

Chapter 2.12: PDF Email Attachments

Overview

This chapter will guide you through the process of setting up your system to create and attach .PDF formatted statements and invoices to emails that can be sent directly from within Route Manager.

Note: All emails sent from Route Manager go through the Customer Message Centre module.

This document has been separated into the following sections:

- Installation
- Configuring Route Manager
- Daily Processing
- Additional Options

Each section is covered in the order listed.



Installation

The installation process includes two steps:

- 1. Install document imaging software (Ghostscript)
- 2. Install a Postscript printer

Follow the steps below to complete the installation.

Document Imaging Software

The first step in the process requires the installation of a program that will convert your customer's statements and invoices to .PDF format. Ghostscript is a freeware program available to all users that can be downloaded after logging into our Web site <u>www.ARS247.com</u>. Search using the keyword: Ghostscript. This page will also include the instructions outlined within this document.

ADVANTAGE	-					Ren <u>Gol</u>	ote Support Meeting (Con	Simple Help Team Viewer tact Support MyGoLive Porta
		Home	Hardware Help	Support.	Supplies	Contact Us •	About	
								Ø Search.
		ESUL	TS FOR "GI	IOSTSC	RIPT"			
	How to set up (Ghostscript/	Postso	system to allow ript)	emailing	statements	and invoice	s 🗲	
	Are you unable to e Endow these endow	mail out st	alements, Invoice cop	es, Etc? In orde	ir to use emailly	ou must setup the	postcript and gh	ostscript printer.
	Script printer not se	tup and to	Ghostscript program	ot installed. Re	solution: Downi	oad and Read M	ore	

Make sure to select the Ghostscript option that matches your Operating System (either 32bit or 64bit).

After the Ghostscript software has been downloaded, initiate the installation by double-clicking on the downloaded file.





Complete the installation by following the installation prompts and selecting the default settings and installation directory:

•	GPL GI	iosiscript setup		
Choose Install L Choose the folde	ocation r in which to install GPL (Ghostscript.		S.
Select the directo	ory to install GPL Ghostso	cript in:		
Destination Fol	der			
Destination Fol C:\Program F	der Files \gs \gs9.06		E	Prowse
Destination Fol C:\Program F Space required: 3	der Files\gs\gs9.06 30.5MB		E	Browse
Destination Fol C: \Program F Space required: 3 Space available:	der Files\gs\gs9.06 30.5MB 109.4GB		E	Prowse
Destination Fol C:\Program F Space required: 3 Space available: rbifex. Software Inc	der 		E	Browse

NOTE: If multiple users on separate workstations will be processing .PDF files, install Ghostscript in a shared directory on the network (i.e., the RMA folder). Although Ghostscript will work across a network, there have been instances when workstations experience problems creating .PDF files in this environment. If you are experiencing problems, install Ghostscript locally on each machine.

Installing a Postscript Printer

After you have installed the Ghostscript program, a new virtual printer will need to be installed on each workstation. This printer will be used for processing .PDF print jobs.

NOTE: Depending on your current operating system, the following steps will vary slightly.

- 1. Browse to *Start > Printers and Faxes* on your PC.
- 2. Double-click on the Add Printer option.



3. On the *Local or Network Printer* page, select **Local Printer** and uncheck the 'Automatically Detect...' option (if applicable).



4. On the *Select a Printer Port* page, choose an available **LPT** port (LPT2 is recommended).

1	elect a Printer Port Computers communicate with printers through ports.
	Select the port you want your printer to use. If the port is not listed, you can create a new port.
	Use the following port: LPT1: (Recommended Printer Port)
	Note: Most computers use the LPT1: port to communicate with a local printer. The connector for this port should look something like this:
	C Create a new port: Type of port: Adobe PDF Port Monitor



5. On the *Install Printer Software* page, make sure to refer back to the ARS247.com Knowledge Base article to find the proper PostScript Printer for your version of Windows.

In this example, we will select **Apple** as the *Manufacturer*, and **Apple Color LaserWriter 12/600** as the *Printer*. As it is the proper Postscript printer to use for Windows 2000 and XP.

Add Printer Wizard					
Install Printer Software The manufacturer and model determine which printer software to use.					
Select the manufacturer and model of your printer. If your printer came with an installation disk, click Have Disk. If your printer is not listed, consult your printer documentation for compatible printer software.					
Manufacturer Printers Adobe Apple Color LW 12/660 PS Agfa Apple Color LaserWriter 12/600 Apollo Apple LaserWriter 12/640 PS Apple Image: Apple LaserWriter 12/640 PS Apple Image: Apple LaserWriter 16/600 PS Apple Image: Apple LaserWriter 16/600 PS Apple Image: Apple LaserWriter 16/600 PS					
Image: This driver is digitally signed. Windows Update Have Disk Itell me why driver signing is important Itell me why driver signing is important					
< Back Next > Cancel					

6. Click **Next** and enter a name for the printer, such as 'Postscript Printer' or RMA_Postscript or similar.

🤝 Ad	ld Printer		×
G	🚔 Add Printer		
	Type a printer name		
	Printer name:	Postscript Printer	

7. Click **Next** until the printer has been added successfully.

NOTE: The new printer can be shared on the network and accessed by your other workstations, if desired. Additionally, it is not recommended to establish the new printer as the default printer on the PC.



Installing the Postscript Printer in a Network Environment

If you shared your new *Postscript Printer* on the network, follow the steps below to connect the virtual printer to your remaining workstations.

- 1. Browse to Start > Printers and Faxes on your PC.
- 2. Double-click on the Add Printer option.
- 3. On the *Local or Network Printer* page, select the **Network Printer** option.

Add Printer Wizard

Local or Network Printer The wizard needs to know which type of printer to set up.	8
Select the option that describes the printer you want to use:	
C Local printer attached to this computer	
 Automatically detect and install my Flug and Flay printer A network printer, or a printer attached to another computer 	
To set up a network printer that is not attached to a print server, use the "Local printer" option.	
< Back Next > Cancel	

4. On the *Specify a Printer* page, select the 'Connect to this Printer...' option.

Add Printer Wizard	
Specify a Printer If you don't know the name or address of the printer, you that meets your needs.	u can search for a printer
What printer do you want to connect to?	
C Find a printer in the directory	
 Connect to this printer (or to browse for a printer, selence) Name: 	ect this option and click Next):
Example: \\server\printer	
Connect to a printer on the Internet or on a home or	office network:
URL:	
Example: http://server/printers/myprinter/.p	rinter
< Back	Next > Cancel



5. Enter the path to the printer on the network, or click *Next* to browse the network.

Add Printer Wizard
Specify a Printer If you don't know the name or address of the printer, you can search for a printer that meets your needs.
What printer do you want to connect to?
 Connect to this printer (or to browse for a printer, select this option and click Next): Name: \\projectmgr\Postscript Printer
C Connec (\projectmgr\Adobe PDF \\projectmgr\Microsoft Office Documen (\projectmgr\PDF995 URL:
Example: http://server/printers/myprinter/.printer
< Back Next > Cancel

6. Complete the remaining steps to add the network printer to the PC.

NOTE: It is not recommended to establish the new printer as the default printer on the PC.



Configuring Route Manager

The configuration process in Route Manager involves two steps:

- 1. Update Local Settings
- 2. Create email Statement Code

Complete the items below to complete the configuration process.

Update Local Settings

In order for Route Manager to properly convert invoices and payments to the .PDF option, you will need to define the *Postscript Printer* and *Ghostscript* settings within *Local Settings* on each workstation.

Navigate to *File* > *Local Settings*, and select the *Printers* tab. Click **Modify**, and select the **Postscript Printer** configured earlier from within the *Postscript Printer* field.



Next, select the Browse button beside the 'Path to Ghost Script' option:





Double-click on the 'gs' (Ghostscript) folder in the *Program Files* directory of your PC, or within the installation directory on the network.

NOTE: 'gs' is the default Ghostscript program installation folder; substitute your installation directory if necessary.

Please Select the	e Location of the (GhostScript Conve	erter (gswin32c.exe)	? X
Look in:	🛅 Program Files		- 3 🔌 📂 🖽 -	
Please Select the Look in: My Recent Documents Desktop My Documents My Computer	Location of the (Program Files Adobe Aurorisoft AVG CCleaner Citrix Common Files ComPlus Applica ComPlus Applica DAEMON Tools Dell Dell HostCD Dell Dell HostCD Dell FileZilla FTP Clie Google gs IcoFX 1.6	ations Lite	erter (gswin32c.exe)	Mozilla MSBui MSEC- MSN MSN G MSN Notep NVIDI Online Outloo Putty Quicki Refere Resea
My Network Places	GhostScript Files of tupe:	Application	<u> </u>	OK Cancel
	Files of type:	Application		Cancel
				//

Double-click on the 'gsX.XX' folder (depending on the version installed, the numbers displayed will vary).

Please Select the Location of the GhostScript Converter (gswin32c.exe)				? X
Look in:	🔁 gs	•	G 👂 📂 🖽 -	
My Recent Documents	📬 gs8.71 💲 uninstgs.exe			

Double-click on the 'bin' folder.

Please Select the Location of the GhostScript Converter (gswin32c.exe)				
Look in:	🔁 gs8.71 💌	G 🦻 📂 🎫		
My Recent Documents	i bin i doc i examples i b			



Double-click on the 'gswin32c.exe' or 'gswin64c.exe' file, depending on your Windows version.

Please Select the	Location of the Gh	ostScript Converter (gswin32	c.exe)	? ×
Look in:	🚞 bin		•	G 🔌 📂 🎫	
My Recent Documents Oesktop	S gswin32.exe S gswin32c.exe				

The path to Ghostscript will now be displayed within *Local Settings*. Click **Save** to complete the process.

Local sectings		
Local Setting	gs	
esktop Communications	Directories Printers	
Printers		740
Standard Printer	Adobe PDF Vise Standard Printer for All Printing	
Afternoon Report Printer	Adobe PDF	
Fax Printer		<u> </u>
Delivery Order Printer	Adobe PDF	EXIT
Impact Printer		
Label Printer		
Statement Printer	Adobe PDF	
Invoice Reprint Printer	Adobe PDF Use Invoice Reprint Printer for	
Postscript Printer	Postscript Printer	
BOL Printer	<u> </u>	
Packing Slip Printer	· · · · · · · · · · · · · · · · · · ·	
Path to Ghost Script	C1PROGRAM FILES\GS\GS8.71"	
Equipment Label Printer	•	

Repeat all of the steps above on each workstation.



Create E-Mail Statement Code

If you would like to transmit email statements to your customers, you will need to create or modify a *Statement Code* within RMA.

Navigate to *Lists > Customer Setup Codes > Statements Codes*. Create or modify an existing statement, and choose the 'E-Mail' option within the *Statement Types* column. Additionally, you may opt to include invoice copies with each statement.

RMT	Stat	tement Codes - E	
Statement Code	es.		
Layout Messages Bill Frequency	E-Mail Msg	E E-mail Statement	
Statement ID E Description E-mail State Statement Label Statement Statement Label Statement O No Statement Standard Statement Handheld Statements Fax E-Mail Standard Postcard Standard Postcard Standard Postcard	iment	Due Date Exclude Amounts Minimum 999999 99 Maximum 999999 00 Options Options Onclude Payment Voucher Pre-Printed Form Open Item Statement Open Item Statement Detail Side First Statement Include Date Extransl Open Item Statement Include Payment Coupon Bar Code Display Bottle Exchange Quantities Show Mini Signatures on Statement Include Invoice Comments on Statement Show Sales Rep on Statement	

he Statement Code.

NOTE: For further information on *Statements Codes*, refer to *User Guide A*.



Updating Customer Information

In order for your customers to receive emails from within Route Manager that contain .PDF attachments, each account will need to be updated by following the step below.

Email Address and Format

You will need to enter a valid email address on each customer's account that will receive emails in the program.

The email option can be found on the *Info* tab of *Lists* > *Customer Information*.

RM? Custome	er Information - 000010	
Customer Information	BANK / CREDIT CARD PACKAGE PLA	N
	Status: Active	e
	PENDING DELIVERY ORDERS	
Into \$ Invoices Credit Payment Info Contacts Route Ro	oute Info Products Equipment Stop History Orders	<u>(P9)</u>
Acct. No. 000010 Customer Type Manufactur	ring Home Branch 0001 <u>Advantage Water and Ic</u>	
Bill To	Contact Info	
Name	Phone 🖀 Ext Fax 🕸	
ARS Office	2096321122 209-632-6868	2.8
ZIP Code	Work Phone A Lt Cell A L	749
	Contact Contact Phone 🖀	1205
3201 Liberty Square Pkwy		
	Billing E-Mail Addresses	
Turlock	AR@ARSOffice.com	
Extra		
Store Number		
		EXIT
Legal Name	Sales Rep 1 SP	
	Rep 2 💽 Sales Rep 3 💽	
Note	Major Account Code 🗾 👻	
	,	
	-eStoreFront	
	Reset eStoreFront Account	
-	Disable eStoreFront Login	

NOTE: Multiple e-mail addresses can be entered by using the following format: email1@domain.com;email2@domain.com (there should not be any spaces after each semi-colon). Up to 254 characters can be used for all addresses in this field.

Repeat this step on each customer's account.



Update the Statement Code

Customers that will receive email statements in the system should be assigned to the new 'E-Mail' *Statement Code* created earlier.

The *Statement Code* can be assigned to each account on the *Credit* tab, and under *Billing/Statement* sub-tab, then the *Statement Options* section.

customer information - 000010		
Customer Information BANK/CREDIT CARD PACKAGE PL	AN	•
000010 M ARS Office Status: Activ	/e	
PENDING DE LIVERY ORDERS		
Info \$ Invoices Credit Payment Info Contacts Route Route Info Products Equipment Stop History Orders		99
Status/Contract Credit Terms Billing/Statement CMC Settings Additional Flags Reward Points		
Pricing and Promotion Master / Sub Billing Options	_	
Price Level Default		
Open Invoice 🔽 Master Bill		14
Promotional Price Group B Promo group code 2 Consolidated Stmt Master Bill Acct. No.		Port-
Refund Check Code		
Period Discount Code		
Statement E-mail Statement		
Statement Cycle AE Auto Email		1
2nd Statement AF Auto Fax		
Equipment Pant Options Rent Invoice Construction As Auto Standard		$\overline{\mathbf{\nabla}}$
Bent Colonder 1 Statement	.	
Statement Bild Bast	<u> </u>	EXIT
I Statement with Invoi	-	
M Mass Mail		
N No Statement		
	_	



Daily Processing

This section will guide you through the daily process followed when transmitting emails with .PDF attachments in Route Manager.

Generating E-Mail Statements

 Navigate to *Reports > Statements > Standard* Statements, and choose the 'E-Mail Statement' code. Enter the criteria desired, and select the Email button on the bottom of the screen.

RM7 Standard Statements				
Standard Statements				
Sort Option 1 by ZIP Code	Acct. No. From 000009 To 423350	ZIP Code From • To 99999 •	Major Acct. From To TEST -	Statement Type ID Description E Email
	Close Date 02/2 US Due 0	ates 9/2016 € e Credit Terms → Days From Close Date	☐ Include F ☐ Include I ☐ Pre-Print ☐ Open Ite ☐ Suppres ☐ Include S ☐ Include S	Payment Voucher nvolces C Standan Rental C Open def Form m Statement s Aging Stop Information Sobile Counts
	Incl ✓ Current ✓ 61 - 90 ✓ 121 - 150	ude	Detail Si 8 1/2 x 1 Include t Dont Inc Show Mi	de First I Invoice Format No Charge Items Iude Invoice Details ni Signatures on Statement
		1		

2. Choose the 'Yes' option, when prompted, to create the *E-mail Statement(s)*.



3. Each customer will receive an email similar to the following:

Subject: Advantage Water Demo E-Mail STATEMENT for Acct# 100000 (Advantage Route Systems) Attachments: 🔂 20070301_2110WYEAR.PDF (7 KB); 🔂 20070301_2110WYH19.PDF (3 KB)
Your Advantage Water Demo STATEMENT and invoice copies are attached.
To read and print the attached PDF document(s), you need Acrobat Reader, which is available as a <u>free download from Adobe</u> for most systems.

The first file attached contains the statement, and the second file contains the invoice copies (if included).



Emailing PDF Statements within Customer Information

.PDF statements can also be generated on an individual basis within each customer's account by navigating to the *Invoice Listing* screen within the 'Invoices' tab within *Customer Information*.

Select the 'Stmt' button on the bottom of the screen to process an *E-mail Statement* individually.

						-			
			Bal Forwar	ď	384.39				
Date 🛛 🕅	Invoice	Description	ID	Amount	Balance	Check No.	Stop	Sub-Acct#	
35/01/2015	008921	(5),BT(2)	ADR	9.81	394.20		1		_
05/01/2015	008924	(5),BT(2)	ADR	9.81	404.01		1		
05/02/2015	008922	(5),5 g(1),re(1),BT(2)	ADR	17.48	421.49		1	000011	
05/03/2015	008926	5 g(1),BT(2)	ADR	13.32	434.81		1	000013	
05/03/2015	008947	(5),BT(2)	ADR	9.81	444.62		1		
	008923	(5),re(1),BT(2)	ADR	6.66	451.28				
									*

Emailing Invoice Copies within Customer Information

Invoice copies can be emailed to customers within the *Invoice Listing* screen as well.

Select the invoice to email to the customer, and click the Select the screen.



						-			
		Ba	I Forwar	ď	384.39				
Date 🛛 🕅	Invoice	Description	ID	Amount	Balance	Check No.	Stop	Sub-Acct#	
05/01/2015	008921	(5),BT(2)	ADR	9.81	394.20		1	1	
05/01/2015	008924	(5),BT(2)	ADR	9.81	404.01		1		
05/02/2015	008922	(5),5 g(1),re(1),BT(2)	ADR	17.48	421.49		1	000011	
05/03/2015	008926	5 g(1),BT(2)	ADR	13.32	434.81		1	000013	
05/03/2015	008947	(5),BT(2)	ADR	9.81	444.62		1		
05/08/2015	008923	(5),re(1),BT(2)	ADR	6.66	451.28		1	000012	
									Ţ

Alternatively, you can send multiple invoices to the customer by using CTRL+Click on your keyboard to highlight each item, and **click** the **Second** *Email* button:

		Ba	Forwar	d	384.39	1			
Date 🛛	Invoice	Description	ID	Amount	Balance	Check No.	Stop	Sub-Acct#	1
05/01/2015	008921	(5),BT(2)	ADR	9.81	394.20		1		_
05/01/2015	008924	(5),BT(2)	ADR	9.81	404.01		1		_
05/02/2015	008922	(5),5 g(1),re(1),BT(2)	ADR	17.48	421.49			000011	
05/03/2015	008926	5 g(1),BT(2)	ADR	13.32	434.81			000013	
05/03/2015	008947	(5),BT(2)	ADR	9.81	444.62		1		
	008923								
									*
									_

Verify that the email information is correct. You may also enter a short 'Introduction' message and click **OK**.



IVO	ce Listin	y		000010	AKS Office
			Bal Forward	384.39	
Date	E Invoice	Description	ID Amount	Ralance Check M	No Ston Sub-Acct#
5/01/2		E	-mail Invoice Copies		
5/01/2	To:	AR@ARSOffice.com			
5/03/2	Reply To Email:	Support@ars247.com			
5/03/2 5/08/2	Subject:	Advantage Water and Ice Invoice Cop	pies for Acct# 000010 (ARS	Office)	
	Body:	Hello ARS Office,			<u> </u>
		Attached are the invoices you reques	sted to review.		
		Thanks!			
					~
	Attachments: C:	RM_Installs\RMA_7_0_Test_Adv/DAT	A_SETS\Local_Data\PDF\IN	VINFO_4HF0OAVI6.PDF	
			√ок ×		
int/E-M elected			Sun		
	-				

The invoice(s) with the introduction will resemble the following:

-
To: support
Cc:
Subject: Advantage Water Demo Invoice Copy for Acct# 100000 (Advantage Route Systems)
Attachments: 🔂 200703012110YI42E.PDF (3 KB)
Sample Email Invoice Invoice copy attached.
To read and print the attached PDF document(s), you need Acrobat Reader, which is available as a <u>free download from Adobe</u> for most systems.



Processing Email PDF Reports

Reports can also be processed via email in .PDF format. This can be helpful for sending reports to upper management or accounting employees, and provides a hard copy for reference later. One of the more popular reports — *Aging Analysis* — is shown below. Notice the *Email* button available on the bottom of the screen.

Enter your criteria, and select the **Select** the **Select** button on the report.



Input the email address of the person(s) to receive the report. You may also edit the subject matter, and enter a note in the introduction field if desired. Click **OK** to process the email.

RM7		Aging Analysis	
Aging Ana	lysis		
Sort Option	1		
by Acct. No.		1	
Sort Option		Email Information	
by Acct Name	To:	Support@Advantagers.com	
por realine	Reply To Email:	Support@ars247.com	
	Subject:	E-Mailing Aging Analysis	
	Body:	Here is the Aging Report for October 2015	
	Attachments: C:\	RM_Installs\RMA_7_0_Test_AdMDATA_SETS\Local_Data\PDF\RPT_4HF002JHY.PDF	
		Л ок Х	
l l			
		🥌 🗙 🖹 🖨? FAX [🎽) 🎟	



Summary

The .PDF options in Route Manager provide you with another flexible option that can be used to help you get important information to your customers quickly. This option also saves paper, and still provides your customers with a professional document that they can store, or print and file away for their records. If you have any questions regarding this feature, please contact Advantage Route Systems.



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