

Customer Email Setup

Petro-Data offers the ability to email to customers AR Statements, Draft Notices, Daily Fuel Price Quotes and Sales Invoices.

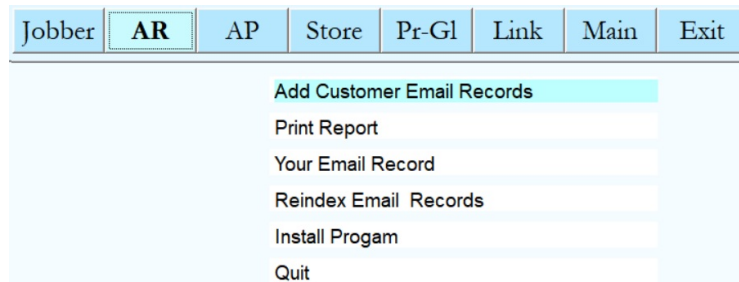
This requires setup of a Sender email address (Your Email Record) and a valid email address for any customer that will receive emails. The single email address in Customer Setup is not the controlling email for emailing these documents.

Petro-Data does not offer a Fax option. If customers have only fax, you can subscribe to a service that provides a fax gateway. Call Petro-Data for more information.

A Special PDF driver (AmyUni in the Windows Printers setup) needs to be installed on each computer that will be emailing documents to customers. There is a program in the Petro-Data \Base directory named 'install.exe' that will install this AmyUni driver. Please read the document provided by Petro-Data on how to install this driver. You may also call Petro-Data support for assistance with this option.

Setup Process:

1. Add Your Email Record Enter your email server information and addresses. This must be a valid email address.
2. Add Customer Email Records Enter customer email addresses for each type of document.



Step 1

AR, Customers, Customer Send File, Your Email Record

Define your company email account as the Sender.

1. Enter an ID number for this email setup. It can describe the email provider (Google, SendGrid) or can be anything you choose (numbers, letters, other words).
2. Enter a description for this setup.
3. Enter the email gateway. This value depends on your email provider. You may need to contact your provider for this setup. Some examples include:
 - a. Gmail - smtp.gmail.com
 - b. SendGrid - smtp.sendgrid.net
 - c. Office365 - smtp.office365.com
4. Enter your email account name.
5. Enter your email account password. The password will display and will **not** be masked.
6. If you are defining an Outlook account, enter 'Y'. If not, enter 'N'.
7. Enter 'Y' if your email requires authentication. The most typical answer is 'Y' but check with your email provider if you are not sure.
8. Enter 'Y' if your email requires SSL. The most typical answer is 'Y' but check with your email provider if you are not sure.
9. Enter the email port number used by your email provider. Check with your email provider if you are not sure but most common examples are:
 - a. Gmail - 465
 - b. SendGrid - 25 or 465
 - c. Office365 - 993, 587 or 25

The screenshot shows a configuration window titled "Your Email Addresses". It contains the following fields and options:

- Idno:** GMAIL (1)
- Name:** Main Gmail Account (2)
- Mailserver:** smtp.gmail.com (3)
- Username:** admin@petro-data.com (4)
- Password:** (5)
- Outlook:** (6)
- Authen:** Y (7)
- Use SSL:** Y (8)
- Emailport:** 465 (9)
- Comp No.:** (checkbox)
- Local Dir?:** (checkbox)
- Time Delay:** (checkbox)
- From Email Addresses:** (10)
 - Invoices:** admin@petro-data.com, larry@petro-data.com
 - Cred Crd:** admin@petro-data.com
 - Cust EFTs:** admin@petro-data.com
 - Spec Prc:** admin@petro-data.com
- CC Email Addresses:** (11)
 - Invoices:** accounting@petro-data.com
 - Cred Crd:** billing@petro-data.com
 - Cust EFTs:** cashier@petro-data.com
 - Spec Prc:** accounting@petro-data.com

Buttons at the bottom: Edit, New, Next, Prey, Delete, Exit.

10. Enter a valid From Email address. This can be the same for all document types - Invoices, Credit Card notices, Customer Drafts (EFT) or Daily Prices (Special Prices) or can be different for each. You can also leave some of these blank if you will not send an email for it.

a. You may also enter multiple addresses. Each address should be separated by a comma.

11. Enter a CC (carbon copy) address, if you would like. This is not required. This can be the same for all document types or can be different for each.

a. You may also enter multiple addresses. Each address should be separated by a comma.

Click Exit when you are done.

The screenshot shows a window titled "Your Email Addresses" with the following fields and values:

- Idno:** GMAIL (1)
- Name:** Main GMail Account (2)
- Mailserver:** smtp.gmail.com (3)
- Username:** admin@petro-data.com (4)
- Password:** ***** (5)
- Outlook:** (6)
- Authen:** (7)
- Use SSL:** (8)
- Emailport:** 465 (9)
- Comp No.:**
- Local Dir?:**
- Time Delay:**

From Email Addresses: 10

Invoices	admin@petro-data.com, larry@petro-data.com	Cred Crd	admin@petro-data.com
Cust EFTs	admin@petro-data.com	Spec Proc	admin@petro-data.com

CC Email Addresses: 11

Invoices	accounting@petro-data.com	Cred Crd	billing@petro-data.com
Cust EFTs	cashier@petro-data.com	Spec Proc	accounting@petro-data.com

Buttons at the bottom: Edit, New, Next, Prev, Delete, Exit

Step 2

AR, Customers, Customer Send File, Add Customer Email Records

Define the customer email address that will receive this email.

1. Enter the Customer ID. If a record does not exist, you will be prompted to add one. Click 'Yes' to the prompt.
2. The system will add the Fax number from the setup screen. Fax is only for reference and has no other function.
3. The system will add the customer email address from the setup screen. You can keep this email address or change it to what your customer has requested. Press Enter.
4. The system will prompt you to use this same email address for all the document types below. Click 'Yes' to have the automatically enter same address in all fields below or 'No' to enter an address manually.

The screenshot shows the 'Customer Send File' window with the following fields: Cust No. (PM1), Ship To, Fax, Email, CC, Invoice Send Type, Sp Price Report, EFT Send Type, AR Send Type, CrCard Send Type, Cardlock Send Type, and Rack Price Type. A red '1' is placed over the 'Petro-Market #1' text. An 'Add Record?' dialog box is overlaid on the window, containing a question mark icon and the text 'Record not found. Do you want to add it?' with 'Yes' and 'No' buttons.

The screenshot shows the 'Customer Send File' window with the following fields: Cust No. (PM1), Ship To, Fax (210-490-4152), Email (jim@petro-data.com), and CC. Red '2' and '3' are placed over the Fax and Email fields respectively.

The screenshot shows the 'Default Email' dialog box with a question mark icon and the text 'Use this email for all document types?' and 'Yes' and 'No' buttons. A red '4' is placed over the 'Yes' button.

1. Accept, change or enter an email address for those documents you will email to your customer. Each field is optional. If you will never email a certain document type, an email address is not required. You may also enter multiple addresses. Each address should be separated by a comma. Document types include:
 - a. Sales Invoice
 - b. Daily Fuel Price Quote
 - c. Customer EFT Draft
 - d. AR Statements
 - e. Credit Card Notices
 - f. Cardlock Notices
 - g. Rack Price Types
2. Enter 'Y' to have the system save the PDFs that are emailed.
3. If you save the PDFs, enter the directory where these PDFs will be stored. The most common value for directory is "**P:\PDF**" with a subdirectory of the customer ID. **Note:** if 'P' is not your Petro-Data directory, enter the appropriate drive letter.

The FTP Directory is not used.

The screenshot shows the 'Customer Send File' window with the following fields and options:

- Cust No.:** PM1 (dropdown), Petro-Market #1 (text)
- Ship To:** (empty dropdown)
- Fax:** 210-490-4152 (text)
- Email:** larry@petro-data.com (text)
- CC:** (empty text)
- Invoice Send Type:** E (dropdown), larry@petro-data.com (text), 1 (red box), A (red box)
- Sp Price Report:** E (dropdown), larry@petro-data.com (text), B (red box)
- EFT Send Type:** E (dropdown), larry@petro-data.com (text), C (red box)
- AR Send Type:** E (dropdown), larry@petro-data.com (text), D (red box)
- CrCard Send Type:** E (dropdown), larry@petro-data.com (text), E (red box)
- Cardlock Send Type:** E (dropdown), (empty text), F (red box)
- Rack Price Type:** E (dropdown), (empty text), G (red box)
- Save PDFs:** Y (dropdown), 2 (red box)
- PDF Dir:** p:\pdf\PM1\ (text), 3 (red box)
- FTP Dir:** (empty text)

Buttons at the bottom: Edit, New, Next, Prev, Delete, Duplicate, Exit.

You are now ready to send email to your customers.

Remember to choose the 'Email' option by clicking on the Printer icon of the report to be emailed.