

Key Communications simplifies sending documents via email to Customers & Vendors directly from within the Sage 300 environment. Sending via email has never been simpler to implement. Best yet - a copy of the email is recorded within Sage 300 for future reference by any Sage 300 user.

Progress has changed the way that organisations distribute commercial documents - now more than ever the emphasis is on email delivery directly from the ERP.

The new Key Communications module from PTS addresses many of the challenges that organisations face when changing business processes to be email-centric. All emailing is handled directly from within the Sage 300 environment.

A great feature of this solution is that a copy of sent emails (including attachments) is stored right inside Sage 300.

The Customer Document Log gives Accpac users an easy way to view everything that has been emailed to a Customer. From here an exact copy of what was originally sent by email can be resent or printed.

## Unlimited Account Contacts

Key Communications introduces new unlimited Customer Contacts (and Vendor Contacts) into the Sage 300.

A common requirement is for certain documents to be sent to multiple contacts. Another tricky requirement is to optionally print and post a hard copy to an admin address.

All scenarios are easily handled in the configuration of each Contact.

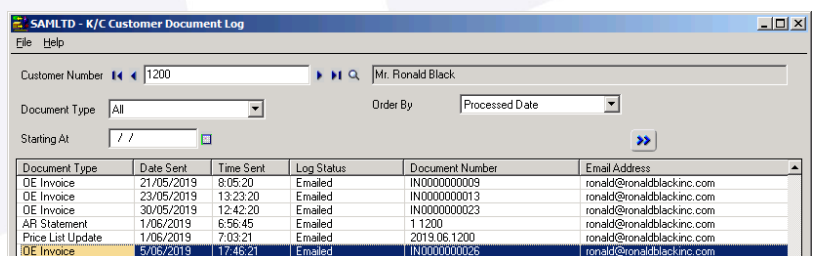
## Sending Documents

With Key Communications, several new reporting or "Emailer" screens are added that send the standard AR, AP and OE documents in a simple & elegant method.

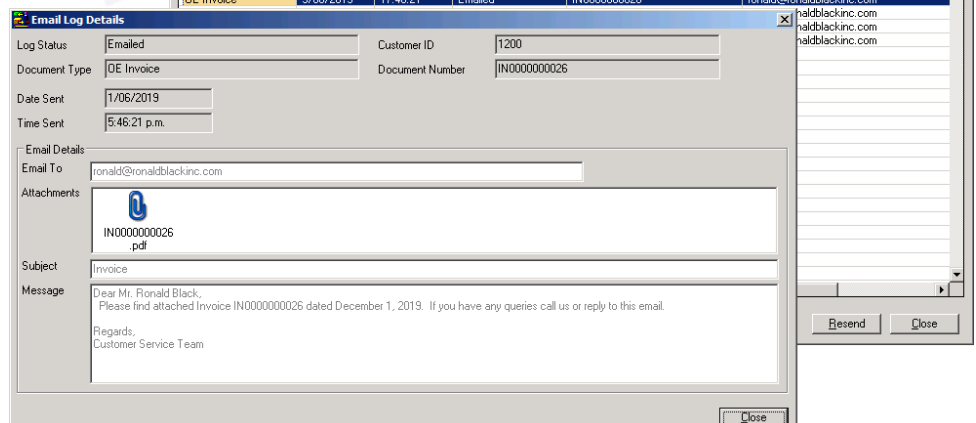
A document register is maintained so only new documents are selected for delivery; the various Emailer screens will resolve which documents and if they should be emailed (or printed) for distribution to the various recipients.

## Supports 3rd Party & Custom Reports

Any reports from your favourite 3<sup>rd</sup> Party application can be added to use the Key Communications framework. Once the custom reports have been configured then these sent emails will be listed in the relevant Document Log.



Document Type	Date Sent	Time Sent	Log Status	Document Number	Email Address
OE Invoice	21/05/2019	8:05:20	Emailed	IN000000009	ronald@ronaldblackinc.com
OE Invoice	23/05/2019	13:23:20	Emailed	IN000000013	ronald@ronaldblackinc.com
OE Invoice	30/05/2019	12:42:20	Emailed	IN000000023	ronald@ronaldblackinc.com
AR Statement	1/06/2019	6:56:45	Emailed	1 1200	ronald@ronaldblackinc.com
Price List Update	1/06/2019	7:03:21	Emailed	2019.06.1200	ronald@ronaldblackinc.com
OE Invoice	5/06/2019	17:46:21	Emailed	IN000000026	ronald@ronaldblackinc.com



**Email Log Details**

Log Status: Emailed      Customer ID: 1200

Document Type: OE Invoice      Document Number: IN000000026

Date Sent: 1/06/2019

Time Sent: 5:46:21 p.m.

Email Details

Email To: ronald@ronaldblackinc.com

Attachments: IN000000026.pdf

Subject: Invoice

Message: Dear Mr. Ronald Black,  
Please find attached Invoice IN000000026 dated December 1, 2019. If you have any queries call us or reply to this email.  
Regards,  
Customer Service Team

Buttons: Resend, Close

## Manageable Email Queue

All emails are sent via an email queue; by default the queue will immediately send email out via the configured email gateway.

Alternatively the queue can be configured **not** to send, but to accumulate emails. In this mode the queue can be manually cleared - or alternatively a scheduled task can be run that will clear the queue automatically at pre-set times.

## Availability & System Requirements

300 Editions: Standard, Advanced & Premium  
 Database: Microsoft SQL Server

### Maintaining Customer Contacts

The screenshot displays the 'SAMLTD - K/C Customer Contacts' application. The main window shows a table of contacts for customer '1210' (ACME Plumbing). The table includes columns for First Name, Last Name, Position, Status, Email, Work Phone, Cell Phone, Fax Number, and Portal. Three contacts are listed: Jason Builder (CFO), Susan Wrightson (Office Admin), and Morris Fredericks (Store Manager). A secondary window, 'SAMLTD - K/C Customer Contacts Entry', is open, showing the details for Jason Builder, including his email address and a table of document types and contact actions.

### OE Invoice Emler

The screenshot shows the 'SAMLTD - K/C OE Invoice Emler' application. The top section contains search and filter options for generating invoices, such as 'Auto Select Unprocessed OE Invoices', 'From Customer ID', 'To Customer ID', and 'Email Message'. Below this is a large table listing individual invoices with columns for Send, Customer ID, Customer Name, Delivery Method, Email Address, and Document number. At the bottom, there are buttons for 'Generate List', 'Select All', 'Deselect All', 'Preview', 'Print/Send', and 'Close'.

Pacific Technology Solutions has a long and successful history as a Sage Development Partner developing Sage 300 modules that enhance the functionality and capability of the Sage 300 solution.

Please visit our website [www.pacifictechsol.com](http://www.pacifictechsol.com) for further information on products and services that Pacific Technology Solutions provides to the Sage 300 channel around the world.



- Sage Australia/Pacific Top Subscription Revenue 2015
- Sage Australia/Pacific Top Development Partner 2014
- International Development Partner of the Year 2009
- Sage Asia Top Development Partner 2008

© Pacific Technology Solutions Ltd. All rights reserved. Sage, Sage 300 are registered trademarks or trademarks of Sage Software, Inc., or its affiliated entities. All other trademarks are the property of their respective owners.