Email Assistant User Guide

Triple E Technologies, LLC

Version 031116.01

Triple E Technologies, LLC
P.O. Box 2677 Post Falls, ID 83877
Phone: 208.777.9300 | Fax: 208.777.9304

The information in this document is subject to change without notice. Although Triple E Technologies, LLC has attempted to ensure the accuracy of the contents of this document, this document may include errors or omissions. The examples and sample programs are for illustration only and may not be suited to your purpose. You should verify the applicability of any example or sample program before placing the software into productive use. The examples in this document may not exactly replicate your system configuration, but the functions will remain the same.

Comments, questions, or concerns? Please email all inquiries to helpdesk@e3tek.com

Table of Contents

Introduction **1**

Setting up Email Assistant **2**

Email Configurator 2

Using Email Assistant 3

Reports Tab **4**

Transaction Notifications 4

Customer Activity Report 5

Invoices 6

Invoices – Vehicle Format 7

Private Card Sales by Customer and Card 8

Statements 8

Emails **10**

Configuring Emails 10

Recipients **11**

Adding Recipients 11

Deleting Recipients 12

Customers **13**

Removing Customer Reports 13

Send **14**

Sending Emails 14

Resending Emails 14

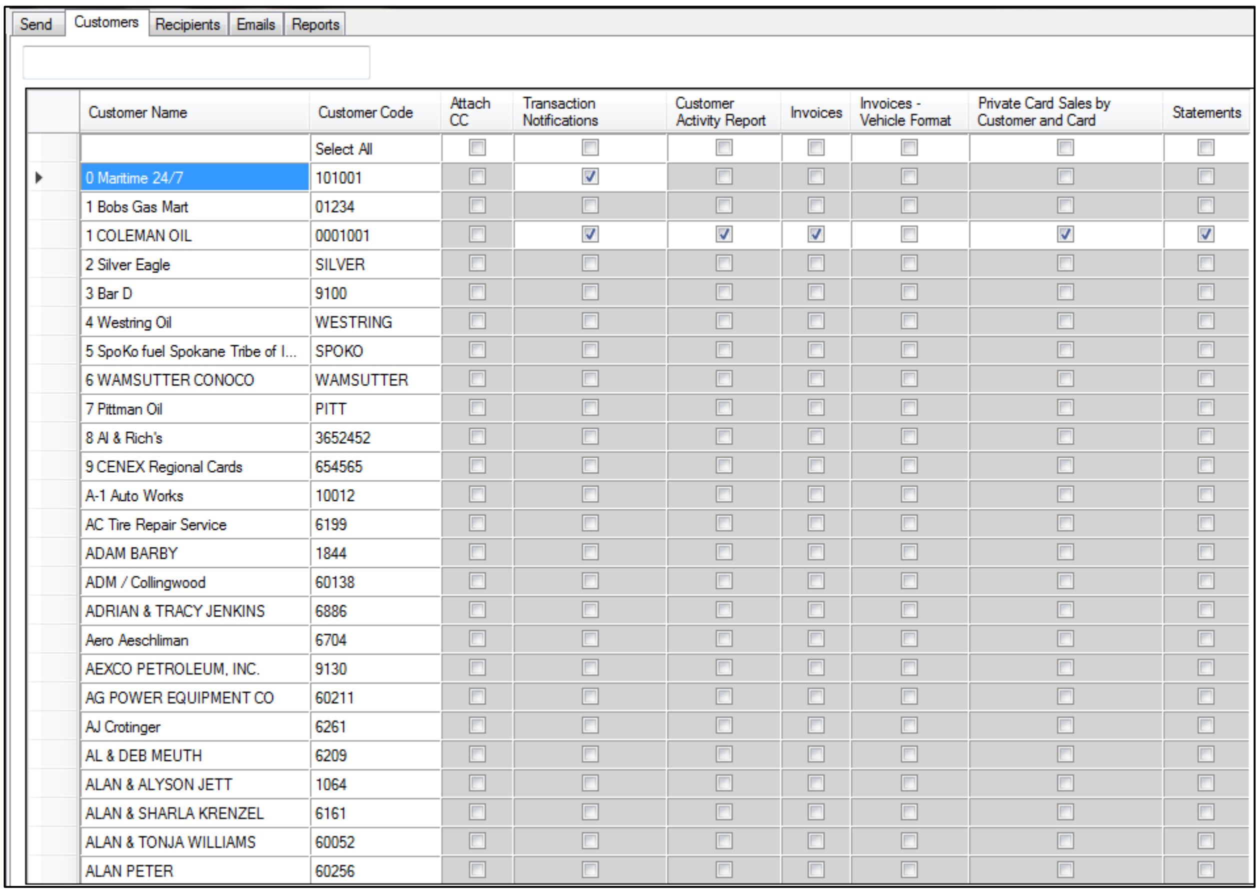
Sending Transaction Notifications 15

Introduction

Email Assistant syncs with our DataManager software to allow you to configure automatic emails. With Email Assistant, you can do the following:

- ✓ Send emails to multiple customers simultaneously
- ✓ Generate and send reports, receipts, and transaction notifications
- ✓ Choose which customers receive notifications and how often
- ✓ Send automated notifications the instant transactions occur

Email Assistant significantly reduces the time and effort spent generating and sending statements to customers, giving you the freedom to focus on other aspects of your business.



Customer Name	Customer Code	Attach CC	Transaction Notifications	Customer Activity Report	Invoices	Invoices - Vehicle Format	Private Card Sales by Customer and Card	Statements
	Select All							
0 Maritime 24/7	101001		✓					
1 Bobs Gas Mart	01234							
1 COLEMAN OIL	0001001		✓	✓	✓		✓	✓
2 Silver Eagle	SILVER							
3 Bar D	9100							
4 Westring Oil	WESTRING							
5 SpoKo fuel Spokane Tribe of I...	SPOKO							
6 WAMSUTTER CONOCO	WAMSUTTER							
7 Pittman Oil	PITT							
8 Al & Rich's	3652452							
9 CENEX Regional Cards	654565							
A-1 Auto Works	10012							
AC Tire Repair Service	6199							
ADAM BARBY	1844							
ADM / Collingwood	60138							
ADRIAN & TRACY JENKINS	6886							
Aero Aeschliman	6704							
AEXCO PETROLEUM, INC.	9130							
AG POWER EQUIPMENT CO	60211							
AJ Crotinger	6261							
AL & DEB MEUTH	6209							
ALAN & ALYSON JETT	1064							
ALAN & SHARLA KRENZEL	6161							
ALAN & TONJA WILLIAMS	60052							
ALAN PETER	60256							

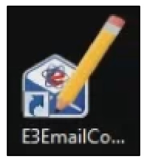
Setting up Email Assistant

Email Configurator

Before using Email Assistant, you will need to configure your basic email settings in the **Email Configurator** application. These settings allow you to connect to the correct customer database and indicate your preferred email account.

To use email configurator:

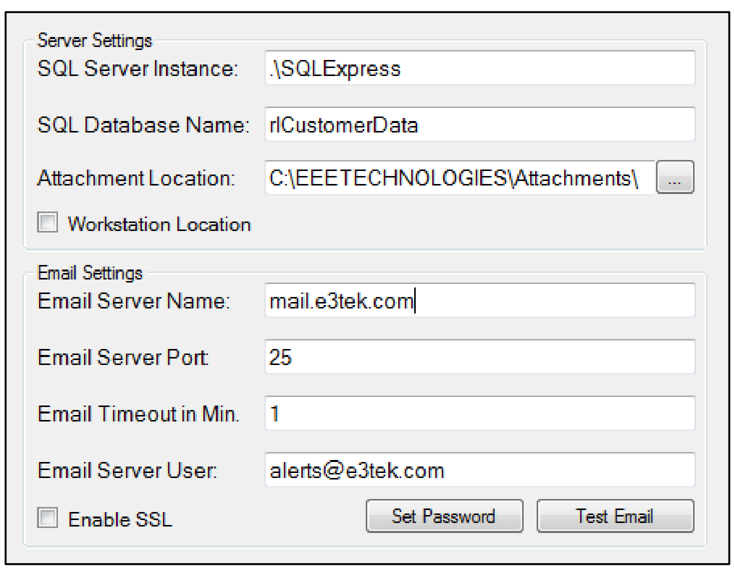
1. Click the **Email Configurator** desktop icon to open the application.



2. Enter values for the following:

Email Server Name	Email server name (e.g., smtp.gmail.com). Check with your email service provider if unsure.
Email Server Port	Server port for sending emails. Valid ports are **25** and **587**. Check with your email service provider if unsure.
Email Timeout in Min.	Duration allowed for attempting to send emails before automatically timing out. Longer timeout is necessary for slower internet connections.
Email Server User	Email account from which all emails will be sent.

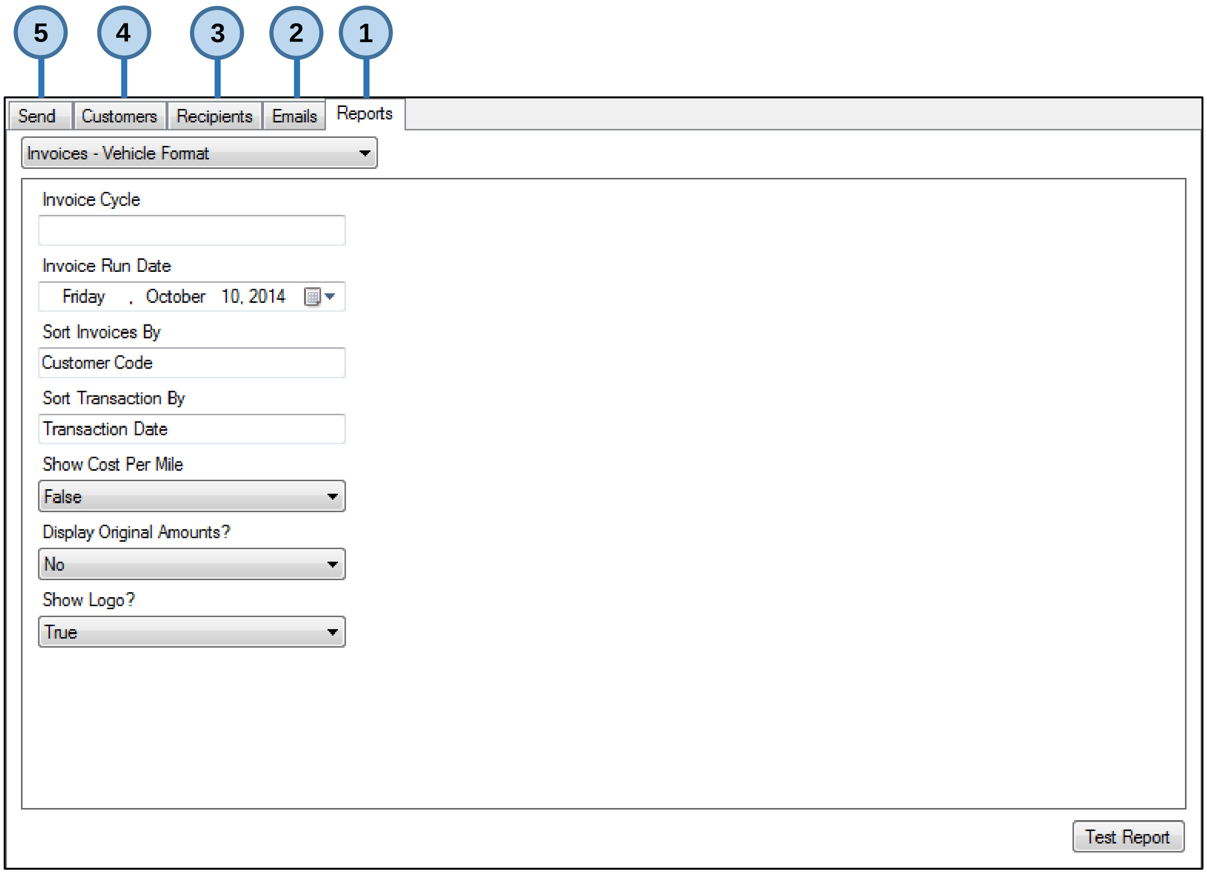
3. Check the **Enable SSL** checkbox, unless SSL interferes with your server (check with your internet service provider if unsure).



4. Click **Set Password** to enter the email account password.
5. Click **Test Email** to validate settings.

Using Email Assistant

Email Assistant is designed to work from right to left. You begin by configuring reports in the **Reports** tab, then you continue by writing email content in the **Emails** tab, adding email addresses in the **Recipients** tab, and confirming recipients in the **Customers** tab. Once you've configured everything, you can send emails using the **Send** tab.



Reports Tab

The **Reports** tab is used to configure report settings. You will use the same parameters as those entered in DataManager when viewing reports. Email Assistant automatically saves your selected parameter values, so you only need to regularly update the run dates. All reports will be attached as PDFs on outgoing emails.

When configuring reports, you can either set values to **True** to display the information or **False** to remove the information from the report**.**

You can configure the following:

- Transaction Notifications
- Customer Activity Report
- Invoices*
- Invoices – Vehicle Format*
- Private Card Sales by Customer and Card
- Statements*

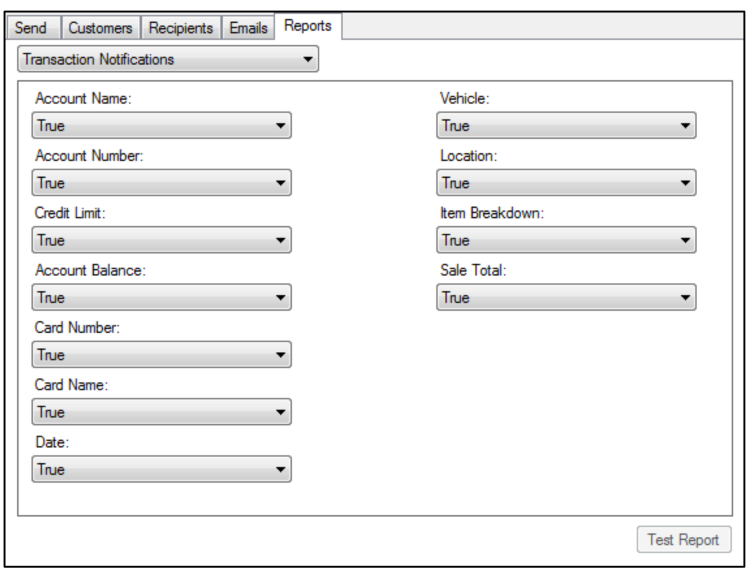
** = AR Suite only*

Transaction Notifications

Transaction notifications are essentially electronic receipts, and selecting true or false values determines what information is displayed on them.

To configure Transaction Notifications:

1. In the dropdown menu, select **Transaction Notifications**.



2. Select **True** or **False** for the following:

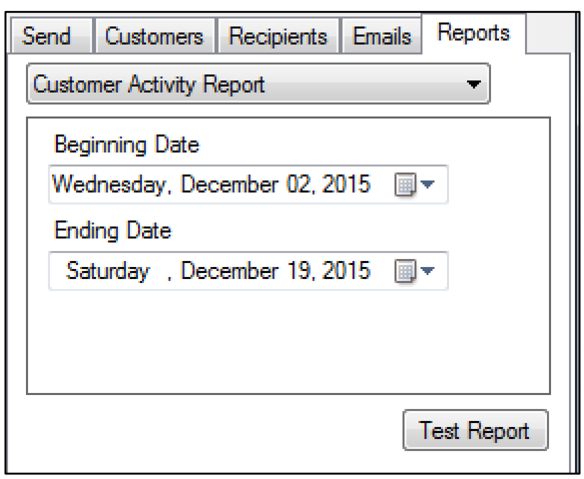
Account Name	Unique name identifying customer account.
Account Number	Unique number identifying customer account.
Credit Limit	Account credit limit dollar amount.
Account Balance	Outstanding customer account balance.
Card Number	Unique number identifying payment card.
Card Name	Unique name identifying payment card.
Date	Transaction date, in MM/DD/YYYY format.
Vehicle	Unique number identifying vehicle for which card use authorized, if applicable.
Location	Unique name identifying site.
Item Breakdown	List of purchased items.
Sale Total	Total dollar amount of all inventory items sold to customer, including taxes and discount.

Customer Activity Report

The **Customer Activity** report provides a summary of sales transactions and account balance activity for the customer and reporting period specified.

To configure Customer Activity Report:

1. In the dropdown menu, select **Customer Activity Report**.



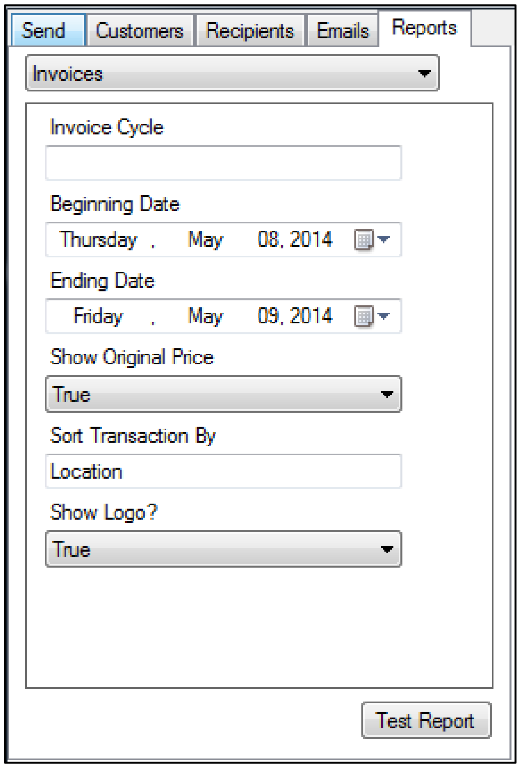
2. Click **Beginning Date**, then select a report start date.
3. Click **Ending Date**, then select a report ending date.
4. If desired, click **Test Report** to generate sample PDF.

Invoices

The **Invoices** report includes a summary and detailed review of customer invoice information.

To configure Invoices:

1. In the dropdown menu, select **Invoices**.



2. Do one of the following:
   - In the **Invoice Cycle** field, enter date for invoices with run frequency specified.

     OR

   - Click **Beginning Date**, then select report beginning date.
   - Click **Ending Date**, then select report ending date.

3. In the **Sort Transaction By** field, enter one of the following:
   - Location
   - Driver #
   - Transaction Date

4. Select **True** or **False** for the following:

Show Original Price	Include vendor pricing on invoices.
Show Logo?	Display company logo on invoices.

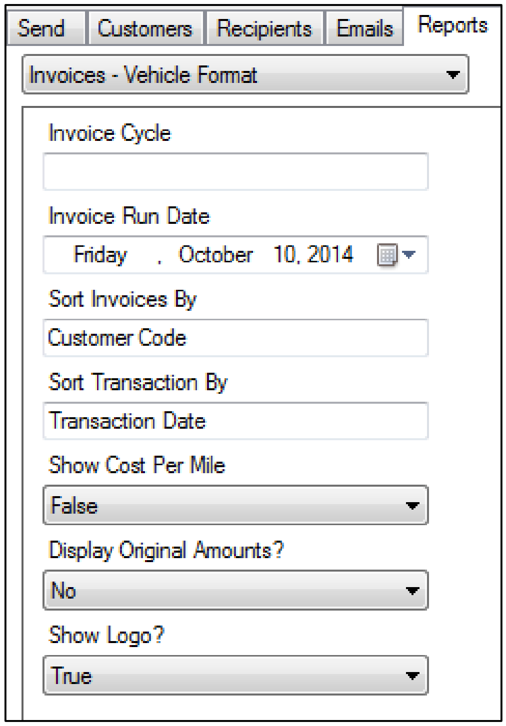
5. If desired, click **Test Report** to generate preview PDF.

Invoices – Vehicle Format

The **Invoices – Vehicle Format** report includes a summary and detailed review of customer invoice information with a focus on vehicle fuel usage and cost.

To configure Invoices – Vehicle Format report:

1. In the dropdown menu, select **Invoices – Vehicle Format**.



2. In the **Invoice Cycle** field, enter date for invoices with run frequency specified.
3. Click **Invoice Run Date**, then select the run date (system default is current date).
4. In the **Sort Invoices By** field, enter one of the following:
    - Customer Code
    - Customer Name
    - Invoice Number
5. In the **Sort Transaction By** field, enter one of the following:
    - Transaction Date
    - Driver #
    - Location
6. Select **True** or **False** for the following:

Show Cost Per Mile	Include vehicle cost per mile data on invoices.
Display Original Amounts	Include vendor original pricing on invoice(s).
Show Logo?	Display company logo on invoices.

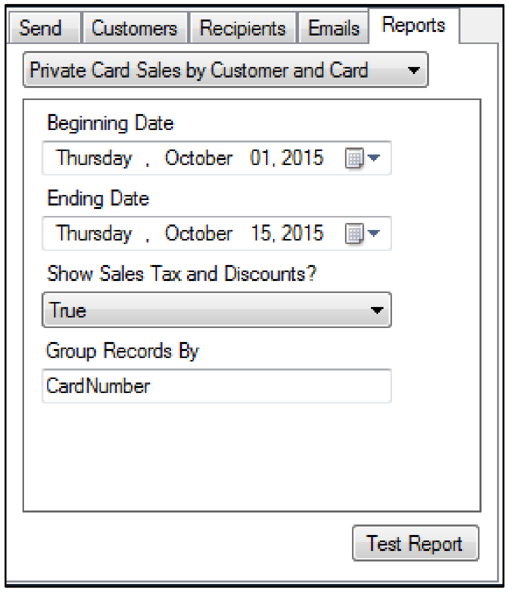
7. If desired, click **Test Report** to generate preview PDF.

Private Card Sales by Customer and Card

This report provides detailed customer private card transaction information by either site or card number for the date range specified.

To configure private card reports:

1. In the dropdown menu, select **Private Card Sales by Customer and Card**.



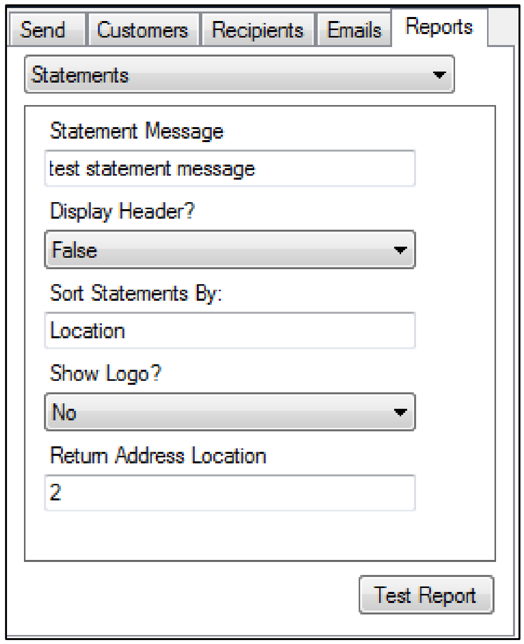
2. Click **Beginning Date**, then select report beginning date.
3. Click **Ending Date**, then select report ending date.
4. Select **True** or **False** in the **Show Sales Tax and Discounts** dropdown menu.
5. In the **Group Records By** field, enter one of the following:
    - Location
    - CardNumber
6. If desired, click **Test Report** to generate preview PDF.

Statements

This report summarizes customer account financial activity, including balance forward, payments, adjustments, and ending credit balance for the reporting period specified.

To configure statements:

1. In the dropdown menu, select **Statements**.



2. In the **Statement Message** field, enter a statement message, if desired.
3. In the **Display Header?** field, select **True** or **False**.
4. In the **Sort Statements By** field, enter one of the following:
    - Name
    - Account Number
    - Location
5. In the **Show Logo?** field, select **Yes** or **No**.
6. In the **Return Address Location** field, enter one of the following:
    - 1 (left side, for double window envelopes)
    - 2 (centered)
7. If desired, click **Test Report** to generate preview PDF.

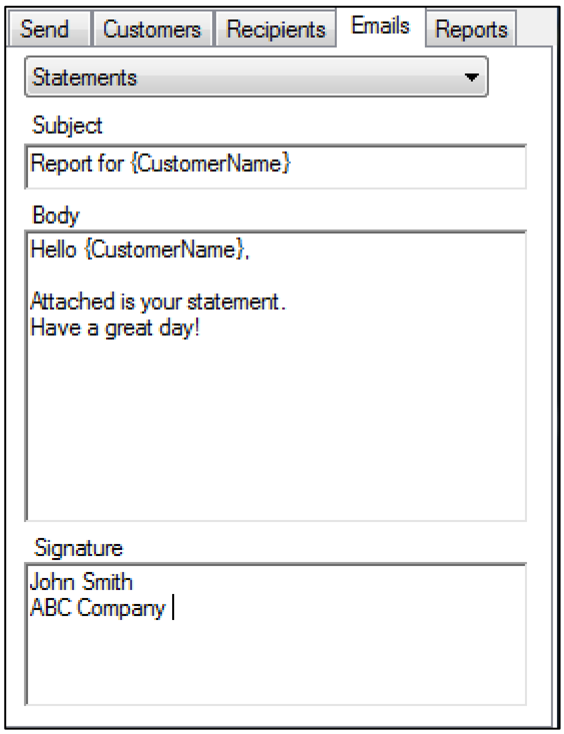
Emails

Once you've configured your reports, you can format text for the corresponding emails in the **Emails** tab. This tab allows you to write a custom subject line, body text, and signature for each report type. If you include {CustomerName} in the **Subject** and **Body** fields, Email Assistant will automatically insert the appropriate customer name as entered in DataManager for each recipient.

Configuring Emails

To configure the emails section:

1. In the dropdown menu, select a report type.



2. In the **Subject** box, enter subject line text (e.g., 'Report for {Customer Name}).
3. In the **Body** box, enter body text (e.g., 'Attached is your statement.').
4. In the **Signature** box, enter signature text (e.g., 'Sincerely, John Smith').
5. Repeat steps 1-4 for each additional report type.

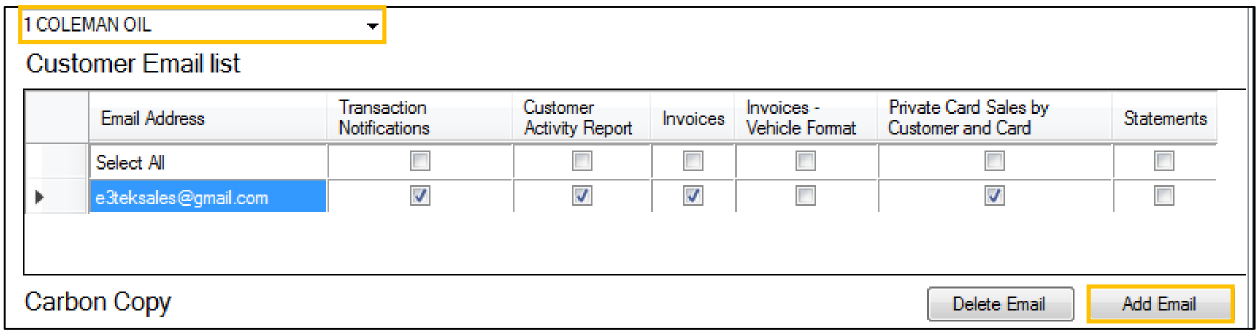
Recipients

After configuring your reports and email text, you can then add recipients in the **Recipients** tab. You can add multiple email addresses for each customer, and then you can select which reports each individual email address receives.

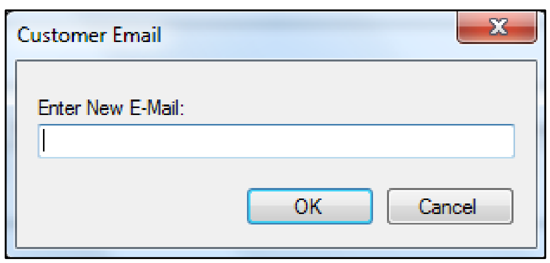
Adding Recipients

To add recipients:

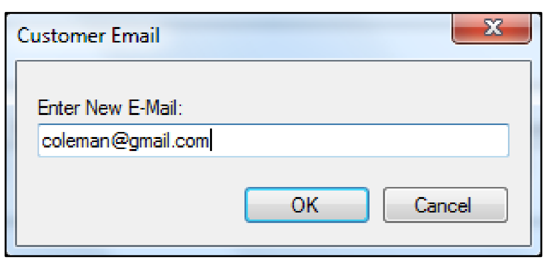
1. Select a customer from the dropdown menu.



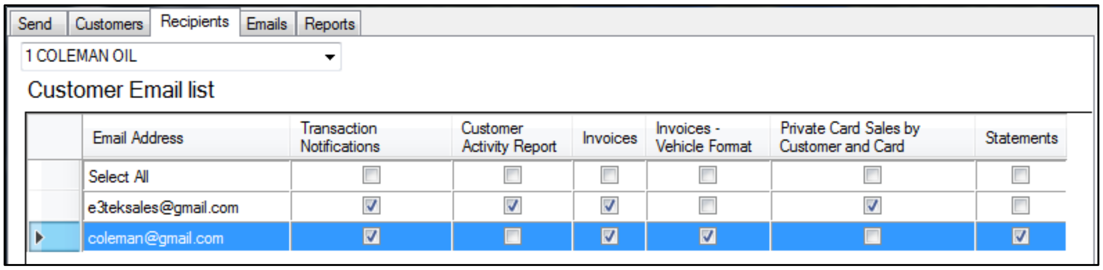
2. Click **Add Email**. **Customer Email** screen displays.



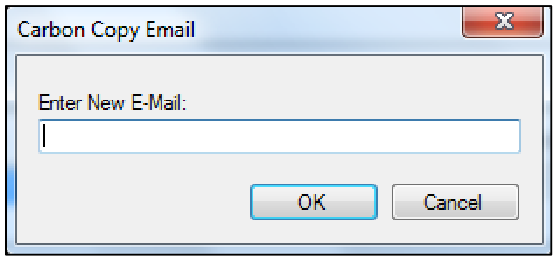
3. Enter the new email address, then click **OK**.



4. Repeat steps 2-3 for each additional email address.
5. Check the appropriate report checkboxes for each email address.



6. If desired, click **Add CC Email**. **Carbon Copy Email** screen displays.

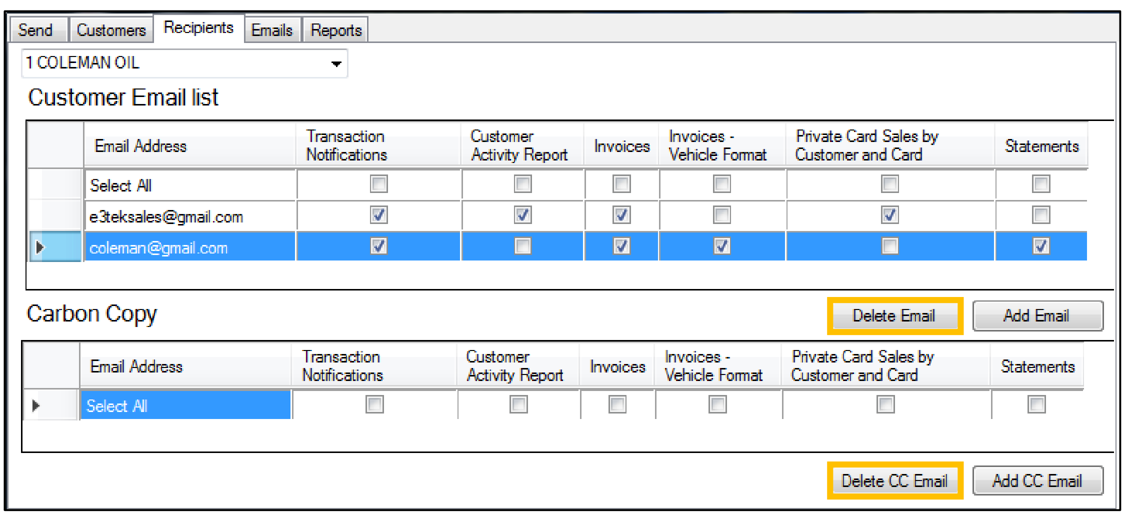


7. Enter the carbon copy email address, then click **OK**.

Deleting Recipients

To remove recipients:

1. Select a customer email address or carbon copy address.
2. Click **Delete Email** or **Delete CC Email**.

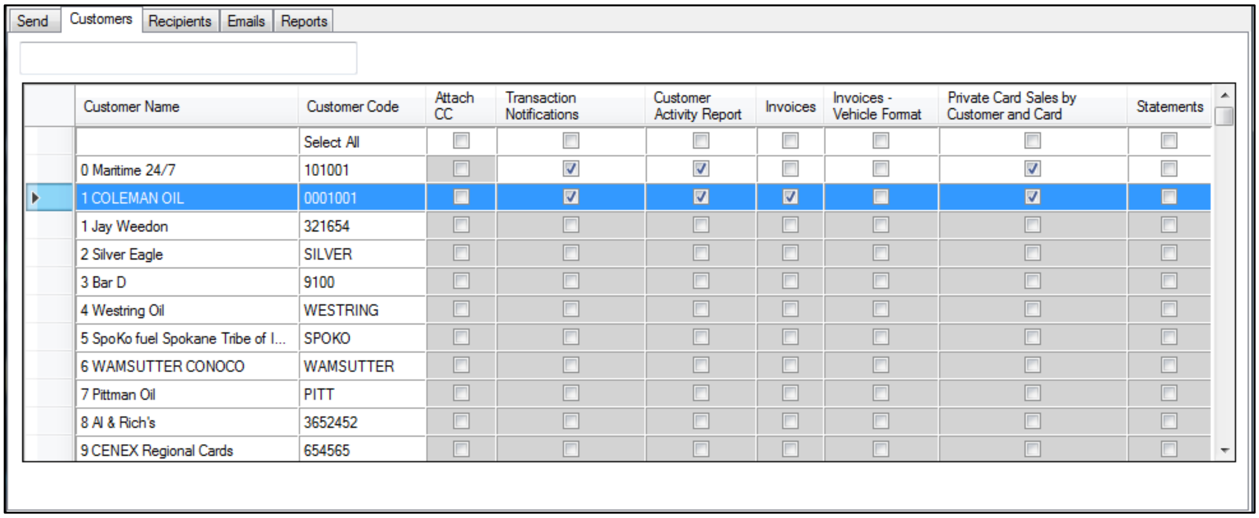


Customers

The **Customers** tab allows you to make changes to already existing recipients. The settings shown are imported directly from the **Recipients** tab and can only be removed – you cannot add additional reports from the Customers tab. To add additional reports to a customer's list, you will need to repeat the steps covered in the Recipients tab section.

Removing Customer Reports

1. Search for and select a customer.



2. Uncheck any of the available checkboxes to remove reports from the recipient's list.

Send

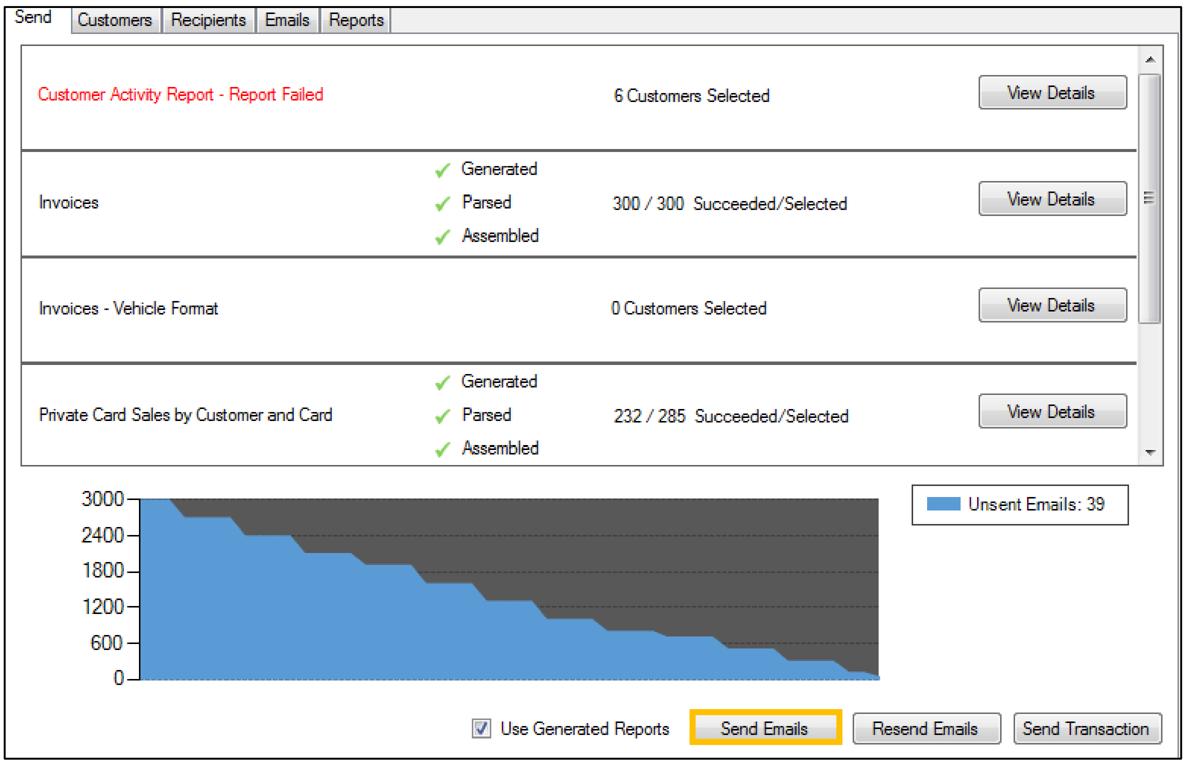
Once you've configured all your settings, you can use the **Send** tab to email reports to your recipients. Prior to sending the emails, this tab displays the number of customers selected for each report, which allows you to view recipients and make changes, as necessary.

If you have already clicked the **Test Report** button on the **Reports** tab, you can check the **Use Generated Reports** checkbox. If you haven't generated a test report, or if you've changed parameters since testing the last report, leave this checkbox unchecked.

Sending Emails

To send emails:

- Click **Send Emails**. Wait for emails to finish sending.



Email Assistant queues emails while a background process send the emails in batches. You can either wait for the application to finish sending the emails or close it and view the results later.

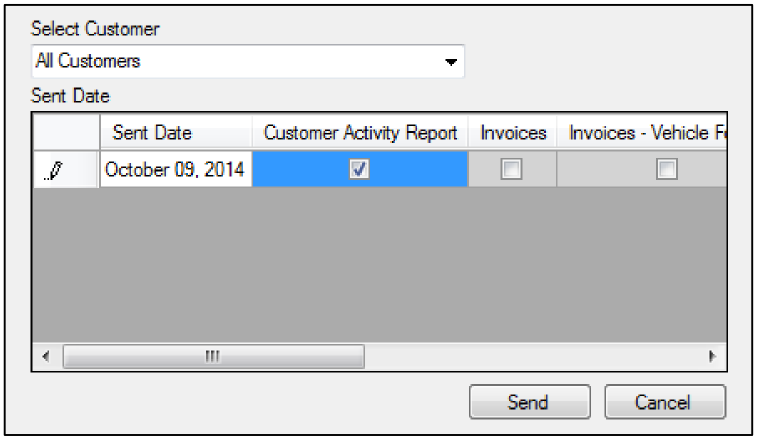
NOTE: When sending emails, be sure to check with your email provider to determine your daily email limit. Sending more emails than your email server can handle can potentially overload it.

Resending Emails

Click **View Details** for any of the reports to get additional information about both successful and failed emails. Depending on the information provided, you may need to edit information in the **Recipients** and/or **Reports** tabs to ensure all emails and run dates are correct.

To resend emails:

1. Click **Resend Emails**. **Resend Emails** screen displays.



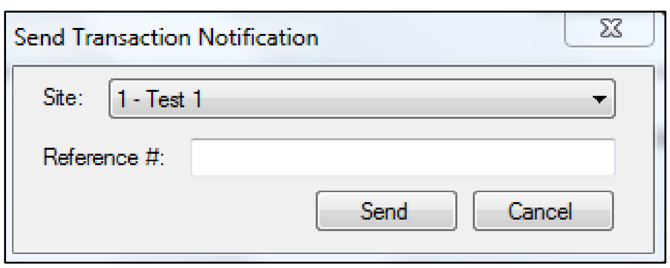
2. In the **Select Customer** dropdown menu, select **All Customers**, so select a specific customer. List of sent reports displays.
3. As appropriate, check report checkboxes for the appropriate days.
4. Click **Send** to send the selected items.

Sending Transaction Notifications

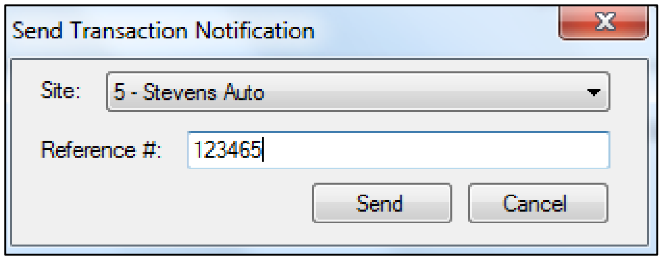
Transaction notifications are essentially electronic receipts. If a customer is set up to receive transaction notifications, they will automatically receive them whenever a charge or private card transaction occurs. Transaction notifications occur automatically, but you can also manually send them to customers if you have the receipt reference number by using the **Send Transaction** button on the **Send** tab.

To send a single transaction:

1. Click **Send Transaction**. **Send Transaction Notification** screen displays.



2. In the **Site** dropdown menu, select the appropriate site location.
3. In the **Reference #** field, enter the receipt reference number.


Send Transaction Notification
Site:
5 - Stevens Auto
Reference #:
123465
Send
Cancel

4. Click **Send**.