Today's tip comes to us from our South Fuel Support Person: Kristy.   Thanks Kristy!

"Going Green"- E-commerce

Most everyone has heard the term 'Going Green', so if you were thinking about how to use your software to Go Green, this tip is for you. I will cover the E-commerce module which can be purchased through RCC Sales Representatives. For those of you that already have this module, you may find some useful tips you may not have been aware of.

With E-commerce, you can email statements, invoices, and reports via email programs, such as outlook. How convenient would it be to be able to email customer statements and invoices instead of printing and sending via postal mail, while saving money and paper? Even so, if you print out certain reports throughout the year to send to someone such as your accountant, how convenient would it be to be able to just email the report to them?

Currently, we support Outlook, and SMTP.   It does not support Outlook Express. Refer to our website in our tech tips to compare the advantages of Outlook versus SMTP. You will need to provide your mail server and a return e-mail address to get started.

After you have purchased our E-commerce module, an RCC support personnel will contact you to do the necessary setup for E-commerce. Once that is complete, the next step is to setup your customers to receive E-statements and E-invoices, explained below.

Setup customers to receive E-statements and E-Invoices

Users must Flag their customers for which type of document to be emailed.

During initial setup, if email addresses are already setup on customer accounts, RCC support staff may be able to run a program to do this step below for you, but for future email addresses that need to be setup, you must do the steps below.

Navigate to File Maintenance>Customer>Customer Location
Select the customer then,
Click on the contact hyperlink – this will show you your contact information, email addresses AND also if they're setup to receive their invoice, statement OR both via email.

You'll see E-Invc, E-Stmt and E-Ltr fields
The number in these fields, correlates to which email address will be used.
Perhaps, the A/P contact at a company would be on line 1 and they just want the invoices, so in the 'E-Invc' field, I would enter a '1', but perhaps the statement needs to be emailed to the contact on line 2, so then in the 'E-Stmt' field, I would enter a 2.

Once that is completed, then when you run statements or print invoices for those customers, an email with that document attached will automatically be sent to that customer. When running statements or invoices, you do not have to do anything different, you will choose the same printer you normally choose.

Customers who have Email turned on (meaning they have a value in the E-Stmt or E-Invc field), will automatically receive an email, and whereas the customers who do not, will print a paper form as usual. Typically, we can set up RCC so that email customers will receive the same 'form' as the paper customers do.

E-commerce Tips

If you have ever wondered how to send general emails directly from RCC, here is how.
Navigate to File Maintenance>Customer>Customer Location
Select the customer then,
Notice how the 'E-mail' field is a hyperlink, when you click on this, Outlook or whichever email program you are using will automatically pull up an email ready to be sent to that contact in contact #1 field.

So, then, you ask, how do I send an email to the other contacts I have stored??
In this case, you would need to click on the 'contact' hyperlink, and then click on the # field to the corresponding email address you wish to send an email to, (notice how each # is a

hyperlink), so if I wanted to send an email to my contact in #2

If you need to send invoices or statements to multiple email addresses, we can support this as well. You can enter multiple emails in ONE field by using a semicolon to separate the emails, see below. Now invoices will be sent to apcontact@bi.net and pj@bi.net.

| Customer General | Credit | Loc General | Loc List | User Defined | Equip List | Branches |

Cust ID VILBIR   Acct #   75
Name   Village of Bird Island
Addr   140 So Main St
         PO Box 197
C/S/Z   Bird Island   MN ▾   55310

Locs 1   ● Residential
Alt Adr □   ○ Commercial
Outstanding SWO   0
Approved Dlvs   0

Contacts

Contacts	Last Name	Extension		E-mail Addr
Pauline	Jones	25	1	apcontact@bi.net;pj@bi.net
Jack	Smith	28	2	jts@bi.net
			3	
			4	
			5	
			6	
			7	
			8	

☐ Corp   E-Invc 1   Web inquiry password ********
                    E-Stmt 2   Web Logins LTD   0
                    E-Ltr 0   Web Attempts LTD   0

[Return]

If you need to preview invoices before emailing, you would just need to contact RCC support staff to turn on the preview function for invoices. However, this would mean all invoices would preview before being emailed or printed.