

**E-mailing Customer/Supplier
Statements/Remittance
Advices & Source Documents,
Invoices to specific e-mail
addresses**

Outline:

This article discusses how to setup your Evolution company to e-mail Customer Statements/Supplier Remittance Advices & Source Documents (e.g., Invoices and others) to specific e-mail addresses.

These e-mail addresses may be different than the Customers'/Suppliers' main e-mail address as captured on the Maintenance screen.

The screenshot shows the 'Edit Customer "BRAVO"' window. On the left is a navigation menu with options: Customer, Tax, Contact Details (highlighted with a red box), Bank & Other, Credit Control, Linked Accounts, and Annuity Billing. The main area is titled 'Contact Details' and contains several input fields: Contact 1 (Bob Main), Contact 2, Cellular, Web Page, E-mail (main@bravo.co.za, highlighted with a red box), ID Number, Telephone 1, Telephone 2, Fax, Addressee, and Passport. At the bottom, there are sections for Postal Address and Physical Address.

Solution / Details

To explain further, we'll be making use of the following scenario:

Phase 1: Setting Up

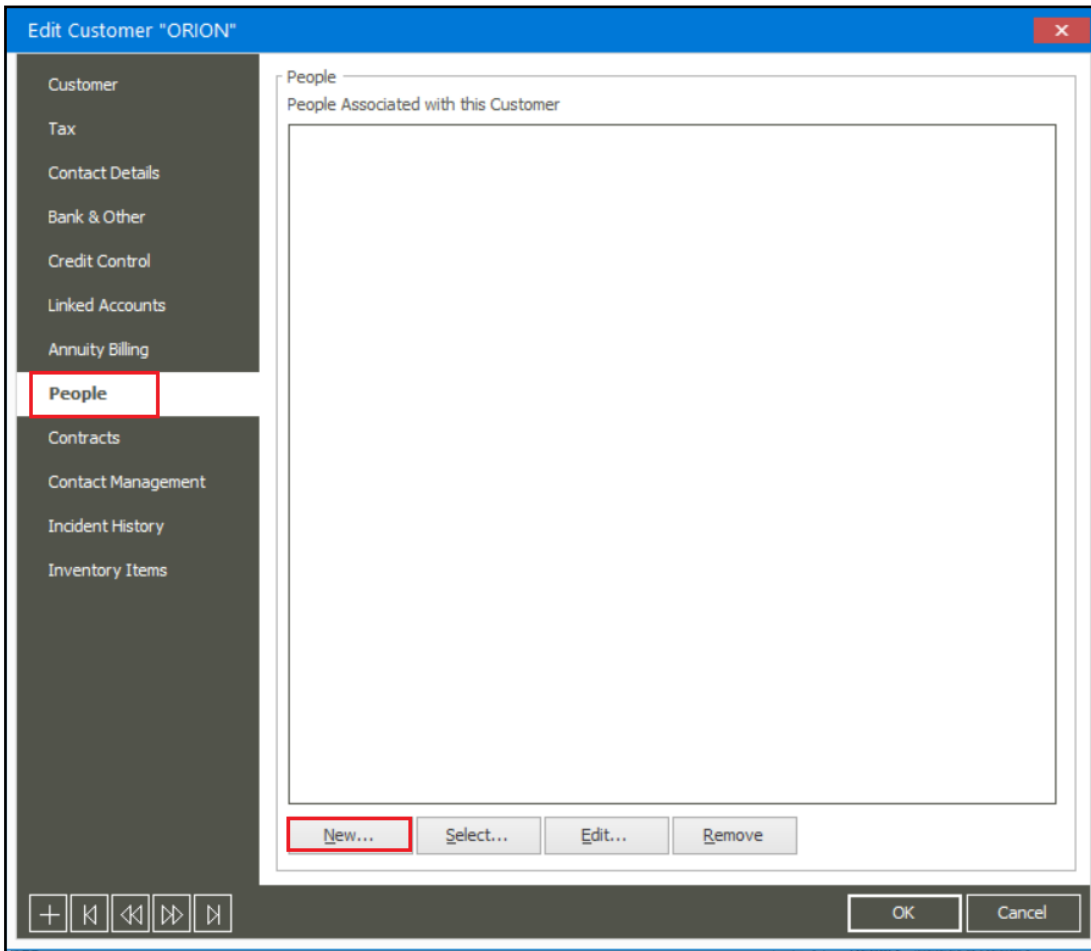
1. We'll refer to the E-mail address setup table below.

CUSTOMER	Main Recipient	Main	Invoice Recipient	Invoice	Statement Recipient	Statement E-mail
ORION	Oscar Main	main@orion.co.za	Otto Invoices	invoices@orion.co.za	Oreo Statements	statements@orion.co.za
BRAVO	Bob Main	main@bravo.co.za	Brad Invoices	invoices@bravo.co.za	Ben Statements	statements@bravo.co.za
GOLF	Gary Main	main@golf.co.za	Geoff Invoices	invoices@golf.co.za	Gal Statements	statements@golf.co.za
ROMEO	Rentia Main	main@romeo.co.za	Robert Invoices	invoices@romeo.co.za	Redd Statements	statements@romeo.co.za

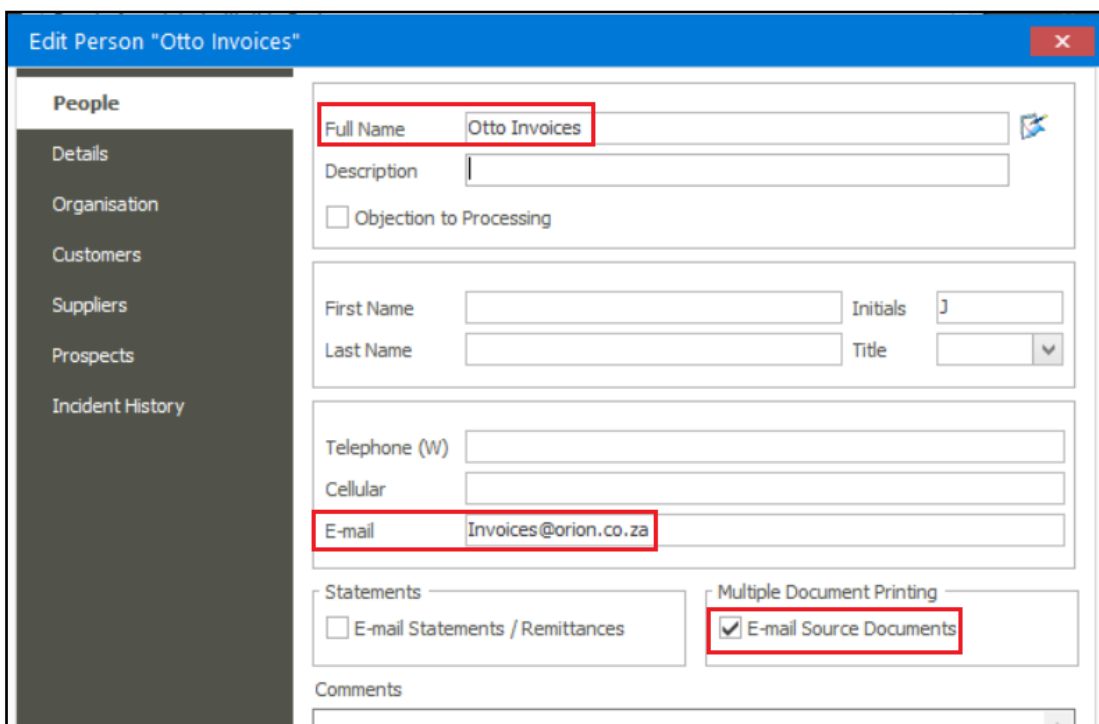
2. For instance, for customer BRAVO above, setup the main e-mail address on the Contact Details tab.

This screenshot is identical to the one above, showing the 'Edit Customer "BRAVO"' window with the 'Contact Details' tab selected. The 'E-mail' field is highlighted with a red box and contains the value 'main@bravo.co.za'.

3. On the **People** tab, click the **New...** button below.



4. In here, enter a **Full Name**, **E-mail** address (which is different than the e-mail address entered on the Contact Details tab above) of the recipient who should receive source documents and select the **E-Mail Source Documents** option below. Save the update when done.



5. Repeat step 3 above.
6. In here, enter a Full Name, E-mail address (which is different than the e-mail address entered on the Contact Details tab above) of the recipient who should receive customer statements and select the E-Mail Statements / Remittances option below. Save the update when done.

The screenshot shows the 'Edit Person "Oreo Statements"' window. The left sidebar has 'People' selected. The main form has the following fields and options:

- Full Name:** Oreo Statements
- Description:** (empty)
- Objection to Processing:**
- First Name:** (empty)
- Last Name:** (empty)
- Initials:** M
- Title:** (dropdown menu)
- Telephone (W):** (empty)
- Cellular:** (empty)
- E-mail:** statements@orion.co.za
- Statements:**
 - E-mail Statements / Remittances
- Multiple Document Printing:**
 - E-mail Source Documents
- Comments:** (empty)

7. On the Bank & Other tab, select the options marked below and save the change.

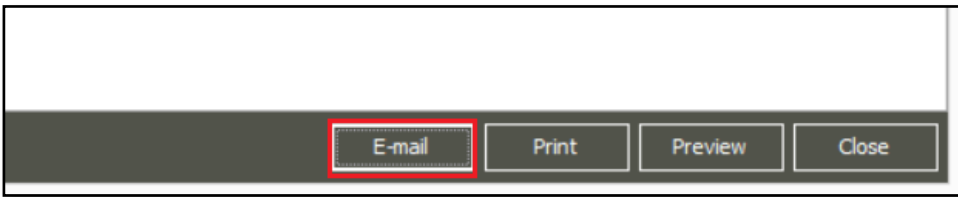
The screenshot shows the 'Edit Customer "GOLF"' window with the 'Bank & Other' tab selected. The form contains the following sections and options:

- Bank Details:**
 - Bank:** Select a Bank
 - Account Holder:** (empty)
 - Bank Code:** (empty)
 - Swift Code:** (empty)
 - Account Number:** (empty)
 - Branch Code:** (empty)
 - Account Type:** (dropdown menu)
 - Reference:** (empty)
 - Buttons:** Validate, Netcash
 - Warning:** Bank details have not been validated
- Statements:**
 - Print Statements
 - E-mail Statements
 - E-mail Customer and Linked People
- Multiple Document Printing:**
 - Print Invoices & Credit Notes
 - E-mail Invoices & Credit Notes
 - E-mail Customer and Linked People
 - Electronic Document Acceptance
- E-mail Password:**
 - Password for Statements & Multiple Document Printing:** (empty)

8. Repeat steps 2 to 6 for the rest of the other customers, according to the table provided above in step 1 above.

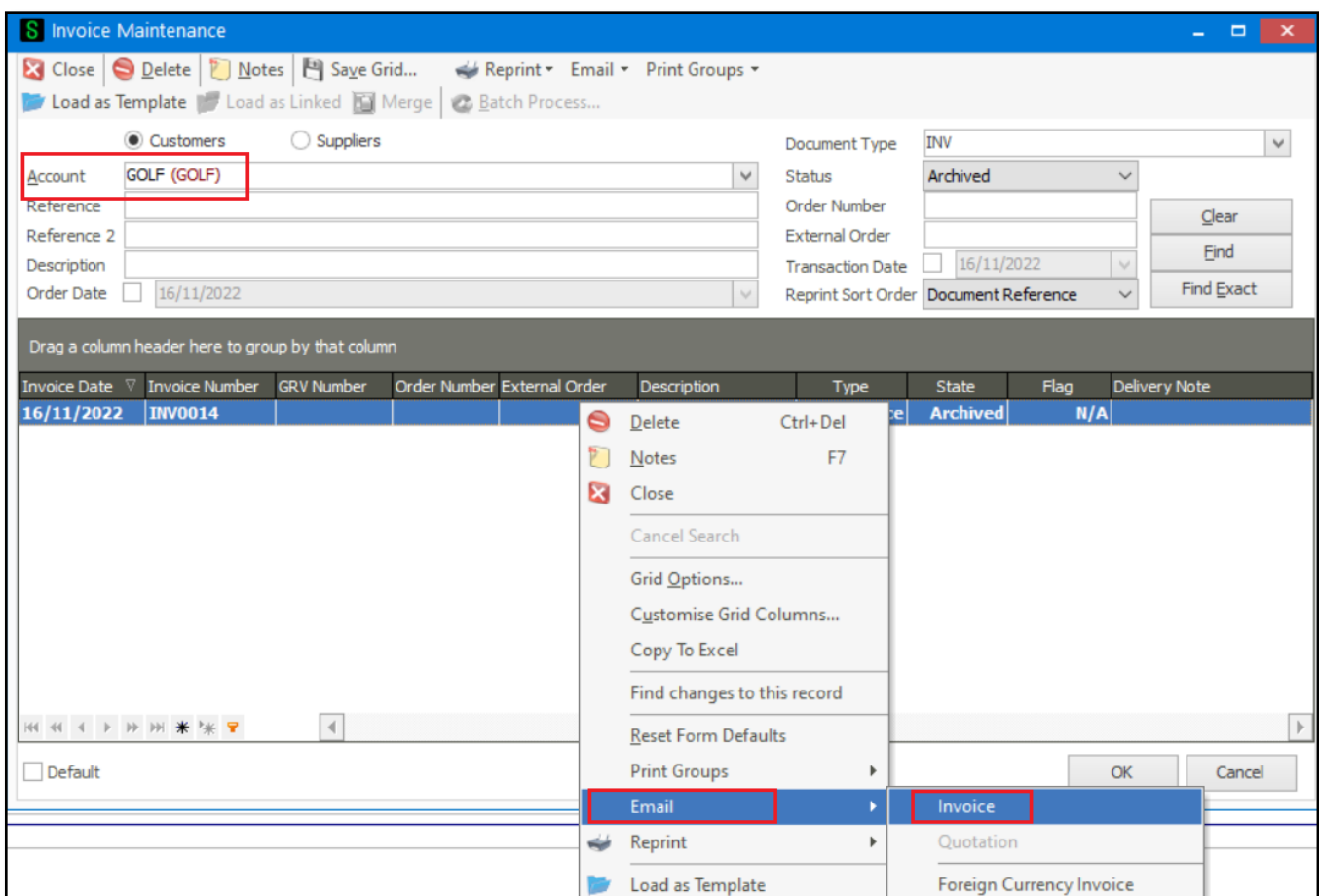
Phase 2: E-Mailing Customer Statements

1. Go to Customers | Reports | Statements.
2. Setup the report as you would usually to send out a bulk mailing of statements to all the relevant customers.
3. When done, click the E-Mail button.



Phase 3: E-Mailing Invoices

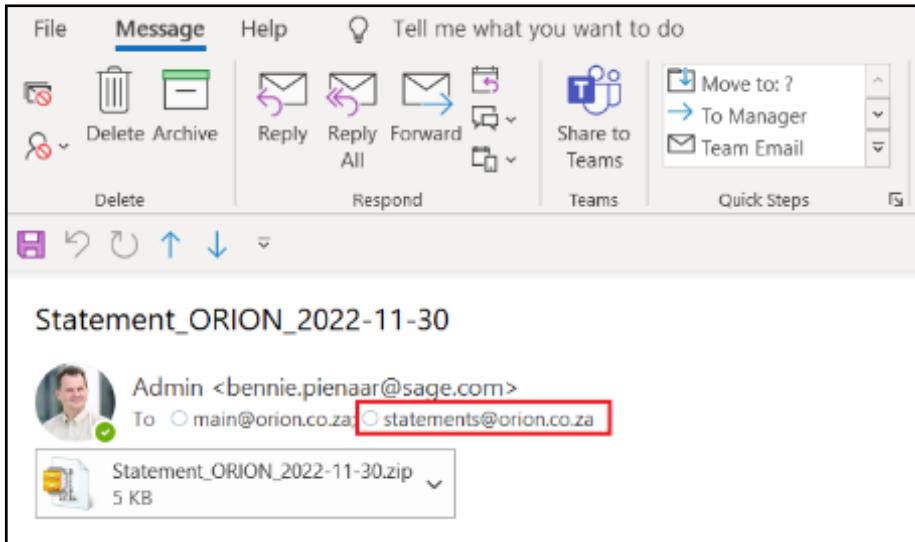
There are 2 main methods of mailing source documents out of the Evolution company. One way is to mail the source document e.g., invoice, from the Invoice Maintenance screen as seen below.



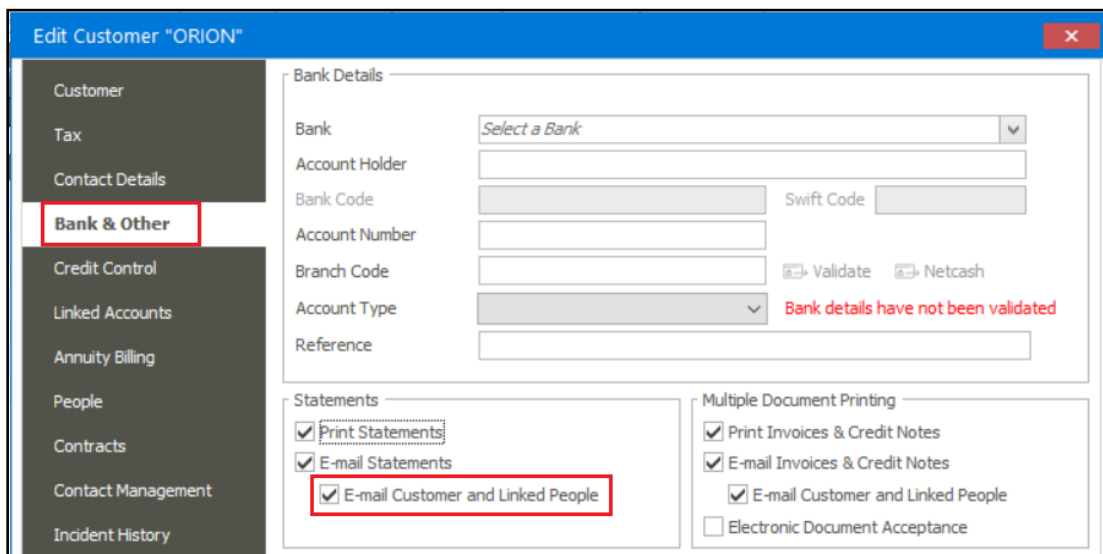
Phase 4: Analysing the Statement E-Mailing results

Open one of the statement related e-mails sent and notice the e-mail addresses marked below.

In this case they agree with the same 2 e-mail addresses setup for customer ORION (refer to Phase 1 above), especially the **statements@orion.co.za** e-mail address as marked below.



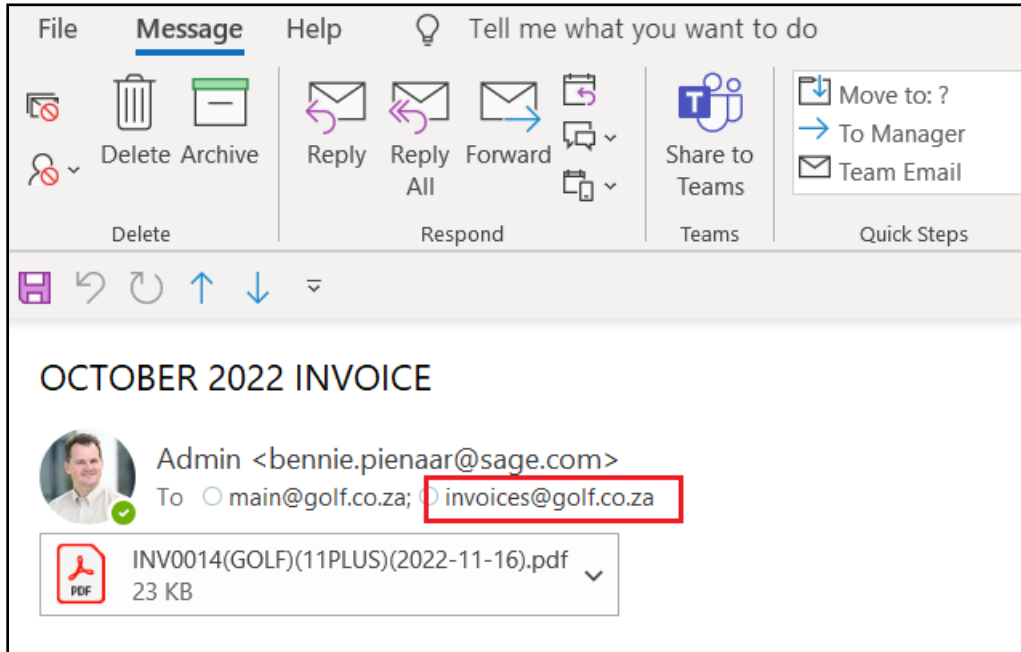
Also notice the **main@orion.co.za** e-mail address is also included in the mail because the option marked below is selected on the Customer Maintenance screen. Of course, you can unselect this option if so required.



Phase 5: Analysing the Invoice E-Mailing results

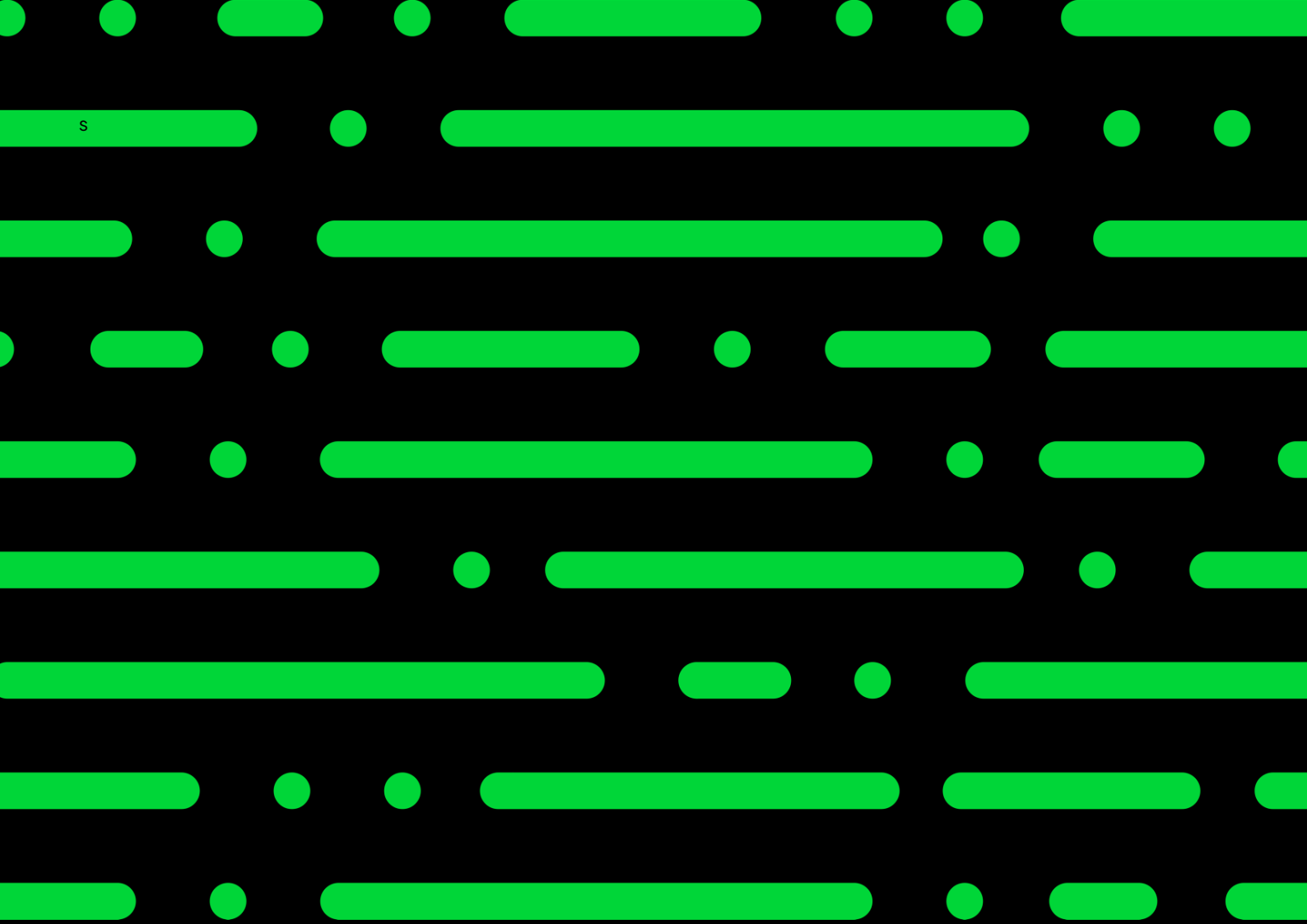
Open one of the Invoice related e-mails sent and notice the e-mail addresses marked below.

In this case they agree with the same 2 e-mail addresses setup for customer GOLF (refer to Phase 1 above), especially the **invoices@golf.co.za** e-mail address as marked below.



E-mailing of Supplier Source Documents and Remittance Advices

Please note that the same setup principles as discussed above also applies to mailing supplier Source Documents and Remittance Advices.



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