



Auto E-Mail Notification For MAS 90 and MAS 200

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Installation Instructions and Cautions

PLEASE NOTE: MAS 90 must already be installed on your system before installing any IIG enhancement. If not already done, perform your MAS 90 installation and setup now; then allow any updating to be accomplished automatically. Once MAS 90 installation and file updating is complete, you may install your IIG enhancement product by following the procedure below.

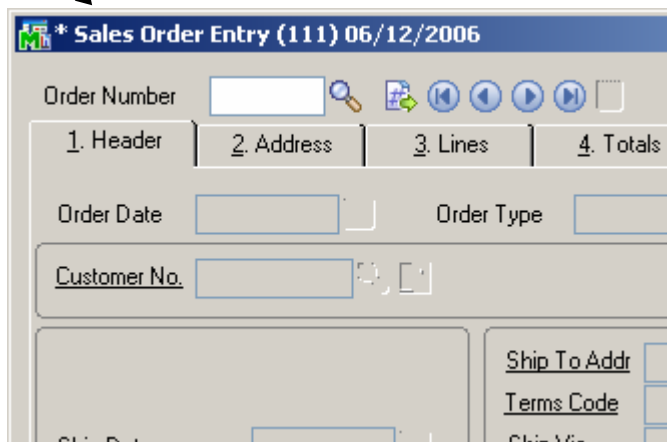
Wait! Before You Install – Do You Use CUSTOM OFFICE?

THIS IS AN IMPORTANT CAUTION: If you have Custom Office installed, **and** if you have modified any MAS 90 screens, you must run **Customizer Update** after you do an enhancement installation.

But wait! BEFORE you run **Customizer Update**, it is very important that you **print all of your tab lists**. Running **Customizer Update** will clear all Tab settings; your printed tab list will help you to reset your Tabs in Customizer Update. **Custom Office** is installed on your system if there is an asterisk in the title bar of some of the screens. The asterisk indicates that the screen has been changed.

An **asterisk** in a window's title bar indicates that the screen has been modified. This means that **Custom Office** is installed.

Follow all the instructions on this page before you run **Customizer Update!**



Registering IIG products

IIG Enhancement should be registered to be able to use it. If registration is not performed, the enhancement will work in a demo mode for a limited time period. The registration can be still done during the demo period.

Select the **IIG Product Registration** program under the **Library Master Setup** menu of the MAS 90.

If this option is not listed under the Library Master Setup menu, go to the main menu, and select **Run** from the **File** menu. Type in SVIIGR and click **OK**.

Enhancement	Level	Release Date	Serial Number	Unlocking Key
IIG Enhancement Name	4.40		AAAAAAAAAAAAAAAA	BBBBBB

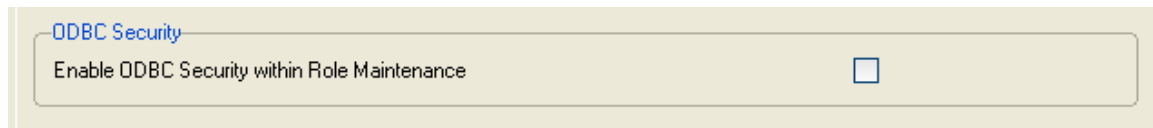
Enter **Serial Number** and **Unlocking Key** provided by IIG, and click **OK**.

If multiple IIG Enhancements are installed, Serial Numbers and Unlocking Keys should be entered for each enhancement.

Use the **Print Registration Form** button to print IIG Registration Form.

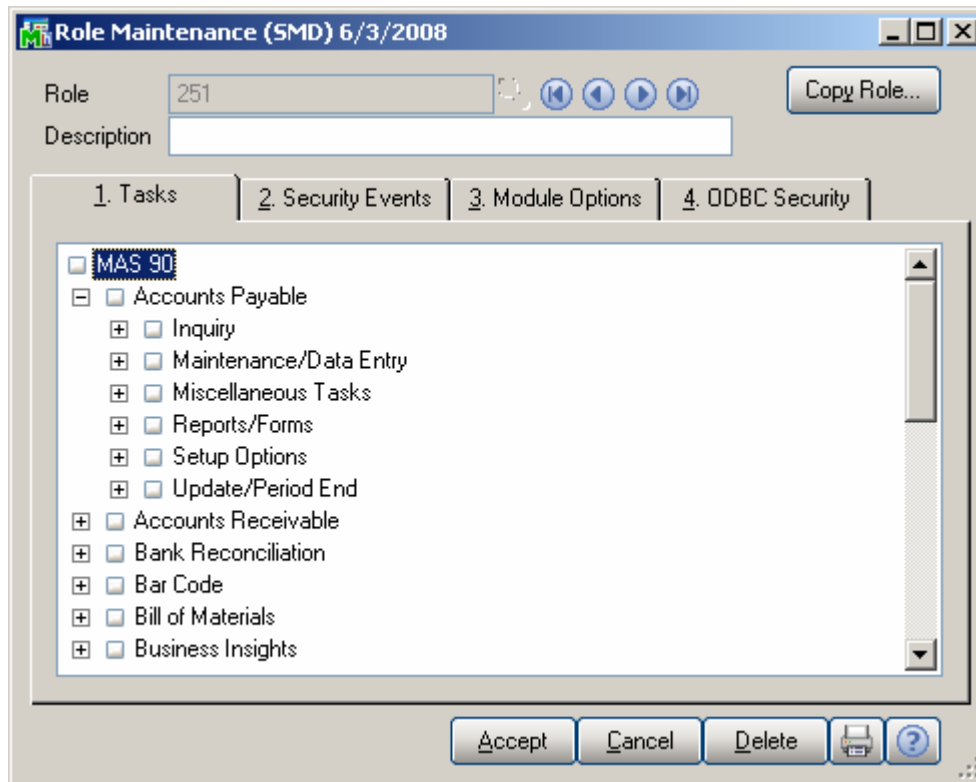
ODBC Security

After installing an **IIG Enhancement**; it is **very important to verify** whether or not the **Enable ODBC Security within Role Maintenance** check box is selected in the **System Configuration** window of your system. If it is selected you must assign ODBC security permissions and allow access to custom data tables/fields for the Roles defined in your system.



Role Maintenance

After installing an **IIG Enhancement**, permissions must be configured for newly created Tasks and Security Events.



Introduction

IIG's **Auto E-Mail Notification** Enhancement allows users to automatically send to their customers copies of orders, at any time, copies of invoices at the moment they are updated, or re-send invoices from the Invoice History.

Setup Activities

Auto E-Mail Notification Options

Select the **Auto E-Mail Notification Options** program in the **Sales Order Setup** menu.

Auto E-Mail Options (ABC) 2/23/2011

Send Customer's E-mails To: Customer E-mail Address

E-Mail Flags

Send Customer E-mails Send Salesperson E-mails

Choose PDF Output Folder

D:\TEMP\PDF

SMTP (Mail) Server

Use SMTP server instead of MS Send HTML E-mails

Address: 192.168.1.203

Port: 25

From E-Mail address: jwsmith@example.com

Invoice | Order

Invoice Form Code: INVOICE_OPTION

Preprinted Laser

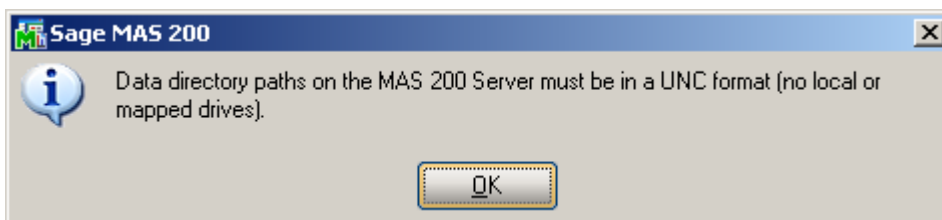
Inline Text: Attached is a copy of invoice ~~~INVOICE~~~
in Adobe Acrobat format.
Download the free Adobe Acrobat Reader at
<http://www.adobe.com/>

CC To The E-Mail Address Associated With The Order

When adding a new customer in **Customer Maintenance**, **Sales Order Entry** (on-fly), **S/O Invoice Data Entry** (on-fly), **A/R Invoice Data Entry** (on-fly) and **E-Business**, the **E-Mail Flags** will appear automatically in these programs, depending on the **E-Mail Flags** set options (the **Send Customer / Salespersons E-Mails** checkboxes).

The **Choose PDF Output Folder** field has been added. Use the **Select Path** button to choose the path of temporary Adobe PDF files converted by Crystal Report.

In case of MAS200 server, the following message box will be displayed if the selected path is not in a UNC format.



Note: In case MAS200 server is used, specify the path with UNC format.

In the **Send Customer's E-Mails To** drop-down box, select either **Customer E-Mail Address** or **Primary Contact's E-Mail Address**.

The E-Mails will be sent to the specified address when sending to Customer.

If Primary Contact has no E-Mail address specified, the Customer E-Mail address will be used.

Check the **Use SMTP server instead of MS** option, and enter the SMTP server's **Address**, **Port**, and the **From E-Mail address** to send to the SMTP server specified.

NOTE: If the SMTP server instead of MS box is unchecked, the MS Outlook (MS Office package) must be installed and functioning on your computer.

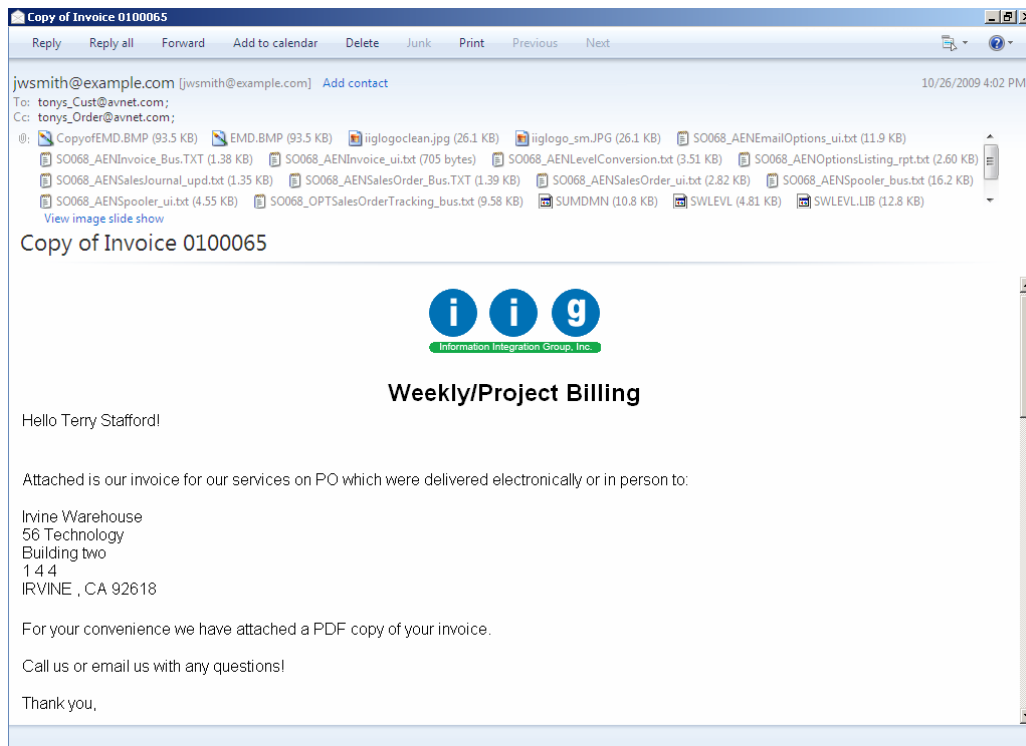
When this check box is cleared, or any of the three fields is empty, the E-Mails will be sent to the MS Outlook.

The **Send HTML E-mails** option enables sending email notifications in the desirable HTML format. This option is

enabled only if the *SMTP server instead of MS* box is selected otherwise it is disabled.

IIG has created two different HTML templates to be used for Sales Order and Invoice: so_mail_template.htm, in_mail_template.htm. The email will be sent using the HTML forms with a .PDF file of the Order/Invoice attached.

While installing the **AEN4.40_CD** those templates are copied to the **AEN_TEMPLATES** folder created during the installation. When sending email the email Body is replaced correspondingly with Sales Order or Invoice header information and the Tracking Information is replaced with corresponding tracking information of the Invoice.



The user can attach also files for advertising to each email. It is necessary to place the files for advertising in the **AEN_Ads** folder created in your MAS system after the CD is installed. Before sending an email the program will check whether there is a file(s) in this folder or not, and if yes will attach it (them) to each email being sent.

The **Auto E-Mail Options** program will load the **Address**, **Port**, and **From E-Mail address** values from the **Company Maintenance of Library Master module**, when the **Options** are opened for the first time. You can change the settings at any time, after that.

A **Form Code** must be selected to define the layout of the document.

The **CC To The E-Mail Address Associated With The Order** checkbox allows sending a copy of the Invoice printing to the e-mail address associated with the order. The CC feature is applied only to the emails sent to the customer.

Inline Text will be added to the body of mail. Standard text can be changed on the corresponding tabs for **Invoices** and **Orders**.

Auto E-Mail Options (ABC) 2/23/2011

Send Customer's E-mails To: Customer E-mail Address

E-Mail Flags

Send Customer E-mails Send Salesperson E-mails

Choose PDF Output Folder

D:\TEMP\PDF

SMTP (Mail) Server

Use SMTP server instead of MS Send HTML E-mails

Address: 192.168.1.203

Port: 25

From E-Mail address: jwsmith@example.com

Invoice | Order

Order Form Code: ORDER_OPTION1

Preprinted Laser

Inline Text

Attached is a copy of sales order ~~~ORDER~~~
in Adobe Acrobat format.
Download the free Adobe Acrobat Reader at
<http://www.adobe.com/>

Use Order E-Mail Address

OK Cancel

The settings of the **Order** tab are similar to the ones on the Invoice tab except of the **Use Order Email Address** checkbox. If this checkbox is selected and the **Email To Customer** is selected in the Sales Order Entry then the Sales Order printing will be emailed to the Customer by the email address specified on the Sales Order Header. If this checkbox is not selected or there is not an email address specified on the **Sales Order Header** the emails will be sent based on the setting of the **Send Customer's E-Mails To** drop-down box.

Set E-Mail Flags Utility

The **Set E-Mail Flags Utility** program has been added under the **Accounts Receivable Setup** menu to allow automatically adding E-Mail Flags.

IIG Set Default Email Send Flag Utility (ABC) 2/23/2011

Report Setting: STANDARD

Update Email Flags

Setting Options

Update Option: Both

Send Customer Emails Number of Copies: 1

Send Salesperson Emails

Select Field	Operand	Value
Customer Number	All	
Customer Name	All	
Salesperson	All	
Customer Type	All	
Sort Field	All	
State	All	
ZIP Code	All	
Tax Schedule	All	

\\IIGSERVER\HP LaserJet 1022

Print Preview Setup

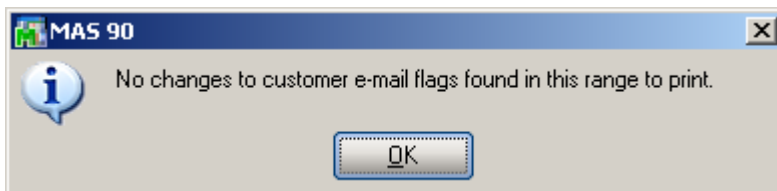
In the Report Setting field specify the type of the report.

E-Mail Flags can be updated selecting the **Update Option**. There are the following Update Options: Both, Customer, and Salesperson. Select **Both** if you want to have both the **Send Customer E-Mail** and **Send Salesperson E-Mail** flags set.

In the **Number of Copies** field specify the number of copies to be printed.

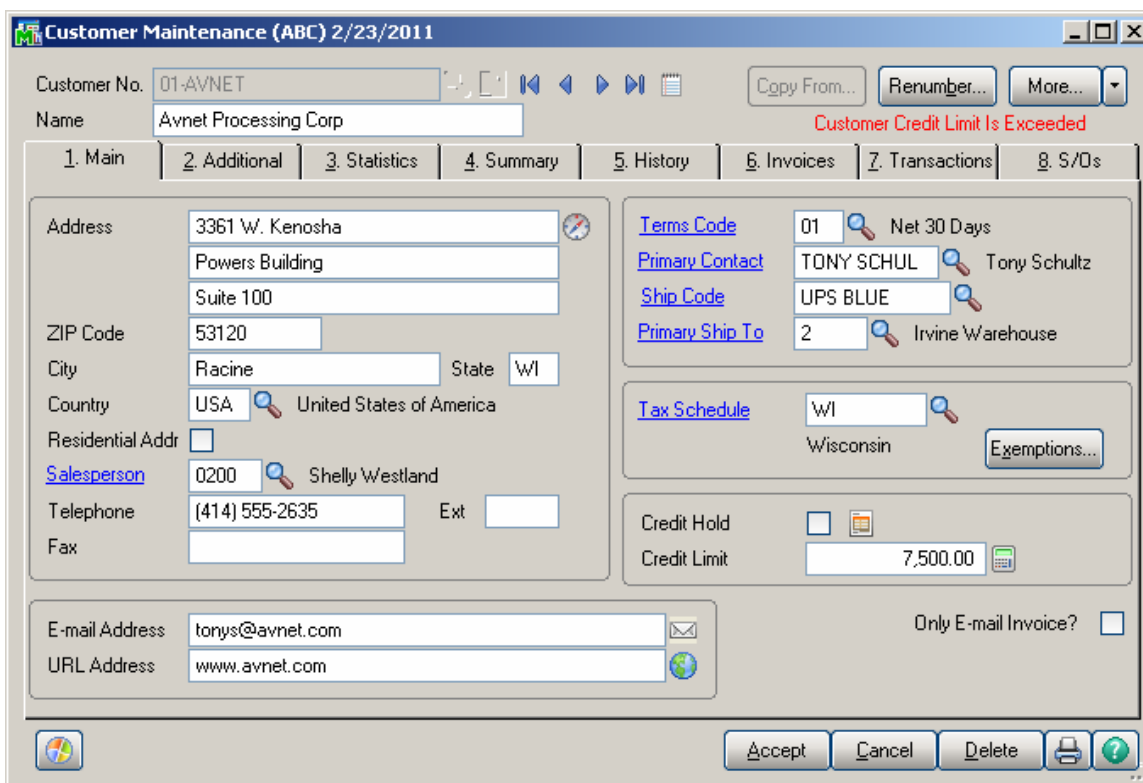
In the below grid specify the range to print.

If no change to customer E-Mail flags is found (for the specified range), the following message appears.



Customer Maintenance

A customer must have an E-Mail address specified so that the program is able to send E-Mail to the customer. The E-Mail address is entered on the **Main** tab in the **Customer Maintenance** program under the **Accounts Receivable Main** menu.



On the **Additional** tab of the **Customer Maintenance** screen, the program can be set to send E-Mail to the customer and/or salesperson, by default. Select the **E-Mail orders/invoices to Customer** and **E-Mail orders/invoices to Salesperson** boxes.

For a newly added customer, the **E-Mail order/invoices to Customer**, **Salesperson** checkboxes will be checked automatically, if the **E-Mail Flags** are checked in the **Auto E-Mail Notification Options** program.

E-Mail Flags for B2C New Customer

The **E-Business Shopping Cart Update** and **Shopping Cart Auto Acceptance** programs have been modified to set for new B2C Customers **E-mail Flags** from **Auto E-Mail Notification Options** program.

Using Auto E-Mail

Sales Order Entry

On the **Sales Order Entry** screen, the program uses the settings for sending E-Mails from the **Customer Maintenance** screen. These settings can be changed on any current order. Check the **E-Mail to Customer** and/or **E-Mail to Salesperson** boxes in the **Totals** tab.

The screenshot displays the 'Sales Order Entry' software interface. The window title is 'Sales Order Entry (ABC) 2/23/2011'. The interface is divided into several sections:

- Order Information:** Order Number (0000182), Order Date (2/11/2011), Order Type (Standard Order), Customer No. (01-ABF), American Business Futures, Salesperson (0100).
- Financials:** Amount Subject to Discount (255.48), Discount Rate (.000%), Discount Amount (.00), Taxable Amount (.00), Non-Taxable Amount (255.48), Commission Rate (10.000%), Sales Tax Amount (.00), Order Total (255.48).
- Payment Details:** Payment Type (CREDIT CARD), American Express, Deposit (checked), Credit Card Number (*****6780), Deposit Amount (.00).
- Shipping:** Ship Zone, Ship Weight (00039), Freight Amount (.00).
- Notification Settings:** E-mail to Customer (checked), E-mail to Salesperson (checked), Form Code (FORM_3), Description (Marbled).

At the bottom, there are buttons for 'Print Order...', 'Print Pick...', 'Recalc Price', 'Accept', 'Cancel', and 'Delete'.

If the **E-Mail to Customer** and/or **E-Mail to Salesperson** boxes are checked, during the entry of a new order, clicking the **E-Mail** button will automatically initiate E-Mails. The E-Mail will be queued at the E-Mail Spooler, which can be run at any time to send E-Mail.

If an order is opened for the purpose of review, the E-Mail button is available only if it has not been previously used to mail the order. To resend E-Mail, clear the check box next to the E-Mail button and then click the button.

The **Form Code** field allows the user to select a specific form code for each order. If no **Form Code** is selected the one specified in the AEN options is used.

S/O Invoice Data Entry

On the **Totals** tab of the **S/O Invoice Data Entry** screen, the program can be set to **E-Mail to Customer** and **E-Mail to Salesperson**. These check boxes are based on the settings on the corresponding Sales Order. If the invoice is a 'one-step' invoice, and not associated with any Sales Order, the settings reflect those set forth in the **Customer Maintenance** program.

Mail records are sent to the E-Mail Spooler during the Sales Journal Update.

S/O Invoice Data Entry (ABC) 2/23/2011

Invoice No. 0100064 Defaults... Customer... Credit...

1. Header 2. Address 3. Lines 4. Totals

Invoice Date 2/23/2011 Invoice Type Standard Invoice Tax Detail...

Customer No. 01-ABF American Business Futures Salesperson 0100

Amount Subject to Discount 0.00
Discount Rate .000%
Discount Amount .00

Taxable Amount .00
Nontaxable Amount .00

Ship Zone
Ship Weight 00039
Freight Amount .00

Payment Type CREDIT CARD American Express
Deposit
Credit Card Number *****6780
Deposit Available .00
Deposit Amount .00

Commission Rate 10.000%
Sales Tax Amount .00
Invoice Total .00
Net Invoice .00

E-mail to Customer E-mail to Salesperson
Form Code
Description

Quick Print Accept Cancel Delete

The **Form Code** field allows the user to select a specific form code for each Invoice. If no **Form Code** is selected the one specified in the AEN Options is used. The form code specified for the Invoice will be used when email is resent from the A/R Invoice History Inquiry.

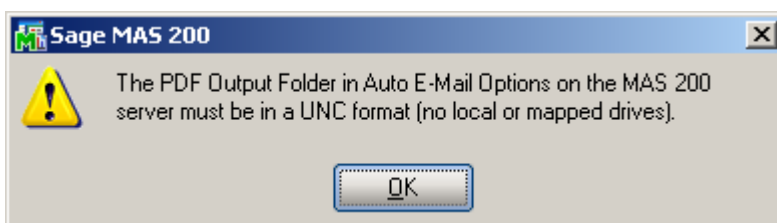
To send a copy of an invoice from Invoice History, simply click the **Resend Email** button on the **Header** tab of the **Invoice History Inquiry** screen.

The **CC To The E-Mail Address Associated With The Order** feature is available also when resending email from History.

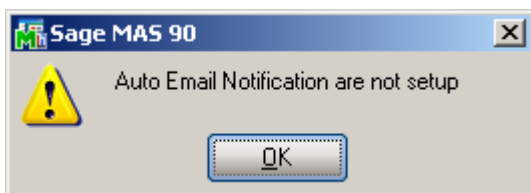
E-Mail Spooler

Warning! In case of MAS90, if the system is run from different workstation, the path of PDF Output Folder specified in Auto E-Mail Options must be in a UNC format in order the spooler works normally.

If E-mail spooler is run in case of MAS200 server, the path of PDF Output Folder specified in Auto E-Mail Options must be in a UNC format, otherwise the following message box will be displayed:

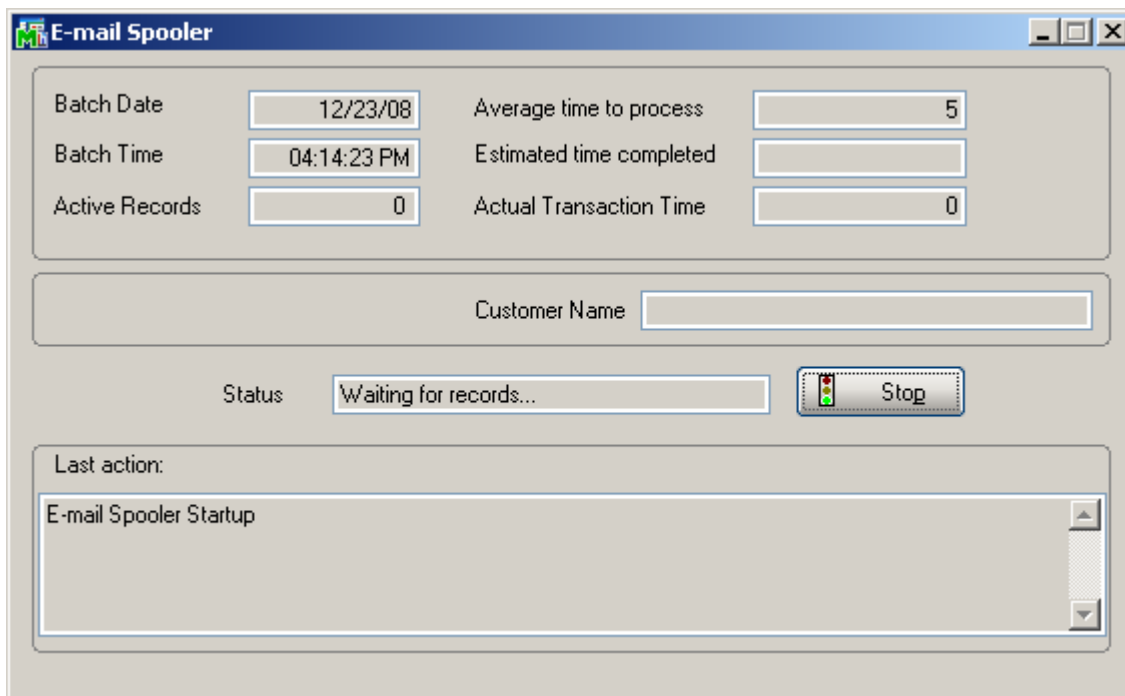


If the AEN options are not setup, then while running the **E-Mail Spooler** program, the following message box will be displayed:



The **E-Mail Spooler** program is run from the **Sales Order Main** menu.

Click the **Start** button to start processing active records. After these records are processed, the program will continue to process any new records added to the spooler.

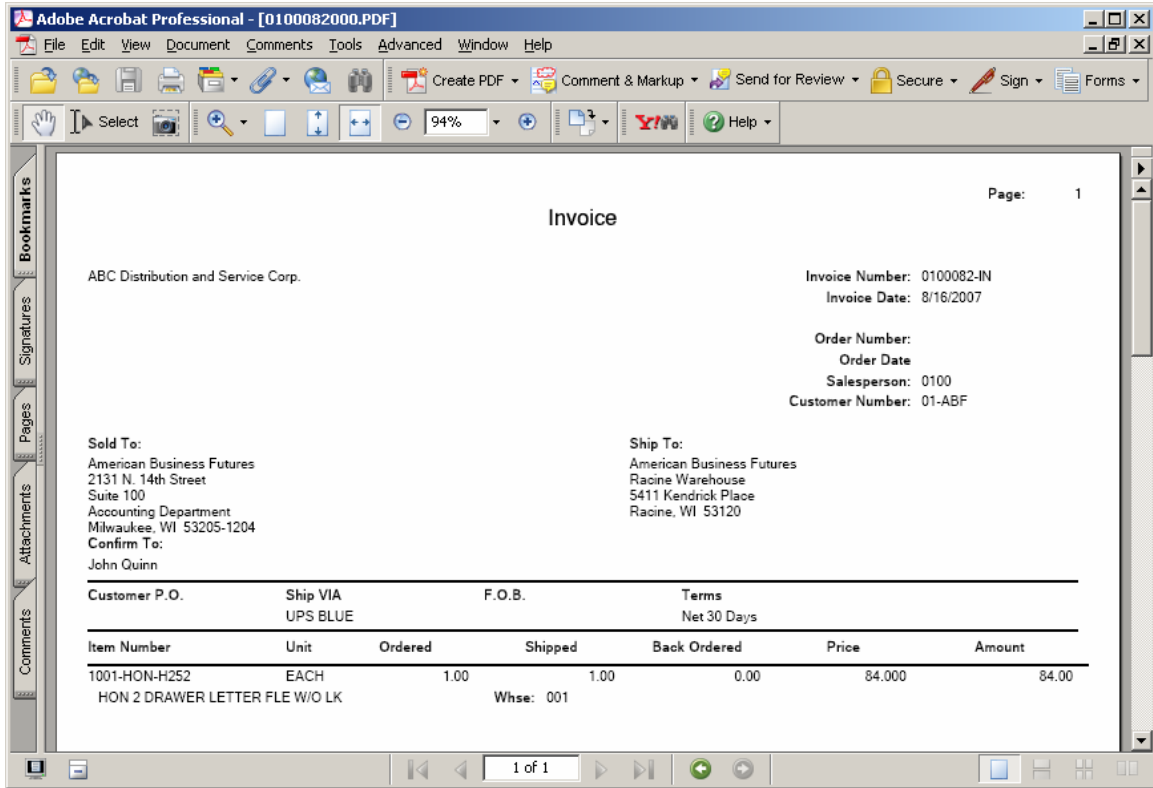


After starting the E-Mail Spooler, the **Start** button is replaced with the **Stop** button.

Click the **Stop** button to stop processing records.

The **Last action** pane displays the description of the action last performed by the spooler. If there is an error (for example, an order is deleted, or no address is specified), the error description is displayed.

The following is an example of an Adobe Acrobat file sent as an attachment by the Auto E-Mail program.



AEN Email Spooler

The **E-mail Spooler** program has been modified to process the emails according to the newly added **Customer & Contacts** option in the **Auto E-mail Options**. In this mode, both the sales orders and invoices will be sent to the Customer E-mail Address as the “To:” e-mail address.

The spooler program also scans through the customer’s contacts and, based on the **Send Order Confirmation Emails?** and **Send Invoice Emails?** options in **Customer Contact Maintenance**, adds that user’s e-mail address (if valid) to the “CC:” part of the e-mail. This works for both HTML and Text emails generated by the E-mail Spooler.

If there is not a valid e-mail address in the customer master, but there are in the contacts that would be sent as a “CC:”, then the program will load the contact emails as the “To:” e-mail addresses.

The E-mail Spooler creates logs in the `\mas90\AEN_Logs` directory, one log as a text file per day. The log records date, time, order or invoice, e-mail addresses sent to, and send status of the email. If the send status is not OK the program will record the error message returned by the e-mail server.

The log file name will have the following structure:

AEN_CompanyName_CreationDate

Here is an example of a log file:



```
Lister - [\\paruyr\D_Paruyr\Mas\Mas200\Mas440\AEN\MAS90\AEN_LOGS\AEN_ABX_02232011.log]
File Edit Options Encoding Help 13 %

-----
02232011 - 09:56:26 AM
Document: Invoice No 0000012
Sent to: tonys@avnet.com
CC to: MMExxx.com; Newxxx@xxx.com; XX@xx.com; susan.maye300@abx.com
BCC to:
Status: Sent
Error message: None

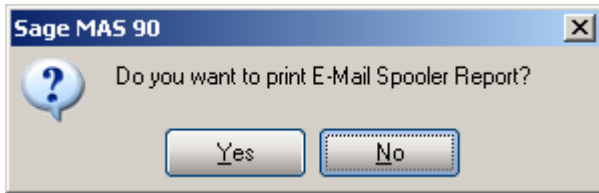
-----
02232011 - 09:56:30 AM
Document: Invoice No 0000013
Sent to: artie@abf.com
CC to: 22@ccc.com;
BCC to:
Status: Sent
Error message: None

-----
02232011 - 09:56:35 AM
Document: Invoice No 0000014
Sent to: susan.maye300@abx.com
CC to:
BCC to:
Status: Not Sent
Error message: Missing TO Address(s)

-----
02232011 - 03:17:55 PM
Document: Sales Order No 0000005
Sent to: artie@abf.com
CC to: 200@aaa.com
BCC to:
Status: Sent
Error message: None
```

AEN Log during Daily Sales Reports Updates

Modified the **Daily Sales Reports/Updates** programs to print the log of invoices for AEN email spooler.



A screenshot of a 'View AEN Log Report' window. The window title is 'View AEN Log Report'. It has a 'Preview' tab and a 'BusinessObjects' logo. The table content is as follows:

Auto E-Mail Notification Log		American Business Expressions (ABX)	
Invoice No	Customer Number	E-Mail Address	InvoiceTotal Amount
0000008	01-XXXXXXXXXXXXXXXXXXXX	tonys0008@avnet.co m	2,184.00
0000009	01-XXXXXXXXXXXXXXXXXXXX	artie0009@abf.co m	5,985.00
0000010	01-XXXXXXXXXXXXXXXXXXXX	ton0010ys@avnet.co m	2,184.00
0000011	01-XXXXXXXXXXXXXXXXXXXX	artie@abf.co m	63.60