



## **Document emailing**

Dear user,

You must make sure that you have read "Navigating the System" first before reading any other Clarity guides as without a good knowledge of the navigation you will not fully benefit from the features and shortcuts that Clarity will provide for you.

Click here to read Navigating the System: https://dataflow.co.uk/images/uploads/release\_notes/Clarity\_-\_Navigating\_the\_System\_.pdf

Also at the end of each guide, there may be a list of other supplements for further explanation of features within this routine.

Enjoy exploring Clarity and please do not hesitate to suggest any improvement that you feel will be useful to add to this document.

Warmest regards

Dataflow (UK) Ltd



This first section covers the emailing of Sales Invoices, Sales Orders, Sales Order Delivery Notes and Sales Order Invoices.

To be able to email the above document types you'll need to flag the Sales Ledger account as eligible for document emailing and define the recipient email address for those documents.

To do so navigate to the Sales Ledger (yellow arrow below) and Browse (green arrow). Select the account in the grid and click the *Modify* button on the footer of the window (highlighted in blue) to open the *Add/Modify Account* window.

The window will default to the *Organisation Address & Main Contact* section, the email address entered into the section in red below will be the recipient email address. You may enter multiple recipient email addresses, simply enter all email addresses and separate them using a semi-colon (;). Click the *Update* button to commit the change.

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For easy reference the destination email address is also displayed within the account browse grid (highlighted above in green).



You'll also need to flag the Sales Ledger account as eligible for document emailing. Click on the *Parameters* tab (highlighted in below yellow) and tick the *Email documents* parameter (highlighted below in red).

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When the next document is created (Sales Invoice in this example) the destination email address will default to the email address defined within the Sales account setup, and is displayed within the *Header* tab of the invoice (highlighted in yellow below). Should you wish to you may enter additional addresses (separated by a semi-colon), or an alternative email address for that particular document.

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There are two methods of emailing documents from Clarity. The method you choose determines which email address the email will be sent <u>from</u>.

The first method is to right click on the grid and choose the option to *Print/Email current range* (highlighted below in green). To display the documents eligible for emailing you'll need to untick *Preview* and tick the *Documents to be emailed* parameters (both are highlighted in yellow below).

If your document does not appear within the list of documents to be emailed this may be due to one (or more) of the following reasons:

- The Sales account is not set to have documents sent via email. Note the account must be set for emailed document prior to the creation of the document you wish to email.
- The document has not been Authorised or Released.
- The document has already been emailed.

To email <u>all</u> of the displayed documents click the *Send* button (highlighted in red below). If you wish to send only select invoices you can use grid filters (highlighted below in blue) to isolate your required range.

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By using the above *Print/Email current range* method of emailing documents the system will use the email address defined within the *Sales Ledger Setup* as the <u>senders email address</u>.

This email address can be set by navigating to System (yellow arrow below), Sales Ledger section, General Setup and Ledger Setup (green arrow below). Enter the required senders address into the *From* field highlighted in red below. You may also wish to enter a generic message into the message section. Click the *Apply* button to commit the change.



The other method of emailing documents is to use the right-click *Email to customer* option (highlighted below in green). Selecting this option will open a new window. This window will automatically populate the email body text with the narrative set within the Sales Ledger system setup, but you may re-write or append to this default narrative should you wish to.

The recipient email address is set to the email address defined against the account. You may add Bcc addresses if you wish to.

Using the *Email to customer* option will email <u>only</u> the selected document and the email will also be sent <u>using the email profile defined within the setup of the Clarity user who is sending the email</u>, it will not use the senders email address define with the Sales Ledger Setup. The senders email address being used is highlighted below in red.



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In addition to transactional documents you may also emailed Statements via Clarity. To do so navigate to the *Sales Ledger* (yellow arrow below) and *Statements* (green arrow).

Ensure that you tick the *Email* parameter (highlighted in red below) and click the *Preview Statements* button on the footer of the window (highlight in blue below).

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From 01/12/2020   By due date     Weekly   Weering   Exclude setted transactions     Order by © Code © Name     Filter     Content     Order filter ©     Preview Statements ©     Concer filter ©     Preview Statements ©     Concer filter ©	Only accounts set up in the account parameters to receive documents by email will have statements sent by email		
From 01/12/2020   As at 17/12/2020   By due date   Unothly   Quarterly   Yearly   Exclude settled transactions   Content Order by © Code © Name Filter Filter	Frequency		
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	Clear filter	Preview Statements	



Clicking the *Preview Statements* button will load a new window displaying only statements eligible for emailing. If the expected statement does not appear and presuming that you've chosen the correct reporting options the Sales account may not be set for emailing (outlined earlier in this document).

Clicking the *Email Statements* button on the footer of the window (highlighted in yellow below) will email <u>all</u> customer statements displayed in that preview. The senders email address will be the address defined within the Sales Ledger System Setup.

👌 Dataflow Clarity [	Sales Ledger]												_		
									Company	Miles Brown and	d Sons &	Co. 🔻	User:	SUPERVISOR	•
Sales Ledger S	ales Orders	Purchase Ledger	Purchase Orders	Nominal Le	dger Audit	Timeshe	ets Dashboa	rd System							
	p p			31											
Browse	Cash Allocate Cash	e Invoice Proform	a Scheduled Invoice	Close Period	Customer Data Listings▼	Transactiona Reports*	al Statements								
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				Dated T 10/10/2019 P 20/03/2020 P	ype Reference #/ 0000002005 #/ M001	E2,350.00 £11,750.00	Credits Outstanding £0.00 £1.637.50 £0.00 £11,750.00								
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				10/07/2020 C 14/08/2020 P 14/08/2020 P	SH 2005 W 000002053 W DM5678	£18.00 £18.00 £2,400.00	-£1,637.50 -£537.50 £0.00 £18.00 £0.00 £2,400.00								
				19/08/2020 P 15/09/2020 P 15/09/2020 P	ev DM5681 ev 0000002051 ev 0000002058	£6,000.00 £108,000.00 £1,200.00	E0.00 E3.200.00 E0.00 E108,000.00 E0.00 E1,200.00								
				15/09/2020 P 15/09/2020 C 15/09/2020 C 17/09/2020 P	VV DM5676 SH Dm6s11 SH Test 2 SV 000002048	£54.00 £0.00 £0.00	-61,000,00 -6500,00 -6200,00 -6200,00 -6200,00 -6200,00								
				17/09/2020 P 23/09/2020 P 23/09/2020 P	V 0000002055 V 0000002059 V 0000002030	£91.20 £38.78 £76.38	£0.00 £01.20 £0.00 £38.78 £0.00 £76.38								
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The emailing procedure for Purchase Order documents and Remittance emailing is the same as the Sales Ledger, except the document emailing parameter and recipient email address for Purchase accounts must be set via the Purchase Ledger browse window.

As with the Sales transactional documents the senders email address is determined by which rightclick option used to send the email to the supplier. If the *Print/Email current range* option is used the *Purchase Ledger System* email address will be used as the senders address. If the right-click *Email to Supplier* option is used the email address set against the Clarity user account sending the email will be used as the senders address.

The system email address for the Purchase Ledger is set by navigating to System (yellow arrow below), Purchase Ledger section, General Setup and Ledger Setup (green arrow below). Enter the required senders address into the *From* field highlighted in red below. You may also wish to enter a generic message into the message section. Click the *Apply* button to commit the change.

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2 Dataflow Clarity	×
	Company Miles Brown and Sons & Co.   User: SUPERVISOR
Sales Ledger Sales Orders Purchase Ledger Purchase Orders Nominal Ledger	Audit Timesheets Dashboard System
Sales Ledger     Sales Orders     Purchase Ledger     Purchase Orders     Nominal Ledger       Users & Company & WT & Consolidation     WT & Consolidation     WT & Consolidation     Invoicing Processing     Order & Currency       General     Sales Ledger     Invoicing Processing     Invoicing Processing     Invoicing Processing	Audit       Timesheets       Dashboard       System         Integration       Image: State and System       Ima
	Apply 🛞 < Back Next >