



DATAFLOW

Financial Software Solutions

E-mail Communications



A basic Guide to using the e-mail Communications Module

Installation

Please refer to the readme.txt included with the upgrade

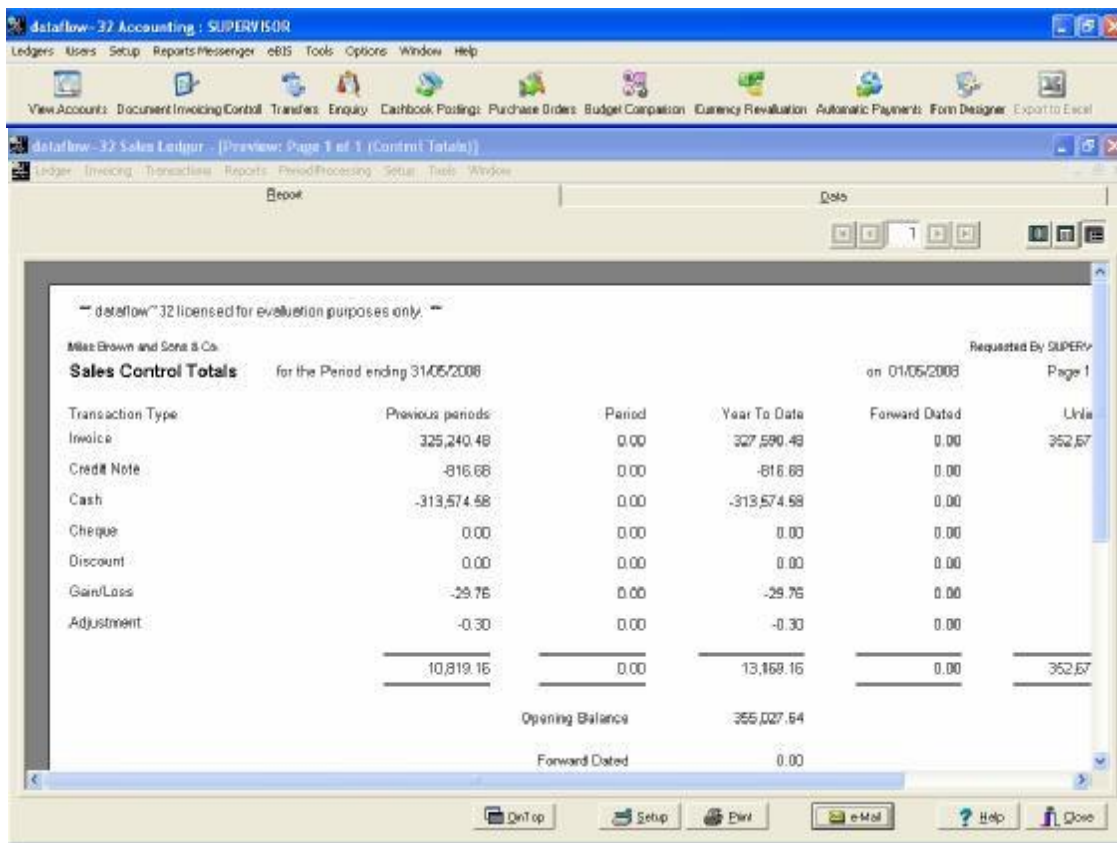
Reports

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

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

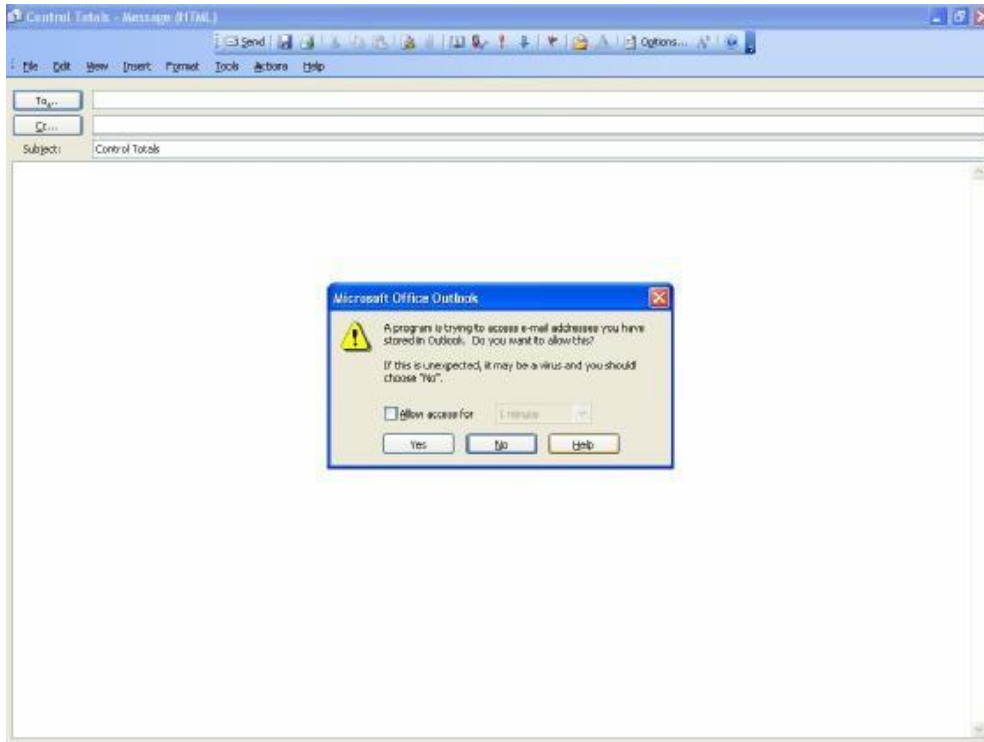
a) E-mailing Reports

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

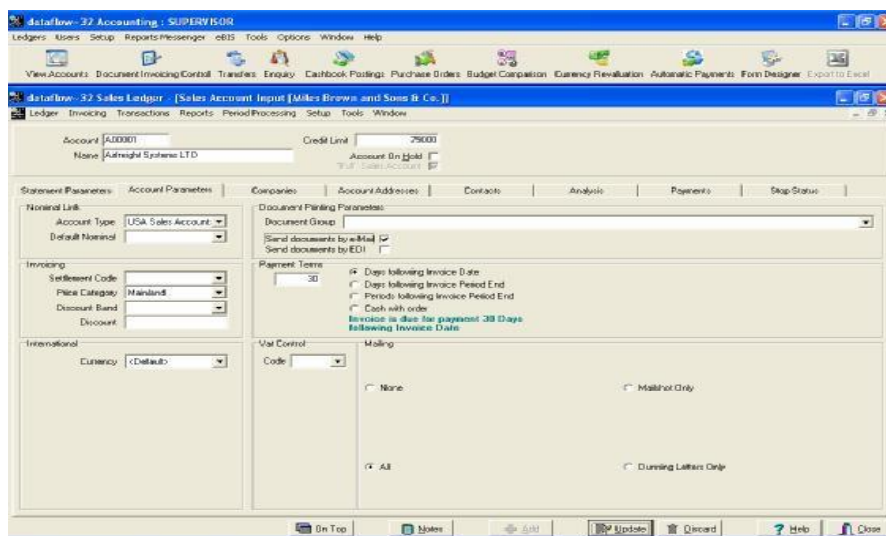
You can email the following documents.

- 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

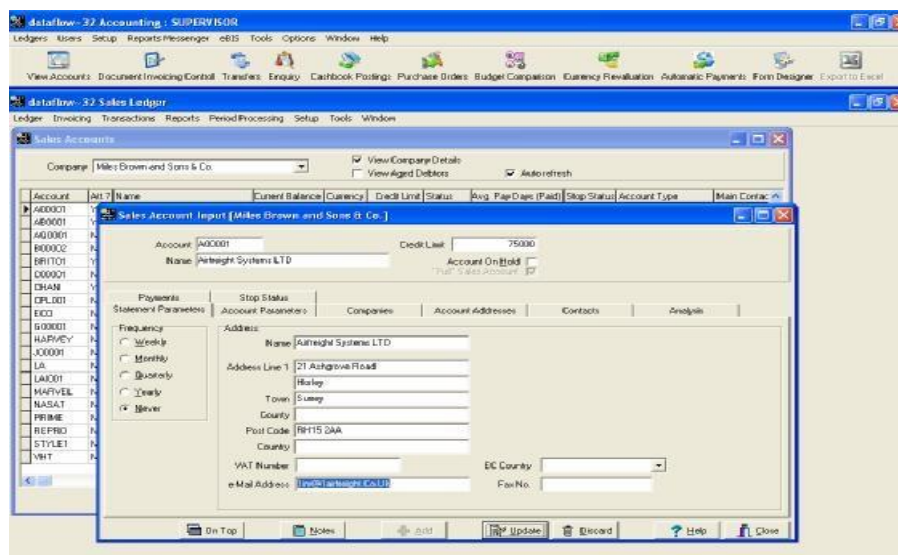
Accounts can be flagged to 'send documents by email'. If this is ticked then the document print run will sent an email as opposed to just printing a hard copy.

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

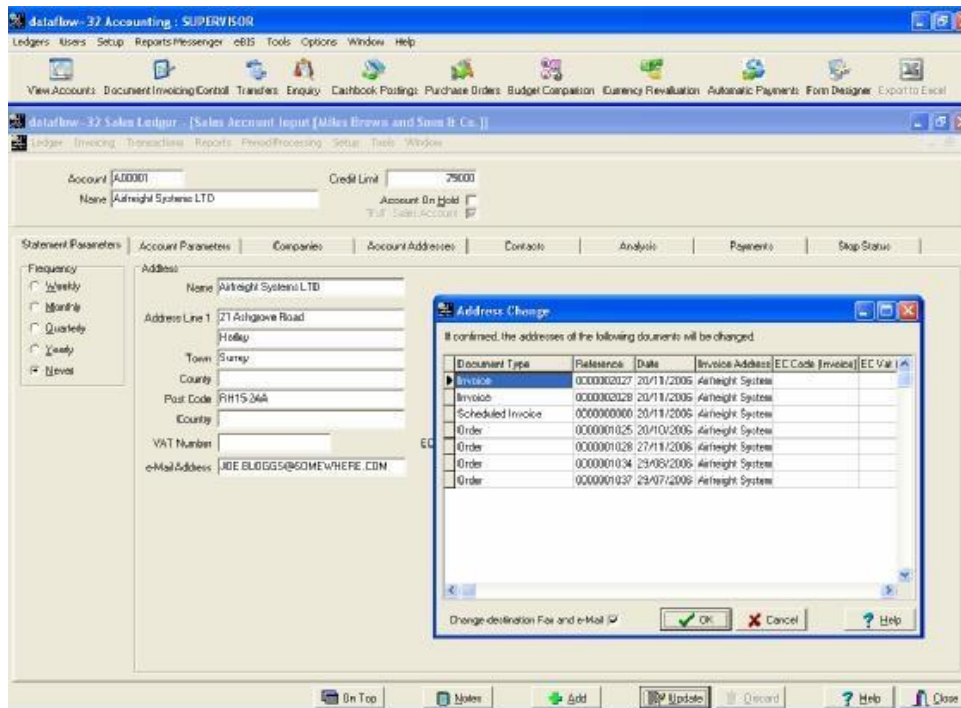


The email address must be entered against the customer or Supplier Account as below.

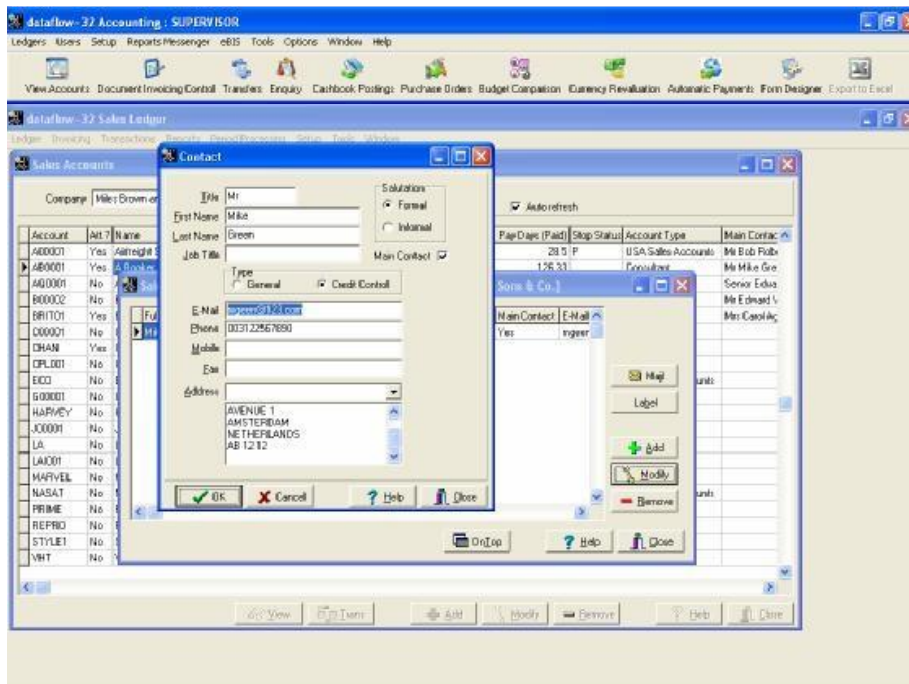
This will be used as the default for any document. If you wish the document to be sent to multiple addresses you can add more than one contact in the email address field separated by a semi colon. You will get a standard 'undeliverable' bounce back message if any email address is incorrect.



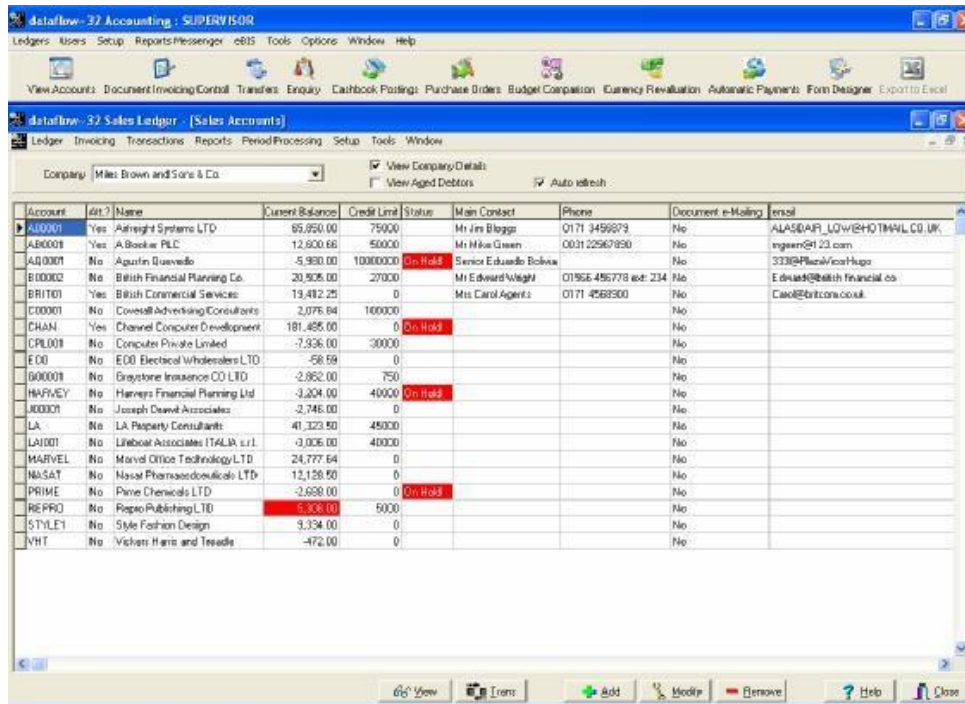
If there are any documents in sales invoicing document control waiting to be updated, then the system will automatically update the email details to the document header.



The email address can also be added to contacts.



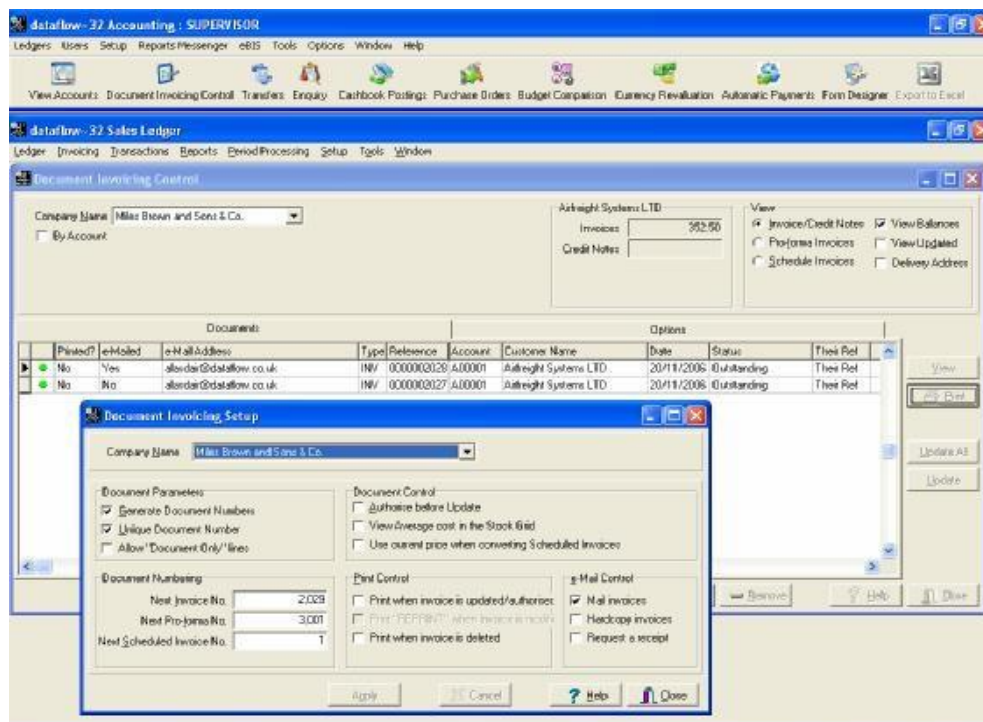
The email address of the 'Main' contact will also be displayed on the enquiry screen. There are two new columns, 'Document emailing' displays whether Document emailing has been enabled or not and emailing displays the Main Contact Email Address.



Account	Amt	Name	Current Balance	Credit Limit	Status	Main Contact	Phone	Document e-Mailing	email
A0001	Yes	Ashright Systems LTD	65,650.00	75000		Mr Jim Baggot	0171 3496679	No	ALAS@AIR_LQW@HOTMAIL.CO.UK
AB001	Yes	A Bookie PLC	12,600.66	50000		Mr Mike Green	0031 22967890	No	mgreen@123.com
AD001	No	Agustin Quevedo	-5,930.00	10000000	On Hold	Senior Eduardo Bolivia		No	333@Plexa/Vica/Hugo
B0002	No	British Financial Planning Co.	20,906.00	27000		Mr Edward Wright	01956 496778 ext: 234	No	E.dward@britishfinancial.co
BRIT01	Yes	British Commercial Services	19,412.25	0		Mrs Carol Argent	0171 4569300	No	Carol@britcom.co.uk
C0001	No	Coveall Advertising Consultants	-2,076.84	160000				No	
CHAN	Yes	Channel Computer Development	181,486.00	0	On Hold			No	
CP001	No	Compuet Private Limited	-7,936.00	-30000				No	
E00	No	E00 Electrical Wholesalers LTD	-58.59	0				No	
G0001	No	Graystone Insurance CO LTD	-2,862.00	750				No	
HARVEY	No	Harvey Financial Planning Ltd	-3,204.00	40000	On Hold			No	
J0001	No	Joseph Dewal Associates	-2,746.00	0				No	
LA	No	LA Property Consultants	41,329.50	45000				No	
LA001	No	Lincoln Associates (TAL) s.r.l.	-0,006.00	40000				No	
MARVEL	No	Marvel Office Technology LTD	24,777.64	0				No	
NASAT	No	Nasal Pharmaceuticals LTD	12,138.50	0				No	
PRIME	No	Pine Chemicals LTD	-3,630.00	0	On Hold			No	
REPRO	No	Repro Publishing LTD	6,306.00	5000				No	
STYLE1	No	Style Fashion Design	3,334.00	0				No	
VHT	No	Vickens Hair and Tresses	-472.00	0				No	

b) Sales Ledger Document Invoicing Control

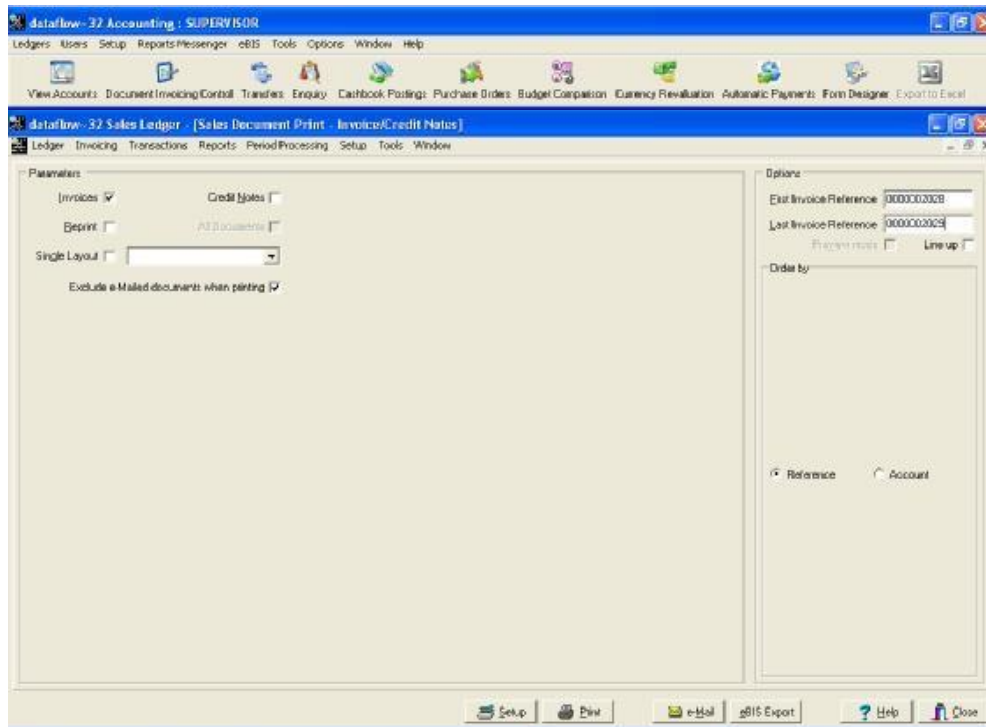
As long as you have enabled the 'Mail Invoices' option in Document Invoicing setup then you can email a range of invoices. You have two new columns 'emailed' and 'email address' in Document Invoicing Control. The print run can contain both email and hard copy only accounts.



Printed?	e-Mailed	e-Mail Address	Type	Reference	Account	Customer Name	Date	Status	Thru Tot
No	Yes	alender@dataflow.co.uk	INV	000000120	A00001	Ashright Systems LTD	20/11/2006	Outstanding	Thru Tot
No	No	alender@dataflow.co.uk	INV	000000127	A00001	Ashright Systems LTD	20/11/2006	Outstanding	Thru Tot

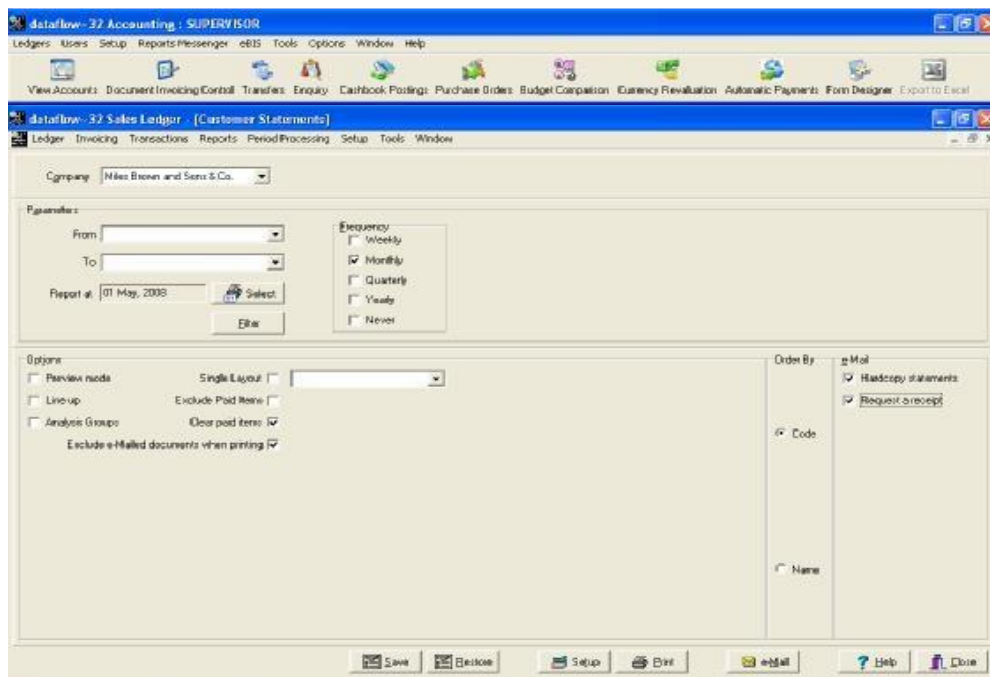
Document Parameters		Document Control		Mail Control	
<input checked="" type="checkbox"/> Generate Document Numbers	<input type="checkbox"/> Authorise before Update	<input checked="" type="checkbox"/> Invoice/Credit Notes	<input type="checkbox"/> View Average cost in the Stock Grid	<input checked="" type="checkbox"/> Mail Invoices	<input type="checkbox"/> Request a receipt
<input checked="" type="checkbox"/> Unique Document Number	<input type="checkbox"/> View Average cost in the Stock Grid	<input type="checkbox"/> Print Invoices	<input type="checkbox"/> Use current price when converting Scheduled Invoices	<input type="checkbox"/> Hardcopy Invoices	
<input type="checkbox"/> Allow Document Only Lines		<input type="checkbox"/> Print when invoice is updated/authorised		<input type="checkbox"/> Print when invoice is deleted	
Document Numbering	Print Control	Next Invoice No.	2009		
		Next Pro-Forma No.	3001		
		Next Scheduled Invoice No.	1		

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.



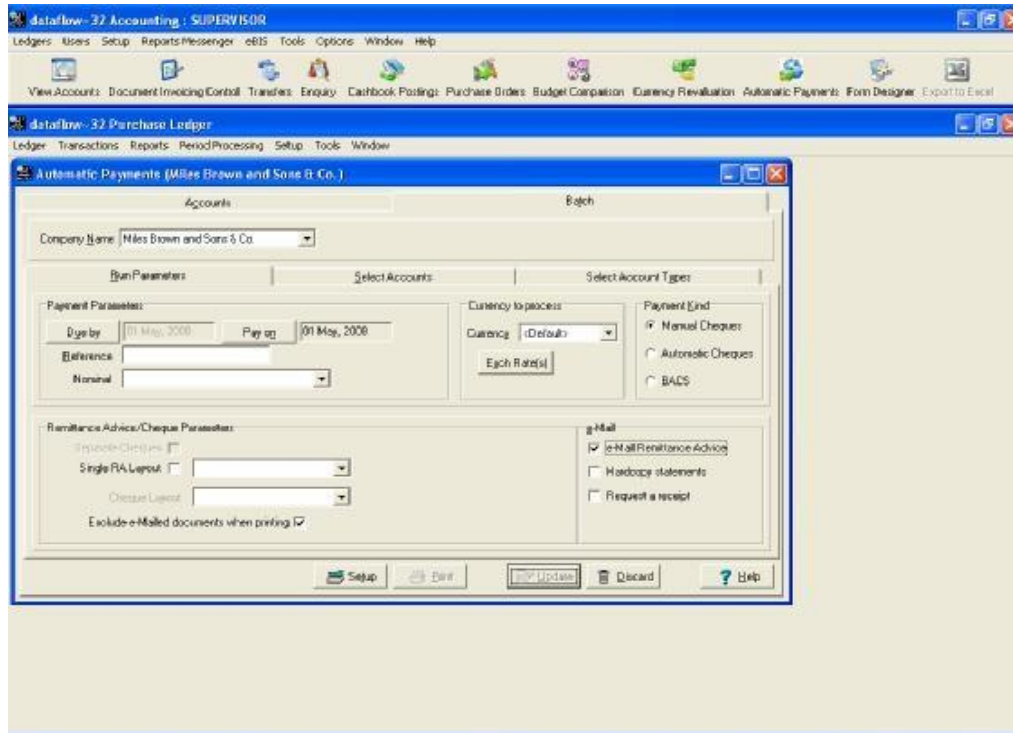
c) Customer Statements

The customer statements print screen has been amended to include various email options, including print a hard copy also.

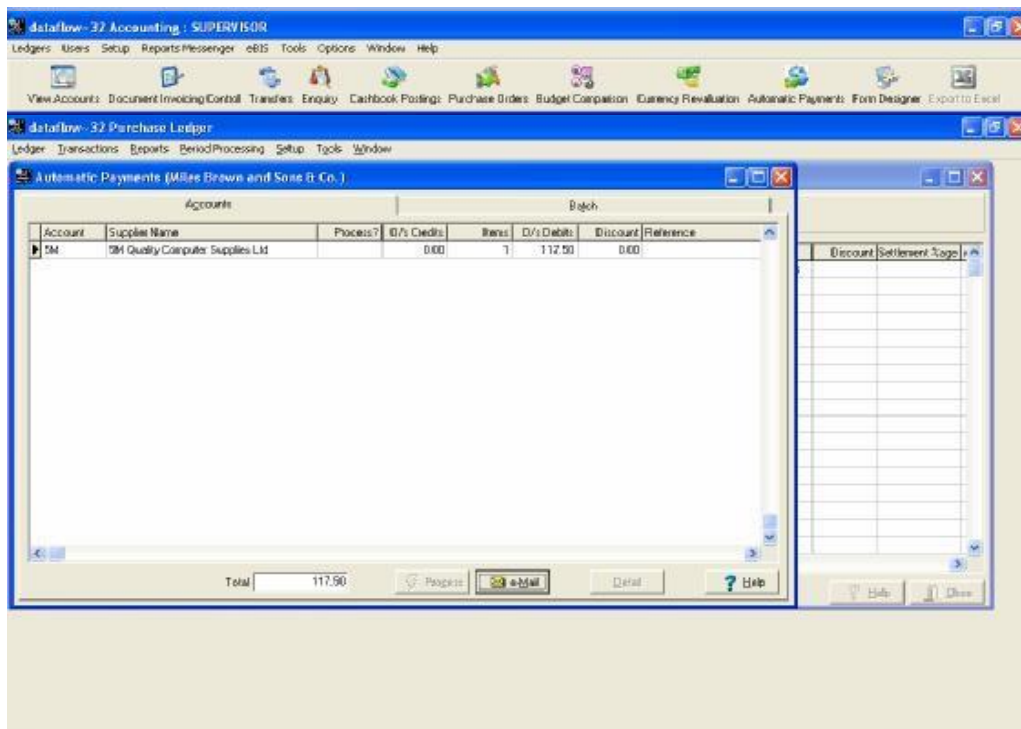


d) Purchase Ledger – Automatic Payments Screen

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

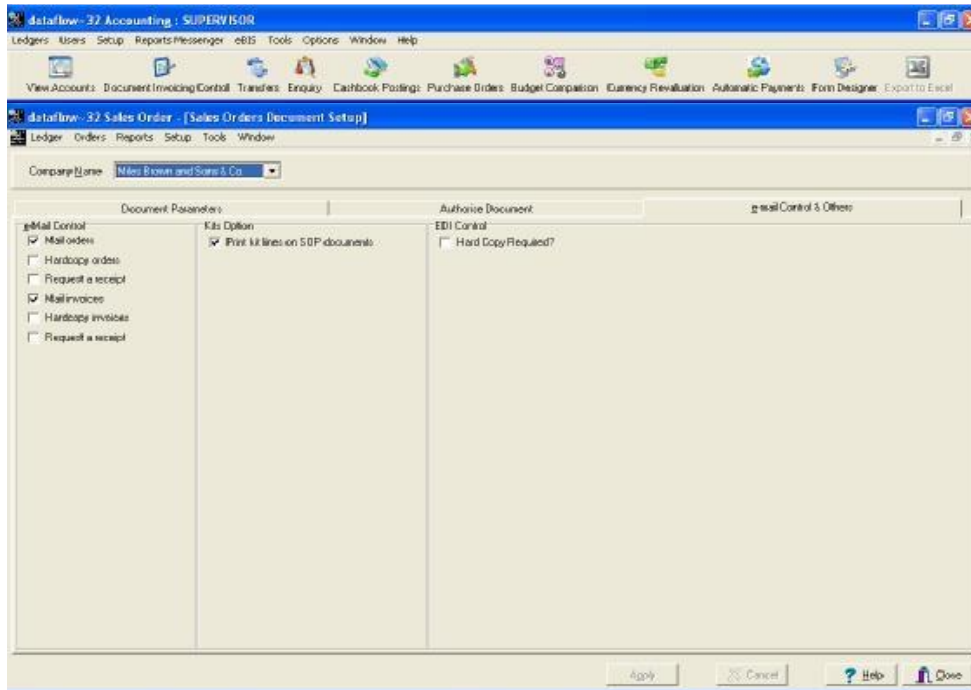


You process the Automatic Payments as normal and then click on the email button which will email the remittance advices. You can also request delivery receipts.

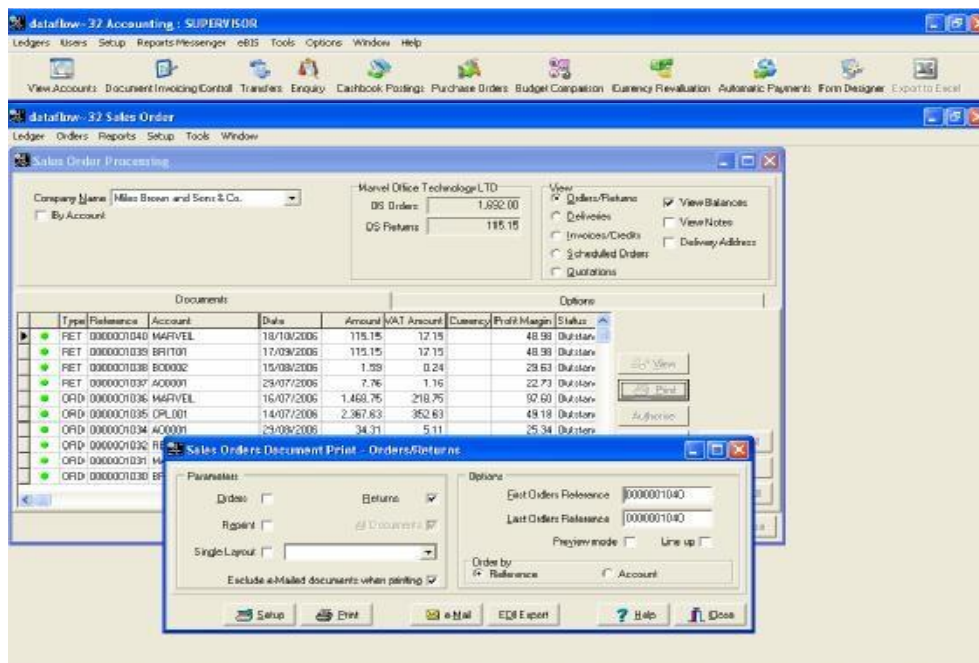


e) Sales Order & Purchase Orders Document Control Setup

There is a new email 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 email.



f) Document Design

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

