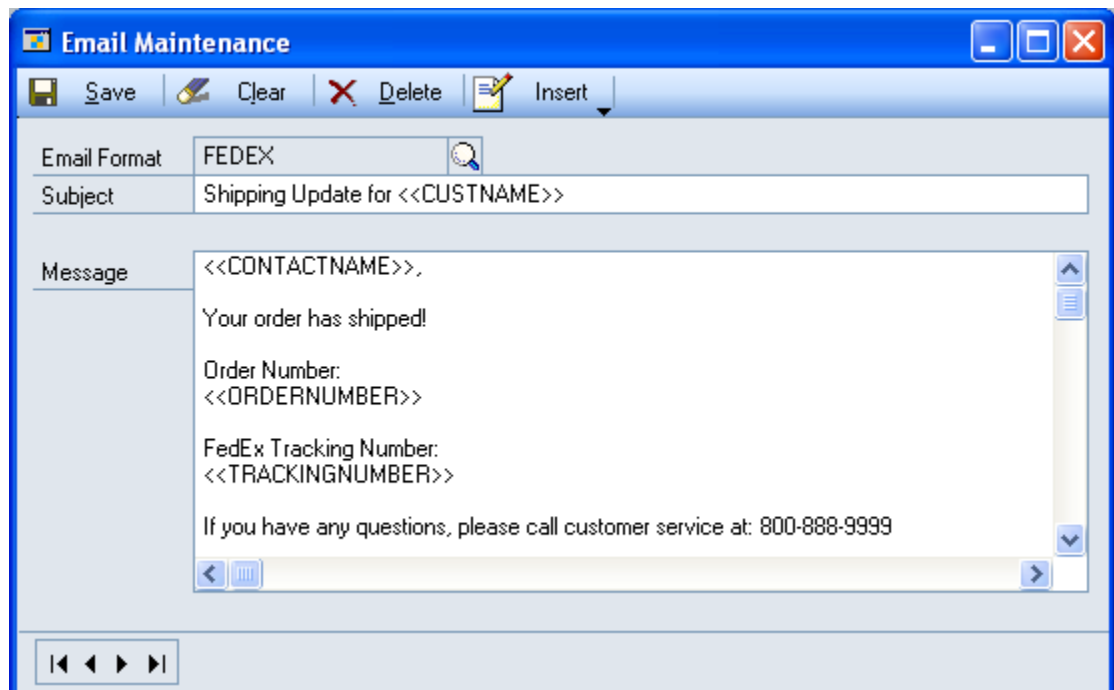


Email Maintenance

Email Maintenance works together with Tracking Number Entry (described below) to provide email updates to customers of shipping information.

Email Maintenance allows creating an unlimited number of pre-defined email messages. Key information, such as Sales Order Number and Tracking Numbers, will be automatically filled into the email.

Navigation: Tools >> Setup >> Sales >> Email Maintenance

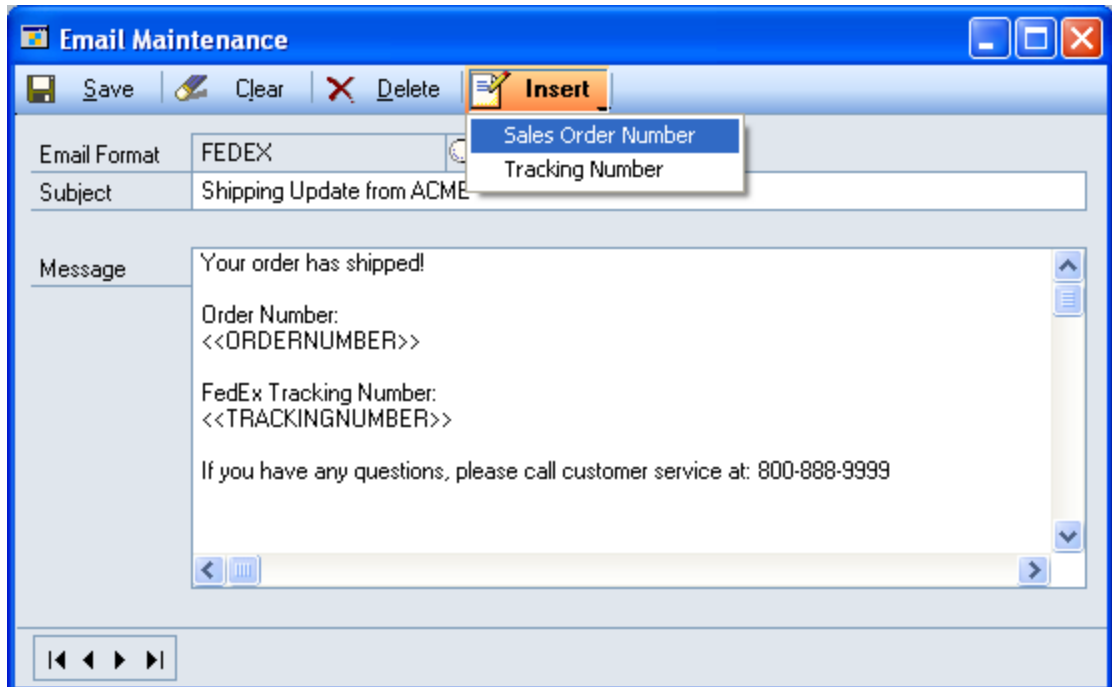


The screenshot shows a software window titled "Email Maintenance". At the top, there is a menu bar with icons for Save, Clear, Delete, and Insert. Below the menu bar, there are two input fields: "Email Format" with the value "FEDEX" and a search icon, and "Subject" with the text "Shipping Update for <<CUSTNAME>>". The main area is a large text box labeled "Message" containing the following text: "<<CONTACTNAME>>," followed by "Your order has shipped!", "Order Number: <<ORDERNUMBER>>", "FedEx Tracking Number: <<TRACKINGNUMBER>>", and "If you have any questions, please call customer service at: 800-888-9999". At the bottom of the window, there are navigation arrows.

Create an Email Format identifier and Subject. Two fields, Customer Name (<<CUSTNAME>>) and Contact Name (<<CONTACTNAME>>) can be used in the Subject or the Message.

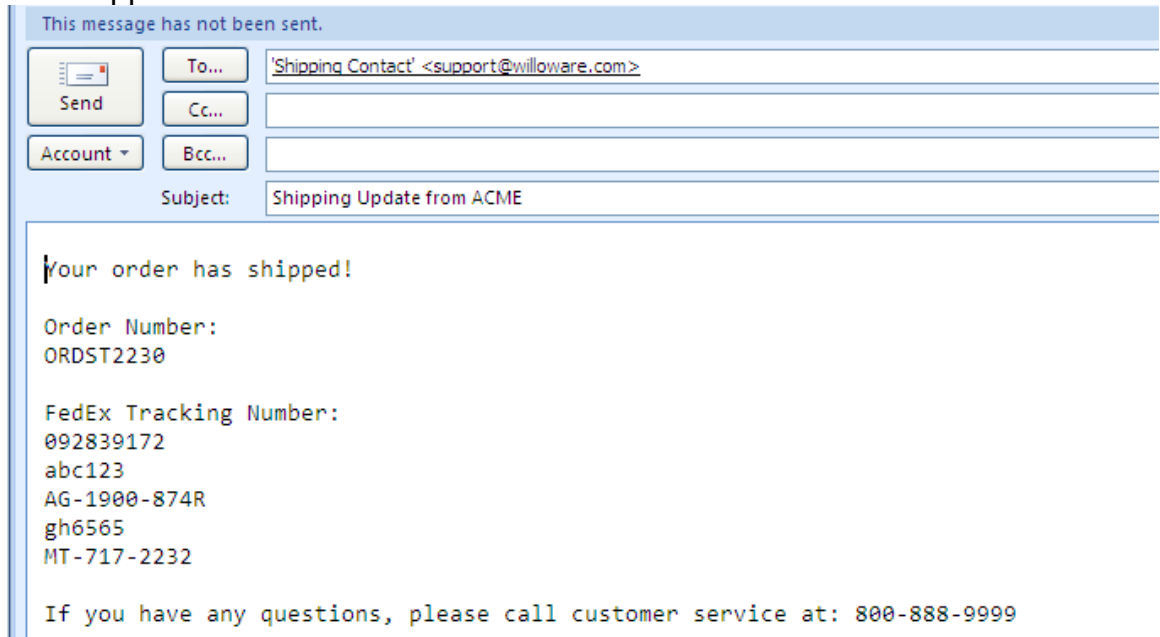
In the Message section write the message you want to send to the customer. When the email is created it can automatically insert the sales order number and/or any tracking numbers.

As shown above, <<ORDERNUMBER>> indicates where the system will put the Sales Order Number. Place the cursor where you want sales order number to appear, then click Insert >> Sales Order Number.



Follow the same process for inserting the <<TRACKINGNUMBER>> tag.

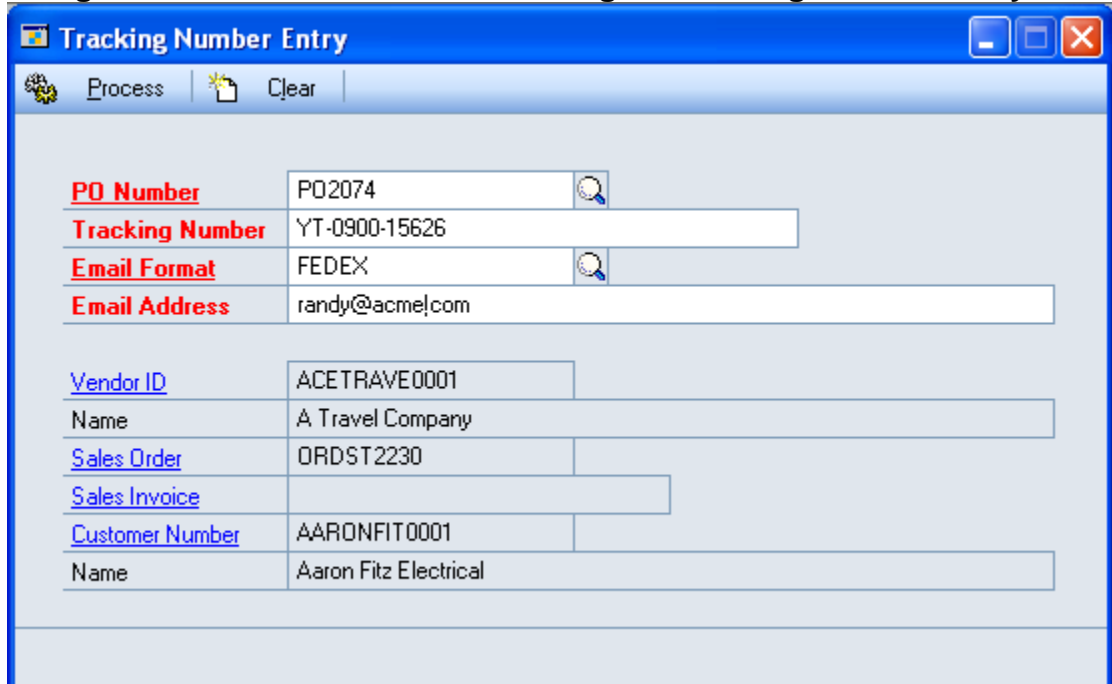
When the email is created, if there are multiple tracking numbers on the Sales Order, all of them will be added. Below is an example of how the email appears:



Tracking Number Entry

Tracking Number Entry updates the sales order in a SOP-POP link with the shippers tracking number (which is received when the vendor ships the drop-ship item), and generates an email notification to the customer that the product has been shipped.

Navigation: Transactions >> Purchasing >> Tracking Number Entry.



The screenshot shows a software window titled "Tracking Number Entry". At the top, there are buttons for "Process" and "Clear". The form contains several fields:

PO Number	PO2074
Tracking Number	YT-0900-15626
Email Format	FEDEX
Email Address	randy@acme.com
Vendor ID	ACETRAVE0001
Name	A Travel Company
Sales Order	ORDST2230
Sales Invoice	
Customer Number	AARONFIT0001
Name	Aaron Fitz Electrical

Select the PO. The system will check that the PO is linked to a SO. Only SOP-POP Link documents may be used here.

Enter the Tracking Number, and select an Email Format.

The Email Address will automatically pull from the Internet Information window attached to the Customers primary address.

When you click Process, the Tracking Number will be saved to the Sales Document Tracking Numbers, and an email will be created in your OUT BOX in Microsoft Outlook.