



Global 3000 Service Pack Note

Email SOP Invoices/Credit Notes

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INTRODUCTION

This service pack introduces a new feature which provides the ability to deliver S.O.P. Invoices and Credit Notes via email.

The following should be noted:

- The emailing of invoices/credit notes is an automated process and forms part of the standard invoice/credit note print run, i.e. the user is not forced to run multiple invoice/credit print runs to select those customers for which invoices are to be printed and those for which they are to be emailed.
- Pro forma invoices are not emailed.
- The emailing of invoice/credit notes is a customer based setting.
- The invoice/credit note is emailed as an attachment (in pdf format) rather than being built into the body text of the email itself.
- It is possible to specify the backdrop to be used for the invoice/credit note (at system level). It should be noted that the settings in the Invoice/Credit Note Layout for Company window (which is in the Invoicing Section of the SOP Parameters) have no affect on the format of invoices and credit notes delivered via email.
- Standard backdrops (landscape format) for invoices and credit notes (in both triple and single column format) have been created and are available for download from http://www.global3000.co.uk/pub/global3000/6.0/sop_invoice_and_credit_backdrops.zip
- Each invoice/credit note results in a single email, e.g. if a customer has 25 invoices they will receive 25 separate emails.
- It is possible to specify up to five other files to be added as attachments to each emailed invoice/credit note. This allows marketing material or other documents (e.g. Terms and Conditions etc) to be sent with each emailed invoice/credit note.
- If an invoice or credit note is delivered via email it will not be physically printed. The ability to produce printed copies of emailed invoices/credit notes has been provided in the form of an additional prompt in invoice/credit note print which is available when reprinting invoices or credit notes.
- Delivery of invoices/credit notes via email requires an up-to-date copy of either PDF_In-The-Box or All_In_The_Box to be present on each GX client used to perform the invoice/credit note generation.
- Sections 349 to 351 of the Companies Act 1985 (as amended) require that the following information be included in business emails sent by a company:
 - the name of the company;
 - the registered office of the company;
 - the place of incorporation of the company; and
 - the registration number of the company.

In addition, "investment companies" must state in their emails that they are investment

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companies; and limited companies that are exempt from the obligation to use the word “limited” as part of their name must state that they are limited companies.

For example, see this web-site for further details:

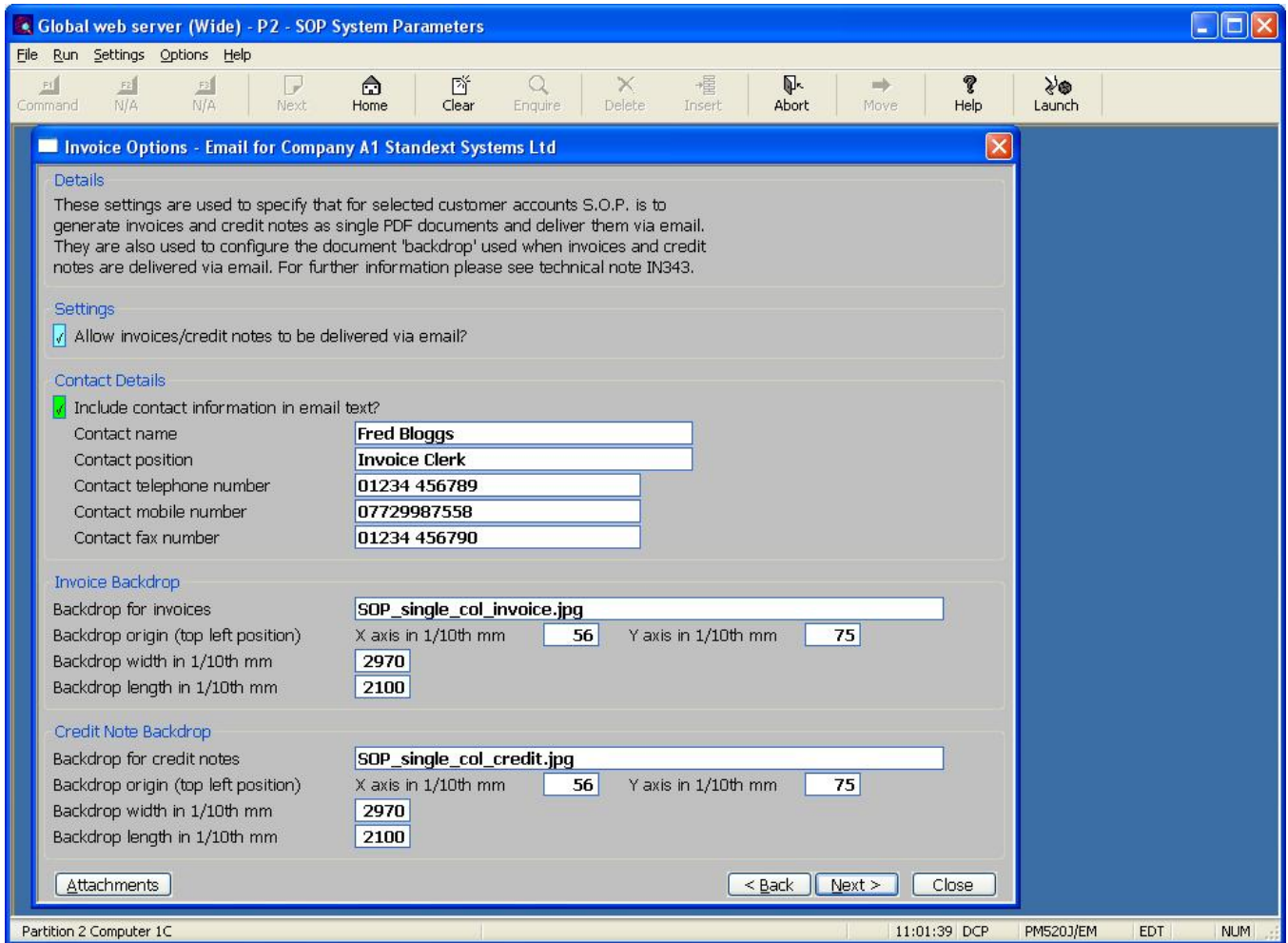
<http://www.website-law.co.uk/blog/category/email-law/>

Technical Note: The Extended PF facility is used to generate the invoice/credit note that is emailed. For full details of the Extended PF facility please refer to Technical Note IN343.

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DOCUMENTATION CHANGES

System Maintenance, SOP, Invoice Options – Email



This window appears when you complete your responses in the Invoice Options – Sales Analysis window.

Purpose This window is used to specify that for selected customer accounts S.O.P. is to generate invoices and credit notes as single PDF format documents to be delivered via email. It is also used to configure a document ‘backdrop’ to be used when Invoices and Credit Notes are delivered via email. It should be noted that great care must be taken when completing the settings in this window. For further information please see Technical Note IN343.

Note Delivery of invoices/credit notes via email requires an up-to-date copy of PDF_In-The-Box or All_In_The_Box to be present on each GX client used to perform the invoice generation.

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The prompts are:

Allow invoices/credit notes to be delivered via email?

Set this if S.O.P. is to generate invoices and credit notes as individual PDF format documents and deliver them via email for selected customer accounts. The customer account option used to control invoice/credit note delivery via email are found in Customer Maintenance/Companies/SOP Details). If this option is not set, the remaining prompts in this window are skipped and the 'Attachments' button (see below for details) is disabled.

When the email is created the subject is automatically set to "Invoice xxxxxxxx from cccccccccccccccccccccccccccccccc" where 'xxxxxxx' is the invoice number and 'ccccccccccccccccccccccccccccccc' is the company name. The text of the email is set to "Please find attached invoice xxxxxxxx" where 'xxxxxxx' is the invoice number. For credit notes the word 'Invoice' is replaced with 'Credit Note'.

To allow emailed invoices and credit notes to be physically printed an option is provided within invoice and credit note print. The option is only available when reprinting invoices and credit notes, when set all invoices and credit notes selected for reprinting are physically printed regardless of the customers account configuration.

Note Pro forma invoices are not delivered via email.

Include contact information in email text?

Set this to include the text 'Regards' followed by the contact details specified below.

Example

Regards

Mr Fred Bloggs

Invoice Clerk

Tel: (01234) 123412

Mobile: 07712345678

Fax : (01234) 123413

Contact name (Only if including contact information in the email text). Enter the contact name to be included in the email text.

Contact position (Only if including contact information in the email text). Enter the contact's position to be included in the email text. This can be left blank if the contact's position is not required within the email text.

Contact telephone number (Only if including contact information in the email text). Enter the contact telephone number to be included in the email text. This can be left blank if the contact's telephone number is not required within the email text.

Contact mobile number (Only if including contact information in the email text). Enter the contact mobile telephone number to be included in the email text. This can be left blank if the contact's mobile number is not required within the email text.

Contact fax number (Only if including contact information in the email text). Enter the contact fax number to be included in the email text. This can be left blank if the contact's fax number is not required within the email text.

Backdrop for Invoices The backdrop to be used when invoices are emailed. This should be set to the filename of the backdrop image excluding its "Image folder".

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Note for system administrators

The backdrop image file must be copied to a fixed sub-folder (named “global3000”) within the server image folder. The server image folder is a sub-folder within the current Global folder and by default is named “PFPrintImages”.

For example, if the backdrop image file above is named ‘SOP_invoice.jpg’ and GSM is installed in folder C:\GSM, the backdrop image file must be copied to

C:\GSM\PFPrintImages\global3000\SOP_invoice.jpg

It should be noted that the server image folder name can be overridden by the following registry setting:

HKEY_LOCAL_MACHINE\Software\Global\Client\Customisations\PF PrintImagesFolder

Backdrop origin (top left position) – X axis (vertical) in 1/10th mm

This provides the X axis (vertical) position of the backdrop origin (i.e. top left-hand pixel position at which the image is to be printed). The origin allows the backdrop to be positioned at a specific location on the page, which can be critical for form-print applications, and is useful to centre small images like watermarks. This should be entered in 1/10th mm (i.e. multiply the position in mm by a scaling factor of 10).

Backdrop origin (top left position) – Y axis (horizontal) in 1/10th mm

This provides the Y axis (horizontal) position of the backdrop origin (i.e. top left-hand pixel position at which the image is to be printed). The origin allows the backdrop to be positioned at a specific location on the page, which can be critical for form-print applications, and is useful to centre small images like watermarks. This should be entered in 1/10th mm (i.e. multiply the position in mm by a scaling factor of 10).

Backdrop width in 1/10th mm

The width of the backdrop in 1/10th mm (i.e. multiply the width in mm by a scaling factor of 10).

Backdrop depth in 1/10th mm

The depth of the backdrop in 1/10th mm (i.e. multiply the depth in mm by a scaling factor of 10).

Backdrop for Credit notes

The backdrop to be used when credit notes are emailed. This should be set to the filename of the backdrop image excluding its “Image folder”.

Note for system administrators

The backdrop image file must be copied to a fixed sub-folder (named “global3000”) within the server image folder. The server image folder is a sub-folder within the current Global folder and by default is named “PFPrintImages”.

For example, if the backdrop image file above is named ‘SOP_credit.jpg’ and GSM is installed in folder C:\GSM, the backdrop image file must be copied to

C:\GSM\PFPrintImages\global3000\SOP_credit.jpg

It should be noted that the server image folder name can be overridden by the following registry setting:

HKEY_LOCAL_MACHINE\Software\Global\Client\Customisations\PF PrintImagesFolder

Backdrop origin (top left position) – X axis (vertical) in 1/10th mm

This provides the X axis (vertical) position of the backdrop origin (i.e. top left-hand pixel position at which the image is to be printed). The origin allows the backdrop to be positioned at a specific location on the page, which can be critical for form-print applications, and is useful to centre small images like watermarks. This should be entered in 1/10th mm (i.e. multiply the position in mm by a scaling factor of 10).

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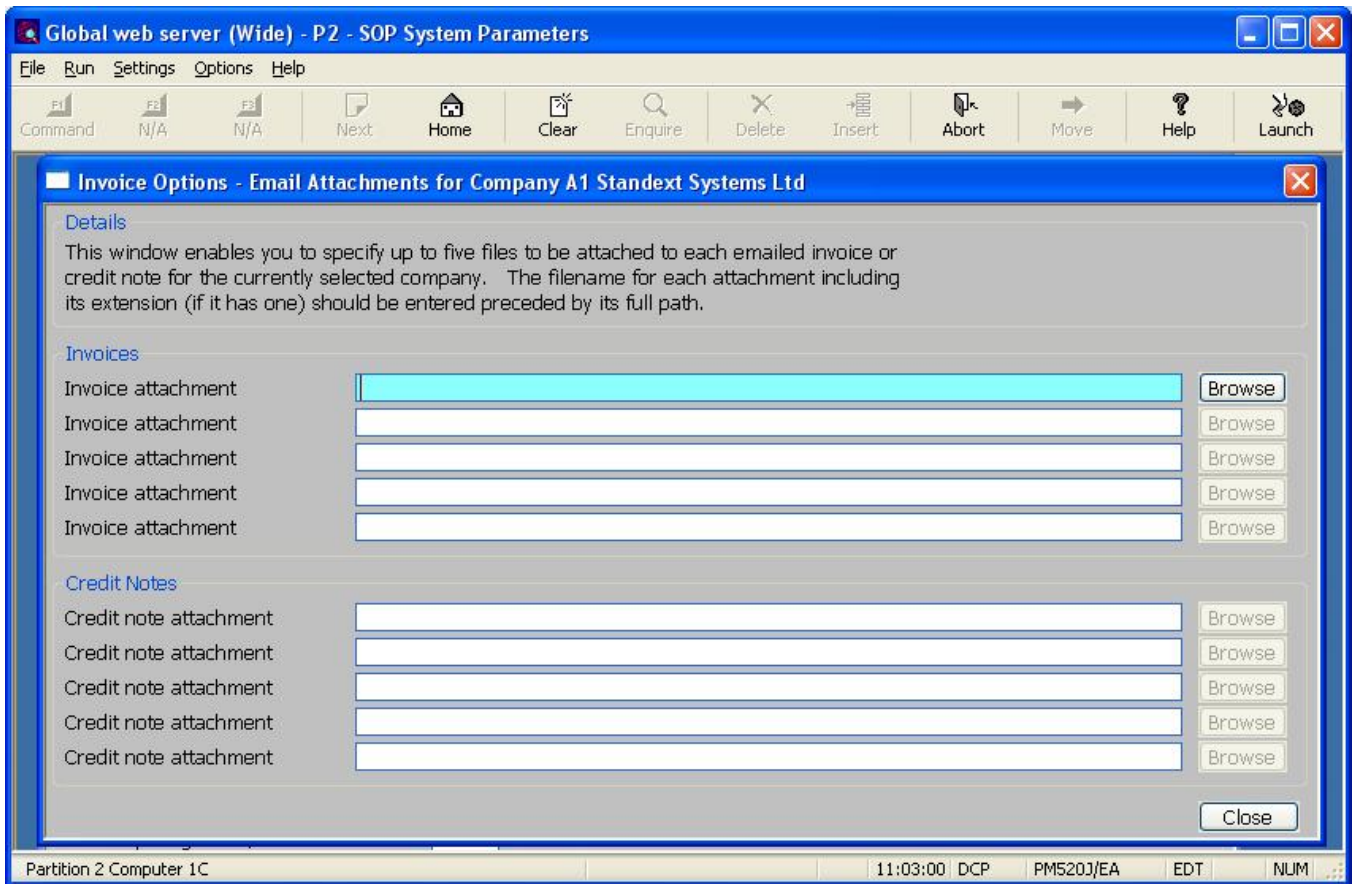
- Backdrop origin (top left position) – Y axis (horizontal) in 1/10th mm** This provides the Y axis (horizontal) position of the backdrop origin (i.e. top left-hand pixel position at which the image is to be printed). The origin allows the backdrop to be positioned at a specific location on the page, which can be critical for form-print applications, and is useful to centre small images like watermarks. This should be entered in 1/10th mm (i.e. multiply the position in mm by a scaling factor of 10).
- Backdrop width in 1/10th mm** The width of the backdrop in 1/10th mm (i.e. multiply the width in mm by a scaling factor of 10).
- Backdrop depth in 1/10th mm** The depth of the backdrop in 1/10th mm (i.e. multiply the depth in mm by a scaling factor of 10).

Buttons:

- Attachments** This enables attachment files (for example sales literature, terms and conditions etc) to be specified. The attachment files are attached to every invoice or credit note delivered via email.
- <Back** This returns to the System Maintenance/S.O.P. Parameters/Invoicing/Invoice Options – Sales Analysis window without saving the settings.
- Close** This saves the settings and returns to the System Maintenance/S.O.P. Parameters menu.

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System Maintenance, SOP, Invoice Options - Email Attachments



Purpose This window enables you to specify up to five files to be attached to each emailed invoice or credit note for the currently selected company.

The prompts are:

Invoice attachment Enter details of the files to be attached to the each invoice delivered via email. The file name for the attachment including its extension (if it has one) should be entered preceded by its full path.

Credit note attachment Enter details of the files to be attached to the each credit note delivered via email. The file name for the attachment including its extension (if it has one) should be entered preceded by its full path.

Note Care must be taken when setting up attachment details especially regarding the path. In cases where the attachment files are not stored on the operators desktop PC the full network path must be used.

Example [\\server_name\documents\sales\leaflet001.pdf](#)

Note The <Browse> buttons can be used to locate and specify attachment files.

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Customer Maintenance – SOP Parameters

Email invoices and credit notes?

(Only if email delivery of invoices and credit notes is allowed). Set this if invoices and credit notes are to be delivered via email (rather than printed) for this customer.

Note

If invoices are to be emailed and the customer is configured to receive invoices via EDI, the invoices will be emailed to the specified email address in addition to the EDI export of the invoice. However, if the customer is configured to both receive invoices via EDI and print them, the invoice will be exported via EDI and emailed but not printed.

Note

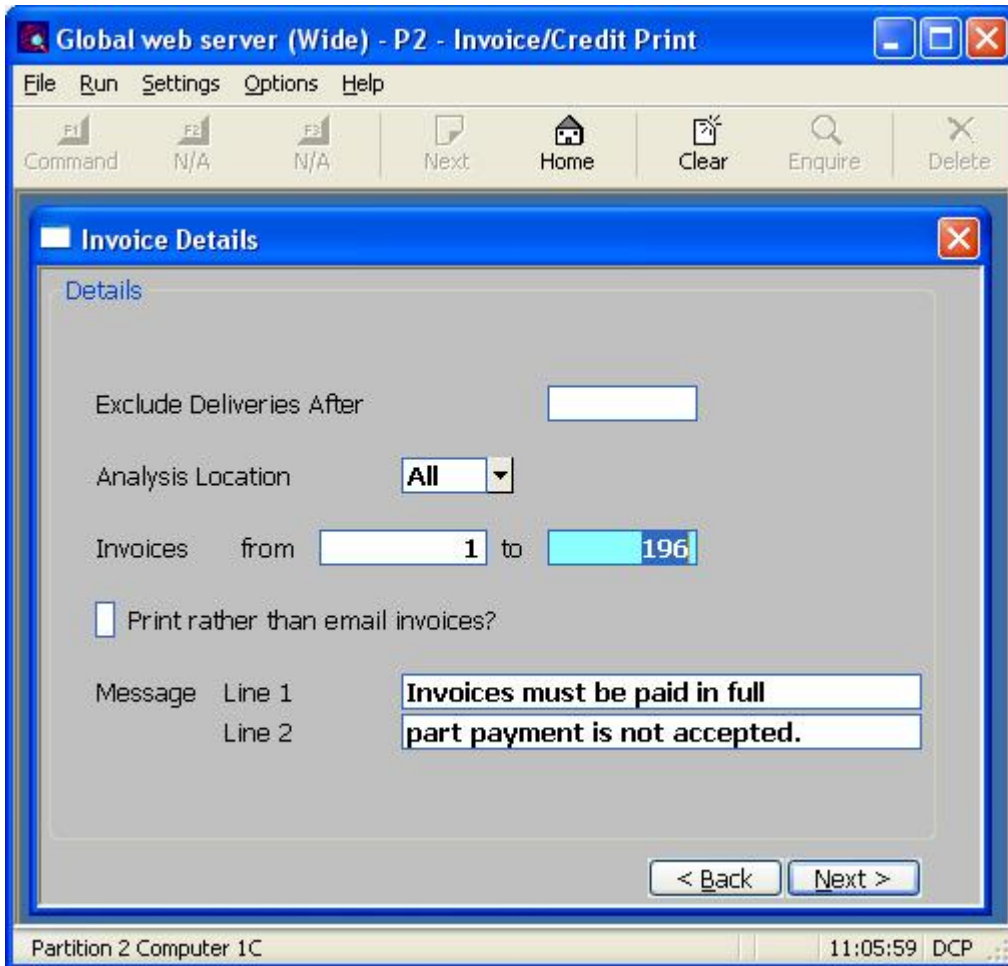
Pro forma invoices are not delivered via email.

Email address for invoices and credit notes

(Only if emailing invoices and credit notes). Enter the email address to which invoices and credit notes are to be sent. A look-up of existing contact records (containing an email address) for the customer is available.

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SOP Invoice/Credit Note Print



Print rather than email invoices/credit notes

(Only when reprinting invoices/credit notes) Set this to physically reprint all invoices/credit notes regardless of whether the customer is configured to receive them via email. If this is not set, invoices/credit notes will be resent via email for those customers configured to receive them via email.

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Standard Backdrops

There are four standard backdrops, to use the standard backdrops the following settings must be made within System Maintenance, SOP, Invoice Options – Email. The backdrops can be downloaded from http://www.global3000.co.uk/pub/global3000/6.0/sop_invoice_and_credit_backdrops.zip

For invoices with ‘To follow’ items printed (triple column format) the following settings are required.

Backdrop for Invoices	SOP_invoice.jpg
Backdrop origin (top left position) – X axis (vertical) in 1/10th mm	56
Backdrop origin (top left position) – Y axis (horizontal) in 1/10th mm	75
Backdrop width in 1/10th mm	2970
Backdrop depth in 1/10th mm	2100

For invoices without ‘To follow’ items printed (single column format) the following settings are required.

Backdrop for Invoices	SOP_single_col_invoice.jpg
Backdrop origin (top left position) – X axis (vertical) in 1/10th mm	56
Backdrop origin (top left position) – Y axis (horizontal) in 1/10th mm	75
Backdrop width in 1/10th mm	2970
Backdrop depth in 1/10th mm	2100

For credit notes with ‘To follow’ items printed (triple column format) the following settings are required.

Backdrop for Invoices	SOP_credit.jpg
Backdrop origin (top left position) – X axis (vertical) in 1/10th mm	56

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Backdrop origin (top left position) – Y axis (horizontal) in 1/10th mm	75
Backdrop width in 1/10th mm	2970
Backdrop depth in 1/10th mm	2100

For credit notes without ‘To follow’ items printed (single column format) the following settings are required.

Backdrop for Invoices SOP_single_col_credit.jpg

Backdrop origin (top left position) – X axis (vertical) in 1/10th mm	56
Backdrop origin (top left position) – Y axis (horizontal) in 1/10th mm	75
Backdrop width in 1/10th mm	2970
Backdrop depth in 1/10th mm	2100

Sections 349 to 351 of the Companies Act 1985 (as amended) require that the following information be included in business emails sent by a company:

- the name of the company;
- the registered office of the company;
- the place of incorporation of the company; and
- the registration number of the company.

In addition, “investment companies” must state in their emails that they are investment companies; and limited companies that are exempt from the obligation to use the word “limited” as part of their name must state that they are limited companies.

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