Rev COMMUNICATIONS

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. A COPY OF THE EMAIL IS RECORDED WITHIN SAGE 300 FOR REFERENCE BY OTHER USERS.

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

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The Key Communications module from Pacifictech addresses many of the challenges that organizations face when changing business processes to be email-centric. All emailing is handled directly from within the Sage 300 environment. The Customer Document Log gives Sage 300 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.

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Processed Date

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

nts) is s	stored I	Document Type	Date Sent	Time Sert	Log Status	Document Number		Email Address
		OE Invoice	10/07/2011	20:16:54	Emailed	IN000000000005		Jose@bargainmart.com
le Sage	300	OE Invoice	10/07/2011	20.16.58	Emailed	IN000000000010		Jose@bargainmart.com
ie Jage	500. I	OE Invoice	10/07/2011	20:17:30	Emailed	IN000000000021		Jose@bargainmart.com
		OE Invoice	10/07/2011	20:17:33	Emailed	IN00000000027		Jose@bargainmart.com
		OE Invoice	10/07/2011	20:17:36	Queued For Emailing	IN00000000036		Jose@bargainmart.com
E TEMP - K	C/C Email Viewer						- ×	
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File Help								4
Log Status	Emaled		Customer ID	11	00			
Document Type	OE Invoice		Document Nu	mber IN	00000000005			
Date Queued	10/07/2011		Document Da					
Time Queued	8:16:54 p.m.		COCOMPT De	~ _				
Email Details	Email Log Details							
Email To	Jose@bargainmart.com							
Email From	accounts@samitd.com							
Email Reply	accounts@sambd.com							
Attachments	0							
	IN0000000000							
	005 pdf							
Subject	Invoice IN000000000005						-	
Message	Dear Bargain Mart - San Diego, Please find attached your Involi						_	Resend
		de Involuciou de la companya de	ed may 13, 2013.	ir you nave a	ly queries piease call us on	1234367830.		
	Repards. Ms. Smith							1
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Sage 300

Unlimited Account Contacts

Key Communications introduces new unlimited Customer Contacts (and Vendor Contacts) into 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, OE and PO 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.



Pacifictech KEY COMMUNICATIONS

First Name Jason Morris	Last Nar Builder Frederick		Primary Contact No No	Status Active Active	Salutati Mr Mr	Position CFO Store Manager	Work Phone		
	TEMP - K/C C File Help	ustomer Conta	cts Entry					-	•
	Customer Contact	1210	2 +	Last Name	Builde	Plumbing			
< Open		JasonB@acmeplumb ociated Ship-To's					sids		
Save	Document Type AR Invoice/Credit AR Statement	Contact None None	Action						
	Customer Details OE Invoice/Credit	Email Co Email Co							

AVAILABILITY & SYSTEM REQUIREMENTS

300 Editions: Standard, Advanced and Premium Databases:

Microsoft SQL Server

Maintaining Customer Contacts

Supports 3rd Party & Custom Reports

Any reports from your favorite 3rd 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.

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 preset times.

Aut	o Select Unpro	ocessed OE Invoices					
Select	By	Customer ID v					
From C	ustomer ID	9			Total Doc		
To Customer ID		ZZZZZZZZZZZZZ Q		Selected Emailed 8 Selected Printed 0			
Order I	By	Document Number V			Selected	Printed 0	
Email I	lessage	OEINV Q DE	Invoices Credits				ĥ.
	Report	OEINV03				Browse	ĩ
Credit Report		OECRN01		Browse	ñ -		
Se	Customer ID	Customer Name	Delivery Meth	Email Address	Dear	ment Number	
ae Yes	1210	ACME Plumbing	Emailed	admin@acmeplumbing.com		0000000050	
Yes	1210	ACME Plumbing - Jason Builder	Emailed	JasonB@acmeplumbing.com		00000000050	
Yes	1210	ACME Plumbing - Monta Fredericks	Emailed	Morris@acmeplumbing.com			
Yes	1210	ACME Plumbing	Emailed	admin@acmeplumbing.com		00000000056	
Yes	1210	ACME Plumbing - Jason Builder	Emailed	Jason B@acmeplumbing.com	IN000	00000000056	
Yes	1210	ACME Plumbing - Morris Fredericks	Emailed	Moms@acmeplumbing.com	IN000	0000000056	
Yes	1100	Bargain Mart - San Diego	Emailed	Jose@bargainmart.com	0000000058		
Yes 1100		Bargain Mart - San Diego	Emailed	Jose@bargainmart.com	INDO	0000000060	



Pacifictech has a long and successful history as a Sage ISV Development Partner, developing Sage 300 solutions that enhance the functionality and capability of Sage 300.

Pacifictech is a Sage Intacct MPP and is developing innovative solutions for Sage Intacct.

Visit our website www.pacifictechsol.com for further information on products and services that Pacifictech provides to the Sage communities around the world.

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Top Development Partner – Sage Australia/Pacific 2021 Top Development Partner – Sage Australia/Pacific 2020 Top Subscription Revenue – Sage Australia/Pacific 2015 Top Development Partner – Sage Australia/Pacific 2014 Sage Global Development Partner of the Year – 2009 Top Development Partner – Sage Asia 2008

OE Invoice Emailer