



## Auto E-Mail Notification For Sage 100 ERP

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## Installation Instructions and Cautions

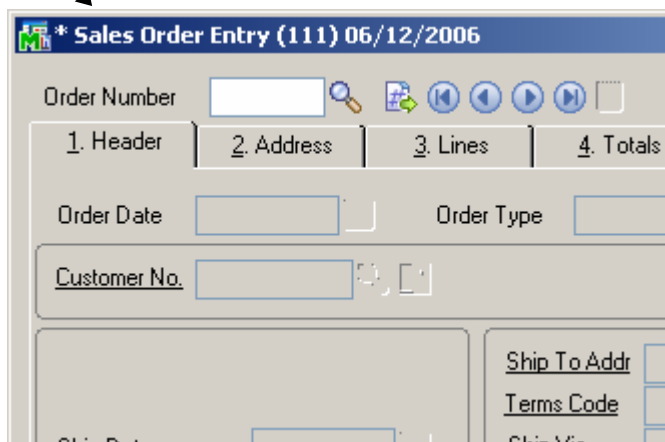
**PLEASE NOTE: SAGE 100 ERP** must already be installed on your system before installing any IIG enhancement. If not already done, perform your SAGE 100 ERP installation and setup now; then allow any updating to be accomplished automatically.

Once SAGE 100 ERP 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 SAGE 100 ERP 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 SAGE 100 ERP.

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	4.50		AAAAAAAAAAAAAAAAAAAA	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.

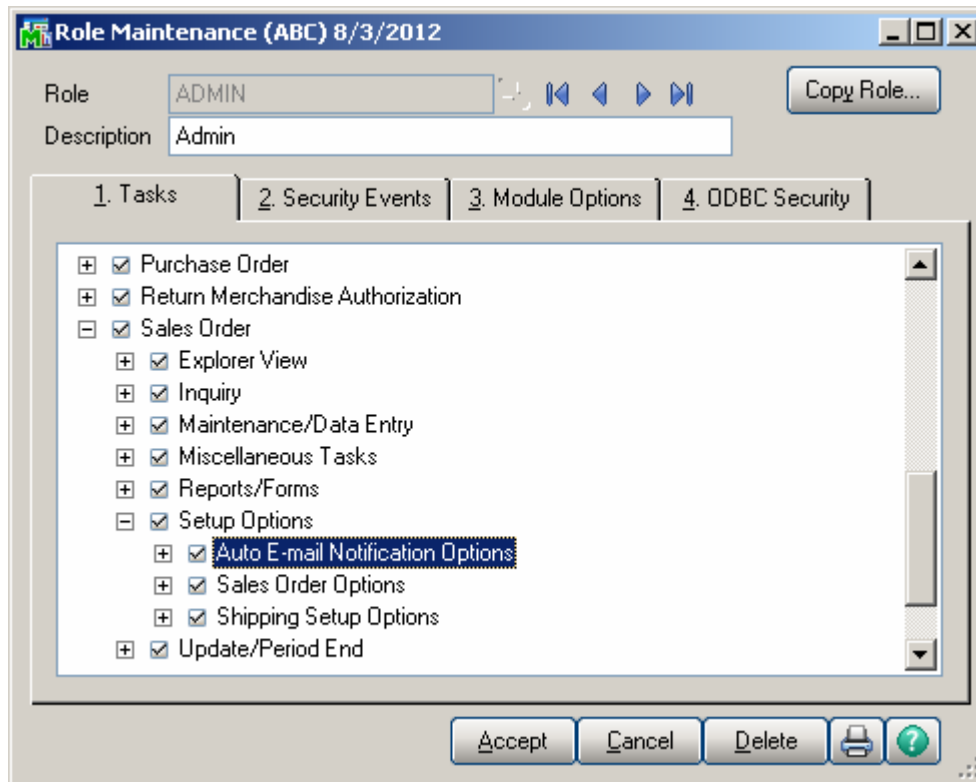
## ODBC Security

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

*Note: If you are using Sage ERP Mas200 SQL you will need to check if the "SyzIIG" file exists in the "...Sage\Client\Mas90\SOA" folder. If not, it is necessary to run the "IIG\_Folders.exe" from the .. Client\Mas90\SOA" folder.*

### Auto E-Mail Notification Options

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

Auto E-Mail Options (ABC) 8/6/2012

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

BCC Send E-mails To: [Empty]

E-Mail Flags

Send Customer E-mails  Send Salesperson E-mails

Choose PDF Output Folder

\\Gohar\Gohar\_D\MAS\MAS450\AEN\MAS90\AEN\_SPOOL

SMTP ( Mail ) Server

Use SMTP server instead of MS  Send HTML E-mails

Address: [Empty]

Port: 25

From E-Mail address: jwsmith@example.com

Invoice | Order

Invoice Form Code: STANDARD [Designer...]

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

OK Cancel [Printer Icon]

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



If **Customer E-mail Address** is selected E-Mails will be sent to the Customer's email address.

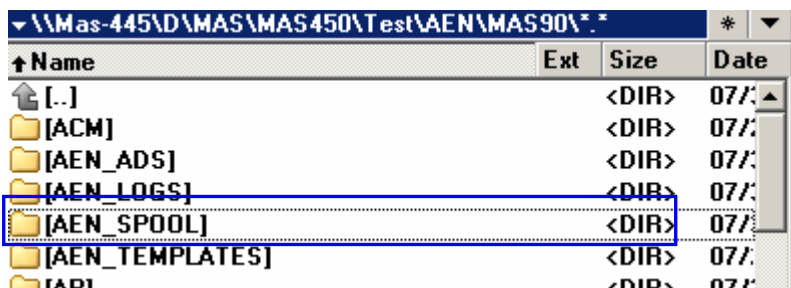
For the second option if the **Primary Contact** has no E-Mail address specified, the Customer E-Mail address will be used.

If **Customer & Contacts** is selected emails are sent to the Customer's email and CC to the Customer's Contacts having the **Send Order Confirmation Emails?** and **Send Invoice Emails?** checkboxes selected in the **Contact Maintenance**.

**BCC Send E-Mails To** field is intended for sending confirmation emails to a blind email account.

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 be automatically set based on the **E-Mail Flags** settings (the **Send Customer / Send Salespersons E-Mails** checkboxes).

**Choose PDF Output Folder-** The **PDF\_Spool** directory is automatically added in the system upon installing the AEN4.50\_CD and the AEN Options program defaults to this directory for its working directory. The UNC path of the **PDF\_Spool** directory is automatically set as the **PDF Output Folder** path.





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.

SMTP ( Mail ) Server

Use SMTP server instead of MS  Send HTML E-mails

Address

Port

From E-Mail address

*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 (Refer to [Appendix](#) for details). This option is enabled only if the **SMTP server instead of MS** box is selected otherwise it is disabled.

The 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.

### *Invoice tab*

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

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

Invoice Order

Invoice Form Code

Preprinted Laser

Inline Text

CC To The E-Mail Address Associated With The Order

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

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 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.

The screenshot shows a software interface with two tabs: 'Invoice' and 'Order'. The 'Order' tab is active. The interface includes the following elements:

- Order Form Code:** A text field containing 'ORDER\_OPTION1' with a magnifying glass icon to its right. Below it is another text field containing 'Preprinted Laser'.
- Designer...:** A button located to the right of the 'Order Form Code' fields.
- Inline Text:** A multi-line text area containing the following 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:** A checkbox that is currently unchecked.

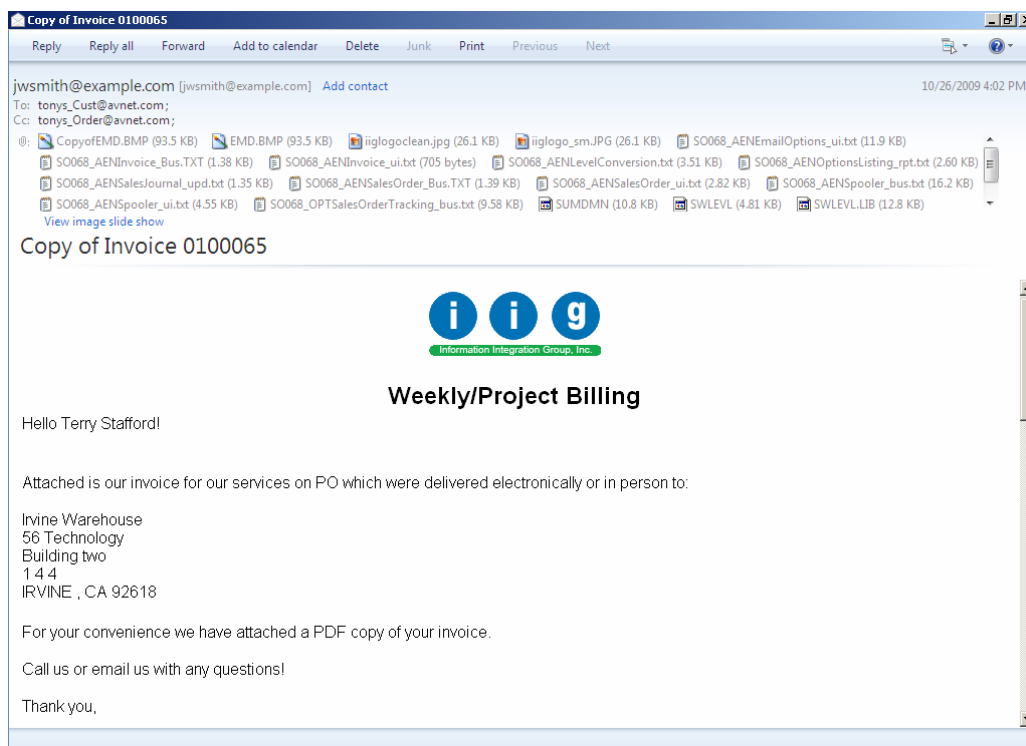
## Appendix

### Setting up HTML Email Templates

IIG has created 3 different HTML templates to be used for Sales Order, Credit Memo and Invoice:

so\_mail\_template.htm, cr\_mail\_template.htm and 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 **AEN4.50\_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.

### 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) 8/3/2012

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	

Adobe PDF

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.

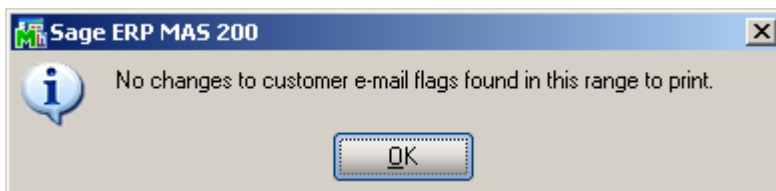
In the below grid specify the range to print.

Here is an example of printout:

The screenshot shows a window titled "View Update Email Flags" with a "Preview" button. The window displays a table of customer data sorted by customer number. The table has four columns: Customer Number, Customer Name, Customer Send E-mail?, and Salsperson Send E-mail?. The data is as follows:

Customer Number:	Customer Name:	Customer Send E-mail?	Salsperson Send E-mail?
01 - BRESLIN	Breslin Parts Supply	No change	Y
01 - HILLS B	Hillsboro Service Center	No change	Y
01 - MAVRK	Maverick Papers	No change	Y
01 - RSSUPPL	R & S Supply Corp.	Y	Y
01 - SHEPARD	Shepard Motorworks	Y	Y
02 - ALLENAP	Allen's Appliance Repair	Y	Y
02 - AMERCON	American Concrete Service	Y	Y
02 - ATOZ	A To Z Carpet Supply	Y	Y
02 - AUTO CR	Autocraft Accessories	Y	Y
02 - BAYPYRO	Bay Pyrotronics Corp.	Y	Y
02 - CAPRI	Capri Sailing Ships	Y	Y
02 - CUSTOM	Custom Craft Products	Y	Y
02 - GREALAR	Greater Alarm Company	Y	Y
02 - JELLCO	Jellco Packing	Y	Y
02 - ORANGE	Orange Door & Window Co.	Y	Y

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.

Customer Maintenance (ABC) 8/3/2012

Customer No. 01-AVNET

Name Avnet Processing Corp

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Os

Address 3361 W. Kenosha  
Powers Building  
Suite 100

ZIP Code 53120

City Racine State WI

Country USA United States of America

Residential Addr

Salesperson 0200 Shelly Westland Split Comm...

Telephone (414) 555-2635 Ext

Fax

Terms Code 01 Net 30 Days

Primary Contact TONY SCHUL TONY SCHULTZ

Ship Code UPS BLUE

Primary Ship To 2 Irvine Warehouse

Tax Schedule WI Wisconsin Exemptions...

Credit Hold

Credit Limit 7,500.00

E-mail Address tonys@avnet.com Only E-mail Invoice?

URL Address www.avnet.com

Accept Cancel Delete Print Help

If the **Only E-Mail Invoice** check box is selected on the Customer Maintenance the **SO Invoice Printing** program will not print the invoices for those customers.

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.

Customer Maintenance (ABC) 8/6/2012

Customer No. 01-AVNET

Name Avnet Processing Corp

1. Main 2. Additional 3. Statistics 4. Summary 5. History 6. Invoices 7. Transactions 8. S/Os

Comment

Open Item Customer

Temporary Customer

Internet Enabled

Data Entry

Price Level 1

Dflt Pymt Type NONE

Discount Rate 5.000 %

Fin Charge Rate 1.500 %

Item Code

Printing

Sort AVNET

Customer Type A1

Statement Cycle M

Print Dun Message

Batch Fax

Primary Credit Card Information

CC Number \*\*\*\*\*1111

CC Pymt Type AMEX American Express

Cardholder Name Avnet Processing Corp

Expiration Date 10/2012

E-mail orders/invoices to Customer

E-mail orders/invoices to Salesperson

Accept Cancel Delete

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.

## Customer Contact Maintenance

The **Send Order Confirmation Emails?** and **Send Invoice Emails?** check boxes have been added to the **Customer Contact Maintenance**.

Customer Contact Maintenance

Contact Code: TONY SCHUL

Name: Tony Schultz Primary

Address: 3361 W. Kenosha Powers Building Suite 100 ZIP Code: 53120 City: Racine State: WI Country: USA United States of America

Salutation: Mr. Title: Acct Rec Mgr Telephone 1: (414) 555-2635 Ext: 1804 Telephone 2: Fax: (414) 555-2800

E-mail: tonys@avnet.com

Notes: Tony will be on vacation the week of Memorial Day. Any questions should be directed to Maria Leone, Finance Manager ext 1800..

Send Order Confirmation Emails?  Send Invoice Emails?

Internet: IT User ID Password Confirm Supervisor Allow Submission of Sales Orders Suspend Access

Accept Cancel Delete

These options are used in the spooler program for scanning through the customer's contacts and adding the Contact's e-mail address to the "CC:" part of the e-mail.



### *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.

## Auto E-Mail Processing

### *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.

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 email 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 email flags can be set to **E-Mail to Customer** and **E-Mail to Salesperson**. These check boxes are based on the settings of 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.

The screenshot shows the 'S/O Invoice Data Entry (ABC) 8/6/2012' window. The 'Totals' tab is selected. The 'E-mail to Customer' and 'E-mail to Salesperson' checkboxes are both checked. The 'Form Code' field is empty, and the 'Description' field is also empty. The window includes navigation tabs (Header, Address, Lines, Totals) and buttons for 'Quick Print', 'Accept', 'Cancel', and '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 screenshot shows the Sage ERP MAS 90 A/R Invoice History Inquiry screen. The window title is "A/R Invoice History Inquiry (ABC) 8/6/2012". The main form displays the following information:

- Invoice No.: 0100056
- Type: INV
- Date: 8/6/2012
- Source: S/O
- Order No.: 0000174
- Customer No.: 01-AVNET (Avnet Processing Corp)
- Ship To: 2 Irvine Warehouse
- Source Journal: SO-000007
- RMA No.: [Empty]
- Terms Code: 01 Net 30 Days
- Ship Date: 8/6/2012
- Ship Via: UPS BLUE
- FOB: [Empty]
- Customer PO: [Empty]
- Salesperson: 01-0200 Shell
- Confirm To: Terry Stafford
- Comment: [Empty]
- E-mail: tonys@avnet.com
- Fax: (949) 555-2223
- Batch Fax:

On the right side, there is a summary table:

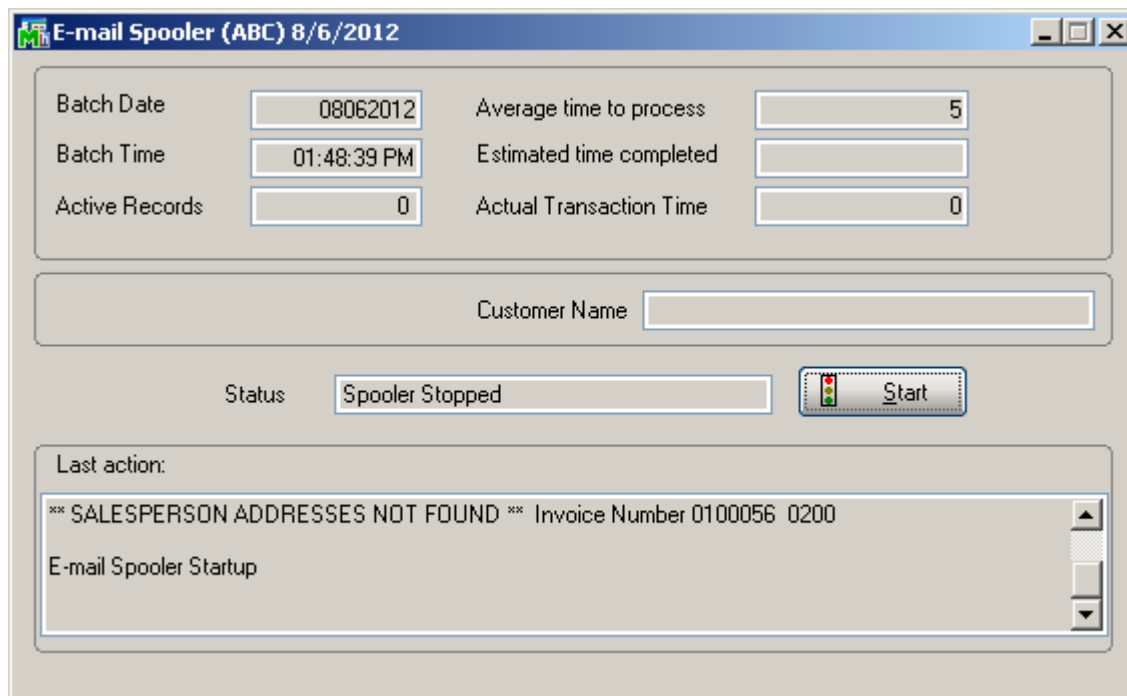
Taxable	654.75
Non-taxable	.00
Freight	.00
Sales Tax	45.10
Count	32.74
Invoice Total	667.11
Deposit	.00
Net Invoice	667.11
Balance	667.11

A pop-up dialog box titled "Sage ERP MAS 90" is open, showing the customer address "tonys@avnet.com" and "Send" and "Cancel" buttons. The "Resend Email" button in the main form is highlighted with a mouse cursor.

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

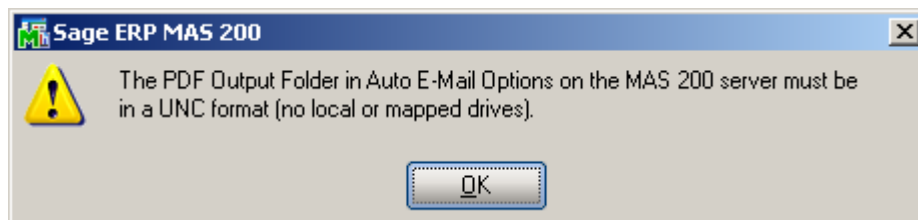
## E-Mail Spooler

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



The screenshot shows the 'E-mail Spooler (ABC) 8/6/2012' window. It features a grid of input fields for 'Batch Date' (08062012), 'Batch Time' (01:48:39 PM), 'Active Records' (0), 'Average time to process' (5), 'Estimated time completed', and 'Actual Transaction Time' (0). Below this is a 'Customer Name' field. The 'Status' is 'Spooler Stopped', and there is a 'Start' button with a traffic light icon. A 'Last action:' section contains a text box with the message: '\*\* SALESPERSON ADDRESSES NOT FOUND \*\* Invoice Number 0100056 0200' and 'E-mail Spooler Startup'.

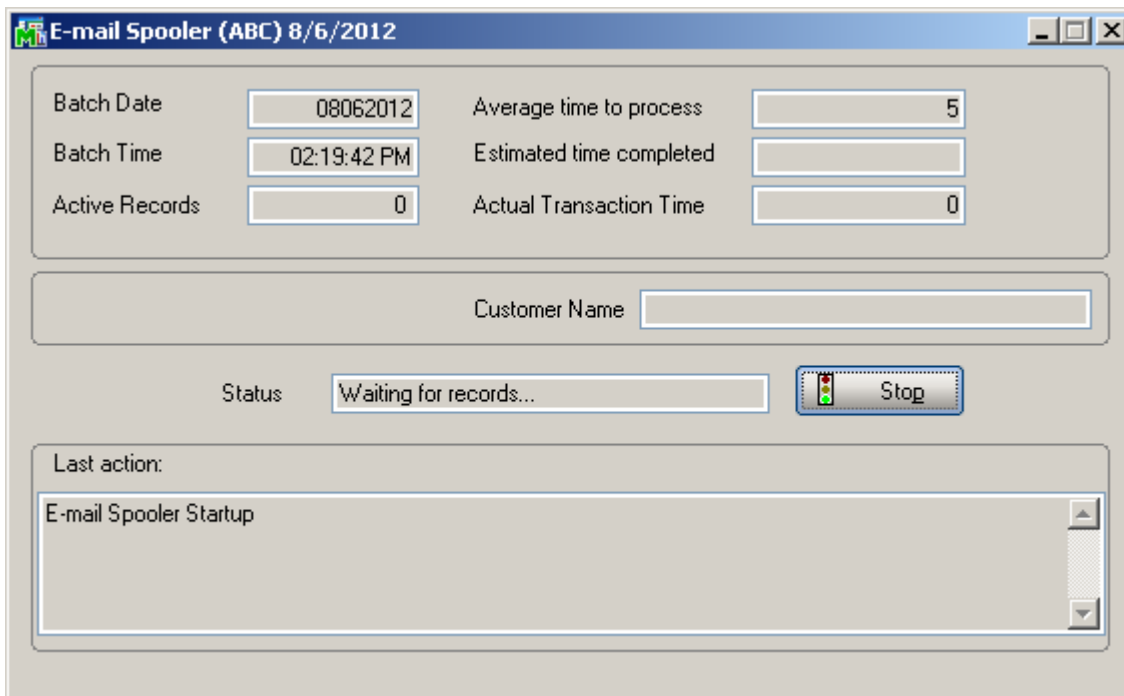
*Note: If E-mail spooler is run in Client/Server mode, the path of PDF Output Folder specified in Auto E-Mail Options must be in a UNC format, otherwise the following message box will be displayed:*



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



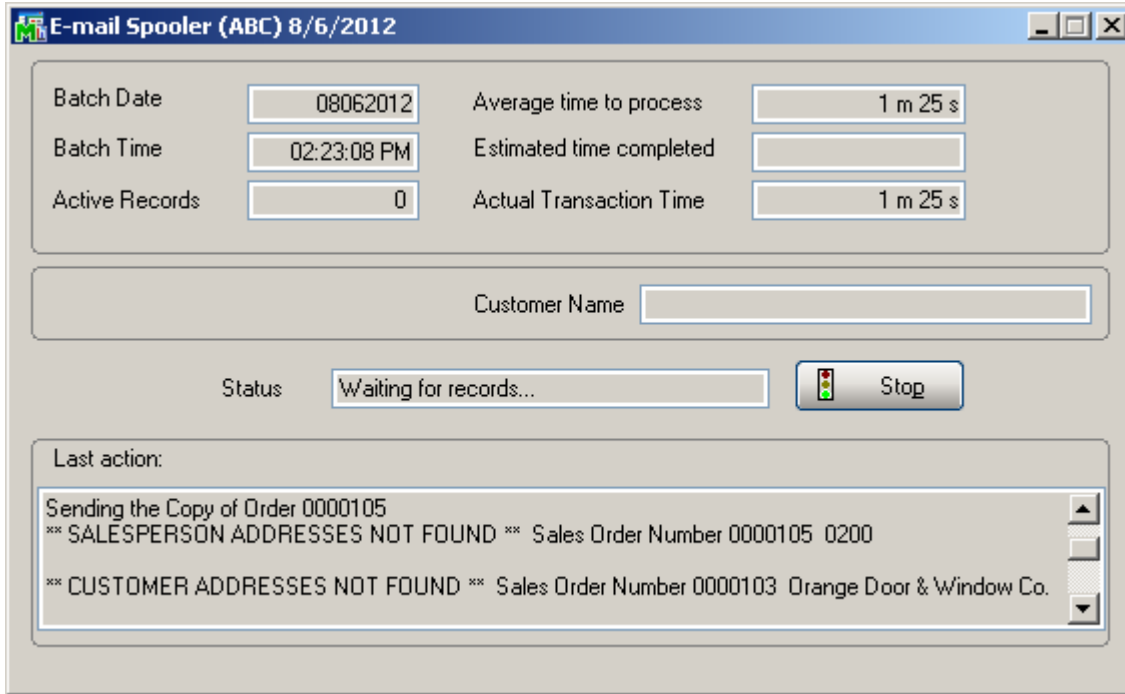
Click the **Start** button to start processing active records. After these records are processed, the program will continue to process any new records added to the spooler.



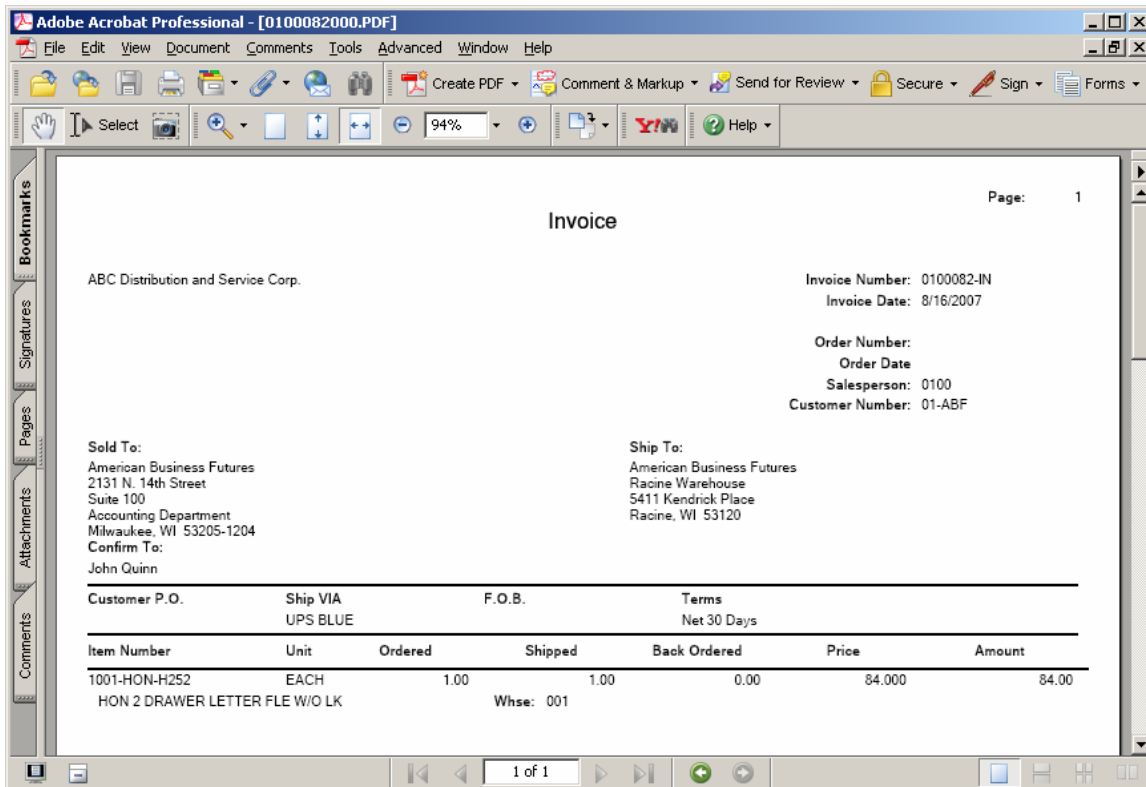
After starting the E-Mail Spooler, the **Start** button is replaced with the **Stop** button.

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.



The **E-mail Spooler** program processes the emails according to the **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.

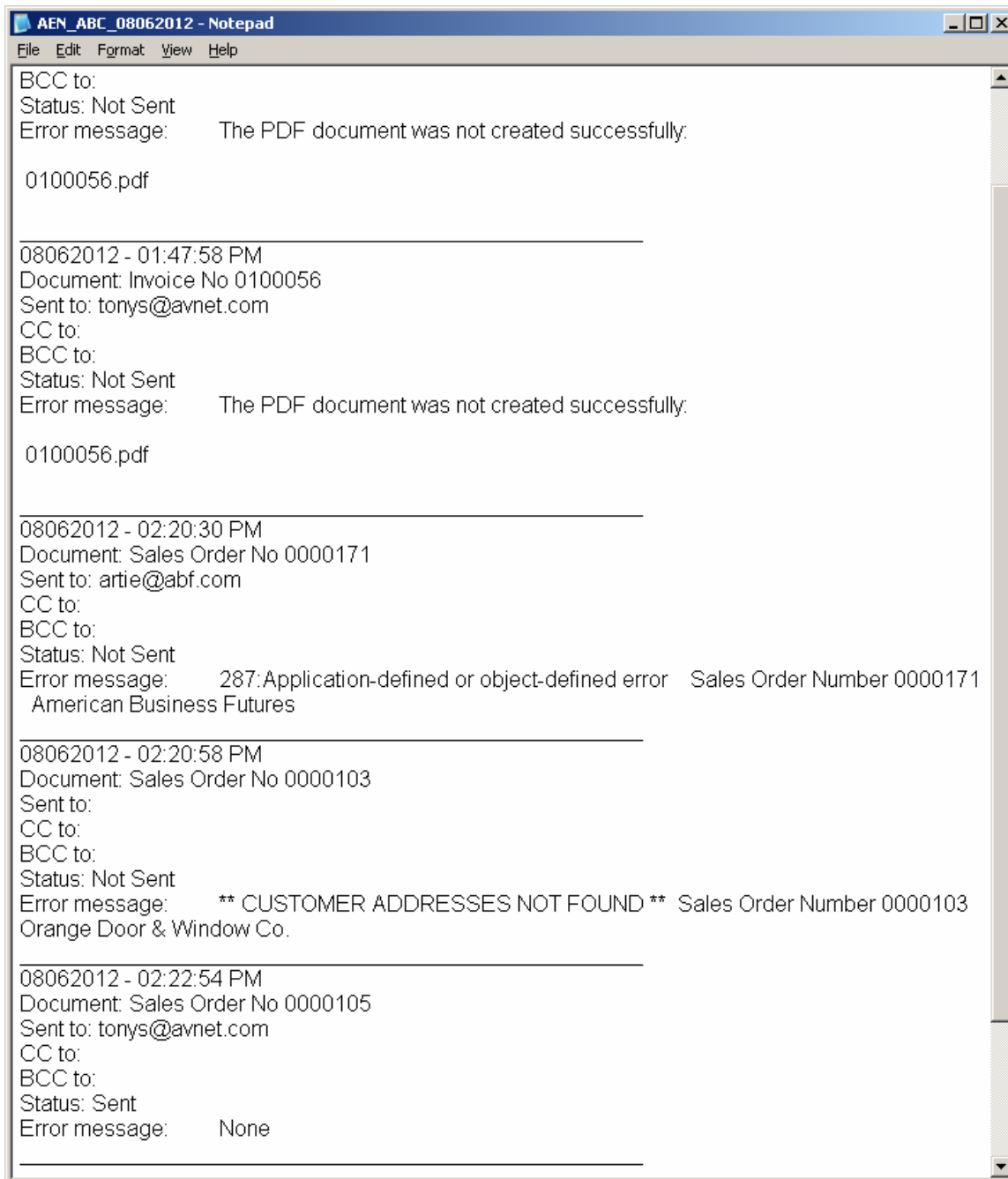
If there is not a valid e-mail address in the customer master, but there are in the contacts that would be sent as a “CC:”, then the program will load the contact emails as the “To:” e-mail addresses.

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*

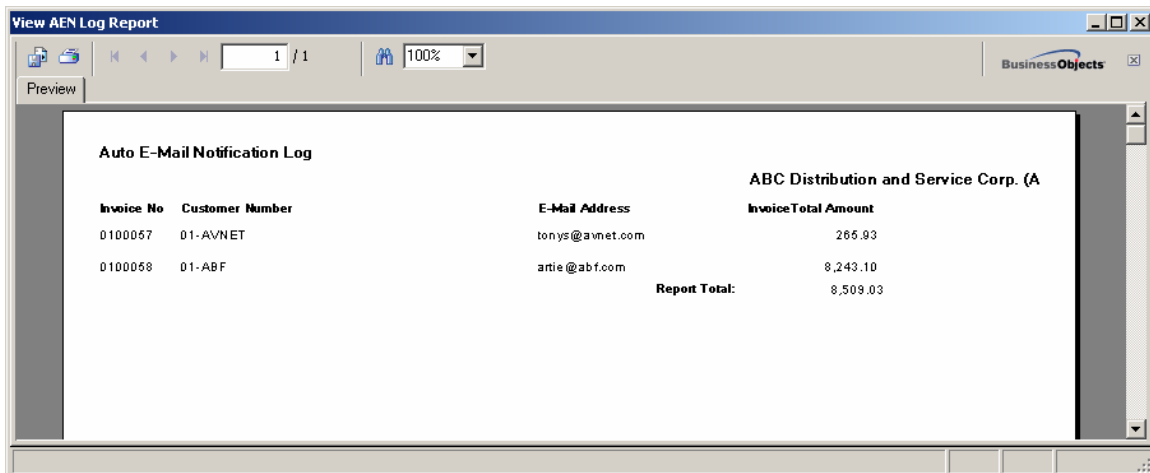
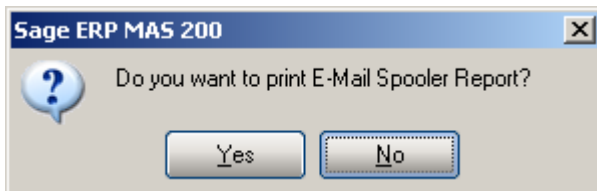
Here is an example of a log file:





## AEN Log during Daily Sales Reports Updates

The **Daily Sales Reports/Updates** programs have been modified to print the log of invoices for AEN email spooler.



The screenshot shows a window titled "View AEN Log Report" with a "Preview" tab. The window displays a table of invoice data for "ABC Distribution and Service Corp. (A)". The table has four columns: "Invoice No", "Customer Number", "E-Mail Address", and "Invoice Total Amount".

Invoice No	Customer Number	E-Mail Address	Invoice Total Amount
0100057	01-AVNET	tonys@avnet.com	266.93
0100058	01-ABF	antie@abf.com	8,243.10
<b>Report Total:</b>			8,509.03

The Invoice/Sales Order Email address is printed on the report.