

GENERAL

There is a popular way of sending invoices, orders etc. by email by printing them to a pdf-printer and then send them by email.

Forms like purchase orders, invoices and reports like stock overview, pricelists can also be send by email directly from Sera. This is more convenient if case series of orders are send and created (automatic purchasing) and the more customers and suppliers want electronic documents the more it is interesting when the system does a lot of work.

FILES AND LOCATIONS

\sera\mailer\emailbin	seramail.bat (script to send email) xps2pdf.exe (converting xps to pdf) pdf.par OR xps.par (defines the type of attachment)
\sera\mailer\emailout	Reports and attachments to send
\sera\paramet	Bodytext.<lan> for automatic body generation

Note: these files can be found at

<http://download.serasoft.com/TOOLS/EMAILBIN/> emailbin.zip

Remove pdf.par in case xps instead of pdf attachments are required

COMPANY EMAIL ADDRESSES

The exact setup of the email server is outside the scope of this manual. Emails can be sent from 3 different addresses like:

1. Sales@yourcompany.com
2. Purchase@yourcompany.com
3. Accounting@yourcompany.com

You can choose other names of keep all 3 the same. Get a password for each of the senders.

EXTERNAL FORMS

External forms like invoices are checking the customer or supplier setting. In case an email address for that form is found the email is completely prepared. There is always a preview, before final shipping, but you have to realize that not sending is sometimes the same as printing but not sending an invoice or a purchase order.

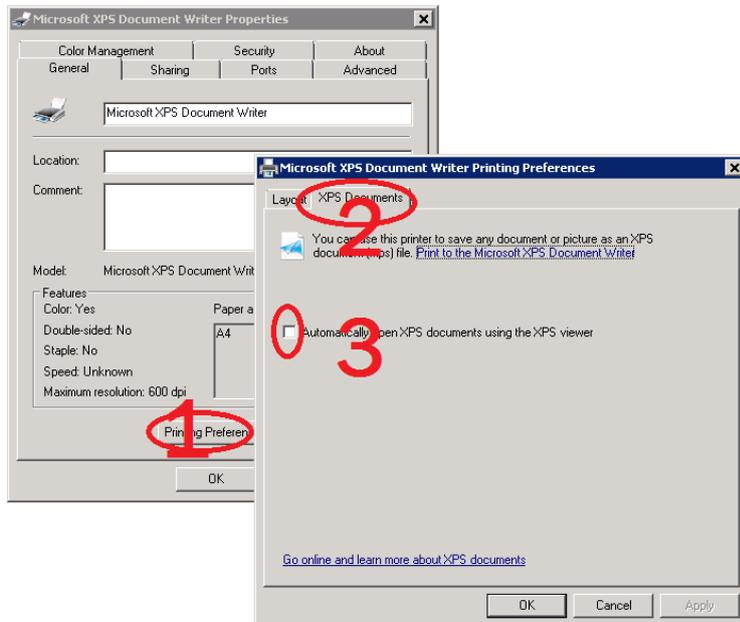
Sender	Form
Sales department (1)	Quotation, Order confirmation, Invoice, Pro Forma
Purchase department (2)	Price request, Purchase order, Orders too late
Accounting (3)	Statement, Reminder, Payment summary

All other prints from Sera can be send by email too, but the user has to add some information like email address, subject etc.

In case extra checks or workflow procedures are required: please consult an email expert.

PRINTER

Create or use the Microsoft XPS Document Writer at the server and set the properties as shown in the example.



Write down the NAME, PORT and DRIVER of the printer.

Probably it is: Microsoft XPS Document Writer, Microsoft XPS Document Writer, XPSport

SERA SETTINGS

Company level

Go to program A082 (at least available in system management menu of user START) and fill in the name of the email server, the sending address(es), password(s) and the name, driver and port of the XPS printer.

Addressee level

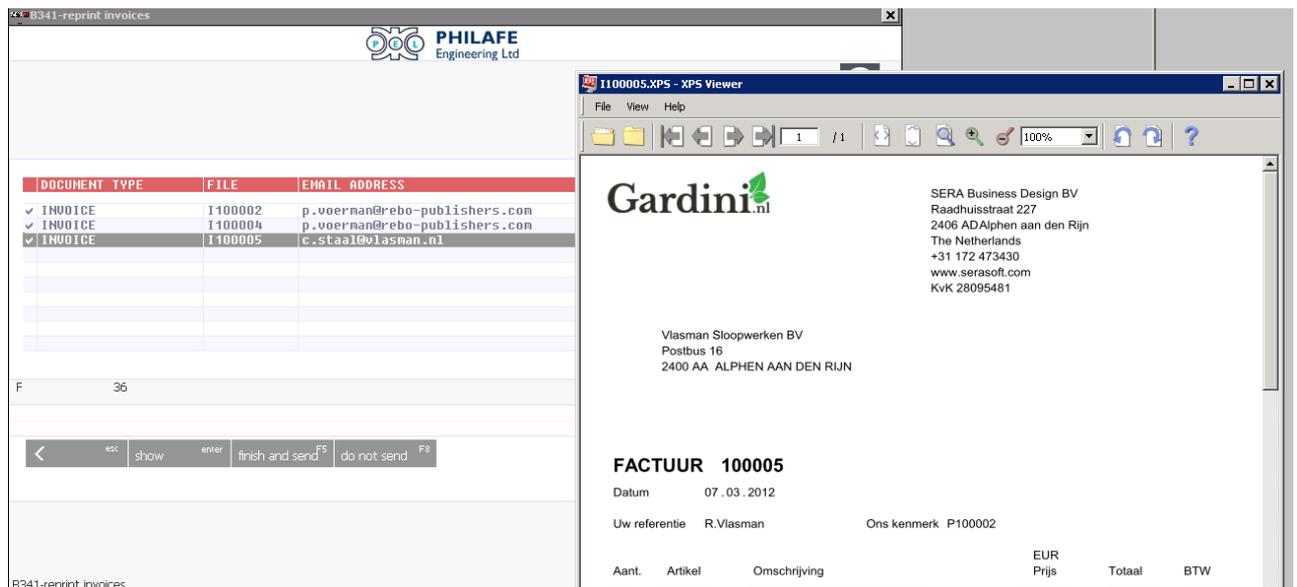
Go to A102 / A112, change suppliers or customers and change the "INTERNET" field with the email addresses where the customer or the supplier wants you to send the documents too

User level (email copy)

A user can receive a copy of the sent emails. Set the "C.C. EMAIL" field in A042.

PRINTING

The external forms as mentioned above will select themselves depending on the settings at company, addressee and user level. Other forms like a stock summary will ask for some information.





BODY TEXTS

The automatically generated emails like invoices or purchase orders are looking up for `\SERA\PARAMET\BODYTEXT.<LAN>`

Keep the texts as simple as possible, because all the information is at the attached document,

It can be text like

Dear Madam, Sir,

Attached you will find our invoice I120056.

Please don't hesitate to contact us, in case there is any question.

Kind regards

The Food Company

15 Central Road
2456 My City

The form \sera\paramet\bodytext.eng as to be:

**Dear Madam, Sir, **

Attached you will find our -DOCUMENT-

Please don't hesitate to contact us, in case there is any question.

Kind regards

**The Food Company **
15 Central Road
2456 My City

Please note that -DOCUMENT- is filled during printing and that HTML code like **** is used. Other HTML like **
** for linefeeds and **<html> <body>** are added automatically in case they are not there. Any other tags can be added by you if you like.