

SedonaEmail

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Sending Invoices to Customers via Email

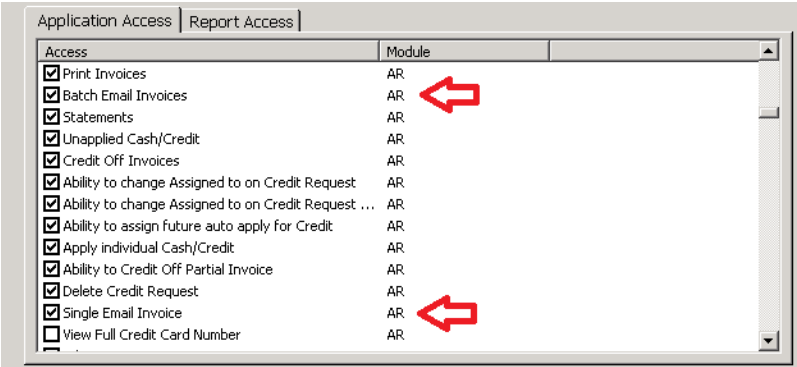
SedonaEmail is a new feature for SedonaOffice that provides functionality for sending email versions of invoices to your customers. The invoice that the customer receives is embedded directly into the email so you need not worry about firewall or anti-virus software, blocking the email due to attachments. The design is based on the Bridgestone Standard invoice form and provides for a presentable invoice format with plenty of information.

Setting Up SedonaEmail for Use

When you are ready to implement SedonaEmail, you need to contact support to arrange for activation of the feature. The SedonaOffice staff will configure the connection from your system to the email servers and provide the necessary credentials for login. Once the system is set-up, no further configuration needs to be done.

Providing Email Functionality to Your Employees

SedonaEmail provides two permission levels in User Group setup: "Single Email Invoice" and "Batch Email Invoice."



Access	Module
<input checked="" type="checkbox"/> Print Invoices	AR
<input checked="" type="checkbox"/> Batch Email Invoices	AR
<input checked="" type="checkbox"/> Statements	AR
<input checked="" type="checkbox"/> Unapplied Cash/Credit	AR
<input checked="" type="checkbox"/> Credit Off Invoices	AR
<input checked="" type="checkbox"/> Ability to change Assigned to on Credit Request	AR
<input checked="" type="checkbox"/> Ability to change Assigned to on Credit Request ...	AR
<input checked="" type="checkbox"/> Ability to assign future auto apply for Credit	AR
<input checked="" type="checkbox"/> Apply individual Cash/Credit	AR
<input checked="" type="checkbox"/> Ability to Credit Off Partial Invoice	AR
<input checked="" type="checkbox"/> Delete Credit Request	AR
<input checked="" type="checkbox"/> Single Email Invoice	AR
<input type="checkbox"/> View Full Credit Card Number	AR

As the names imply, "Single Email Invoice" gives a user access to all of the single email functionality in the invoice display and "Batch Email Invoices" gives a user access to the Batch sending routine from the main A/R Tree. These permissions are exclusive, so any user that requires rights to perform both of these activities will need both boxes checked! Once you have checked the appropriate boxes for a User Group, anyone in that User Group will have access to these features.

Configuring a Customer to Receive Emails

Email addressing and Email preference are controlled by the customer's bill-to record.

Customer Billing 10111 (CDM DATA)

Customer Information

Customer # 10111

Customer Name Abc Glass Company

Billing Information | Contacts

Inactive
 Primary Mail

Residential Commercial

Name Abc Glass Company

Additional Name

Address... 37-43 Sullivan Street
Detroit, MI 48201

Phone 1 (586) 785-5566 Primary RMR
Phone 2 Primary Service
Fax Primary Job
Email JimM@SedonaOffice.Com Primary Other

Email Invoices

Copy Billing Address to Site

Save Close

Emails designated for this customer will default to the email address entered in the indicated space. If this space is blank, the customer will not be eligible for emailing of invoices! The “Email Invoices” check box sets the preference for whether this customer will receive invoices via email. If the box is checked, all invoices created for this Bill-to will start with the “In Email Queue” setting checked. This setting has no impact on whether the customer receives paper invoices.

IMPORTANT

Each bill-to record on a customer is treated separately so you must enter the email address and decide the email preference for each bill-to record.

Single Invoice Emailing

If the user has permission to “Single Email Invoice”, the invoice screen will appear as pictured below showing the Single Email button and the Email History Button.

*** Multiple Tax Groups - Invoice Locked ***

Customer ID: 01111 Category: A/R Account: 110110 Tax Group: OH-Cuyahoga County

Invoice # 279295 10/1/2015 - 12/31/2015

Site: **Abc Glass Company**
37-43 Sullivan Street
Detroit, MI 48201

Invoice Date: 10/1/2015 Aging Date: 10/1/2015
Branch: MI P.O. Number:
Warehouse: Term: Due On Receipt
Invoice Type:
Cycle Bill: Posting Date: 10/1/2015
Salesperson: N/A

Items: \$802.50

Item	Site	Months	Rate	Amount	Memo
INSP Core	Inspection Contract	3	75.00	225.00	
NON-Taxable	Monitoring	3	77.50	232.50	
Service Agreement	Service Contract	3	37.50	112.50	
NON-Taxable	Monitoring	3	77.50	232.50	

Description: Recurring Contract: Memo: Sub Total: 802.50 Tax: 37.29 Total: 840.29 Balance Due: 840.29

Complete Add to Print Queue Last Printed: 11/19/2015 Add to Email Queue

Buttons: Invoice List EFT Save Close

Email a Single Invoice (circled in red)

Email History (circled in red)

Clicking the Email Invoice button brings up the following screen:

Invoice #279295 (COM DATA)

From: Sedona Email <SedonaEmail@SedonaOffice.com>

Reply To: SedonaEmail@SedonaOffice.com

To: JimM@SedonaOffice.Com, JimM@PerennialSoftware.Com

Template: Sedona Office Invoice Test

Subject: SedonaOffice Invoice #279295

Additional Note On This Email

Here is the email copy of your invoice that you requested. This is seriously past due, please pay ASAP!!!! If you have any questions, please call Jim at 734-414-0760

You can type whatever you like in this area and it will appear in the body of the email! (circled in red)

Buttons: Send Cancel

Updated status for 0 items.

To

From here you can review and edit the destination email address listed in the "To" section. The default value of this address is taken from the set-up of the bill-to record associated to the invoice. You can add multiple recipients by separating additional email addresses with a comma. Note in the above screen this invoice will be sent to JimM@SedonaOffice.Com and JimM@PerennialSoftware.Com!

Template

This is the invoice template that the email server will use to build the contents of the email sent to the customer. Currently there is only one template available.

Subject

The default subject is the company and the invoice number. You can edit this as needed.

Additional Notes

This space is provided so that you can include a specific note associated to this email. The note will display at the top of the email, prior to the invoice section.

Once you are satisfied with these entries, you click **SEND** to finish or **CANCEL** to abort. If you click **SEND**, the system will write a confirmation that the email went out successfully.



If you receive an error, the error message will indicate the issue. You may need to contact SedonaOffice Support for assistance with any issues.

Below is an example of the invoice that went out as a result of the above process:

Here is the email copy of your invoice that you requested. This is seriously past due, please pay ASAP!!!! If you have any questions, please call Jim at 734-414-0760

Invoice #279295 on your account for Contracted Services (10/1/2015-12/31/2015).

Summary of Current Invoice

SedonaSecurity

417 Forest rd
Plymouth, MI 48170
7344140760

Invoice

Customer	Abc Glass Company
Customer Number	10111
Invoice Number	279295
Invoice Date	10/1/2015
PO Number	
PAYMENTS APPLIED THRU	03/17/2017
Job / Service Ticket #	

CURRENT CHARGES

Description		Amount
<i>Abc Glass Company, 37-43 Sullivan Street, Detroit, MI</i>		
3	Inspection Contract	75.00 225.00
3	Monitoring	77.50 232.50
3	Service Contract	37.50 112.50
3	Monitoring	77.50 232.50
	Subtotal:	802.50
Tax		37.79
Payments/Credits Applied		(0.00)
	Invoice Balance Due:	\$840.29

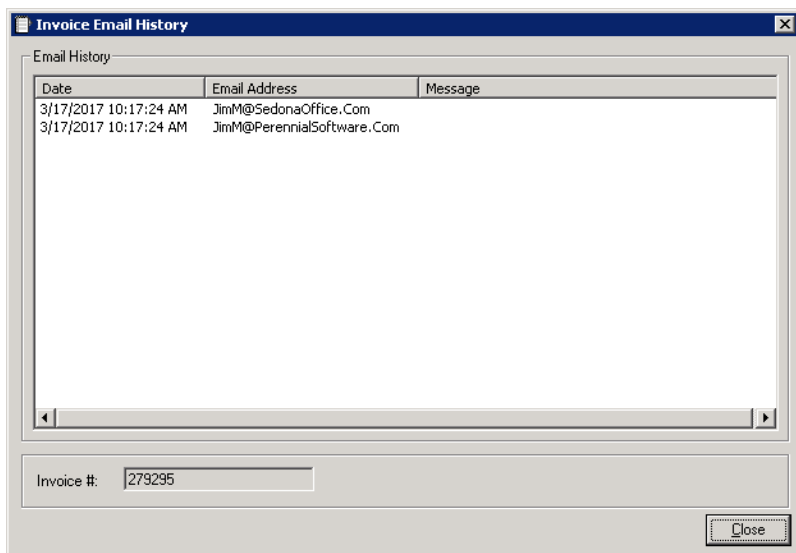
IMPORTANT MESSAGES

Message that will print on Std and bridges invoice

Note the Additional Message printed at the top of the email! Once you send the email, you can click **CANCEL** or the **X** to leave the email screen.

Email History

If you click the Email History button, the below will display.



This provides a listing of all email attempts made for this invoice. As this feature develops, additional messages from the email server will be displayed, including whether the email was viewed by the customer!

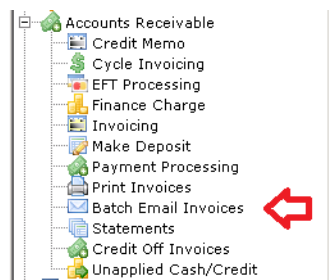
Add/Remove Invoice from Email Queue

All users that can edit invoices have the ability to add or remove an email from the Email Queue.

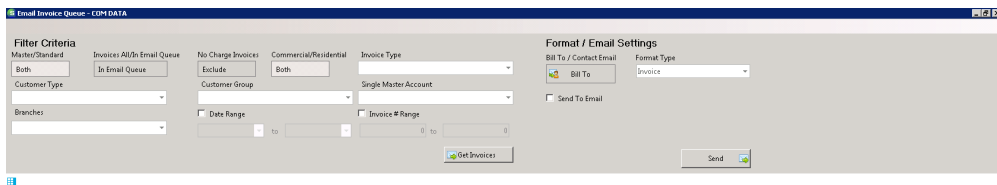


Batch Emailing of Invoices

If the user has permission for "Batch Email Invoices", they will see the below option on the main SedonaOffice tree.

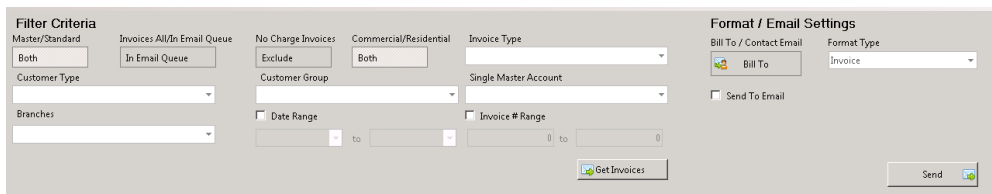


Double clicking this option will take them to the following screen:



Ready...

This is the Invoice Email Queue! All batch emailing of invoices takes place from this window and the items that show are populated based on the filters chosen.



Master/Standard

You can select to filter Master Account Invoices, Non-Master Account Invoices or Both by clicking this button.

Invoices All/In Email Queue

This button switches the filter between items with “In Email Queue” checked and those that do not.

No Charge Invoices

If these are excluded, any invoice with a balance = \$0 will not display.

Commercial/Residential

You can choose commercial customers, residential customers or both.

Invoice Type

Cycle, Service, Jobs, Other

Customer Type

Select the customer types you would like to include. The default is all.

Customer Group

Select the customer groups you would like to include. The default is all.

Single Master Account

Allows you to select all invoices associated with a particular Master account.

Branches

Select the branches you would like to include. The default is all.

Date Range

Checking this box allows the user to restrict the invoice selection to only invoices dated within this range.

Invoice Number Range

Checking this box allows the user to restrict the invoice selection to only invoices numbered within this range.

Bill-to/Contact Email

Switching this feature determines whether to use the email address associated to the bill-to address or the email address associated with the contact. In cases where the contact is not provided or the email address for the contact is blank, the bill-to email address is used.

Format Type

Currently, "Invoice" is the only option.

Send to Email

When you check this box, you are provided with a box to input an override email address. All emails sent while this box is checked are sent to the override email address instead of the designated email address. This is highly useful for testing and when emailing invoices internally.

Column Filters

Each column provides the functionality to sort by that column and filter the items displayed based on the settings you choose within that column.

Populating the Email Queue

Once you have your filters set, click the **GET INVOICES** button. This will populate the invoice listing using the filters selected. If you decide that you need to change any filters, simply change the filter settings and then click **GET**

INVOICES again.

Email Invoice Queue - CDM DATA

Filter Criteria
 Master/Standard: Invoices All/No Email Queue
 Both: All Invoices
 Customer Type: [Dropdown]
 Branches: [Dropdown]
 No Charge Invoices: Exclude
 Commercial/Residential: Both
 Invoice Type: [Dropdown]
 Single Master Account: [Dropdown]
 Date Range: [From] to [To]
 Invoice # Range: [From] to [To]

Format / Email Settings
 Bill To / Contact Email: [Dropdown]
 Format Type: [Dropdown]
 Send To Email:

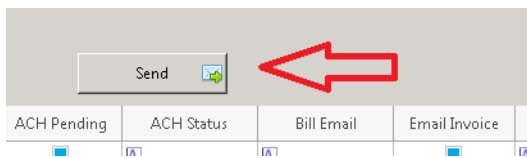
OH Invoices

Invoice #	Customer #	Type	Invoice Date	Amount	Net Due	Tax Amount	Aging Date	Customer Name	Branch	Term	ACH Pending	ACH Status	Bill Email	Email Invoice	Contact	Contact Em	
<input type="checkbox"/>	224823	20892	Cycle	02/02/2015	\$1745.90	\$1745.90	\$125.29	02/02/2015	Evergreen Medic...	OH	Due On Receipt	<input type="checkbox"/>		JimM@Sedona...	<input type="checkbox"/>	Mr. Fred Savage	JimM@Sedona...
<input type="checkbox"/>	249128	232	Cycle	02/05/2015	\$50.00	\$50.00	\$0.00	02/05/2015	Melissa Robinson	ME	Due On Receipt	<input type="checkbox"/>		melissar@penn...	<input type="checkbox"/>		
<input type="checkbox"/>	249218	229	Cycle	03/02/2015	\$142.50	\$142.50	\$0.00	03/02/2015	Smith, William	ME	Due On Receipt	<input type="checkbox"/>		wsmith@sybter...	<input type="checkbox"/>		
<input type="checkbox"/>	249246	147	Cycle	03/02/2015	\$170.47	\$170.47	\$0.00	03/02/2015	Kringie, Kosi	ME	Due On Receipt	<input type="checkbox"/>		KringieK@Chr...	<input type="checkbox"/>		
<input type="checkbox"/>	249247	147	Cycle	03/02/2015	\$172.50	\$172.50	\$0.00	03/02/2015	Saint, Nicholas	ME	Due On Receipt	<input type="checkbox"/>		KringieK@Chr...	<input type="checkbox"/>		
<input type="checkbox"/>	249256	148	Cycle	03/02/2015	\$62.00	\$62.00	\$0.00	03/02/2015	Jones, May	ME	Due On Receipt	<input type="checkbox"/>		mrayjones@gm...	<input type="checkbox"/>		
<input type="checkbox"/>	249279	252	Cycle	03/02/2015	\$144.00	\$144.00	\$0.00	03/02/2015	Landi, Rebecca	ME	Due On Receipt	<input type="checkbox"/>		rebecca.landi@...	<input type="checkbox"/>		
<input type="checkbox"/>	249676	229	Cycle	03/02/2015	\$55.00	\$55.00	\$0.00	03/02/2015	DW206 FiveDorSe	ME	Due On Receipt	<input type="checkbox"/>		5.6.214@gmail...	<input type="checkbox"/>		
<input type="checkbox"/>	249882	22942	Cycle	03/02/2015	\$595.00	\$595.00	\$0.00	03/02/2015	Dapt Parki Bldg...	ME	Due On Receipt	<input type="checkbox"/>		jimm@sedonaO...	<input type="checkbox"/>		
<input type="checkbox"/>	250878	292	Cycle	03/02/2015	\$53.00	\$53.00	\$0.00	03/02/2015	Melissa Robinson	ME	Due On Receipt	<input type="checkbox"/>		melissar@penn...	<input type="checkbox"/>		
<input type="checkbox"/>	254635	45942	Cycle	03/02/2015	\$188.00	\$188.00	\$0.00	03/02/2015	Brookside Plaza	ME	Due On Receipt	<input type="checkbox"/>		billling@brook...	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	255254	14552	Cycle	03/02/2015	\$42.89	\$42.89	\$1.83	03/02/2015	American Stee...	ME	Due On Receipt	<input type="checkbox"/>		jmlkowsk@penn...	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	255369	22942	Cycle	03/02/2015	\$97.02	\$97.02	\$6.98	03/02/2015	Dapt Parki Bldg...	ME	Due On Receipt	<input type="checkbox"/>		jimm@sedonaO...	<input type="checkbox"/>		
<input type="checkbox"/>	255468	18113	Cycle	04/02/2015	\$710.38	\$710.38	\$27.88	04/02/2015	Abc Glass Comp...	ME	Due On Receipt	<input type="checkbox"/>		JimM@Sedona...	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	255818	148	Cycle	04/02/2015	\$71.50	\$71.50	\$0.00	04/02/2015	Jones, May	ME	Due On Receipt	<input type="checkbox"/>		mrayjones@gm...	<input type="checkbox"/>		
<input type="checkbox"/>	255840	152	Cycle	04/02/2015	\$72.00	\$72.00	\$0.00	04/02/2015	Landi, Rebecca	ME	Due On Receipt	<input type="checkbox"/>		rebecca.landi@...	<input type="checkbox"/>		
<input type="checkbox"/>	256273	229	Cycle	04/02/2015	\$20.00	\$20.00	\$0.00	04/02/2015	Dapt216 FiveDorSe	ME	Due On Receipt	<input type="checkbox"/>		5.6.214@gmail...	<input type="checkbox"/>		
<input type="checkbox"/>	256733	22942	Cycle	04/02/2015	\$148.52	\$148.52	\$6.98	04/02/2015	Dapt Parki Bldg...	ME	Due On Receipt	<input type="checkbox"/>		jimm@sedonaO...	<input type="checkbox"/>		
<input type="checkbox"/>	257366	292	Cycle	04/02/2015	\$53.00	\$53.00	\$0.00	04/02/2015	Melissa Robinson	ME	Due On Receipt	<input type="checkbox"/>		melissar@penn...	<input type="checkbox"/>		
<input type="checkbox"/>	262204	45942	Cycle	04/02/2015	\$16.50	\$16.50	\$0.00	04/02/2015	Brookside Plaza	ME	Due On Receipt	<input type="checkbox"/>		billling@brook...	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	262246	18083	Cycle	04/02/2015	\$1745.90	\$1745.90	\$125.29	04/02/2015	Evergreen Medic...	OH	Due On Receipt	<input type="checkbox"/>		JimM@Sedona...	<input type="checkbox"/>		
<input type="checkbox"/>	262403	12697	Cycle	04/02/2015	\$131.39	\$131.39	\$22.31	04/02/2015	Arianna English	OH	Due On Receipt	<input type="checkbox"/>		adrianna.english...	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	263487	14552	Cycle	04/02/2015	\$42.89	\$42.89	\$1.83	04/02/2015	American Stee...	ME	Due On Receipt	<input type="checkbox"/>		jmlkowsk@penn...	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	263982	21121	Cycle	04/02/2015	\$133.54	\$133.54	\$7.45	04/02/2015	Wellington Cove...	OH	Due On Receipt	<input type="checkbox"/>		jimm@sedonaO...	<input checked="" type="checkbox"/>		
<input type="checkbox"/>	265666	121	Cycle	05/02/2015	\$69.28	\$69.28	\$0.00	05/02/2015	Davis, Roger	ME	Due On Receipt	<input type="checkbox"/>		rogied@sedona...	<input type="checkbox"/>		
<input type="checkbox"/>	265258	147	Cycle	05/02/2015	\$157.50	\$157.50	\$0.00	05/02/2015	Kringie, Kosi	ME	Due On Receipt	<input type="checkbox"/>		KringieK@Chr...	<input type="checkbox"/>		
<input type="checkbox"/>	265265	148	Cycle	05/02/2015	\$31.00	\$31.00	\$0.00	05/02/2015	Jones, May	ME	Due On Receipt	<input type="checkbox"/>		mrayjones@gm...	<input type="checkbox"/>		
<input type="checkbox"/>	265278	152	Cycle	05/02/2015	\$72.00	\$72.00	\$0.00	05/02/2015	Landi, Rebecca	ME	Due On Receipt	<input type="checkbox"/>		rebecca.landi@...	<input type="checkbox"/>		
<input type="checkbox"/>	265408	213	Cycle	05/02/2015	\$58.00	\$58.00	\$0.00	05/02/2015	Mountain Retreat	Spain	Due On Receipt	<input type="checkbox"/>		emmet@sedona...	<input checked="" type="checkbox"/>		

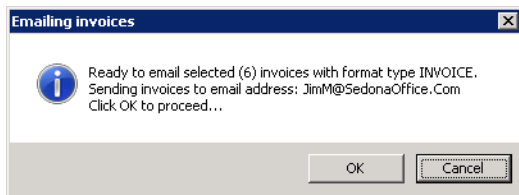
Found 224 Invoices.

Once the list is populated, you can check the associated box to email that invoice. If you want to check all, simply check the very top box and the system will check all. If you need to uncheck all, you can uncheck that box (if all are checked) or check and then uncheck the box to clear everything.

Once you have the desired invoices selected, you initiate the email process by clicking **SEND**.



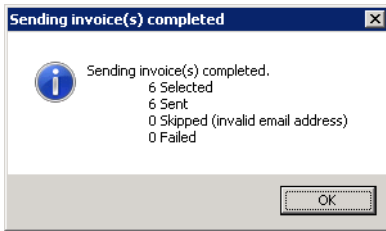
The system will prompt you to confirm that you are ready to email the selected items.



Click **OK** to continue or **CANCEL** to abort.

Once the emails are sent, you will get a confirmation screen indicating the success rate. If there are items that failed,

you can review the log to determine why the item failed.



When you are done with emailing invoices, simply click the X in the upper right hand corner to exit.