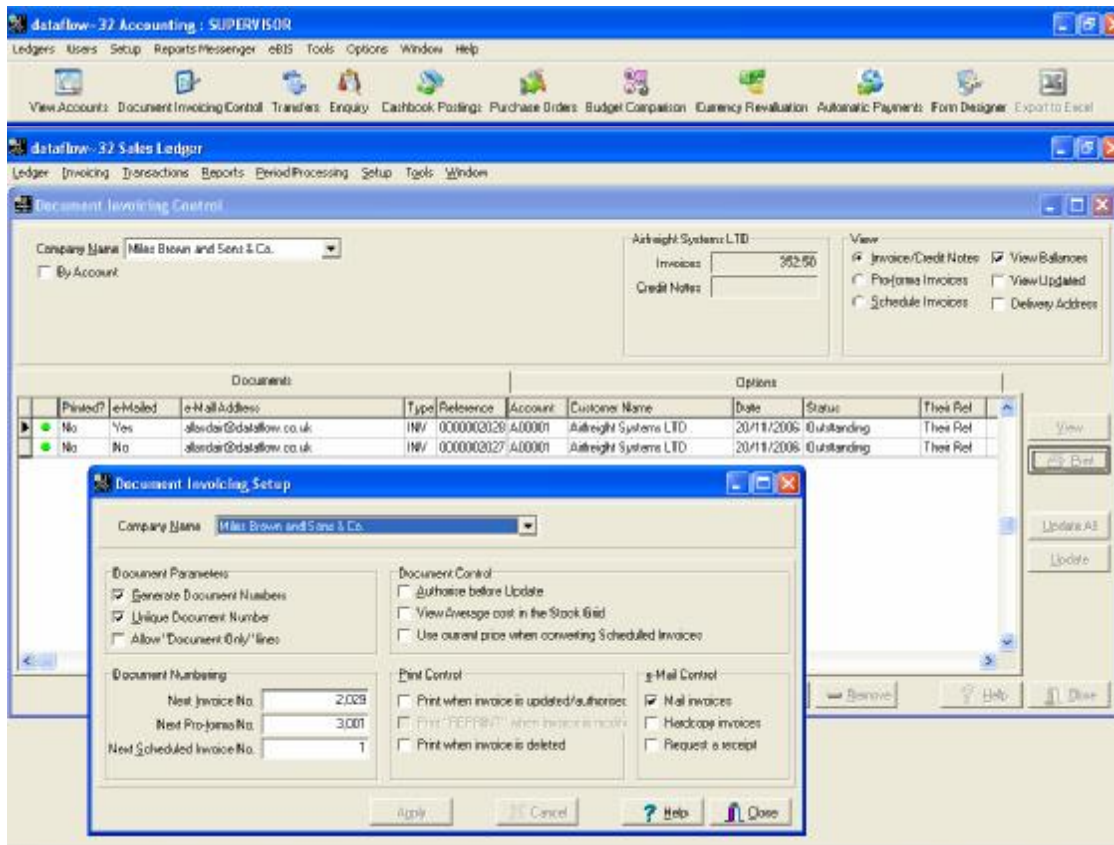
Company: Miles Brown and Sons & Co View Company Details View Aged Debtors Auto Refresh

Account	dit?	Name	Current Balance	Credit Limit	Status	Main Contact	Phone	Document e-Mailing	email
A00001	Yes	Afreight Systems LTD	85,850.00	75000		Mr Jim Bloggs	0171 3456679	No	ALASDAIR_LOWETH@HMIL.CO.UK
A00001	Yes	A Booker PLC	12,600.66	50000		Mr Mike Green	0031 22567890	No	ingem@123.com
A00001	No	Aguirre Guavella	-5,980.00	10000000	On Hold	Senior Eduardo Bolivia		No	333@PlanVicarHugo
B00002	No	British Financial Planning Co.	20,906.00	27000		Mr Edward Wright	01956 456778 ext: 234	No	Edward@British financial.co
BRIT01	Yes	British Commercial Services	19,412.25	0		Mrs Carol Agents	0171 4568300	No	Carol@britcom.co.uk
C00001	No	Covesell Advertising/Consultants	2,076.84	160000				No	
CHAN	Yes	Channel Computer Development	181,485.00	0	On Hold			No	
CPL001	No	Computer Private Limited	-7,936.00	-30000				No	
E00	No	E00 Electrical Wholesalers LTD	-58.59	0				No	
G00001	No	Graystone Insurance CO LTD	-2,852.00	750				No	
HARVEY	No	Harveys Financial Planning Ltd	-3,204.00	40000	On Hold			No	
J00001	No	Joseph Dewitt Associates	-2,746.00	0				No	
LA	No	LA Property Consultants	41,323.80	45000				No	
LAI001	No	Libeal Associates ITALIA s.r.l.	-9,006.00	40000				No	
MARVEL	No	Marvel Office Technology LTD	24,777.64	0				No	
NASAT	No	Nasar Pharmaceuticals LTD	12,126.50	0				No	
PRIME	No	Prime Chemicals LTD	-2,698.00	0	On Hold			No	
REPRO	No	Repro Publishing LTD	5,308.00	5000				No	
STYLE1	No	Style Fashion Design	3,334.00	0				No	
VHT	No	Vickers Harris and Teasdale	-472.00	0				No	

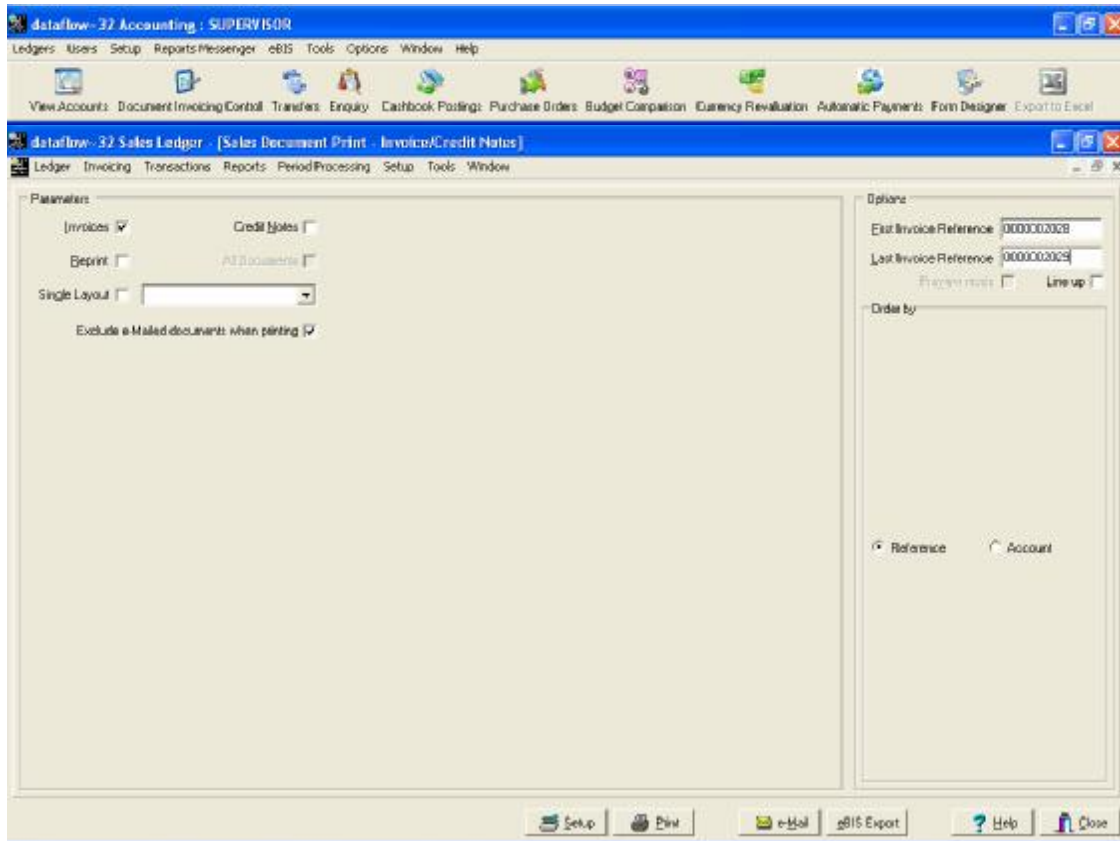
View Trans Add Modify Remove Help Close

b) Sales Ledger Document Invoicing Control

As long as you have enabled the "Mail Invoices" option in Document Invoicing setup, then you can email a range of invoices. You have two new columns "e-mailed" and "e-mail Address" in Document Invoicing Control. The print run can contain both e-mail and hard copy only accounts.

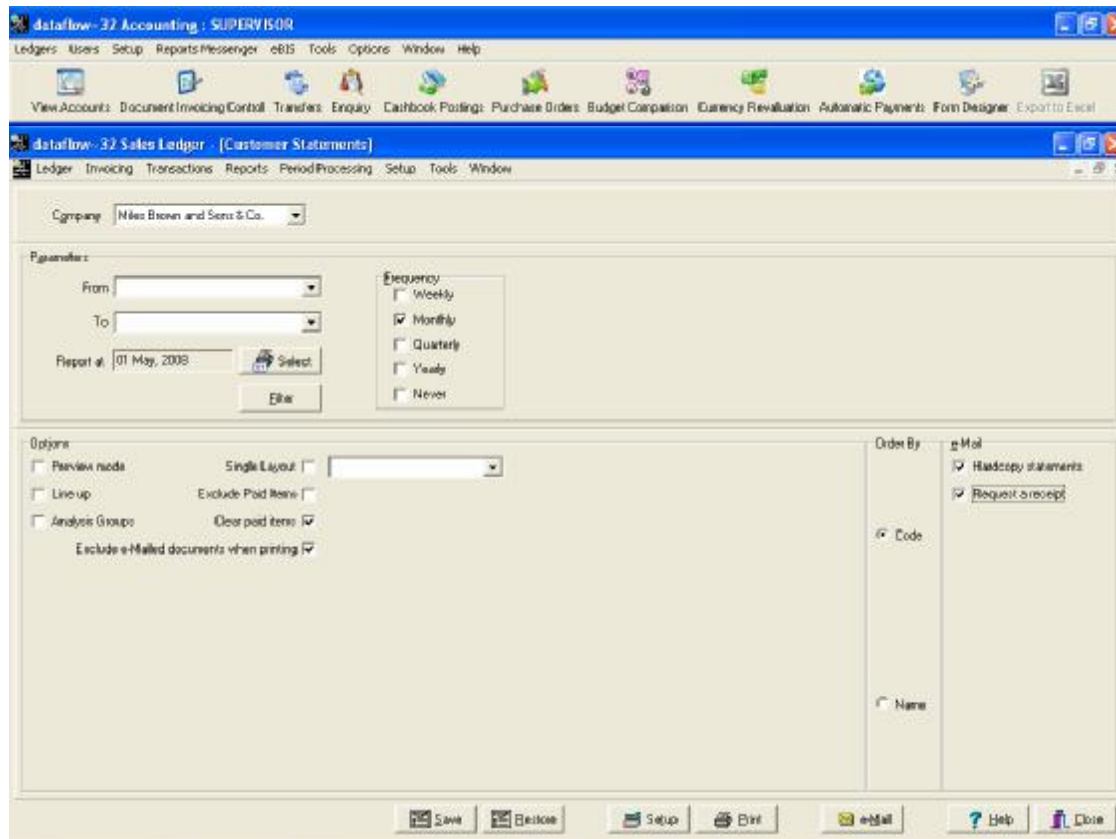


You can enter a range of invoices and click on the email button. If you leave "Exclude emailed documents when printing" then it will exclude any with an emailed status of yes".



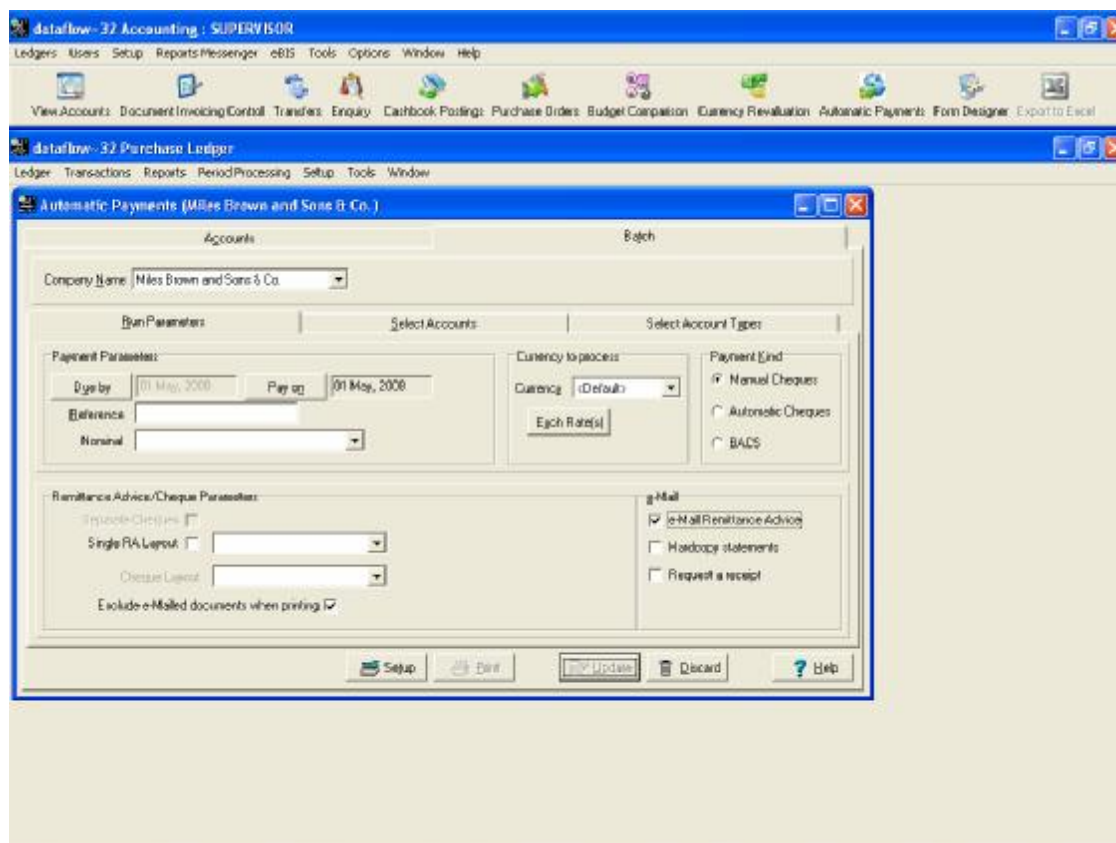
c) Customer Statements

The Customer Statements print screen has been amended to include various e-mail options, including print a hard copy also.



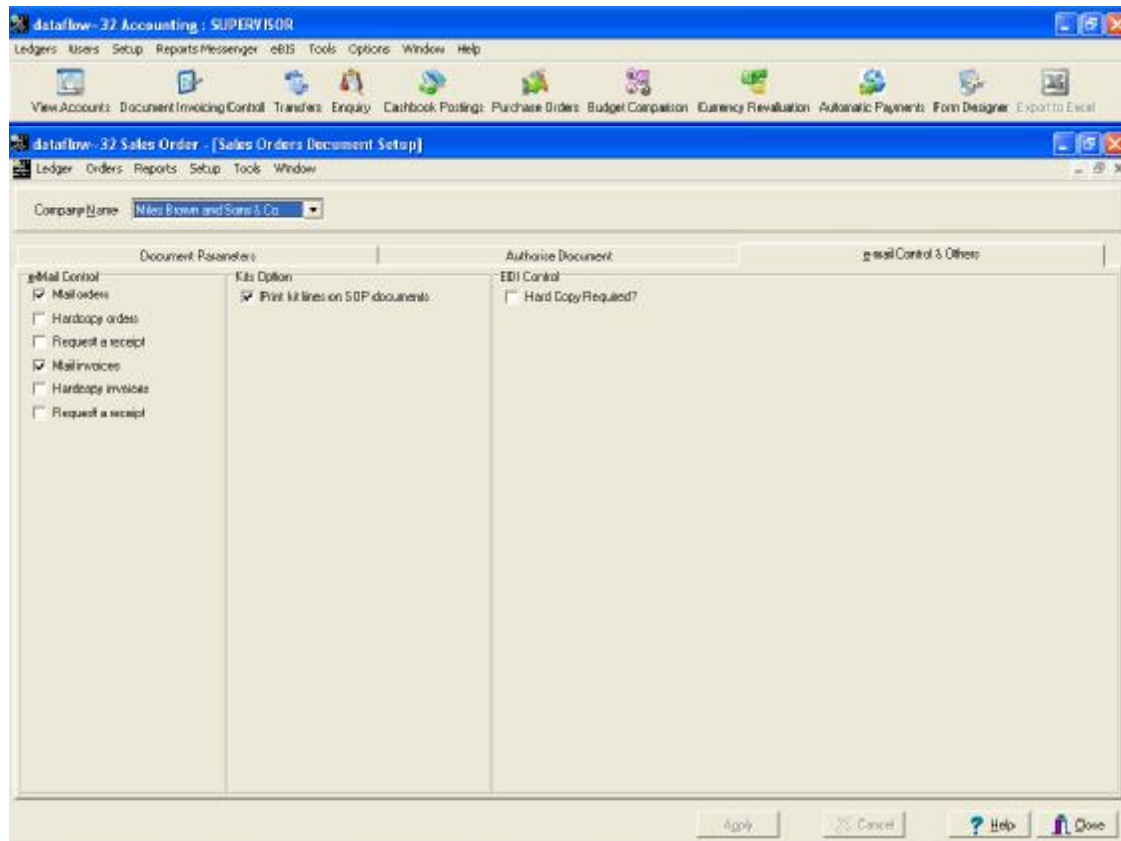
d) Purchase Ledger – Automatic Payments Screen.

An email section has been added in the bottom right hand of the screen so that you can activate emailing of remittance advices.

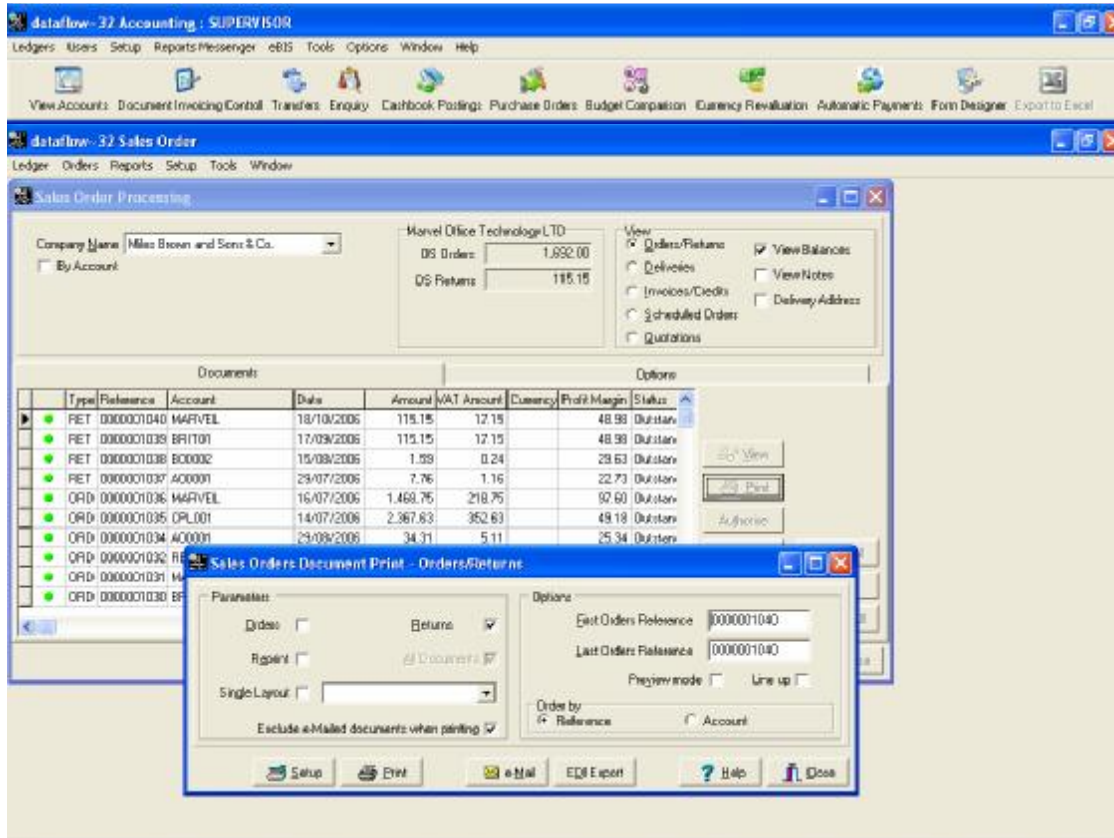


e) Sales Orders & Purchase Orders Document Control Setup

There is a new e-mail Control tab where you can enable the email facility for Orders and Invoices.



You can email from within the SOP/POP Document control window as per Sales Invoicing Document Control Window. You can print a range of documents, or print preview single documents and then e-mail.



f) Document Design

Each Document Design control window has a new e-mail tab which allows you to Set standard text, or attach additional files to any e-mail which is sent out.

