CUSTOMER SEND FILE

This file contains customer EMAIL addresses and is used in the MASS EMAIL package which includes emailing prices, invoices, customer drafts, and statements. It is not part of the standard package. Sometimes it is used for emailing invoices only from 'Sales Invoice entry', or individually from 'Print Invoices' which is part of the standard package and requires minimal setup. Your email information is entered in the Install option.

We offer only EMAIL delivery not Fax. If customers have only fax, you can subscribe to a company that you can send the emails to and they will send the faxes for you. Call Petro-Data for information.

Initial Setup Sequence:
1. Install Program - enter three lines of text for the body of the emails.
2. Your Email Record - enter your email server information and addresses.
3. Add Customer Email Records - enter customer email addresses.
Note: PDF drivers need to be installed on each computer that will be emailing documents to customers. There is a program in the Base directory of the network drive called *install.exe* that will accomplish this. Sometimes the printer port automatically selected in the install program is already in use by another printer and needs to be changed. Call Petro-Data support for assistance with this process.

Menu Select:

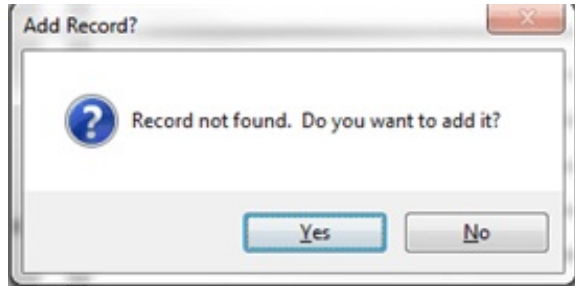From the Customers Submenu, select - *Customer Send File*.

Add Customer Email Records

Menu Select:

From the Customer Send File submenu, select - *Add Customer Email Records*.
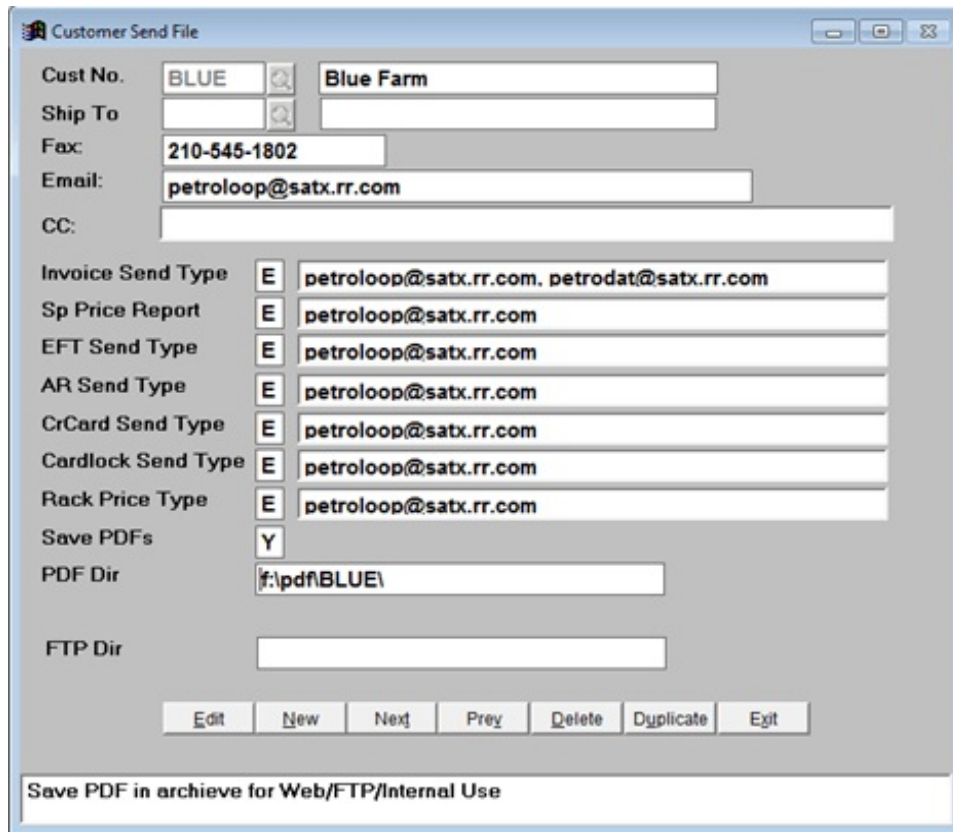
Cust No.

Enter the Customer number.

Ship To.

Enter a customer ship-to code if needed. Leave blank for none.

Fax.

Leave Blank or enter fax number for reference only.

Email.

Enter the main email address for this customer. If multiple email addresses are needed, enter a COMMA and a space between them. This email address will automatically be copied to each of the Send Types.

CC.

Leave blank or enter an email address to send a copy of the invoice to.

Invoice Send Type.

E = Email. This is the only option. Invoices to be faxes must be emailed to a company that provices faxing services.

The default email address displays. If a different email address will be used to send sales invoices, enter it in the space provided. If invoices will be sent to multiple fax numbers, enter a COMMA and a SPACE between each one.
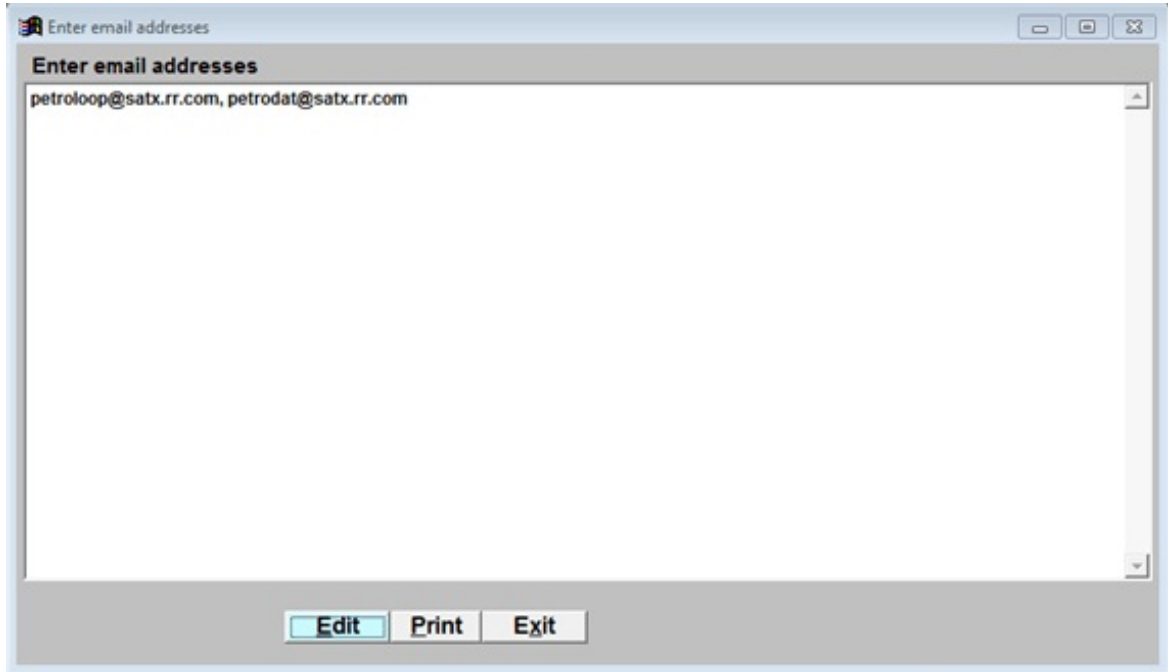
When you click on an email address, this screen displays. Enter as many email addresses as you need for this customer and send type.

\<Edit\>	Edit email addresses.
\<Print\>	Print or display the addresses in report format.
\<Exit\>	Exit the email entry popup screen.

Sp Price Report.

Email address for sending Special Price Reports to this customer.

EFT Send Type.

Email address for sending EFT (Draft) Notices.

AR Send Type.

Email address for sending a Customer Statements.

CrCard Send Type.

Email address for sending Credit Card Receipt Reports.

Cardlock Send Type.
Email address for sending Cardlock reports.

Rack Price Type.
Email address for sending Customer Price Reports.

Save PDFs.
Y   Emails are saved in the PDF directory for this customer.

PDF Dir.
Example: F:\pdf\BLUE\   Network drive, colon, backslash, PDF, backslash, customer number.

FTP Dir.
If you have an FTP site and will be saving the documents to this site, enter the FTP directory.

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< Edit **>**   Edit the Customer Send File. You may also select the button using the arrow keys and press <Enter> or enter the letter **E** to edit the screen. You may also click on the field to be changed.

< New **>**   Add another Customer Send File record for this customer, another ship to OR another customer. Or to Inquire (display) an existing one. You may also select the button using the arrow keys and press <Enter>, or enter the letter W.

< Next **>**   Display the next Customer Send File record in the file. You may also select the button using the arrow keys or enter the letter **N**.

< Prev **>**   Display the previous Customer Send File record. You may also select the button using the arrow keys or enter the letter **V**.

< **D**elete >   Delete the displayed Customer Send File record. You may also select the button or enter the letter **D**. '*Are You Sure You Want to Delete? <Yes> <No>*' displays allowing you to confirm the deletion or continue without deleting.

< Duplicate >   Duplicate this Customer Send Record to another customer/ship to or another customer who has the same email addresses.

< E**x**it >   Exit Customer Send File return to the Customer Send File submenu. You may also select the button using the arrow keys or enter the letter **X**.
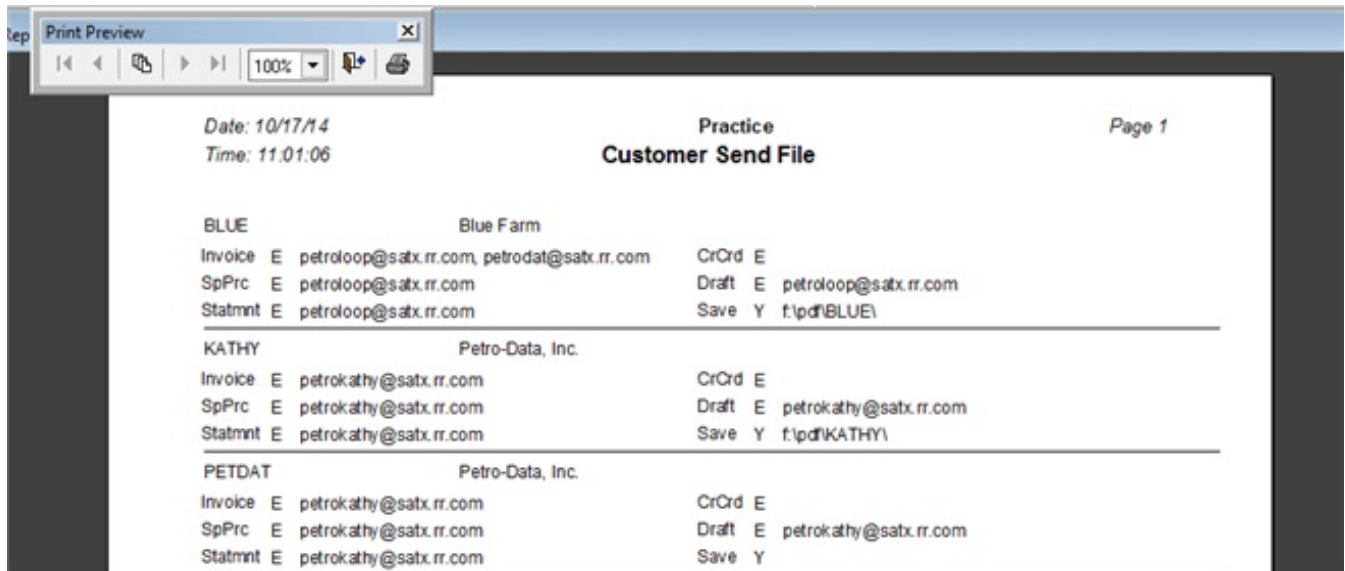
Print Report

Menu Select:

From the Customer Send File submenu, select - *Print Report*.
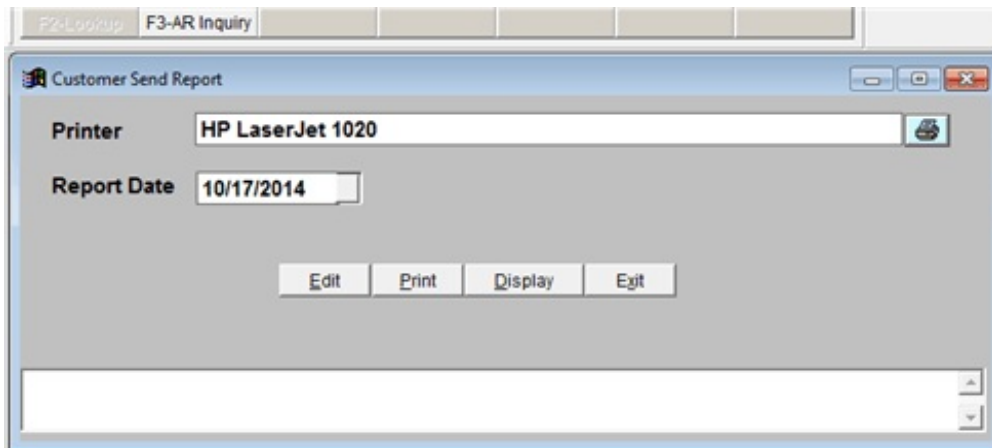
\<Edit\>	Edit options. Click printer icon to change printer.
\<Print\>	Print report on selected printer.
\<Display\>	Display report on screen with option to print.
\<Exit\>	Exit the print report option.

<u>**Your Email Record**</u>

This email address is used to send all emails from all workstations in Petro-Data. You can

copy yourself on all emails so that every email sent also sends a copy to your in box in addition to sending it to the 'sent' folder.

If you email information changes, this record must be changed to the new information.

Menu Select:

From the Customer Send File submenu, select - *Your Email Record*.

Idno:
Enter '1' to add a new ID number. Some records entered by Petro-Data before this record was available might not have an ID number as show above. Click the magnifying glass to select and display the existing record.
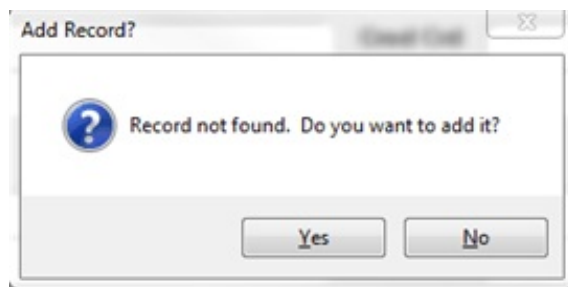
Name.
Enter a name for this email address. It can be your company name.

Mailserver.
Enter the SMTP mail server name. This can be found in your email under Account

detail.

Username.
>   Enter the user name for this email account.

Password.
>   Enter the password for this email account.

Outlook.
>   Y if you use Outlook. N if you use an SMTP.

Authen.
>   **Y** Authenticate email addresses. This would generate an error if the email address is invalid.

Emailport.
>   Default is 25. Some are 465 or 587. The email provider has to tell you which one.

SSL(Gmail).
>   **Blank** or **N** usually.
>   **Y** if the SMTP server uses SSL security.

From Email Addresses:
>   Enter the 'FROM' email address to show on sent emails for Invoices, Credit Cards, Customer EFTs and Special Prices.. All can be the same or each can be different if you want reply information to go to a different operator in your company who has a unique company email address.

CC Email Addresses:
>   Enter the 'CC' copy email address to show on the sent emails and to send a copy of the email for Invoices, Credit Cards, Customer EFTs and Special Prices. All can be blank if you don't want copies of all emails. They can all be the same or each can be different if you want copies sent to a different operator in your company who has a unique company email address.

***BUTTONS *** BUTTONS *** BUTTONS *** BUTTONS *** BUTTONS ***

< Edit > Edit Your Email Addresses File. You may also select the button using the arrow keys and press <Enter> or enter the letter **E** to edit the screen. You may also click on the field to be changed.

< New **>** Only ONE 'Your Email Addresses' file is allowed at this time.

< Next > Displays the next record if any. At this time there should only be one record. You may also select the button using the arrow keys or enter the letter **N**.

< Prev **>** Displays the previous record if any. At this time there should only be one record. You may also select the button using the arrow keys or enter the

letter **V**.

<Print>   Not available at this time.

< **D**elete >   Not recommended. You should edit the record if there is a change in email address. Delete the displayed 'Your Email Address' record. You may also select the button or enter the letter **D**. *'Do you Want to Delete this record? <Yes> <No>'* displays allowing you to confirm the deletion or continue without deleting.

< **E**xit >   Exit the 'Your Email Addresses' screen.

Reindex Email Records

This option recreates the index file for ARCSTSND only. This is the Customer Send File.

Menu Select:

From the Customer Send File submenu, select - *Reindex Email Records*.

Index complete in ARCSTSND. Press enter.
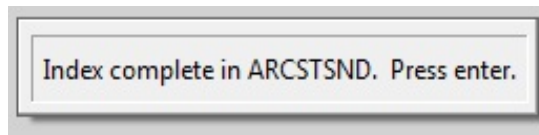
Install Program

This option defines the PDF directory where customer invoices are stored as well as a place for you to put up to three lines of text to be included in the body of every email.

Menu Select:

From the Customer Send File submenu, select - *Install Program*.

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Enter default PDF Directory  f:\pdf\

Enter three lines of text for the body
Attached is a copy of your fuel invoice.



Everything OK? (Y/N)            Y
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Is everything OK? (Y/N)
        Y   Exit to the Customer Send File submenu.
        N   Edit the default directory or the text.

QUIT
    Quit the Customer Send File submenu.