EMAIL IMPLEMENTATION

Documents

The following documents can be emailed from Harvest
- Order Acknowledgements
- Invoices
- Quotes
- Purchase orders
- A/R Statements

Operator Email Address

Before you start to send emails, the email addresses for each computer operator should be set up in Operator Maintenance on the OPM menu. When documents are emailed, this will show as the sending address for each document.

Customer/Vendor Email Address

In order to start emailing documents you must set up a default email address for the customer/vendor. When you have done this, then the 'email' option will come up on the output screen for the documents to those customers/vendors.

On the C/M menu, selection option #6 DEFAULT E-MAIL ADDRESS MAINT. After you select a branch, you will notice that branch # is displayed and on the upper right hand side of the screen the system prompts you to enter 'DF' for the Company Default. You must always enter the company wide default email address before you can enter different ones for the branches. If your branches all use the same email address for the customer, then you only have to enter the default.

Enter 'DF' and the branch will change to say 'DEFAULT EMAIL FOR ALL BRANCHES'. Then enter the customer and fill in the top section for Invoices and the bottom section for Order Acknowledgements and Quotes. If you do not wish to fill in the section for Invoices, then enter 'SKIP' on the first line for the EMAIL FROM NAME. If you do not wish to fill in the section for Order Acknowledgements and Quotes, then enter 'SKIP' on the first line for the EMAIL FROM NAME.

The EMAIL FROM NAME and EMAIL FROM ADDRESS are usually your company name and your company email address. However, if an address has been entered for the operator sending the email, then their email address will override the one entered here. The EMAIL MESSAGE could be something thanking the customer for their business. We highly recommend that you fill in this field. The text that is entered here is put in the body of the email and helps assure that the email is delivered rather than filtered out as spam or junk mail.

After you have filled in the Default email address for a customer/vendor, you can add an unlimited number of addresses for people that work at that company by their name using option #7 on the C/M menu.

You may wish to enter your email address as the EMAIL TO ADDRESS so that you can try sending some examples to yourself. When you send an email, the system will prompt to send to the default, allow you to enter one on the spot (ad-hoc) or choose from the list of names that have email addresses for a customer.

Automatically Email Customer Invoices

If you wish to have the invoices/credits automatically emailed to customers each day, then you must change field #45 '# OF INVOICES" in Customer Maintenance. There are 6 different choices here for email. The tables below are different ways of presenting the same information that should help you understand the choices.

Letter	Description
I	1 document & 1 attachment per email
M	Multiple documents in 1 attachment
O	1 email with multiple attachments
N	1 document & 1 attachment with paper
L	Multiple docs in 1 attachment with paper
Q	1 email with multiple attachments with paper

	Paper	No Paper
1 doc & 1 attachment	N	I
Multiple documents in 1 attachment	L	M
1 email with multiple attachments	Q	O

Letter	# of invoices pending	# of emails sent	# of attachments
I,M,O,N,L,Q	1	1	1
I,N	6	6	1
M,L	6	1	1
O,Q	6	1	6

Automatically Email Customer Statements

If you wish to have the monthly statements automatically emailed to customers each day, then you must change field #31 'PRINT STATEMENTS" in Customer Maintenance. Set this to an 'M' for email.

Security Statement

In MAILER MESSAGE MAINTENANCE on the S/M menu) text may be entered that will go in the body of each email. Companies frequently have a message such as this for

security purposes. The message must be entered for each document type (quote vs p.o.) which gives the flexibility to have different text for different document types. Some examples are listed below, or you may simple wish to have your company name and address listed.

> Please do not reply to this email, the mailbox is unable to receive replies.
>
> This email message was sent from a notification-only address that cannot accept incoming email. Please do not reply to this message.
>
> DO NOT REPLY TO THIS E-MAIL. This e-mail address is not monitored.
> If you have questions, please contact xxxxxxxxxxxx for further assistance.
>
> Please remember to add us to your address book to ensure that you will continue to receive our emails in your inbox.
>
> This message and any attachments are intended only for the use of the addressee and may contain information that is privileged and confidential. If the reader of the message is not the intended recipient or an authorized representative of the intended recipient, you are hereby notified that any dissemination of this communication is strictly prohibited. If you have received this communication in error, notify the sender immediately by return mail and delete the message and any attachments from your system.
>
> This e-mail (including attachments) is meant only for the use of the intended recipient. It may contain confidential information which is legally privileged or otherwise protected by law. If you have received this e-mail in error or from someone who was not authorized to send it to you, you are strictly prohibited from reviewing, using, disseminating, distributing or copying the e-mail. PLEASE NOTIFY US IMMEDIATELY OF THE ERROR BY RETURN E-MAIL & DELETE THIS MESSAGE FROM YOUR SYSTEM.

Questions

1. We have a dummy vendor set up under 'MIS' for miscellaneous vendors where we place a p.o. once or twice a year. How can we set up the email addresses for these vendors for future reference?

Answer: Use the option for EMAIL ADDRESS MAINT BY PERSON on the Customer Maintenance menu. Enter the company name and fill in the email address for future selection when sending purchase orders.

2. We have a customer that is getting their invoices via email each day and the system only puts the customer code in the subject line. The customer wants this to contain the document number. How can we change this?

Answer: See the section above that describes the different options for sending invoices. If you switch this to 'I' for '1 document and 1 attachment per email' then the subject line should contain the document #.   Note that this means if they have three invoices in a day, then they will be sent three separate emails, each with one document attached.