

Global 3000 Service Pack Note

DL Statements - Email Text

Author	DCP	
Project	ZD60_000292	
Version	1.0	1 of 7

INTRODUCTION

The requirement is to provide the ability to specify free format text to be included in the email text generated when DL statements are delivered via email.

A new option labelled 'Include message in email?' has been added to the (DL) Statement Print and Statement for Customer windows. When enabled up to 3 lines (70 characters each) of user defined text is included in the body of the emails generated when statements are delivered via email.

A new button labelled 'Email Message' has been added to the (DL) Statement Print and Statement for Customer windows. When pressed a new window is displayed which allows the user to enter up to 3 lines (70 characters each) of text to be included in the body of the email generated when statements are delivered via email.

A new button labelled 'Email Message' has been added to the DL Statement Options -Email/PDF window. When pressed a new window is displayed which allows the user to set up to 3 lines (70 characters each) of text to be used as a default for the message which is included in the body of the email generated when statements are delivered via email.

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DL Parameters – Statement Options – Email/PDF

global-dev: 23 - P2 - System Parameters	
ile <u>R</u> un <u>S</u> ettings <u>O</u> ptions <u>H</u> elp	
Statement Options - Email/PDF for Company A1	X
Details These settings are used to specify that for selected customer accounts Debtors Ledger is to generate customer statements as single PDF documents and deliver them via email. They are also used to configure the document 'backdrop' used when customer statements are created/printed as a PDF. For further information please see technical note IN343.	
Settings	
Allow statements to be delivered via email?	
Generate customer statements in PDF format by default?	
Contact Details	
Include contact information in email text?	
Contact name	
Contact position	
Contact telephone number	
Contact mobile number	
Contact fax number	
Statement Backdrop	
Backdrop for statements dl_statement.jpg	
Backdrop origin (top left position) X axis in 1/10th mm 56 Y axis in 1/10th mm 75	
Backdrop width in 1/10th mm 2970	
Backdrop length in 1/10th mm 2100	
Attachments Email Message <a> <a>Back Close	
Partition 2 Computer 1D 13:32:16 DCP DL520A/EM EDT NL	JM

Email Message Select this to enter and update default message text to be included in the body of emails generated when the statements delivered via email.

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DL Parameters – Statement Email Message Details

🔀 global-dev: 23 - P2 - System Parameters	
<u>Eile R</u> un <u>S</u> ettings <u>O</u> ptions <u>H</u> elp	
Email Message	
Details Text entered below is used by statement print as default email message text when customer statements are delivered via email. The text is included in the body of the email and can be amended within statement print if required. Email Message Text	
Apply	<u>C</u> ancel
Partition 2 Computer 1D 13:32:54 DCP DL520A/EX	EDT .::

This window appears when you press the 'Email Message' button from the Statement Option- Email/PDF window.

Purpose This window is used to specify default email message text to be included in the body of emails generated when statements are delivered via email.

The prompts are:

- Email message text
lines 1..3Enter up to 3 lines of default text to be included in the body of emails
generated when statements are delivered via email.
 - **Note** The email message text can be amended, included or excluded when statements are generated.

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DL Statement Print

global-dev:23 - P2 - Print St	atements Company: A1 Period: 4/2005	
Statement Print for Compar	ny A1	
Range Sequence by Account Coo	ie V Range From AAAAAA V To WATSO V	
Report format Credit rating	Sales Rep.	
Suspended accounts?	All Accounts Class	
Currency code Contact type	Accounts Payable	
Balance restriction	None Overdue days	
 Include transactions with a z Print rather than email state Include message in email? 	ero outstanding balance? ments?	
Information Statement run number From date Statement date	0005 01/01/1997 30/04/2005 Include later transactions?	
Ageing periods Print 'As balance forward' st Include transactions that have	Periods in Days atement for 'open item' customers? re already appeared on a statement? ('as balance forward' statements)	
Statement message		
Recall Email Me	Image Cancel <th< th=""> <th< th=""> <th< th=""> <th< td=""><td>EDT NUM</td></th<></th<></th<></th<>	EDT NUM

Prompt:

Include message in email?	Set this to include the email message text in the body of emails generated when statements are delivered via email.				
Note	The email message text can be viewed and amended via the 'Email Message' button; default message text can be defined within system parameters.				
Button:					
Email Message	(Only if messages are included in emails) Select this to enter and update the message text to be included in the body of emails generated when statements are delivered via email.				

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DL Statement for Customer

🕵 global-dev: 23 - P2 - P	rint Statements	Company: A1 Period:	4/2005
<u>File Run S</u> ettings <u>O</u> ptions	Help		
Statement for Custon	ner WATS010 Watson	s Plc Company A1	
Customer Statement			
Customer	WATS01 Vats	ons Plc	
From date	01/01/1997		
Statement date	30/04/2005	Include later transactions?	
🔽 Include transactions v	with a zero outstanding	balance?	
Ageing periods	Periods in Days	×	
As balance forward s	tatement?		
Include transaction	ns that have already ap	peared on a statement?	
Print rather than ema	ail statement?		
🖌 Include message in e	mail?		
Statement message			
Default Settings	Email Message	< <u>B</u> ack	Next > Cancel
Partition 2 Computer 1D		13:34:23 DCP	DL230C/IS EDT

Prompt:

Include message in email?	Set this to include the email message text in the body of the email generated when the statements is delivered via email.		
Note	The email message text can be viewed and amended via the 'Email Message' button; default message text can be defined within system parameters.		
Button:			
Email Message	(Only if messages are included in emails) Select this to enter and update the message text to be included in the body of the email generated when		

the statement is delivered via email.

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DL Statement - Email Message Details

💐 global-dev:23 - P2 - Print Statements	Company: A1 Period:	4/2005
<u>File Run S</u> ettings <u>O</u> ptions <u>H</u> elp		
🔲 Email Message		
Details Please enter up to three lines of text to be added to generated to deliver customer statements via email. Email Message Text	the body of the email	
		Apply Cancel
Partition 2 Computer 1D	13:36:35 DCP	DL230C/EX EDT

This window appears when you press the 'Email Message' button from the Statement Print or Statement for Customer window.

Purpose This window is used to view and amend the email message text to be included in the body of emails generated when statements are delivered via email.

The prompts are:

Email message text
lines 1..3Enter up to 3 lines of default text to be included in the body of emails
generated when statements are delivered via email.NoteDefault email message text can be specified in system parameters (via the

Statement Options – Email/PDF window.

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