



Emailing Purchase Orders, Supplier Returns, Customer Invoices and Statements from CI Office

User Guide



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This manual describes the processes of emailing purchase orders and supplier returns directly to your suppliers and invoices/credit notes and statements directly to your customers from Counter Intelligence Office.

Settings

Email details

SMTP Server: mail.kudos.net.nz

SMTP Port: 25

User Name: lauren@kudos.co.nz

Password: *****

SMTP SSL:

From Address: support@kudos.co.nz

To Address: brendon@kudos.co.nz

Subject: Invoice #010071 from Demo

Any change made to the Message will be returned as the default message for subsequent emails. A %d in the message is automatically changed to the document description.


Message: Please find attached %d.
If you are unable to view this document please contact us immediately.
Thanks

Hide this dialogue for future emails (can be restored in System Settings):

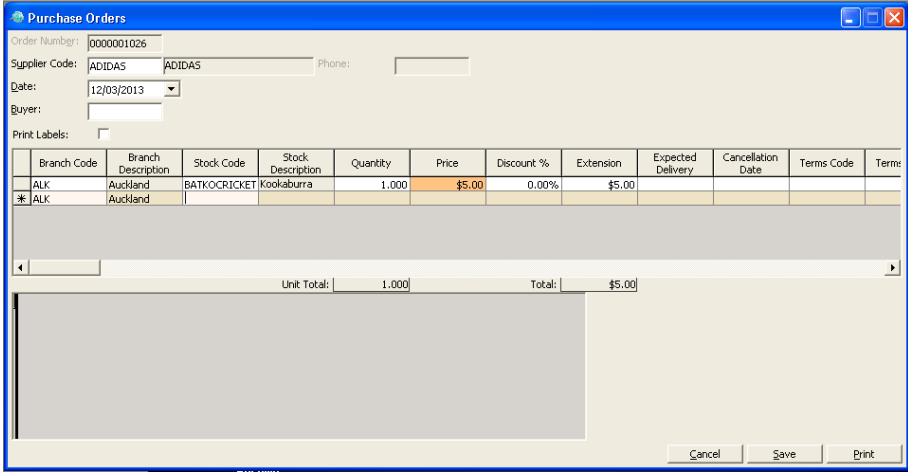
Cancel Send

- SMTP Server:** this is whoever your Internet Service Provider is i.e. smtp.vodafone.co.nz
- SMTP Port:** 25 (this shouldn't need to be changed)
- User Name:** user name for which email account will be sending the emails through.
- Password:** the password for the user name used above.
- SMTP SSL:** can be left unchecked
- From Address:** the email address that you want the emails to display
- To Address:** this is pulled from the Customer Account
- Subject:** the subject that will appear on the email
- Message:** this is the message that will display on each email that is sent through.
- Hide this dialogue for future emails (can be restored in System Settings):**
this prevents the Email Details window from appearing the next time you send an email.

Emailing Purchase Orders

Right Click on the Purchase Icon  in Counter Intelligence Office to select *Create or Modify an Order*.

Fill in the Purchase Order with the required information or recall an existing purchase order that you know is already in the system.



Purchase Orders

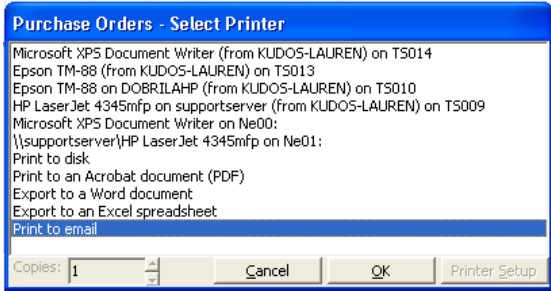
Order Number: 000001026
 Supplier Code: ADIDAS ADIDAS Phone:
 Date: 12/03/2013
 Buyer:
 Print Labels:

Branch Code	Branch Description	Stock Code	Stock Description	Quantity	Price	Discount %	Extension	Expected Delivery	Cancellation Date	Terms Code	Terms
ALK	Auckland	BATKOCRICKET	Kookaburra	1.000	\$5.00	0.00%	\$5.00				
* ALK	Auckland										

Unit Total: 1.000 Total: \$5.00

Buttons: Cancel Save Print

Click on *Print*; when the first *Select Printer* window appears select *Print to email* and click *OK*.



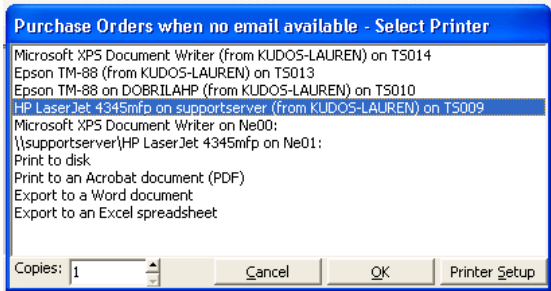
Purchase Orders - Select Printer

Microsoft XPS Document Writer (from KUDOS-LAUREN) on TS014
 Epson TM-88 (from KUDOS-LAUREN) on TS013
 Epson TM-88 on DOBRILAHP (from KUDOS-LAUREN) on TS010
 HP LaserJet 4345mfp on supportserver (from KUDOS-LAUREN) on TS009
 Microsoft XPS Document Writer on Ne00:
 \\supportserver\HP LaserJet 4345mfp on Ne01:
 Print to disk
 Print to an Acrobat document (PDF)
 Export to a Word document
 Export to an Excel spreadsheet
 Print to email

Copies: 1

Buttons: Cancel OK Printer Setup

When the second window appears it is asking what action to take when there is no email address against the Supplier; select a printer or one of the other options that is available to you.



Purchase Orders when no email available - Select Printer


Microsoft XPS Document Writer (from KUDOS-LAUREN) on TS014
 Epson TM-88 (from KUDOS-LAUREN) on TS013
 Epson TM-88 on DOBRILAHP (from KUDOS-LAUREN) on TS010
 HP LaserJet 4345mfp on supportserver (from KUDOS-LAUREN) on TS009
 Microsoft XPS Document Writer on Ne00:
 \\supportserver\HP LaserJet 4345mfp on Ne01:
 Print to disk
 Print to an Acrobat document (PDF)
 Export to a Word document
 Export to an Excel spreadsheet

Copies: 1

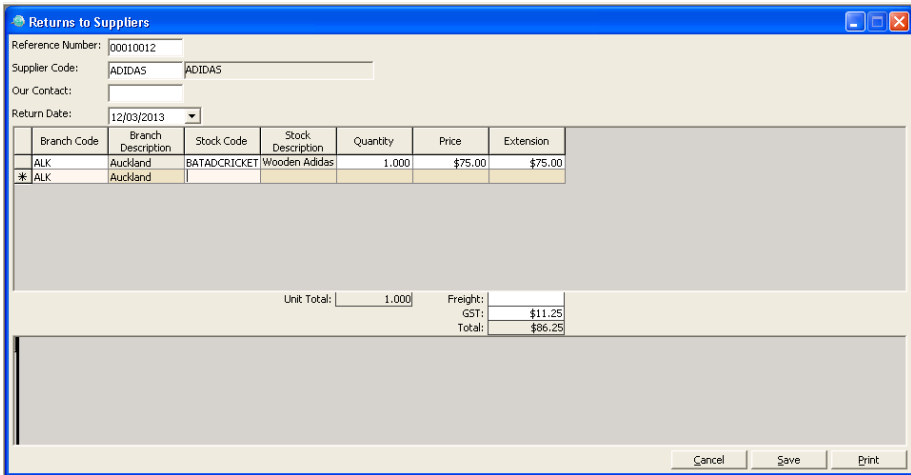
Buttons: Cancel OK Printer Setup

Once you have clicked on the second print option the email window will appear for you to click *send*, or if you have disabled this settings window the purchase order will be emailed or printed if there is no valid email address.

Emailing Supplier Returns

Right Click on the Supplier Icon  in Counter Intelligence Office to select *Returns to Suppliers*.

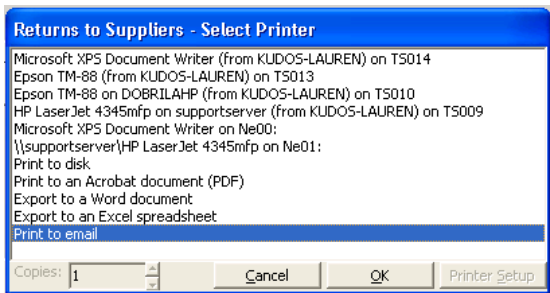
Fill in the Returns to Supplier with the required information or recall an existing supplier return that you know is already in the system.



Branch Code	Branch Description	Stock Code	Stock Description	Quantity	Price	Extension
ALK	Auckland	BATADCRICKET	Wooden Adidas	1.000	\$75.00	\$75.00

Unit Total: 1.000 Freight: GST: \$11.25
Total: \$86.25

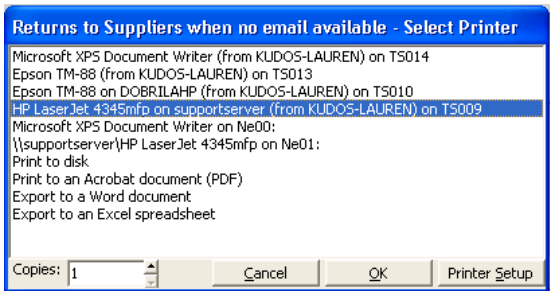
Click on *Print*; when the first *Select Printer* window appears select *Print to email* and click *OK*.



Microsoft XPS Document Writer (from KUDOS-LAUREN) on TS014
Epson TM-88 (from KUDOS-LAUREN) on TS013
Epson TM-88 on DOBRILAHP (from KUDOS-LAUREN) on TS010
HP LaserJet 4345mfp on supportserver (from KUDOS-LAUREN) on TS009
Microsoft XPS Document Writer on Ne00:
\\supportserver\HP LaserJet 4345mfp on Ne01:
Print to disk
Print to an Acrobat document (PDF)
Export to a Word document
Export to an Excel spreadsheet
Print to email

Copies: 1 Cancel OK Printer Setup

When the second window appears it is asking what action to take when there is no email address against the Supplier; select a printer or one of the other options that is available to you.




Microsoft XPS Document Writer (from KUDOS-LAUREN) on TS014
Epson TM-88 (from KUDOS-LAUREN) on TS013
Epson TM-88 on DOBRILAHP (from KUDOS-LAUREN) on TS010
HP LaserJet 4345mfp on supportserver (from KUDOS-LAUREN) on TS009
Microsoft XPS Document Writer on Ne00:
\\supportserver\HP LaserJet 4345mfp on Ne01:
Print to disk
Print to an Acrobat document (PDF)
Export to a Word document
Export to an Excel spreadsheet

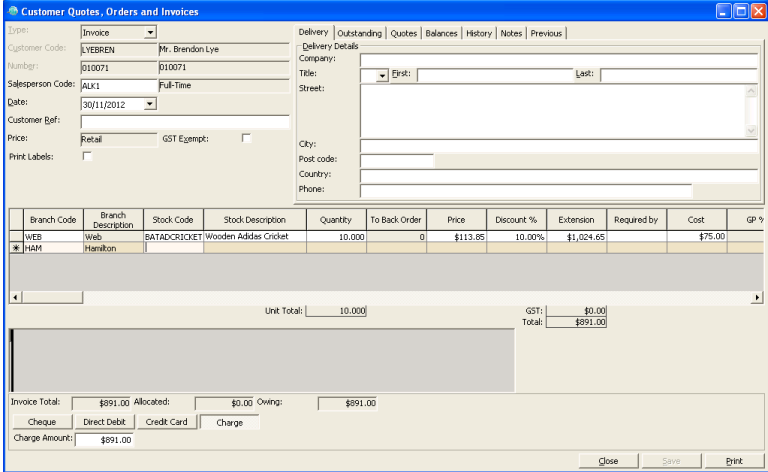
Copies: 1 Cancel OK Printer Setup

Once you have clicked on the second print option the email window will appear for you to click *send*, or if you have disabled this settings window the supplier return will be emailed or printed if there is no valid email address.

Emailing Invoices / Credit Notes

Right Click on the Sell Icon  in Counter Intelligence Office to select *Create or Modify a Quote, Order or Invoice*.

Fill in the Quote, Order or Invoice with the required information or recall an existing Quote, Order, or Invoice that you know is already in the system.



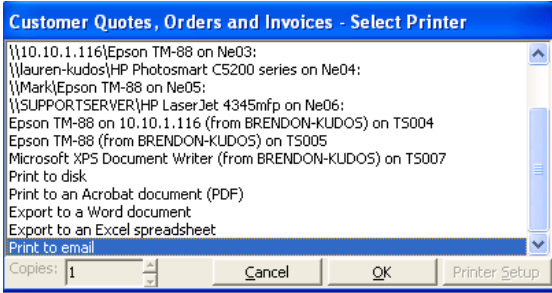
Branch Code	Branch Description	Stock Code	Stock Description	Quantity	To Back Order	Price	Discount %	Extension	Required by	Cost	GP %
WEB HAM	Hampton	BATADCRICRET	Wooden Adides Cricket	10,000	0	\$113.85	10.00%	\$1,024.65		\$75.00	

Unit Total: 10,000
GST: \$0.00
Total: \$891.00

Invoice Total: \$891.00 Allocated: \$0.00 Owing: \$891.00

Charge Amount: \$891.00

Click on *Print*; when the first *Select Printer* window appears select *Print to email* and click *OK*.

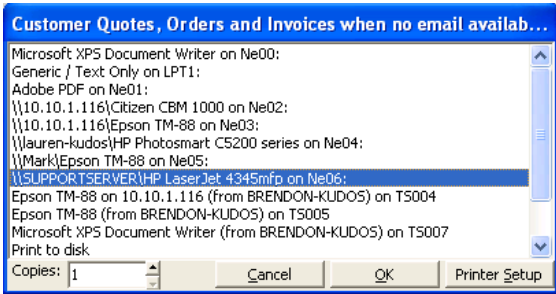


Customer Quotes, Orders and Invoices - Select Printer

- \\10.10.1.116\Epson TM-88 on Ne03:
- \\lauren-kudos\HP Photosmart C5200 series on Ne04:
- \\Mark\Epson TM-88 on Ne05:
- \\SUPPORTSERVER\HP LaserJet 4345mfp on Ne06:
- Epson TM-88 on 10.10.1.116 (from BRENDON-KUDOS) on TS004
- Epson TM-88 (from BRENDON-KUDOS) on TS005
- Microsoft XPS Document Writer (from BRENDON-KUDOS) on TS007
- Print to disk
- Print to an Acrobat document (PDF)
- Export to a Word document
- Export to an Excel spreadsheet
- Print to email**

Copies: 1

When the second window appears it is asking what action to take when there is no email address against the Customer Account; select a printer or one of the other options that is available to you.



Customer Quotes, Orders and Invoices when no email availab...

- Microsoft XPS Document Writer on Ne00:
- Generic / Text Only on LPT1:
- Adobe PDF on Ne01:
- \\10.10.1.116\Citizen CBM 1000 on Ne02:
- \\10.10.1.116\Epson TM-88 on Ne03:
- \\lauren-kudos\HP Photosmart C5200 series on Ne04:
- \\Mark\Epson TM-88 on Ne05:
- \\SUPPORTSERVER\HP LaserJet 4345mfp on Ne06:
- Epson TM-88 on 10.10.1.116 (from BRENDON-KUDOS) on TS004
- Epson TM-88 (from BRENDON-KUDOS) on TS005
- Microsoft XPS Document Writer (from BRENDON-KUDOS) on TS007
- Print to disk

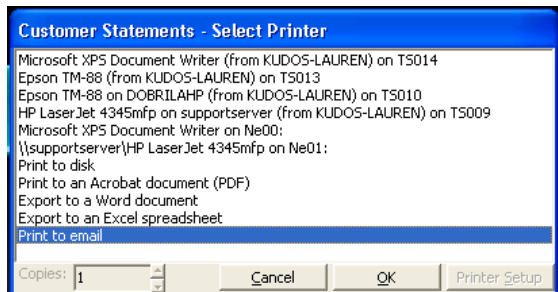
Copies: 1

Once you have clicked on the second print option the email window will appear for you to click *send*, or if you have disable this settings window the invoice/credit note will be emailed or printed if there is no valid email address.

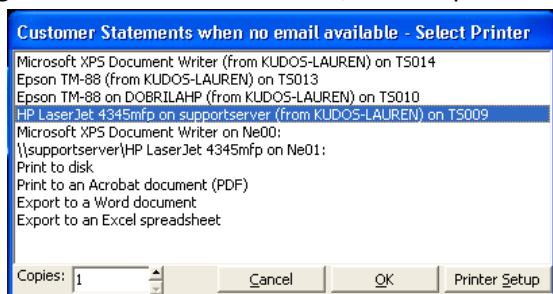
Emailing Statements

Right Click on the Customer Icon  in Counter Intelligence Office to select *Print Statements*.

When the first *Select Printer* window appears select *Print to email* and click *OK*.



When the second window appears it is asking what action to take when there is no email address against the Customer Account; select a printer or one of the other options that is available to you.



Fill in the Print Customer Statements with the required information and click *Print*.

Once you have clicked on the print option the email window will appear for you to click *send*, or if you have disabled this settings window the statements will be emailed or printed if there is no valid email address.

Updating the Email Settings

If you need to change the settings again, you will need to go into Setup and System Settings and put a checkmark against the option: Show email dialogue. This will make the prompt from above appear the next time you try to print another email

System Settings	
Attribute 1 Description	Colour
Attribute 2 Description	Size
Company Address 1	
Company Address 2	
Company Address 3	
Show email dialogue	<input checked="" type="checkbox"/>
Alternating row shading colour in Customer Quotes, Orders and Invoices	<input type="text"/>
Disable Colour/Size grid in Customer Quotes, Orders and Invoices	<input type="checkbox"/>
GST Inclusive Customer Quotes, Orders and Invoices	<input checked="" type="checkbox"/>
Customer Quotes, Orders and Invoices Layout	Portrait