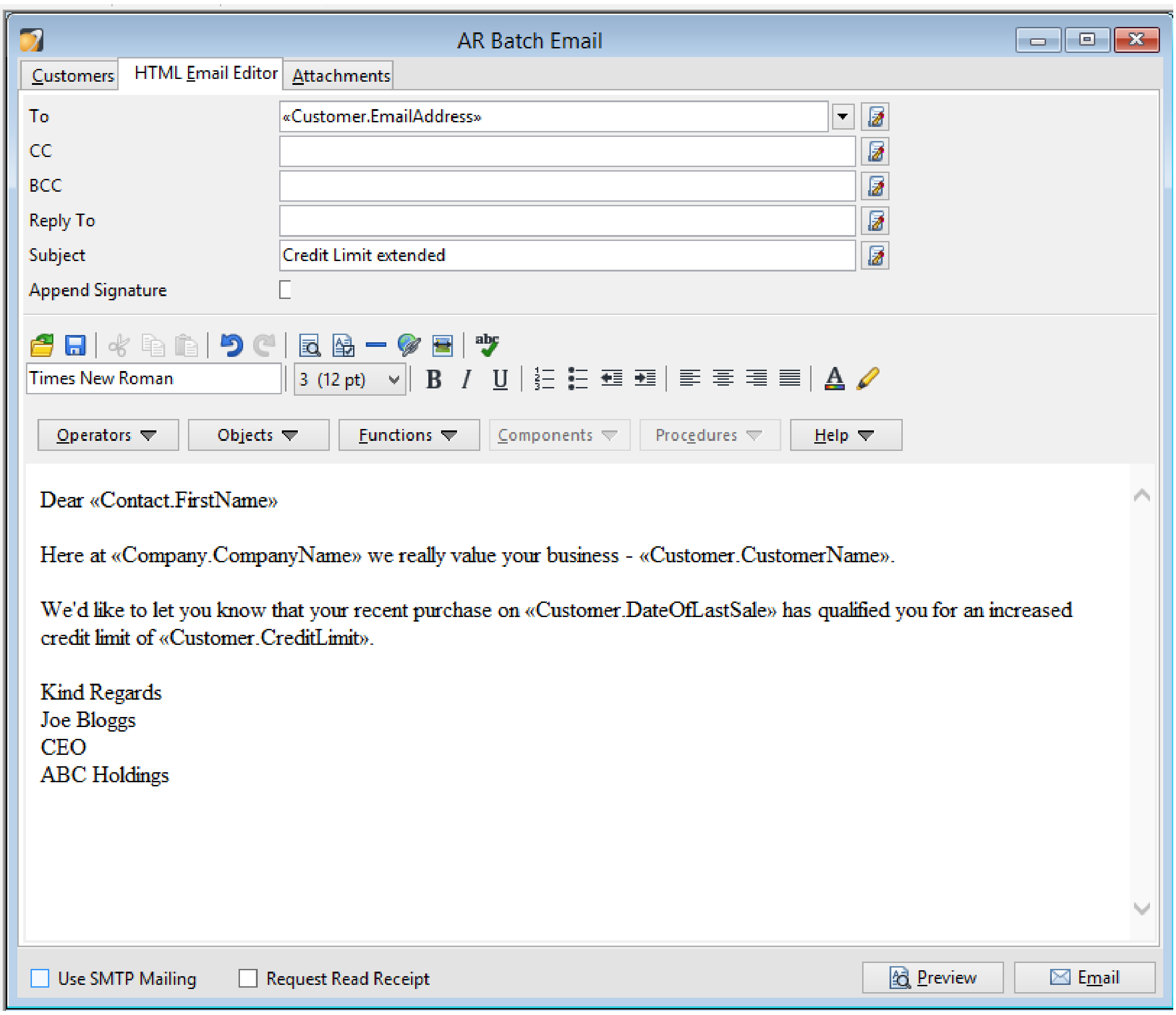
Training Document - Email Integration



In this lesson you will learn about Accredo's new email integration features.

After completing this lesson you will be able to:

- Set up email integration, Signatures, and more.
- Email Statements and Invoices.
- Create a mail out list based on multiple criteria.
- Create a batch email that sends a personalised message.
- Attach a file to an email.

Contents

Email Settings

Email system Integration

Accredo allows for two different formats of email. Plain text and HTML. Plain text is unformatted text only. HTML allows for fonts, colour, images, bold, alignment, links etc. HTML is a much better looking format and almost all email programs will support HTML coded messages.

Email Server Settings

It's recommended that you set up SMTP access (How Accredo accesses your email program). You may need assistance from your IT department / IT support organisation / Webmail Help to get the correct settings.

- Settings / Company / Configuration / Mail Settings
- Edit details (F11)
- Enter Server address, Port, Authorisation and Timeout.
- Save details (F9)

User Settings

- Settings / Company / Users / User Settings
- Select the User from the dropdown box
- Edit details (F11)
- On the general tab select the mail format (HTML is recommended)
- On the SMTP tab check the two *"Use SMTP … "* boxes
- Enter the users email login and password.
- Test the login to check the connection
- Save (F9)
- Repeat for all users

If you receive an error when testing you'll need to confirm that both the Email Server and User Login settings are correct.

Signatures – Company and User

Signatures appear by default at the end of an email message. Signatures can be plain text, or HTML. Each user has a signature and there is also a companywide signature. By default both signatures will show – the user before the company one. We recommend testing signatures in an email to an external address to check whether your email program applies an additional signature.

Setting the Company Signature

- Settings / Company / Configuration / Mail Settings
- Choose the Plain or HTML tab.
- Edit (F11)
- Enter the signature
- Save (F9)

Setting User Signatures

- Settings / Company / Users / User Preferences
- Select the User from the dropdown box
- Choose the Plain or HTML tab.
- Edit (F11)
- Enter the signature
- Save (F9)
- Repeat for all users
- Note: There is an option on the general tab to overwrite the company signature. If this is checked the company signature will not show after the user one.

Consider including name, title and contact details in the user signature, and the company name website and logo in the company signature to create a signature in the usual format.

Setting up contact email addresses

Accredo will not be able to send emails to customers and creditors if you have not set up the relevant email addresses. There are three areas for email addresses: The main address, contacts addresses, and document addresses.

Setting Customer email addresses

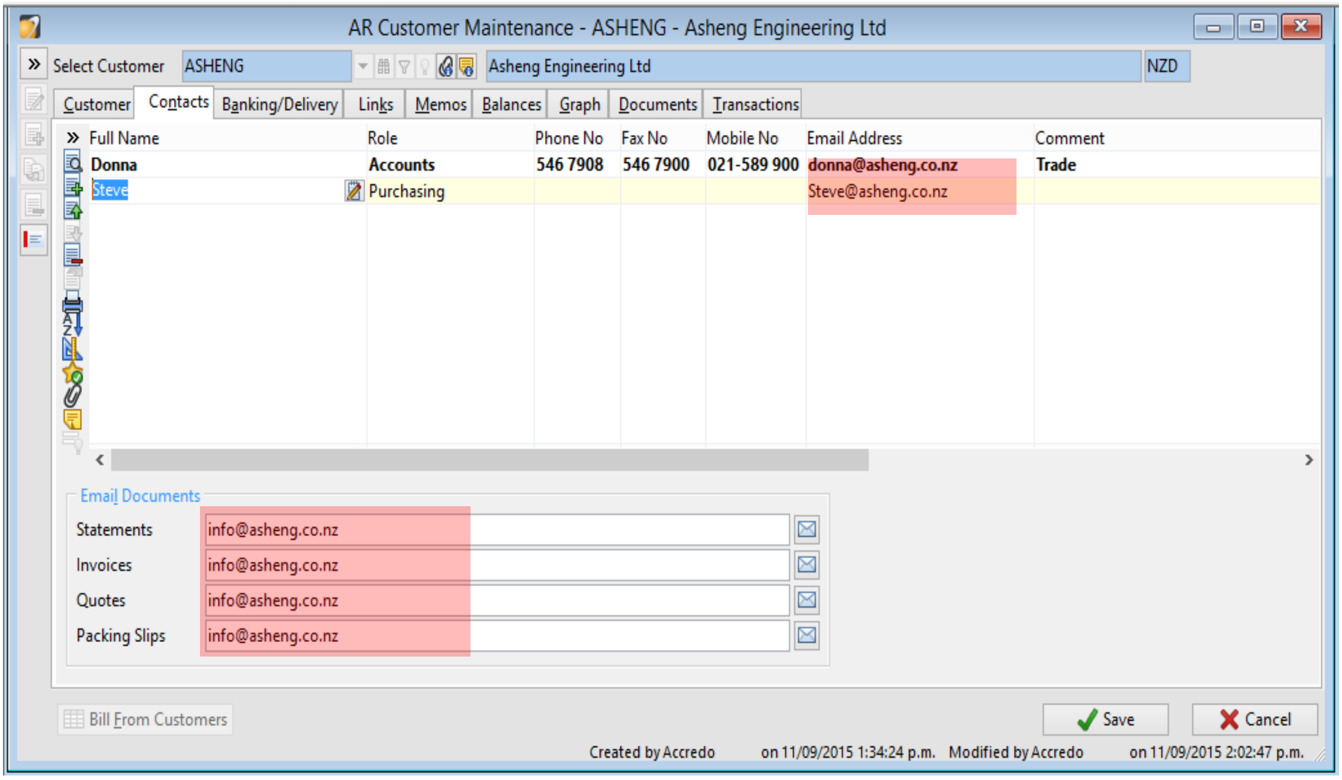
- Maintain / Accounts Receivable / Customers
- Select a customer from the drop down box "Select Customer".

- **Change the main customer address**
  - Edit customer details (F11)
  - Enter the customers email address in the "Email Address" box
- Save (F9)

- **Change the contacts addresses**
  - Select the contact tab.
  - Edit customer details (F11)
  - Add additional contacts for this customer if necessary (F4)
  - Enter each contacts email address in the corresponding field. Note, you may have to scroll along to see the field.
  - Save (F9)

- **Change the document addresses.**
  - These are located at the bottom of the Contacts tab.
  - Edit customer details (F11)
  - For each document type enter the email address that you would like to send that document to.
  - **Note:** You can press (F2) to select from the email addresses entered in earlier steps.
  - Save (F9)

Change the document addresses continued.



The Email Window

The email window has three tabs, the first selects the email recipients (this tab varies according to the procedure used); the second tab contains an email editor; the third tab is used to attach files.

You can use the preview button to preview the email at any time – this is highly recommended before sending emails.

Recipient Selection

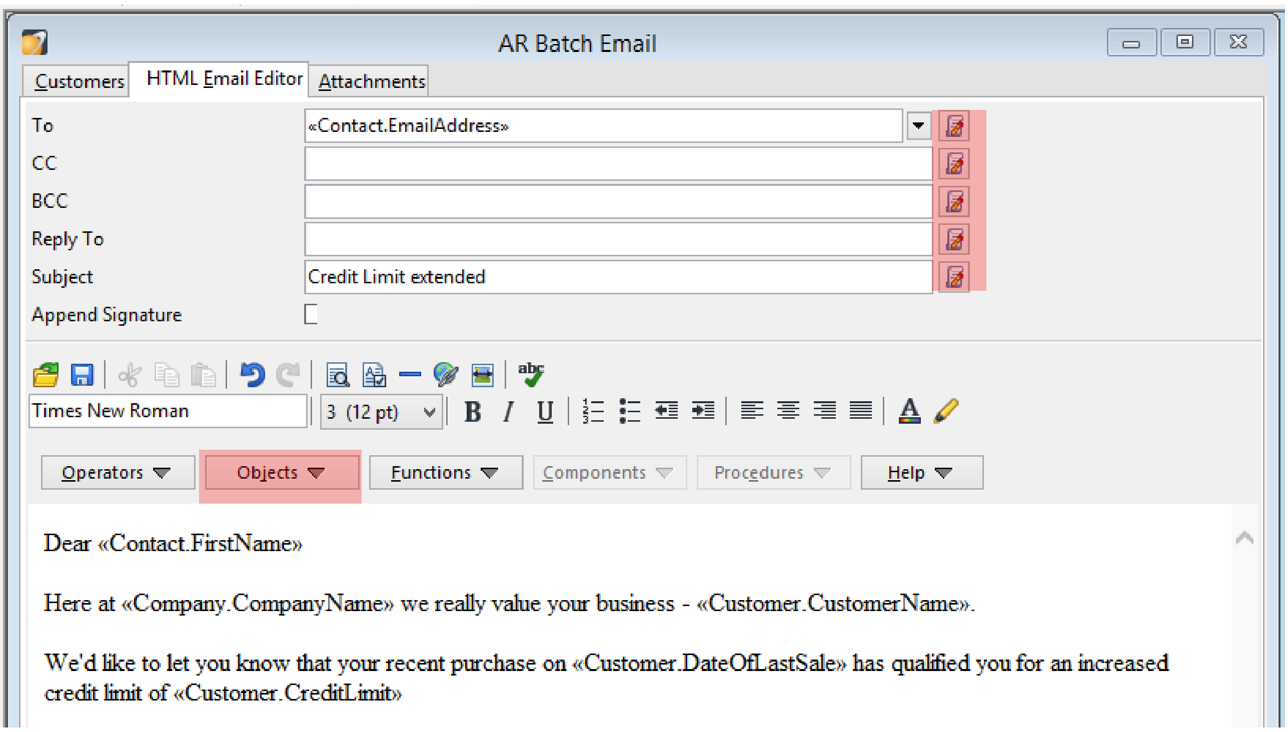
This tab will be discussed in the “Emailing Documents” and “Batch Emails” sections.

Email Editor

You should already be familiar with typing and formatting an email so we will skip that step. If you are using Signatures you will notice these are already contained in the email body.

You may notice some code in the *TO*, *SUBJECT*, and Body of the email like so:
<<Contact.EmailAddress>>

This will be familiar to you if you have ever used a mail merge. As each email is created by the system it will look up the information and replace the code with the required detail – in this case the contacts email address. Have a look at the example below.



These codes can be accessed from the objects button just above the body of the email. They are grouped by subject. To enter a code in the To, Cc, Bcc, Subject Lines click on the ‘…’ button (F2).

This is a powerful tool for sending targeted emails. For more help with using these codes please give us a call.

Attachments

You can attach files from this tab.

- Add an attachment (F4)
- Find the relevant file and select open.
- Repeat for all required attachments.
    - **Note:** When running the email invoices or statements procedures (discussed later) you do not have to separately attach an invoice or statement file. This will happen automatically (The file will not be visible in the attachments tab)

Emailing Documents

You may consider emailing your Customer Statements & Invoices in addition to or even instead of printing physical statements. The process is much the same as printing. The emailed documents can be setup to default to separate "email" documents (For instance if you use letterhead paper you may want to setup an email document with logos included).

Document defaults are changed via Settings / Company / Document Defaults.

These procedures will email to the relevant document email addresses set above.

Emailing Statements

- Reports / Accounts Receivable / Email Statements
- Check the "Use SMTP Mailing box" is ticked.
- Fill out the other fields as usual for printing.
- On the HTML Editor Tab amend the email as required (The email editor is discussed in detail elsewhere).
    - **IMPORTANT** don't make changes to the attachment filename field.
- Add any additional attachments in the attachment tab. The AR Statement will be saved and attached automatically.
- Click Run to send the emails (F9).

Emailing Invoices

- Reports / Invoicing System / Email Invoices [OR] Email Printed Invoices
- Repeat the steps from "Emailing Statements" above.

Batch Emails

The batch email tool is a powerful tool for filtering through your Customer or Creditor contacts to send an email to a very specific group. When combined with the coding ability of the email editor this allows you to send detailed personalised emails to select groups.

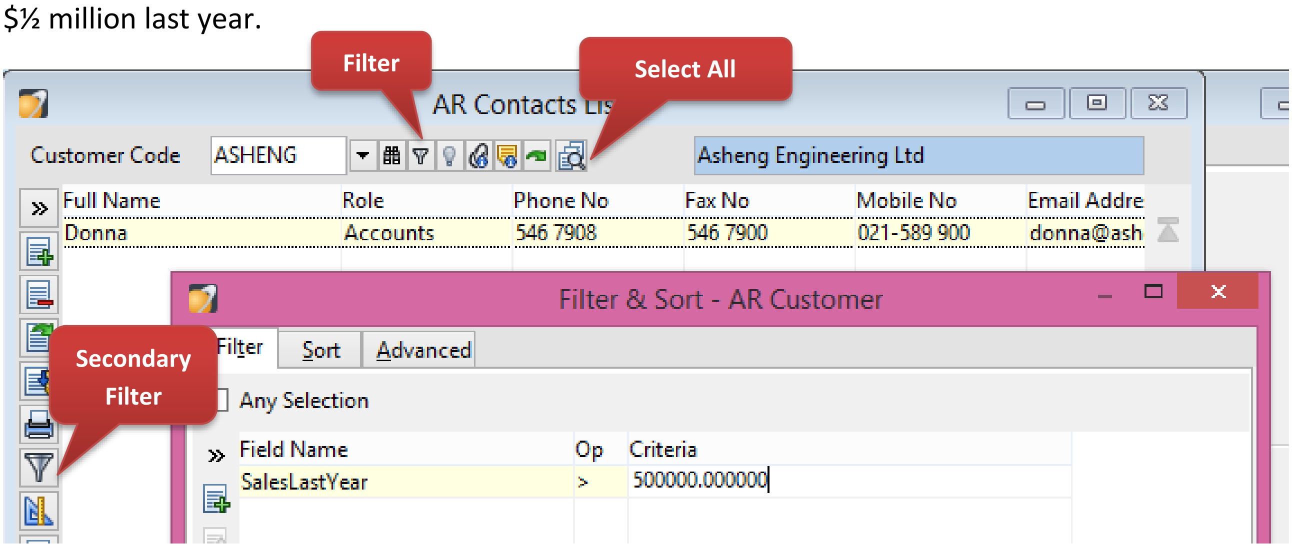
For example you could email the purchasing officer of each customer who had not made a purchase in the last month with a sales offer. You are able to filter both by Customer (or Creditor), and by contact.

We will look at this from the example of emailing a Customer, but the same steps apply for Creditor batch emails.

Selecting who to email

- Maintain / Accounts Receivable / Contacts List
- If you want to filter Customers select the filter button, otherwise click the select all button.
    - Enter a filter and Save

In the example below I have entered a filter to only select customers who purchased more than $½ million last year.



- You can further filter by contact
    - Click the secondary filter on the left
    - Enter a filter and save
- Click Batch Email
- You will now be at the Email Window, The recipients tab will contain contacts that passed the second filter for Customers who passed the first.

This is just a brief look at Batch emails. For more complex filtering or automation of filtered emails please call us for assistance.

Batch Email – Customer Relationship Management Ideas

Here are just a few ways you could use the batch emailing system to benefit your business. There are many other clever ways you could use this system.

- Email an Industry group of clients to let them know about a new product relevant to their industry. Target the emails to the Purchasing managers only.
- Automate emails to remind tardy debtors of their outstanding amounts.
- Target a sales promotion at high value clients who have not purchased recently.
- Remind customers of approaching meetings or scheduled work.
- Automatically inform clients of the stage of a job as it changes.
- Let clients in a location know that you'll be passing through shortly.
- Automatically update clients when their back-order is filled.

If you'd like more detail, or if you've got a good idea but aren't sure how to implement it, please give us a call.

Contact Us

For further information or for assistance with Accredo please do get in touch with us.

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