



Discussion Document 8

E-Mail Set-Up for Statement Printing

Discussion Topics

Setting up the E-Mail Control to facilitate the ability to e-mail out Debtors Statements.

E-Mail Control File

A screenshot of a Windows dialog box titled "Email Control file". The dialog is divided into three main sections: "E-Mail Options", "General", and "CRM".
- **E-Mail Options:** Contains four text input fields: "Email CTL" (value: EMAIL_CTL), "Program Location" (value: d:\data\csoft7), "Host" (value: smtp.ihug.co.nz), and "From" (value: csoft@csoft.co.nz). Below these is a checked checkbox labeled "Send Copy to Self".
- **General:** Contains a list of radio button options: Postie, Microsoft (selected), VBScript, Csoft AutoMail, Csoft AutoMail V3.0, OI V7.2, Selected Location, and Use Local drive (selected).
- **CRM:** Contains a list of radio button options: Postie, Microsoft (selected), VBScript, Csoft AutoMail, Csoft AutoMail V3.0, OI V7.2, Selected Location, and Use Local drive (selected).

E-Mail Ctl - This indicates the control file that is being set up. Leave as is.

Program Location - This is the location of CSoft within your computer.

Host - The e-mail address of the host

From - The email address of the sender.

Selection Options

a) Send Copy to Self – This sends a copy of the statement to sender. (address of the "From" field)

b) General & CRM

Next, you will need to select the type of e-mail system you use. By default, use Microsoft. For systems that have the CRM module installed as well, please use the same options as that of the General options.

CSB Management



Update Customer Setup

The next step is to setup the contacts and allocate these contacts in the customer entry screen.

Contact Names

Contacts	Contact Gp	Phone	EMAIL	DOB	Comments
John Doe			johnD@tra.co.nz		
Jane Doe			janeD@webmail.com		

Related Customers

	Cust No	Cust Name	Credit Limit
1			
2			
3			
4			

- 1) Go to Customer Setup Screen and enter in the required customer number.
- 2) Scroll down to the Contact Details Page (2nd Page).
- 3) Enter in contact details. (see image above as an example).
- 4) Next, click on the E-Mail Tab Page (Last Page).
- 5) Check the 'Statements' Box.
- 6) Select the format of the statements to be e-mailed out. (ideally this should be PDF)

Customer entry screen

Main Mgre Bank Credit Web **E-Mail**

Format

Email Invoice PDF
 CSV
 XML
Emails

Format

Statement PDF
 CSV
 XML
Emails

- 7) Next, use the options to select the contacts that should receive the e-mailed statements.

Key

1	John Doe
2	Jane Doe

OK Cancel Search... Print

CSB Management



- 7) After you have selected the recipients of the statements they will be added to the e-mail list table. You can select more than one recipient to receive the statements via e-mail. See Screen shot below.

A screenshot of a software dialog box titled "Format". It contains two sections: "Format" and "Emails". In the "Format" section, there is a checked checkbox for "Statement" and four radio buttons for "PDF", "CSV", "XML", and "HTML", with "PDF" selected. In the "Emails" section, there is a text input field containing "John Doe" and an empty text input field below it.

Format	
<input checked="" type="checkbox"/> Statement	<input checked="" type="radio"/> PDF
	<input type="radio"/> CSV
	<input type="radio"/> XML
	<input type="radio"/> HTML
Emails	
<input type="text" value="John Doe"/>	
<input type="text"/>	

Print Statements

Now that the e-mail setups have been done, you can continue to print statements as you normally do.

However, for debtors for whom you have selected to receive statements by e-mail, their contact will automatically receive a copy of the statements by e-mail.