

114370 AR STATEMENT EMAILS – CUSTOMER CODE AND NAME

1 INTRODUCTION

The *AR Statement* feature has been updated so that when emailing statements, it is possible to add the customer code and / or customer name as part of the email subject. This makes it easier to understand which customer an reply email relates to.

2 BENEFITS

- ✓ Easier to follow up email replies – can identify which customer account it relates to – even if they don't keep the attached statement in the email

3 SETUP

The *AR Statements* screen has been modified to include new functionality to configure whether this is to be included in the subject.

The screenshot shows the 'AR Statement (RAD)' software window. The 'Options' tab is active, displaying various configuration settings. The 'Report Name' is 'TEST EMAIL SUBJECT WITH CUSTOMER CODE'. Under 'Aging options', 'Aged by period end date' is checked. The 'Email subject' field is pre-filled with 'Your statement is attached - customer <Cust Code> <Cust Name>'. A red arrow points to the '<Cust Code>' placeholder in the subject line. Other fields include 'Forward transactions' (Forward), 'Current transactions' (31/01/2016), 'First period' (31/12/2015), 'Second period' (30/11/2015), 'Third period', and 'Fourth period'. The 'Logo options' section has 'Print all statements with logo' checked. The 'Email subject' field also includes a checkbox for 'Edit email before sending'. At the bottom, there are buttons for 'Preview', 'Email', 'Print', and 'Schedule'.

Insert the tag <Cust Code> to include the customer code and <Cust Name> as part of the email subject.

4 DESCRIPTION / USAGE

When the statements are emailed, if these tags are used, they are substituted with the customer code or name.

The screenshot shows the 'Customer Maintenance' window for 'Emma@INTL\DOC' licensed to 'Bass Internal Customer'. The 'References' tab is active, showing the following details:

- Code:** ALICEMC
- Name:** ALICE MACCA CHILDRENS BOUTIQUE
- Account Balance:** 245,122.48 AUD
- Phone Number:** [Empty]
- A.C.N.:** [Empty]
- A.B.N.:** A.B.N.
- Currency:** AUD
- Store Code:** STORE
- Invoice Contact:** EMMA GIRSCHIK
- City:** RICHMOND
- Trade name:** ALICE MACCA BOUTIQUE
- State:** VIC
- Address:** LEVEL 1
- Country:** AUSTRALIA
- Address 2:** 1 SWAN STREET
- Post Code:** 3121

Customer References Table:

Reference	Code
Whouse	AUSTRALIA
SalesPr	AU Wholesale
ProdMap	
Terr.	VIC
C.Class	MINORS
C.Group	BOU
InvForma	18021
Company	1
CustType	Wholesale
Interest	24
Division	Jive

Supplier code: [Empty]

Credit Warehouse: [Empty]

Charge To: Sender Receiver

Carrier: TEST

On-forwarder: [Empty]

Service Type: Road CODE

Factor:

- Code:** [Empty]
- Name:** [Empty]
- DC:**
- Code:** [Empty]
- Name:** [Empty]
- Bill To:**
- Code:** ALICEMC
- Name:** ALICE MACCA CHILDRENS BOU
- Accountant:**
- Code:** [Empty]
- Name:** [Empty]

Customer code and name will be added to the email subject

