

E-Mails

Composing, Managing, and Sending E-Mails from VisionX

- 1) Setup
- 2) The E-Mail Screen
- 3) Clicking on an E-Mail Address Field
- 4) E-mailing Purchase Orders, Sales Orders, or Invoices
- 5) Broadcast E-Mail from Customer Search

1) Setup

In order to allow VisionX to send electronic mails you first need to specify some technical information about your network.

Only the Administrator is allowed to enter or modify such information.

A. General Setup

From the File menu, select Setup/Net Access.

Fill in all the Outgoing and Incoming Mail sections fields.

The SMTP and POP3 server addresses are those of your e-mail provider. You should be able to copy them from the Preferences section of your regular e-mail software.

The Incoming Mail account and password may be used for outgoing mail as well if such a security feature has been set in your messaging system.

Close the window to save your setting.

Outgoing Mail (SMTP)

SMTP Server address: smtp.comcast.net

Senders E-Mail Address: gpelpel@comcast.net

Senders Name: Georges Pelpel

Incoming Mail (POP3)

POP3 Server Address: mail.comcast.net

E-Mail Account: gpelpel

Password: *****

Web Access

HTML Files Folder Root: []

Website URL: []

Website Time-Out URL: []

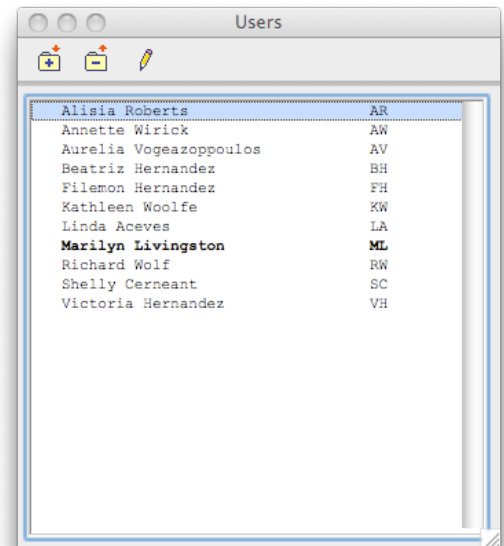
Accounting Dpt. E-Mail: []

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B. User Setup

By individualizing your e-mail settings each message originating from VisionX carries the identify and e-mail address of the document initiator.

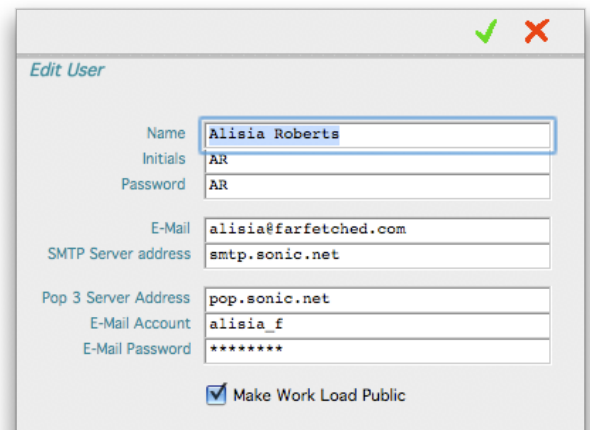
From the File menu, select Setup/Users.



Select a user and click the Edit button or double-click on the list.

SMTP and POP3 Server information should already be filled by default as specified in the general setup screen.

Fill in the user personal e-mail fields.



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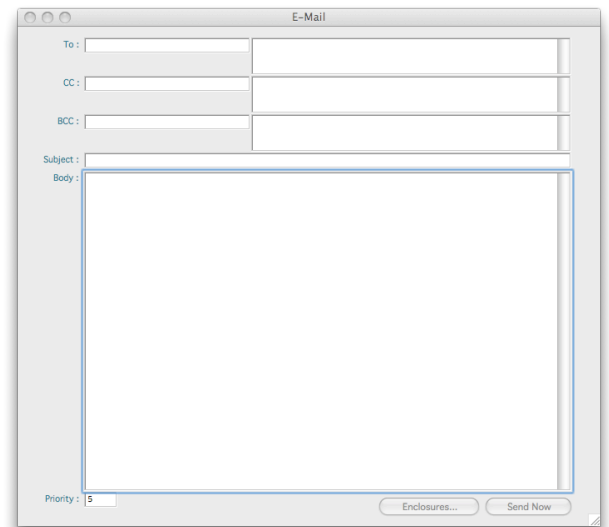
2) The E-Mail Screen

The E-Mail window allows you to create a new message as in any other e-mail system. You may address the message to one or to multiple addressees as direct (TO), carbon copy (CC), or blind carbon copy (BCC) recipients. Enclosures may be attached to e-mails as well.

From the File menu, select E-Mail.

Entering an e-mail address in the To, CC, or BCC field will trigger VisionX to search your Customer, Vendor, Leads, and Representative data files. If a match is found the e-mail document will be linked to that match and added to its historical contact log.

The To, Subject, and Body fields are mandatory. The Enclosures and Send Now button will be enabled once these fields have been populated.

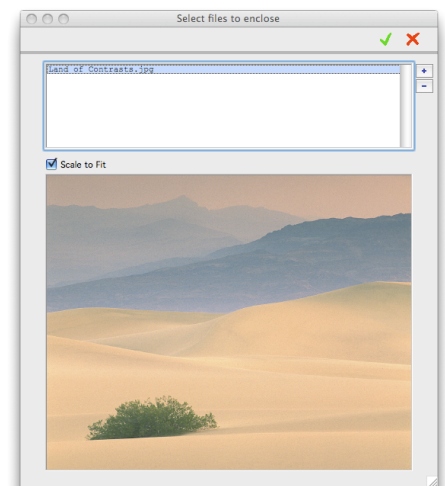


Click the Enclosures button to attach documents to your e-mail. These may be of any type including images.

The list at the top of the window displays all the documents you have selected to attach to your e-mail. The selected line document is displayed at the bottom of the screen as a reference.

Use the + button to add documents, and the - button to remove an already attached one.

Clicking the + button will open your operating system document finder window.



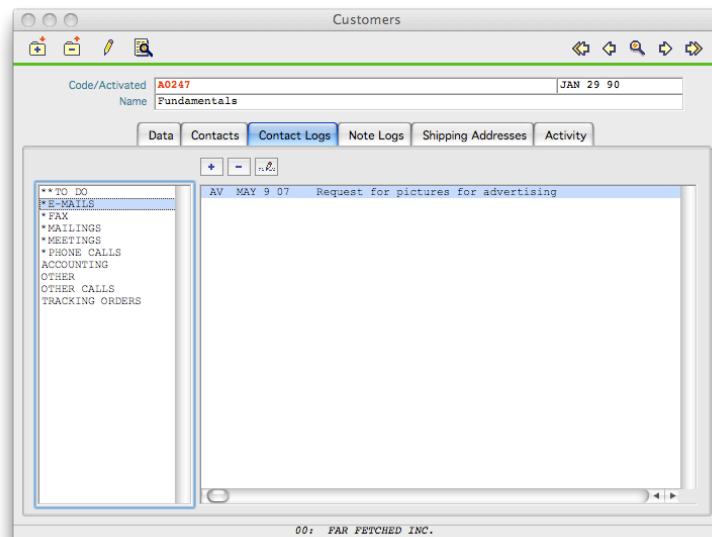
3) Clicking on an E-Mail Address Field

Customer, vendor, lead, and representative records include e-mail addresses fields. By clicking on these fields you may directly open the E-Mail window with a pre-filled To field.

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Once the e-mail is sent a record will be added to the Contact Log file of the recipient.



4) E-mailing Purchase Orders, Sales Orders, or Invoices

Customers or vendors may require receiving documents via e-mail rather than by printed form. You may instruct VisionX to do so on a general or individual basis.

VisionX actually first saves the document on your hard disk as a .pdf file that is then attached to an e-mail message.

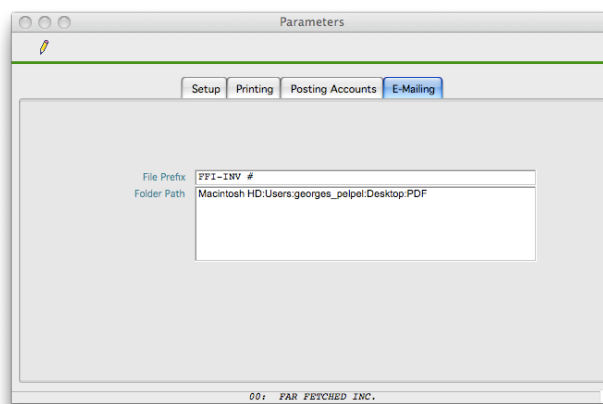
A. General Setup

The Parameters window of the Purchases, Sales Orders, and Sales sections has a tab named E-Mailing.

This is where you specify:

- The naming convention for the .pdf files,
- The location the folder on your hard disk or server where you want the files to be saved.

We suggest you start the File Prefix with an abbreviation of your company name followed by an abbreviation of the document type, the recipient of the e-mail will receive many more from other entities and should be able to easily recognize yours.





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VisionX automatically adds the document number (i.e. Invoice Number) and recipient name after the prefix.

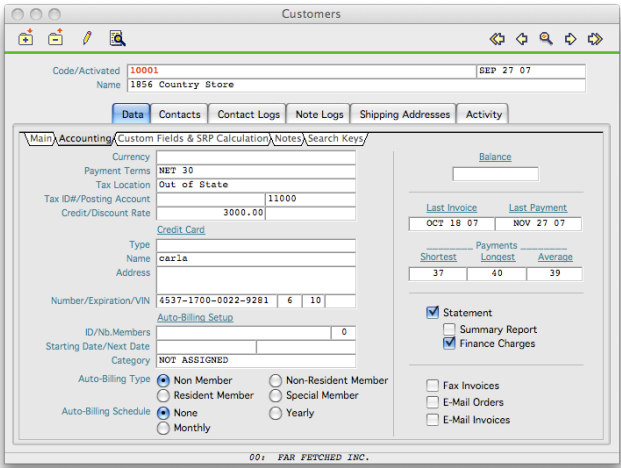
The location where the .pdf files are saved should be a folder available and authorized to all VisionX users. The system automatically creates three sub-folders within your specified folder; Invoices, Purchase Orders, and Sales Orders.

B. Individual Setup

The Customers and Vendors screens allow you to force the system to automatically e-mail documents addressed to selected recipients.

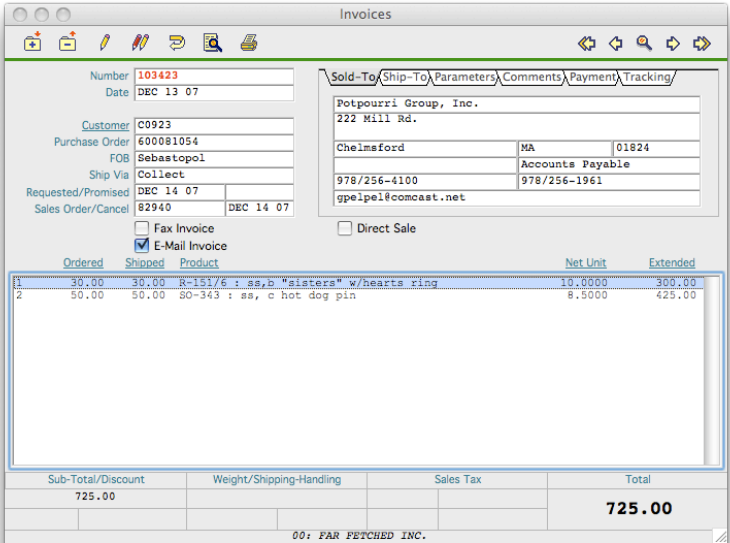
The option to do so resides under the Accounting tab.

In the case of a Customer you may activate the E-Mail Orders, and/or the E-Mail Invoices check boxes. By doing so e-mails will automatically be sent to the customer when such documents are printed. A paper copy will still be printed for your own use.



C. Printing and E-Mailing Invoices

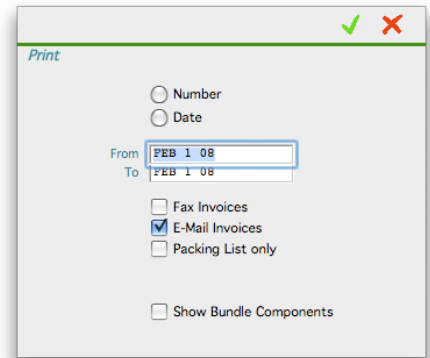
The E-Mail Invoice flag is checked by default when creating an invoice for a Customer whose E-Mail Invoices box has been activated. This flag may be removed if desired on an invoice per invoice basis.



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The Print window has an E-Mail Invoices option that forces all invoices within the selected range to be e-mailed. No paper copy will be printed as a result.

Leave this option off when printing a regular invoice batch.



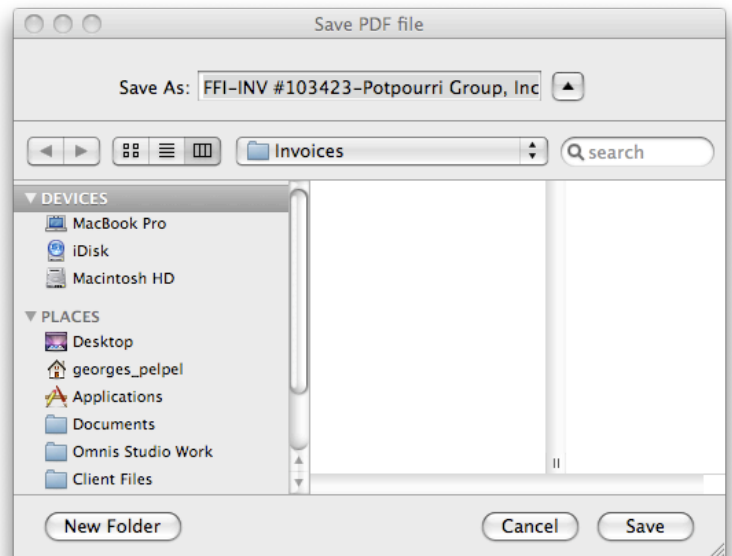
The printing process first starts with the paper copies by displaying the usual Print dialog window.

Once done VisionX will prompt you for the name and location of the .pdf file.

The name of the file has already been assigned by the system according to your settings.

Make sure the file is directed to the proper folder, Vision should already have selected it, and click the Save button.

The .pdf file is then created and the invoice is e-mailed to the recipient.



D. Printing and E-Mailing Purchase Orders and Sales Orders

The procedures for e-mailing Purchase and Sales Orders are identical as for the invoices.

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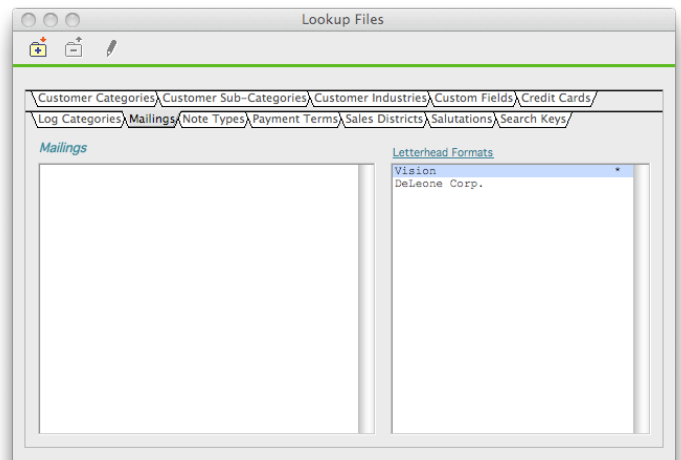
5) Broadcast E-Mail from Customer Search

It is possible to create Letter forms in VisionX and then broadcast e-mail them to multiple customers using your regular letterhead as a background.

A) Creating Letter Forms

Select Lookup Files from the Accounts Receivable/ Setup menu.

Click on the Mailings tab. Two columns are available; the left column displays the list of forms you will create, the right one displays a list of letterhead background formats. VisionX already has a background letterhead format that displays your company logo on the top left side of the page and your address and phone numbers as a footer as the bottom of the form. Additional custom letterhead formats may be added if requested.



Click the New button to add a new form.

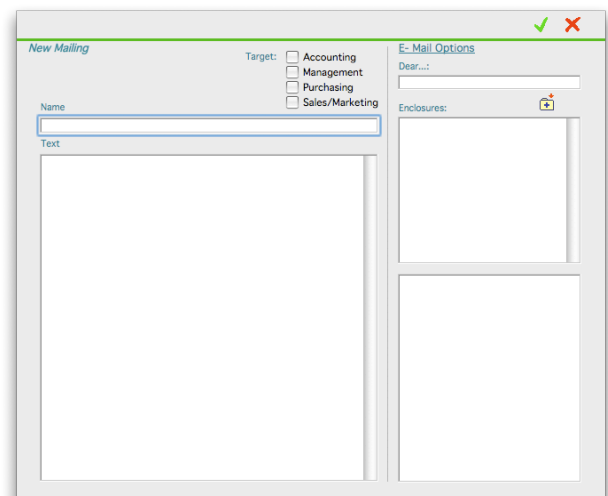
The Name field is used as a reference and won't be printed in the document.

The Text field is the body of the document. It will be printed following an introduction line.

The introduction line is either the individualized standard 'Dear First Name:' formula or a generic line that you may define in the Dear... field.

Attachments such as images or other computer documents may also be added to the Mailing.

For targeted mailings you may also specified the target department(s) of this document. You may select one or several targets.



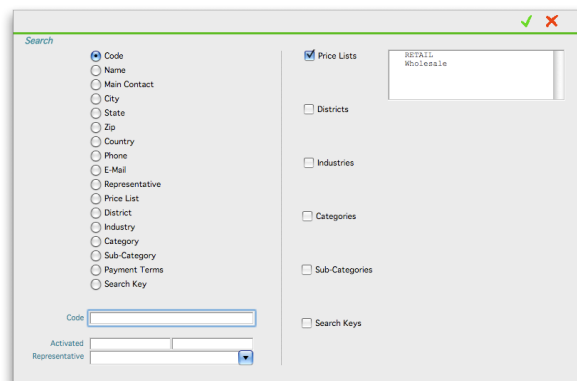
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B) Building the Target Customer List

From the Customers screen click on the Search button.



Use the Search window to select a single record or multiple records according to specified criteria. The radio button on the left side are used to declare the main search field. If the field(s) below the radio buttons are left blank the search will include all the Customer records sorted by the selected field. If the fields are populated the search will display all records matching the criteria.



The check boxes on the right side of the screen allow for a search limited to single or multiple choice(s) within each lookup file associated to the Customer file. Double-click on any line of each lookup file record list to select it. An * at the end of the line indicates that the line has been selected.

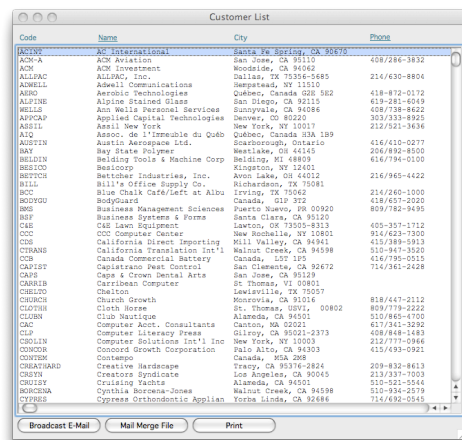
Click the OK button (green check mark) to start the search.

C) Sending a Broadcast E-Mail

Once the search is completed a list of matching Customers will be displayed.

From this list options are to print it, create a text file of all names to be used for mail merging with a word-processing software such as Microsoft Word, or to broadcast an e-mail to all included Customers.

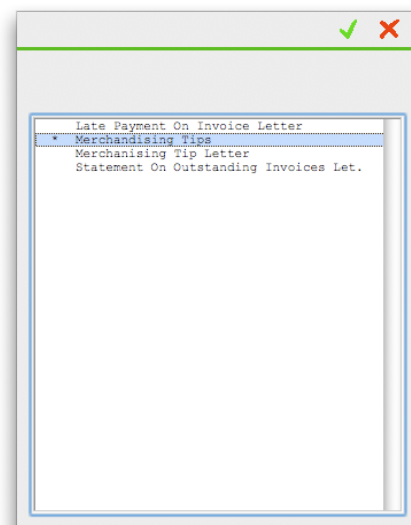
Click the Broadcast E-Mail button.



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You are now presented with the list of all the Mailing Forms you previously created in the Lookup Files section.

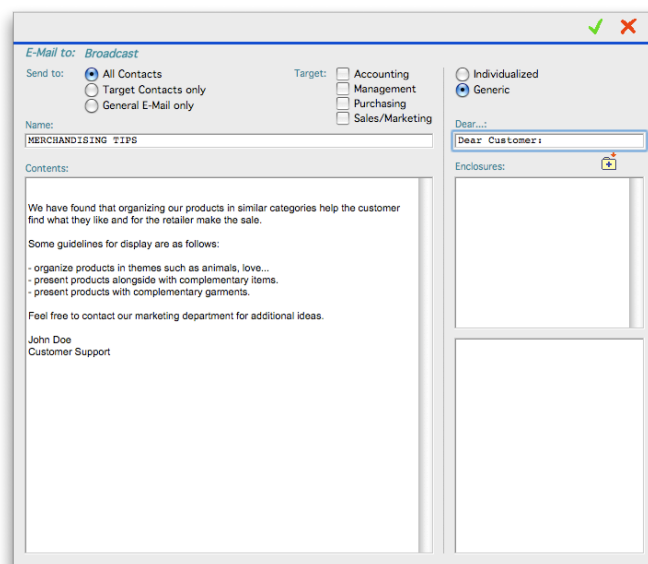
Double-click on one of this form and click the OK button (green checkmark).



VisionX allows you to edit the preset form for this particular broadcast. You may modified the content of the body as needed.

The first option to consider is who do you intend to send the message:

- All Contacts: will send the e-mail to each contact person associated with the previously selected list of Customers.
- Target Contacts only: will send it only to the contact persons matching the target department if such a target has been specified. Each contact record entered in the Customers screen may be attached to one or several departments.
- General E-Mail only: will only send the e-mail to the general e-mail address of the Customer not to individual contact persons.



The second option is to specified how the e-mail will be introduced. Do you want it personalized (i.e. Dear John) for each recipient or do you want a generic introduction? If Generic is selected the default introduction line specified in the Lookup Files screen is used but it may be modified for the purpose of this particular e-mail in the Dear... field.

As with regular E-Mail composed in other parts of VisionX you may attach/enclose additional documents such as images.

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Once the OK button is activated a .pdf file is created in the VisionX PDF/Mailings folder, this document uses the Letterhead design as selected in the Lookup Files screen.

Then an e-mail is sent to each selected recipient. The title of the message will be as defined in the Mailing Form followed by the date. The body of the message only contains the .pdf file as an attachment.

If your Customer desires to print the document it will look as professional as would a letter sent via the Postal Service.