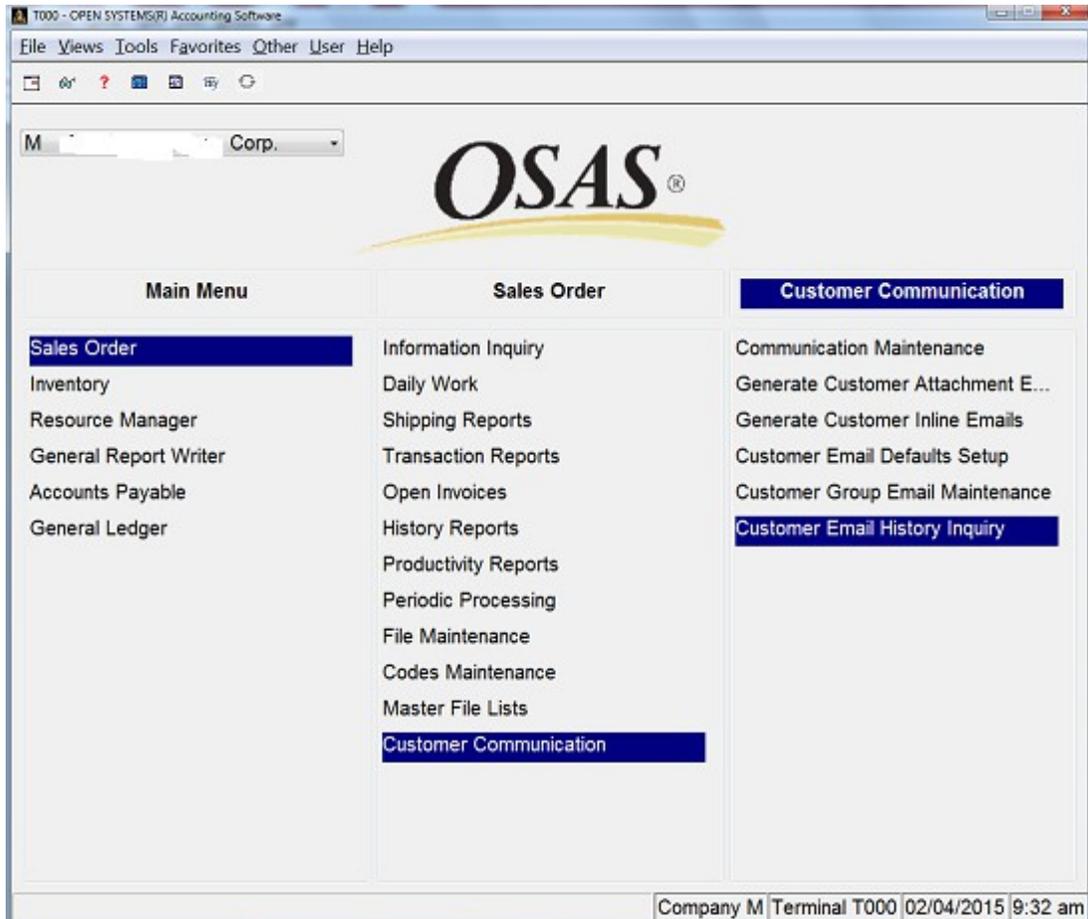Customer Communication Add-on to OSAS Accounts Receivable

Customer Communication add-on to Open Systems Accounting Software currently contains five tasks as shown below:

They are:

COMMUNICATION MAINTENANCE

GENERATE CUSTOMER ATTACHMENT EMAILS

GENERATE CUSTOMER INLINE EMAILS

CUSTOMER GROUP EMAIL MAINTENANCE

CUSTOMER EMAIL HISTORY INQUIRY

Each are described in greater detail as follows:

COMMUNICATION MAINTENANCE

The user selects a customer and creates an email to be sent. The user identifies the email code type being used (GENERAL, MARKETING, etc.) and whether the email contains an attachment.

If there is an attachment, the user decides if it is an OSAS generated attachment or an external, previously generated document.

External- document can be any of any form- PDF, TXT, DOC, etc. No accompanying inline text may be added. The system inserts the standard body message indicating that a file has been attached

Internal- An OSAS generated attached document is formed from the inline text that is entered into the body of message. The user may enter up to thirteen lines of 75 characters maximum each. The attached is formed as a PDF.

The user may elect to not have an attachment and just use the thirteen lines of inline text as the basis of the email.

As shown below, the cover screen shows either all pending emails or those previously sent. By default, it first displays only pending emails. The cover screen identifier whether there is an attachment or if it is just an inline text email. An email with attachment that is an external document, just shows the name of the document. An email that generates an OSAS created document shows the first line of the inline text (if there is any).

GENERATE CUSTOMER ATTACHMENT EMAILS

This routine generates pending emails only for those with attachments. The user selects (as shown below) only those to be sent that match the customer email code type as well as whether it is an internal OSAS generated attachment or external previously generated document. Therefore, it is possible that if one has a mix of emails to be sent, this routine will be required to be run for each selection type needed.

The user is allowed to override the standard subject line saved in the email setup routine for a customized one to be used on this run.

GENERATE CUSTOMER INLINE EMAILS

This routine generates pending emails only for those with no attachments but just inline body text. The user selects (as shown below) only those to be sent that match the customer email code type. Therefore, it is possible that if one has a mix of emails to be sent, this routine will be required to be run for each selection type needed.

The user is allowed to override the standard subject line saved in the email setup routine for a customized one to be used on this run.

CUSTOMER GROUP EMAIL MAINTENANCE

This routine is used for generating the same email with the same attachment and inline text to a group of customers. This may be the ideal task to use for sending monthly newsletters.

The user enters the name of the previously created file, the customer email type to be selected and the subject line. The user may also enter up to thirteen lines of body message text.

The list of customers that is associated with the chosen email type is displayed. The user may decide to delete individuals off the list before sending the email.

The screen also provides buttons for saving the list to be recalled at a later time to be generated.

CUSTOMER EMAIL HISTORY INQUIRY

This screen allows the user to view the standard OSAS email history for a selected customer from a given start date. Each line displayed shows the date the email was generated, to whom and the name of the file attachment.

On highlighting any given detail line, one may click the VIEW button and see the full email address, document name and location, subject line, and inline text (if any).   (Currently, inline text is not implemented on any OSAS generated invoice, quote or statement form that is emailed to a customer)

Notes:

Benefits of these routines are:

> The ability to send a group email of one specific document that does not need to be generated by OSAS.
>
> The ability to send a specific document as an attachment and include inline text.
>
> The ability to send a specific document to a customer without the need to first link it to the customer master file.
>
> Customized Subject Line
>
> Viewable Email History Inquiry

These routines work within the parameters of regular OSAS internally generated emails. If the RM options are set to SEND EMAILS IMMEDIATELY, then one must use care in generating these email routines. Otherwise, all emails are first routed to the EMAIL QUEUE for review and processing.

The sender's email address is established in the set-up maintenance routine.

OSAS Emailing is currently limited to using standard smtp servers with probable ssl socket and authentication. It is not intended for sending outbound high volume traffic typically found on exchange servers.

There is no linkage to email readers such as Outlook. If you want a record of the email other than the standard email history, be sure to create a customer record and email link to yourself so that you get a copy.

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