

Application	ChreosClient – Chreos 3
Module	Various
Access	Various
Minimum service pack	SP33
This document	E-Mailing Reports Ref 15.19 Release 2 Published February 2003

Overview

The ability to e-mail reports from within Chreos to clients and creditors is implemented through a number of screens. Examples of reports include debtor orders, packing slips, invoices and supplier orders.

Setup

The e-mail functionality must be activated and set up from “Printing setup (9.3)”.

- Select the menu option “Maintenance | Printing setup”.
- For each transaction that can be e-mailed there will be a different option within the “Printing setup” screen that needs to be activated and set up. For example the ability to e-mail a debtor invoice is set up on the “Clients | Invoices | E-mail” page of printing setup whereas the ability to e-mail a supplier order is set up on the “Creditors | Orders | E-mail” page.
- Select the required page.
- Tick the ‘Active’ check box and enter/select the required information.
- Refer to ‘Common settings – e-mail’ on the “Printing setup (9.3)” information sheet.

Client/Creditor Management

The e-mail details of each client and creditor that can have the reports e-mailed to them need to be individually set up.

- Select the menu option “Clients | Client management” or “Creditors | Creditor management”.
- Select the required client or creditor.
- Select the ‘E-mail’ page.

- Click the [Edit] button.
- Select 'Send e-mail using following settings'.
- Select the required settings or use the default settings.
- Click the [Save] button.
- Refer to 'E-mail' in the "Client management (3.1)" or "Creditor management (4.1)" information sheets.

To E-Mail a Report

For each of the following screens there is an 'E-mail this document' check box near the [Save] button.

- Client Orders
- Debtor Packing Slips
- Debtor Invoices
- Supplier Orders
- Creditor Payments

This checkbox will only be visible if the 'Active' checkbox has been ticked on the appropriate page in "Printing setup (9.3)". It will also be automatically ticked if the 'Send e-mail on document creation' checkbox has been ticked. It can be unticked for instances when the report does not need to be e-mailed.

To Re-Send an E-Mailed Report

This can be done in a variety of places.

Client / Creditor Management

- Select the menu option "Clients | Client management" or "Creditors | Creditor management".
- Select the required client or creditor.
- Select the required transaction from the 'Activities'/'Transactions' page.
- Select the 'Documents' page and the details of the transaction will be displayed.
- Click the [E-Mail] button.

Print Invoices

- Select the menu option "Print | Transactions | Invoices".
- Transfer the invoices to be e-mailed from the 'Available invoices' grid to the 'Invoices to print' grid.
- Select 'E-mail' or 'Print and e-mail' as the method and click the [Process] button.
- Refer to "Print debtor invoices (8.4)".

Related Issues

- If there are errors occurring when trying to e-mail a transaction they will appear in the Server log as one of the following:
 - **Communication Error** – This generally indicates a problem with the internet connection, proxy or network.
 - **Configuration Error** – This generally indicates that there is a problem with one of the set up options being used. This is often concerning the internet settings in “Setup (9.1)”.
 - **Report Creation Error** – This indicates that the report could not be created and therefore not sent. To correct this the report would need to be configured correctly.

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