



Email Assistant User Guide

Triple E Technologies, LLC

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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.

Send Customers Recipients Emails Reports									
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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶ 0 Maritime 24/7	101001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1 Bobs Gas Mart	01234	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1 COLEMAN OIL	0001001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2 Silver Eagle	SILVER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Bar D	9100	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 Westring Oil	WESTRING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 SpoKo fuel Spokane Tribe of I...	SPOKO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 WAMSUTTER CONOCO	WAMSUTTER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Pittman Oil	PITT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 Al & Rich's	3652452	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 CENEX Regional Cards	654565	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A-1 Auto Works	10012	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AC Tire Repair Service	6199	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADAM BARBY	1844	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADM / Collingwood	60138	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADRIAN & TRACY JENKINS	6886	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Aero Aeschliman	6704	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AEXCO PETROLEUM, INC.	9130	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AG POWER EQUIPMENT CO	60211	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AJ Crotinger	6261	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AL & DEB MEUTH	6209	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ALAN & ALYSON JETT	1064	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ALAN & SHARLA KRENZEL	6161	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ALAN & TONJA WILLIAMS	60052	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ALAN PETER	60256	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

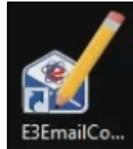
Setting up Email Assistant

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:

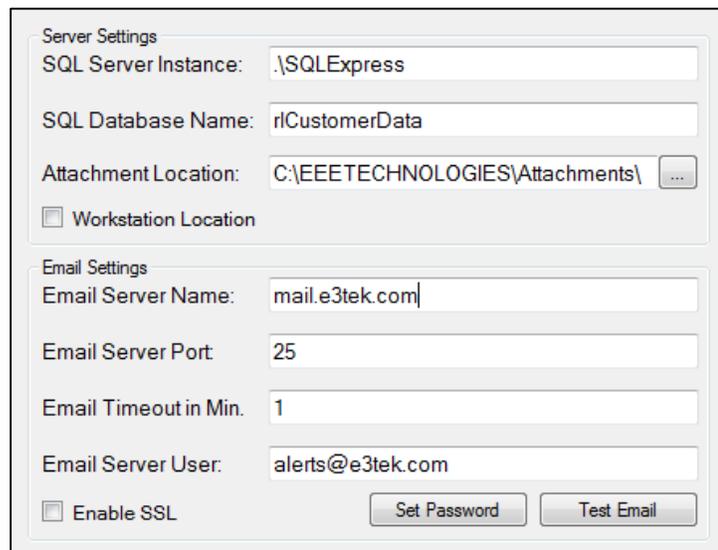
1. Click the **Email Configurator** desktop icon to open the application.



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).

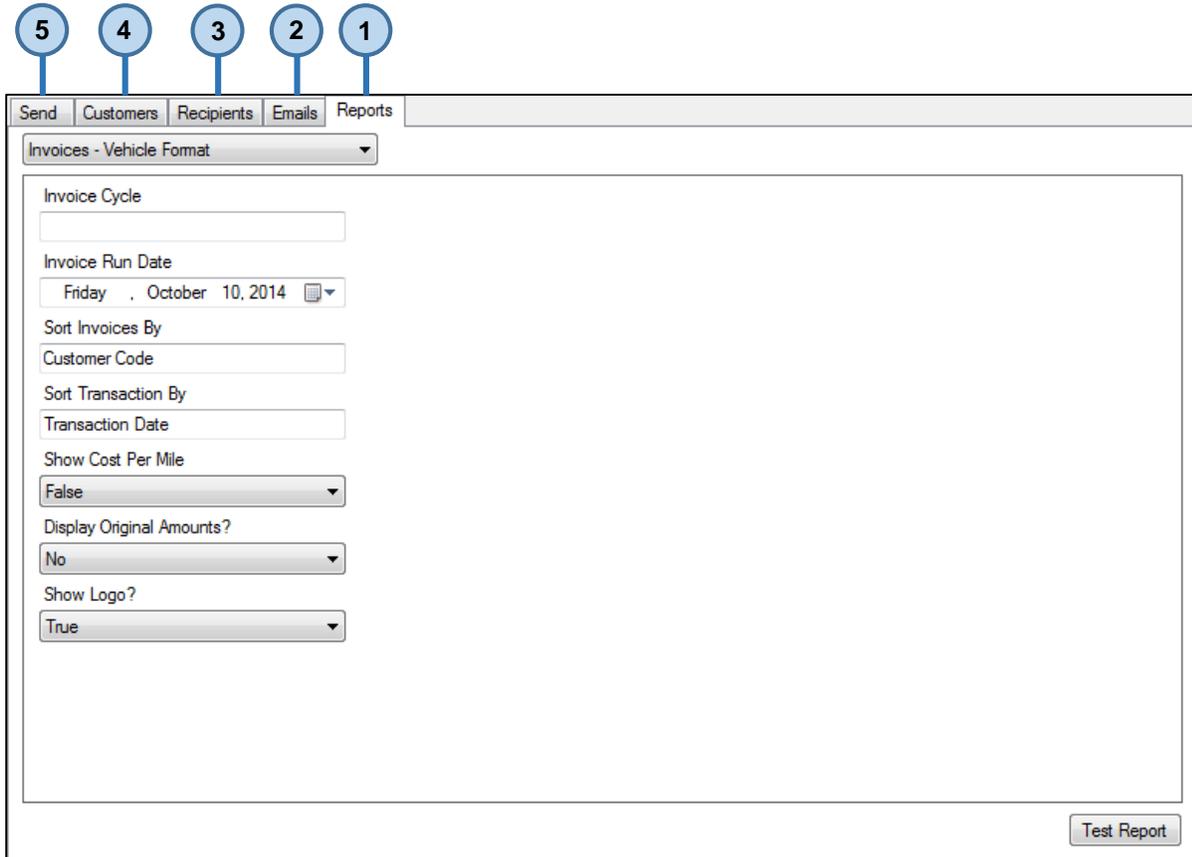


The screenshot shows the 'Email Configurator' application window. It is divided into two main sections: 'Server Settings' and 'Email Settings'.
Server Settings:
 - SQL Server Instance: .\SQLEXPRESS
 - SQL Database Name: rlCustomerData
 - Attachment Location: C:\EEETECHNOLOGIES\Attachments\ (with a browse button)
 - Workstation Location
Email Settings:
 - Email Server Name: mail.e3tek.com
 - Email Server Port: 25
 - Email Timeout in Min.: 1
 - Email Server User: alerts@e3tek.com
 - Enable SSL
 - Buttons: Set Password, Test Email

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*

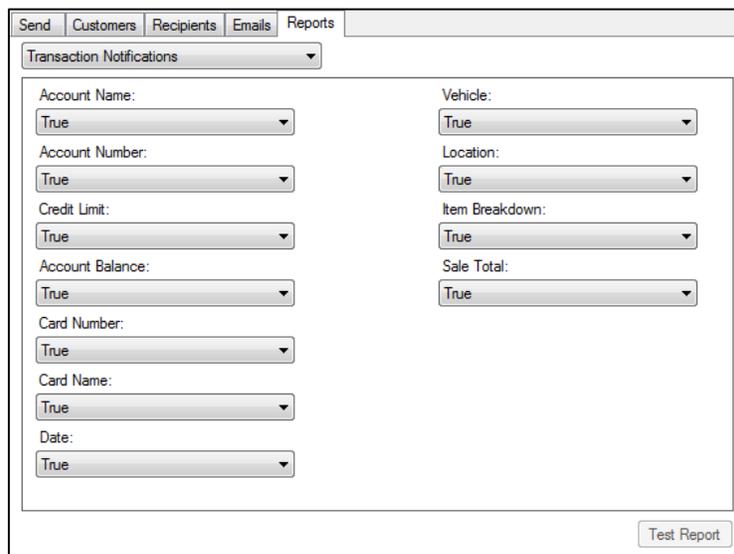
* = AR Suite only

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**.



The screenshot shows a software interface with a tabbed menu at the top containing 'Send', 'Customers', 'Recipients', 'Emails', and 'Reports'. The 'Reports' tab is active, and a dropdown menu is open, showing 'Transaction Notifications' selected. Below the dropdown is a form with two columns of settings, each with a 'True' dropdown menu:

Account Name:	Vehicle:
True	True
Account Number:	Location:
True	True
Credit Limit:	Item Breakdown:
True	True
Account Balance:	Sale Total:
True	True
Card Number:	
True	
Card Name:	
True	
Date:	
True	

A 'Test Report' button is located at the bottom right of the form area.

- Select **True** or **False** for the following:

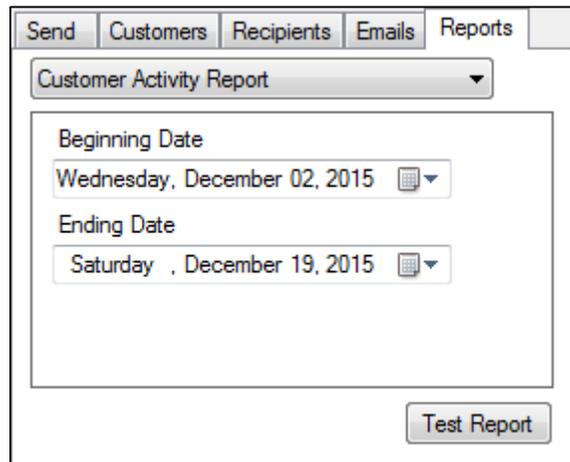
Account Name	Unique name identifying customer account.
Account Number	Unique number identifying customer account.
Credit Limit	Account credit limit dollar amount.
Account Balance	Outstanding customer account balance.
Card Number	Unique number identifying payment card.
Card Name	Unique name identifying 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:

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



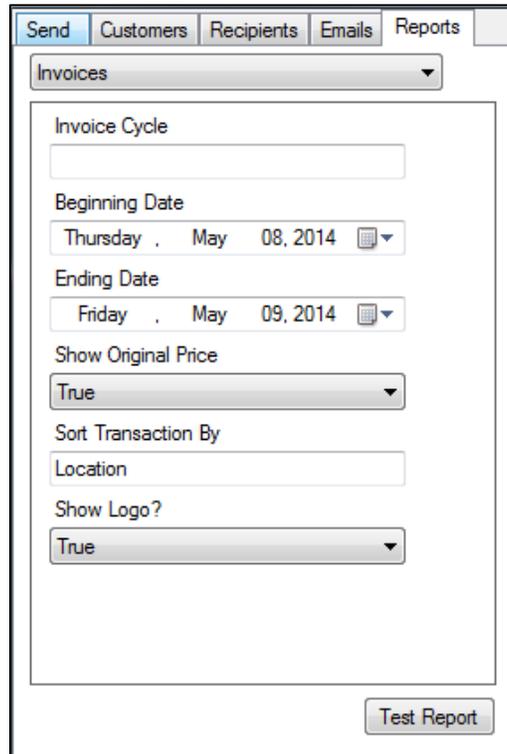
- Click **Beginning Date**, then select a report start date.
- Click **Ending Date**, then select a report ending date.
- If desired, click **Test Report** to generate sample PDF.

Invoices

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

To configure Invoices:

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



The screenshot shows a web interface with a navigation bar containing 'Send', 'Customers', 'Recipients', 'Emails', and 'Reports'. Below the navigation bar is a dropdown menu with 'Invoices' selected. The main form area contains the following fields:

- Invoice Cycle**: An empty text input field.
- Beginning Date**: A date picker showing 'Thursday . May 08, 2014'.
- Ending Date**: A date picker showing 'Friday . May 09, 2014'.
- Show Original Price**: A dropdown menu with 'True' selected.
- Sort Transaction By**: A text input field containing 'Location'.
- Show Logo?**: A dropdown menu with 'True' selected.

A 'Test Report' button is located at the bottom right of the form.

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.

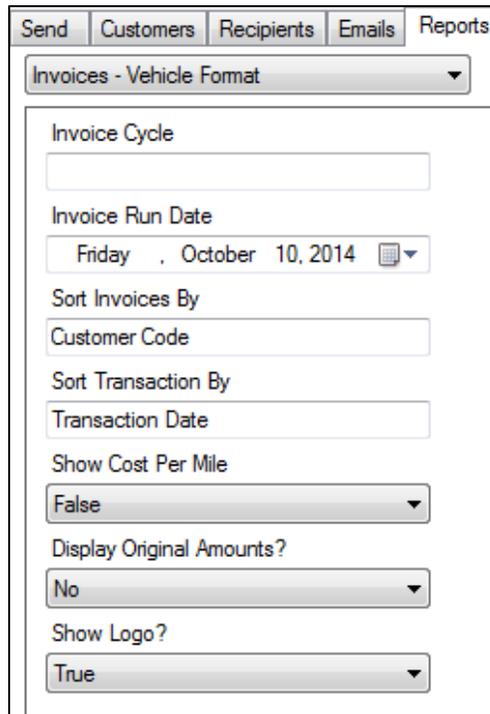
5. If desired, click **Test Report** to generate preview PDF.

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.

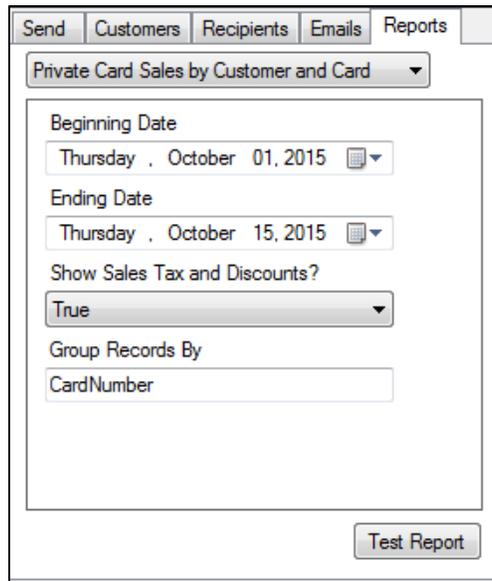
7. If desired, click **Test Report** to generate preview PDF.

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**.



The screenshot shows a web application interface with a navigation bar containing 'Send', 'Customers', 'Recipients', 'Emails', and 'Reports'. Below the navigation bar is a dropdown menu currently set to 'Private Card Sales by Customer and Card'. The main configuration area includes:

- Beginning Date:** A date picker set to 'Thursday, October 01, 2015'.
- Ending Date:** A date picker set to 'Thursday, October 15, 2015'.
- Show Sales Tax and Discounts?:** A dropdown menu set to 'True'.
- Group Records By:** A text input field containing 'CardNumber'.

A 'Test Report' button is located at the bottom right of the configuration area.

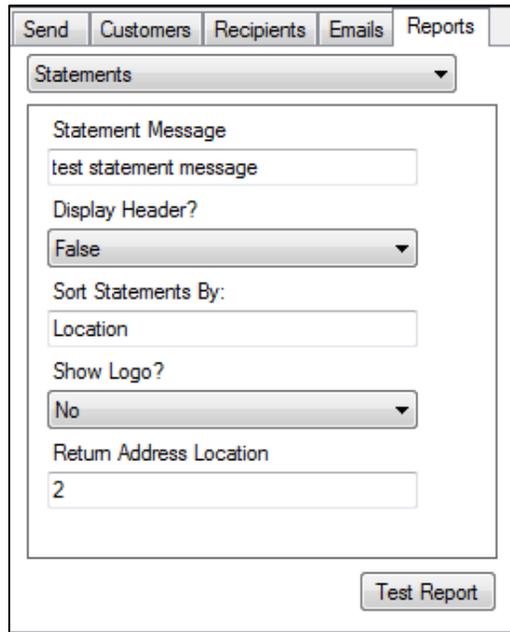
2. Click **Beginning Date**, then select report beginning date.
3. Click **Ending Date**, then select report ending date.
4. Select **True** or **False** in the **Show Sales Tax and Discounts** dropdown menu.
5. In the **Group Records By** field, enter one of the following:
 - Location
 - CardNumber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

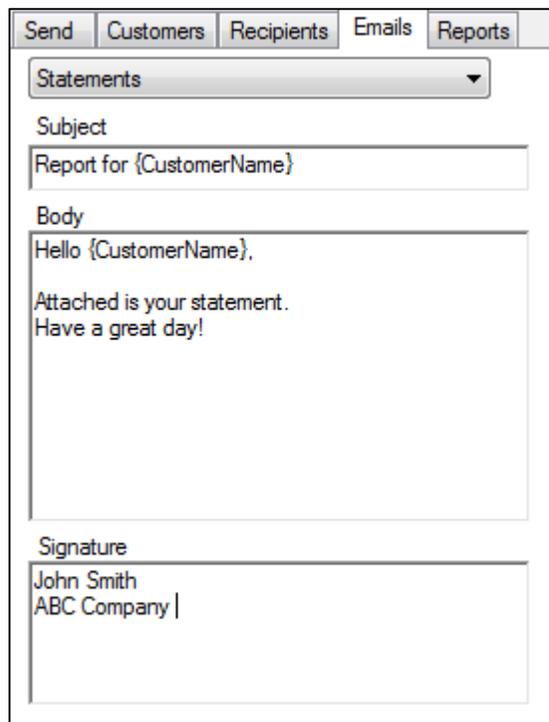
Emails

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.



The screenshot shows a software interface with several tabs: 'Send', 'Customers', 'Recipients', 'Emails', and 'Reports'. The 'Emails' tab is active. At the top of the 'Emails' tab is a dropdown menu currently set to 'Statements'. Below this are three text input fields:

- Subject:** A text box containing the text "Report for {CustomerName}".
- Body:** A larger text box containing the text "Hello {CustomerName},
Attached is your statement.
Have a great day!"
- Signature:** A text box containing the text "John Smith
ABC Company |"

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.

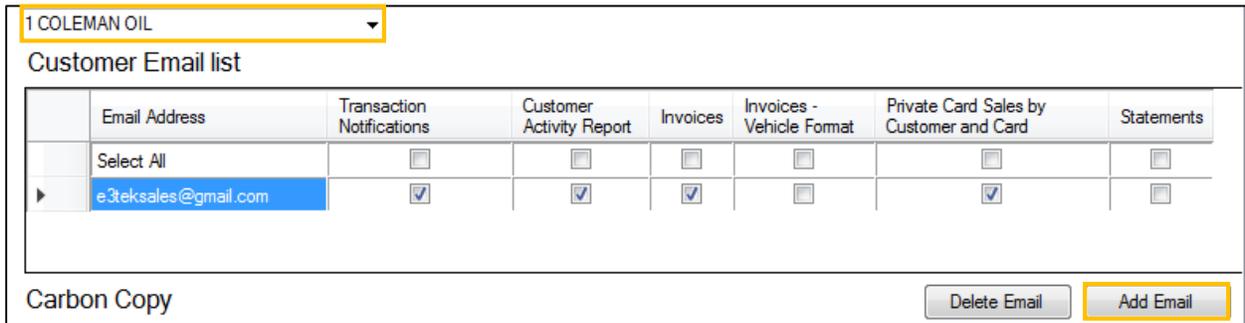
Recipients

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:

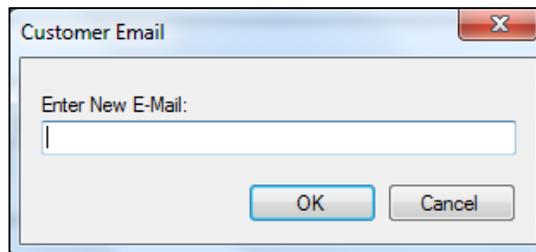
1. Select a customer from the dropdown menu.



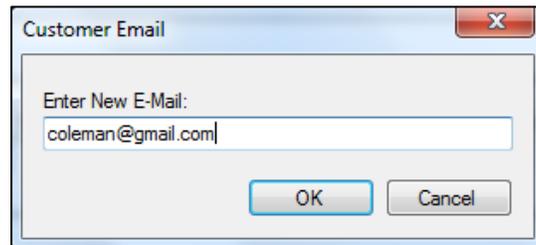
	Email Address	Transaction Notifications	Customer Activity Report	Invoices	Invoices - Vehicle Format	Private Card Sales by Customer and Card	Statements
	Select All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
▶	e3teksales@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Carbon Copy Delete Email Add Email

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.

Send Customers Recipients Emails Reports							
1 COLEMAN OIL							
Customer Email list							
	Email Address	Transaction Notifications	Customer Activity Report	Invoices	Invoices - Vehicle Format	Private Card Sales by Customer and Card	Statements
	Select All	<input type="checkbox"/>	<input type="checkbox"/>				
	e3teksales@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	coleman@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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

Carbon Copy Email X

Enter New E-Mail:

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**.

Send Customers Recipients Emails Reports							
1 COLEMAN OIL							
Customer Email list							
	Email Address	Transaction Notifications	Customer Activity Report	Invoices	Invoices - Vehicle Format	Private Card Sales by Customer and Card	Statements
	Select All	<input type="checkbox"/>	<input type="checkbox"/>				
	e3teksales@gmail.com	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	coleman@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Carbon Copy							
	Email Address	Transaction Notifications	Customer Activity Report	Invoices	Invoices - Vehicle Format	Private Card Sales by Customer and Card	Statements
	Select All	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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.

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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
0 Maritime 24/7	101001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1 COLEMAN OIL	0001001	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
1 Jay Weedon	321654	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2 Silver Eagle	SILVER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3 Bar D	9100	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4 Westring Oil	WESTRING	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5 SpoKo fuel Spokane Tribe of I...	SPOKO	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6 WAMSUTTER CONOCO	WAMSUTTER	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7 Pittman Oil	PITT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8 Al & Rich's	3652452	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9 CENEX Regional Cards	654565	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

Send

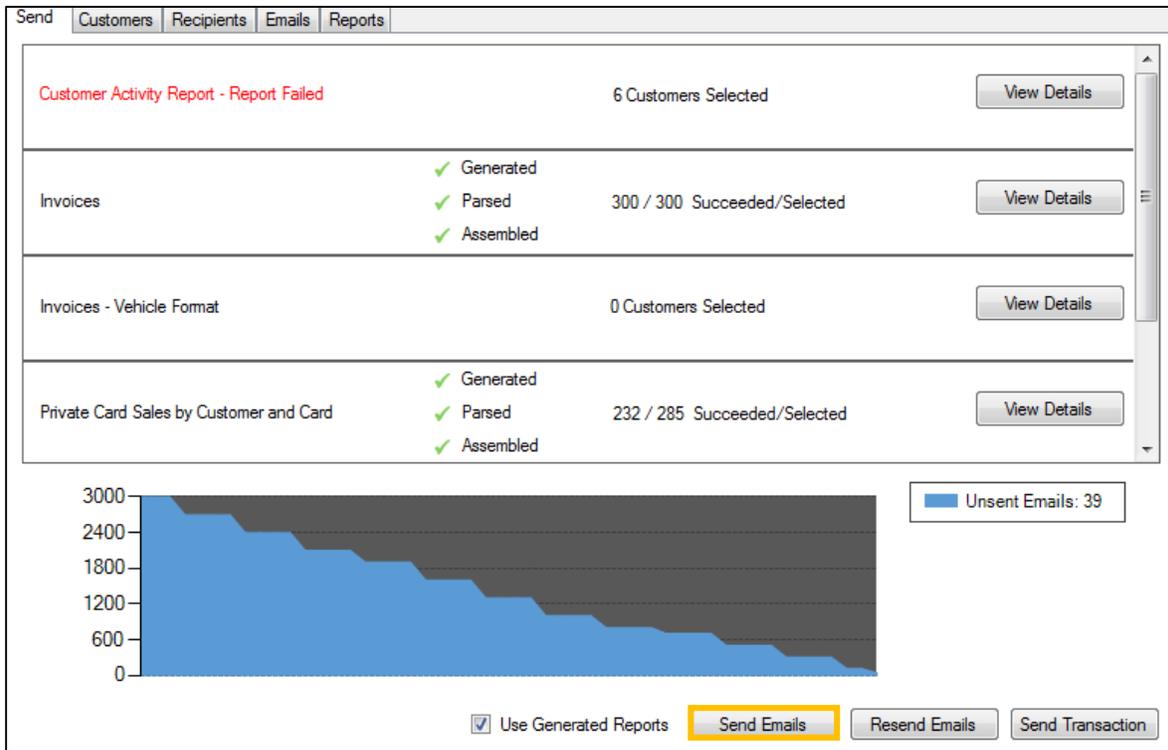
Once you've configured all your settings, you can use the **Send** tab to email reports to your recipients. Prior to sending the emails, this tab displays the number of customers selected for each report, which allows you to view recipients and make changes, as necessary.

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.



The screenshot shows the 'Send' tab interface with the following details:

Report Name	Status	Customers Selected	Action
Customer Activity Report - Report Failed	6 Customers Selected	6 Customers Selected	View Details
Invoices	<ul style="list-style-type: none"> Generated Parsed Assembled 	300 / 300 Succeeded/Selected	View Details
Invoices - Vehicle Format	0 Customers Selected	0 Customers Selected	View Details
Private Card Sales by Customer and Card	<ul style="list-style-type: none"> Generated Parsed Assembled 	232 / 285 Succeeded/Selected	View Details

At the bottom of the interface, there is a progress chart showing 'Unsent Emails: 39' and a row of buttons: Use Generated Reports, **Send Emails** (highlighted), Resend Emails, and Send Transaction.

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.

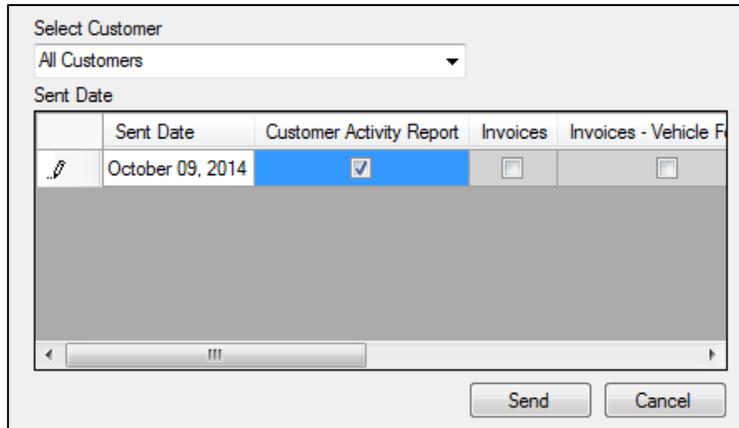
NOTE: When sending emails, be sure to check with your email provider to determine your daily email limit. Sending more emails than your email server can handle can potentially overload it.

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.



	Sent Date	Customer Activity Report	Invoices	Invoices - Vehicle F
	October 09, 2014	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

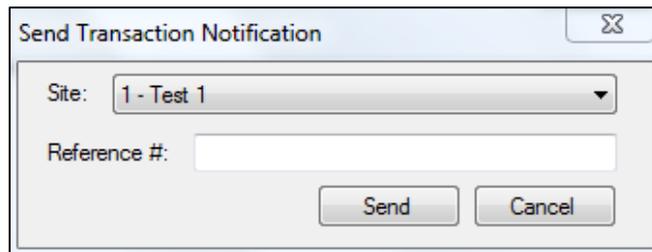
2. In the **Select Customer** dropdown menu, select **All Customers**, so select a specific customer. List of sent reports displays.
3. As appropriate, check report checkboxes for the appropriate days.
4. Click **Send** to send the selected items.

Sending Transaction Notifications

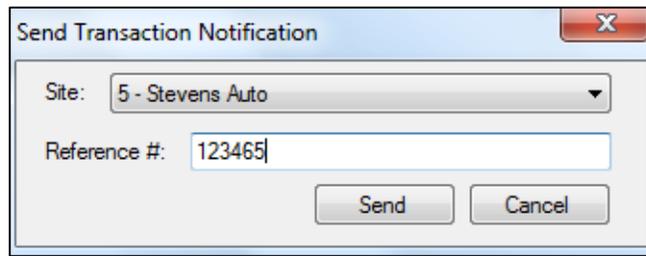
Transaction notifications are essentially electronic receipts. If a customer is set up to receive transaction notifications, they will automatically receive them whenever a charge or private card transaction occurs. Transaction notifications occur automatically, but you can also manually send them to 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.



The image shows a dialog box titled "Send Transaction Notification" with a close button (X) in the top right corner. Inside the dialog, there is a "Site:" dropdown menu currently showing "5 - Stevens Auto". Below it is a "Reference #:" text input field containing the number "123465". At the bottom of the dialog are two buttons: "Send" and "Cancel".

4. Click **Send**.