



Batch Emailing and Faxing

Our Batch Emailing and Faxing process is a new ACS/MASTER 8.1 feature that allows the user to Email or Fax Customer Statements and Customer Invoices directly to the customer from the printing process.

Offered as one of our Bolt On products, this process makes quick work of sending the documents as part of the Invoice Print and Statement Print functions.

BATCH EMAILING SYSTEM CONFIGURATION

Because this process is not a Microsoft Outlook function, it does not require the user to change email providers, however, it will require configuration maintenance in your system.

1. Service Repair Parameter

ACS will perform all necessary Parameter File configuration at the time of installation.

2. Customer Name and Address Maintenance

Customer Maintenance (ACS 8.1.0 STANDARD SYSTEM)

File Edit Favorites Help

Customer 000100 Everest Industries

Name and Address

Name Everest Industries

Address 123 Main St.
Suite 111

City San Bernardino

State CA ZIP/Postal 93121-0000

Country

Telephone (714)-832-8113 Ext 0234

Fax Phone (714)-931-9220

Contact Mr. James Rockville

Alternate Sequence EVEREST

Date Opened 02/15/03

Ship-Via UPS GCD

FOB

Resale Number SR-EW399291

DB Number

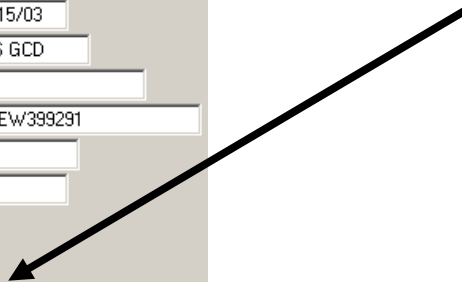
SIC

Retain Customer

Inactive

Batch Email/Fax E

The Batch Email/Fax flag must be "turned on" in each Customer's Name and Address Maintenance



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3. Customer Email and Fax Printing Defaults

The screenshot shows the 'Customer Maintenance' window for 'Everest Industries' (Customer ID: 000100). The 'Email and Fax Printing Defaults' section contains the following fields:

Email To	helenm@acsmaster.com
Email Cc	
Fax To	Mr. James Rockville
Fax No	714-931-9220
Web Page	

Buttons: OK, Cancel, Delete

Customer Email and Fax Printing Defaults must be provided as part of Customer Maintenance.

NOTE: Fax numbers should include Numbers and Dashes only.

4. Invoice/Customer Statement Email RETURN Email Address

When E-mailing these two documents to your Customer, your system will obtain your RETURN Email address from two sources:

The screenshot shows the 'User Maintenance' window for user 'ACS'. The 'User Information' section contains the following fields:

User ID	ACS
Name	ACS
Security Level	9
Valid Firms	All
Printers	P1 PC PF PP PS PU PZ Pa Pe Po
Password	<input type="checkbox"/>
Default Menu	SYS ACS / MASTER Electric / Apparatus
Default Firm	01 ACS 8.1.0 STANDARD SYSTEM
Email Address	Helenm@acsmaster.com

The 'User Preferences' section contains the following fields:

Char Input Field Type	B	Maximum PF Files	99	Interface	<input type="checkbox"/>
Case Conversion Key	12	PF File ID	ACS		
Upper Case Key	09	Allow Menu Jumping	<input checked="" type="checkbox"/>		
Favorites Menu	mb_fav_ACS	Favorites Menu			

First, the system will check the User Maintenance information for the user logged onto the workstation printing the documents.

If the user has a valid Email address, the system will use this as the return Email address.

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If your system does not find a valid Email address in User Maintenance, it will look to the Email Parameter Maintenance information located in System → System Maintenance → Email Parameter Maintenance

For assistance determining your SMTP and Port, please contact ACS Customer Support

5. FORM Configuration

A. If using **MATERSFORMS** it will also be necessary to determine the number of Invoice Copies that are to be "printed".

System → New Installation → Company → Master Form Number of Copies Maintenance

FORM ID	PRINT FORM	FORM DESCRIPTION
CUSTOMER STATEMENT-1	<input checked="" type="checkbox"/>	CUSTOMER
CUSTOMER STATEMENT-2	<input checked="" type="checkbox"/>	INHOUSE
CUSTOMER STATEMENT-3	<input type="checkbox"/>	
CUSTOMER STATEMENT-4	<input type="checkbox"/>	
CUSTOMER STATEMENT-5	<input type="checkbox"/>	
INVOICE PRINT-1	<input checked="" type="checkbox"/>	CUSTOMER
INVOICE PRINT-2	<input checked="" type="checkbox"/>	FILE COPY
INVOICE PRINT-3	<input type="checkbox"/>	
INVOICE PRINT-4	<input type="checkbox"/>	
INVOICE PRINT-5	<input type="checkbox"/>	
JOB CARD PRINT-1	<input type="checkbox"/>	
JOB CARD PRINT-2	<input type="checkbox"/>	
JOB CARD PRINT-3	<input type="checkbox"/>	
JOB CARD PRINT-4	<input type="checkbox"/>	
JOB CARD PRINT-5	<input type="checkbox"/>	
JOB DELV TICKET-1	<input type="checkbox"/>	
JOB DELV TICKET-2	<input type="checkbox"/>	
JOB DELV TICKET-3	<input type="checkbox"/>	
JOB DELV TICKET-4	<input type="checkbox"/>	
JOB DELV TICKET-5	<input type="checkbox"/>	
JOB ESTIMATE PRINT-1	<input type="checkbox"/>	
JOB ESTIMATE PRINT-2	<input type="checkbox"/>	
JOB ESTIMATE PRINT-3	<input type="checkbox"/>	
JOB ESTIMATE PRINT-4	<input type="checkbox"/>	
JOB ESTIMATE PRINT-5	<input type="checkbox"/>	
JOB MTL PICK LIST-1	<input type="checkbox"/>	

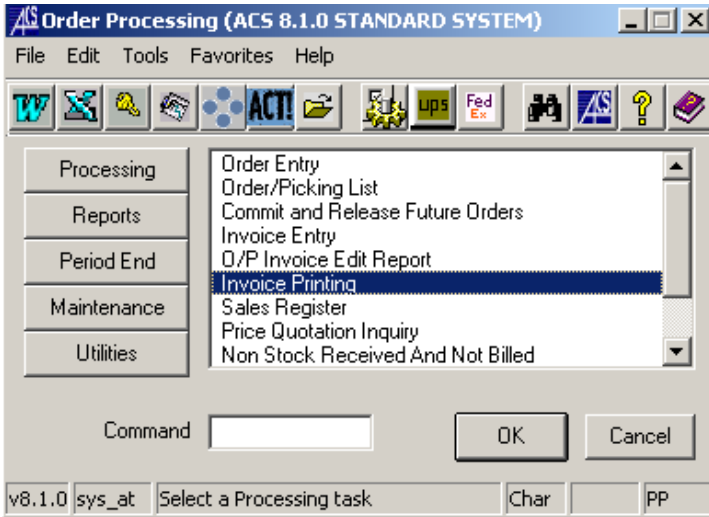
From this maintenance menu you will determine how many Invoice Print copies are to be generated.

Invoice Print 1 will be your EMAIL copy.
The remaining Invoice Print options will be sent to your designated printer.

If Customer Statements are to be E-mailed, again, Customer Statement 1 will be your EMAIL copy and the remaining Customer Statement options will be sent to your designated printer.

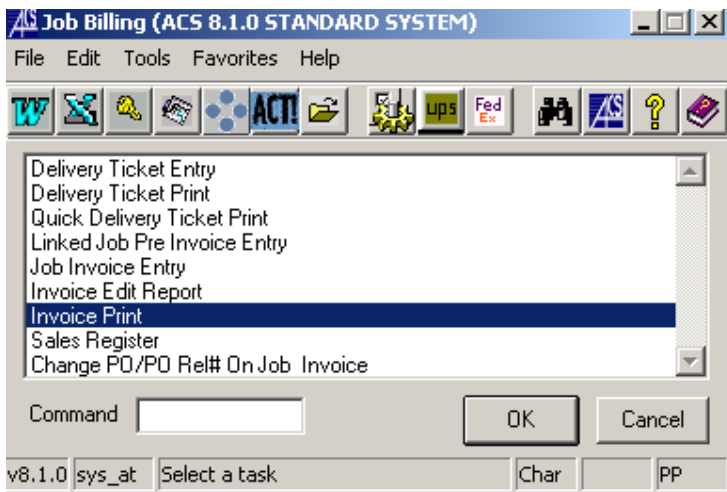
B. IF using **UNFORM** No configuration is necessary, UNFORM will automatically send the first form page to your Fax or Email recipient.

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Batch invoice printing can be completed from
Order Processing

OR FROM



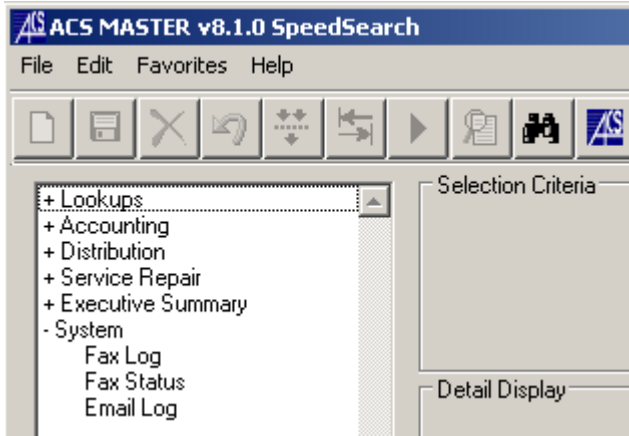
Job Billing

Select the printer you would normally use to print your Customer Invoices. If the correction configuration has been set up (see above instructions), all customers having a valid email address or fax number will have the Customer copy of their invoice sent directly to them. The remaining invoice copies (if any) will be sent to your designated printer.

After the batch Invoice Print process is complete, you can determine which invoices were Emailed or Faxed successfully by accessing the Email log or Fax log from your System Speedsearch function.

Once Email/Fax status has been verified, it will be necessary to run and update the Sales Register as you normally would.

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EMAIL LOG

Speedsearch → System → Email Log

Your System Speedsearch options include an Email Log that allows the user to review a list of Emailed invoices.

Once the Invoice Print option has been completed, select the Email Log and you will receive the following prompt:



ACS 8.1.0 STANDARD SYSTEM							SpeedSearch	
Date	Time	Status	Source	Doc Type	Doc#	Email From	Email To	
03/22/11								
03:38 PM								
03/22/11	15.61	Sent	000100	INVOICE	0005216	Helenm@acsmaster.com	helenm@acsmaster.com	
03/22/11	15.61	Sent	000100	INVOICE	0005217	Helenm@acsmaster.com	helenm@acsmaster.com	
02/11/11	15.81	Error	000100	INVOICE	0005212	Helenm@acsmaster.com	helenm@acsmaster.com	

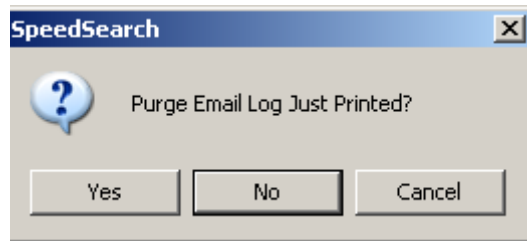
Email Log will include:

Date document was Emailed
Time document was Emailed
Status of Email
Source / Customer

Document Type: Invoice or Statement
Document Number
Email From: Sender Email Address
Email To: Recipient Email Address

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After you have printed the Email Log you will be issued the following prompt:



Please review the Email Log BEFORE you answer this question YES.

NOTE: This log is the only notification your system will generate to verify Email status. Once purged, the email status record is gone.

FAX LOG

Similarly, your Speedsearch System Fax log will provide a detail listing of all items FAXED from your system. The data appearing on your Fax log as well as how to maintain this information will be different for each company as Faxing configurations will vary.

Please contact ACS to review your Fax configuration.

EMAILING AND FAXING CUSTOMER STATEMENTS

As with the Invoice Print option, this process is triggered by the PRINTING of Customer Statements. Any customer that has an Email of Fax designation in their Customer Maintenance configuration will have the first copy of their Customer Statement sent directly to them.

Process your monthly customer statements as you normally would and select your printer. Once you begin the print process, your system will automatically send the statements that have been "flagged" to your customer and print the remaining statements as they normally would.

Again, the Speedsearch Email and Fax logs will be the only notifications your system will generate to verify Email/Fax status.