

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

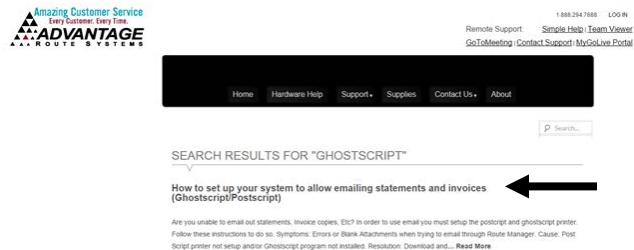
The installation process includes two steps:

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

Follow the steps below to complete the installation.

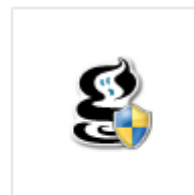
Document Imaging Software

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 www.ARS247.com. Search using the keyword: Ghostscript. This page will also include the instructions outlined within this document.



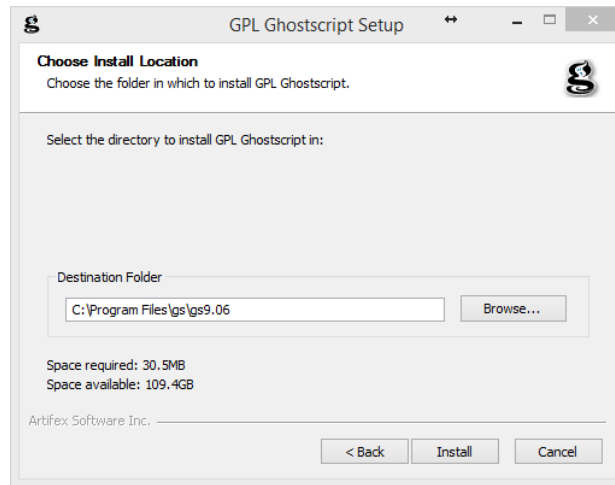
Make sure to select the Ghostscript option that matches your Operating System (either 32bit or 64bit).

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



GhostScript_gs90
6w64.exe

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



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.

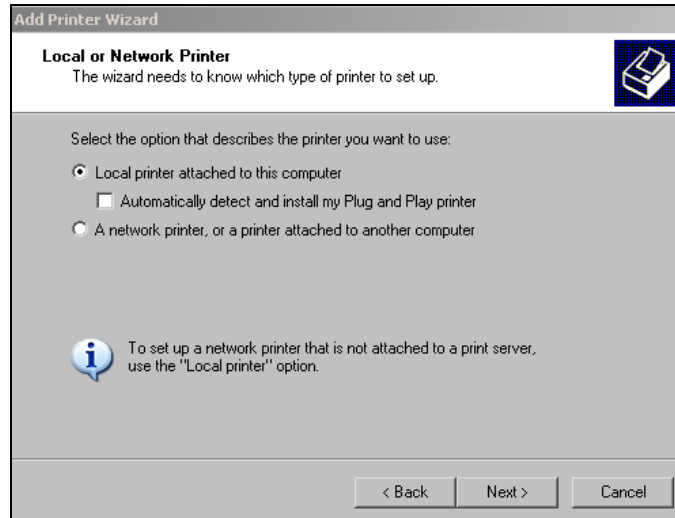
Installing a Postscript Printer

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.

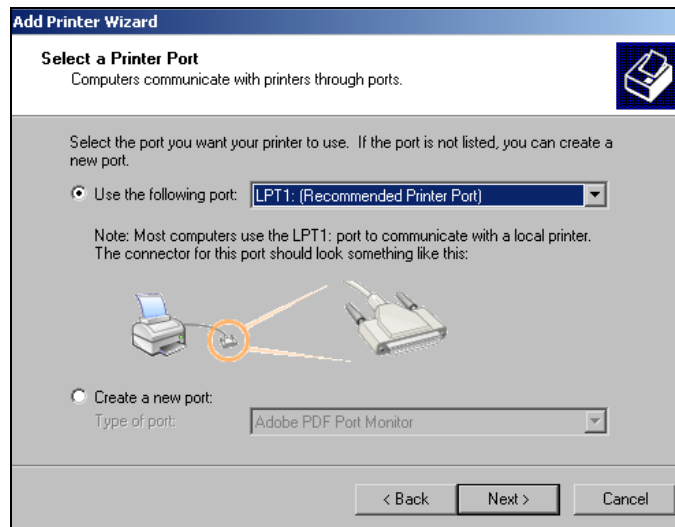
NOTE: Depending on your current operating system, the following steps will vary slightly.

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

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

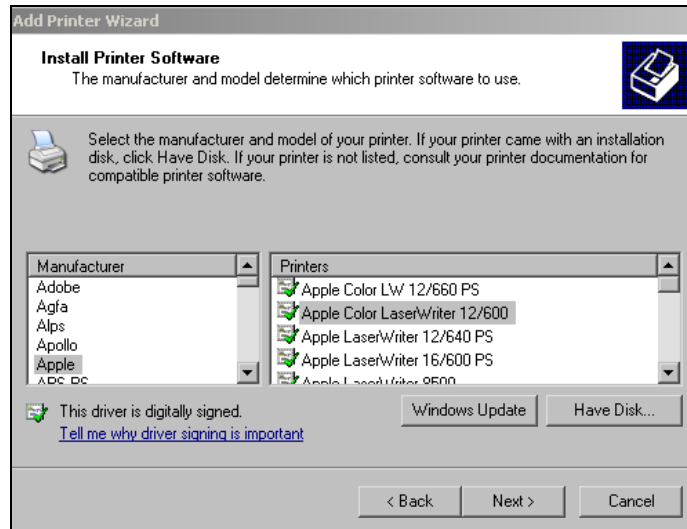


- On the *Select a Printer Port* page, choose an available **LPT** port (LPT2 is recommended).

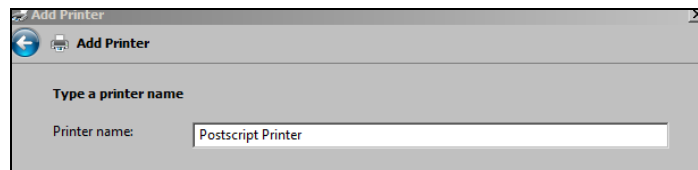


- On the *Install Printer Software* page, make sure to refer back to the ARS247.com Knowledge Base article to find the proper PostScript Printer for your version of Windows.

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.



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



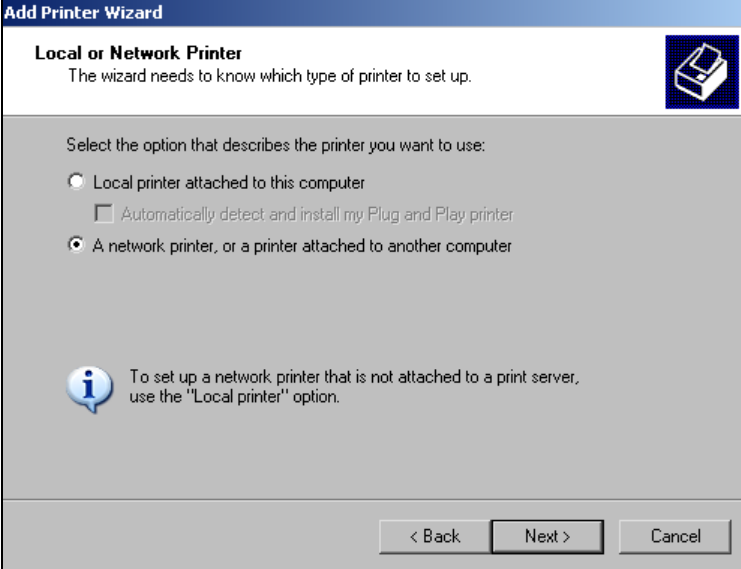
- Click **Next** until the printer has been added successfully.

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.

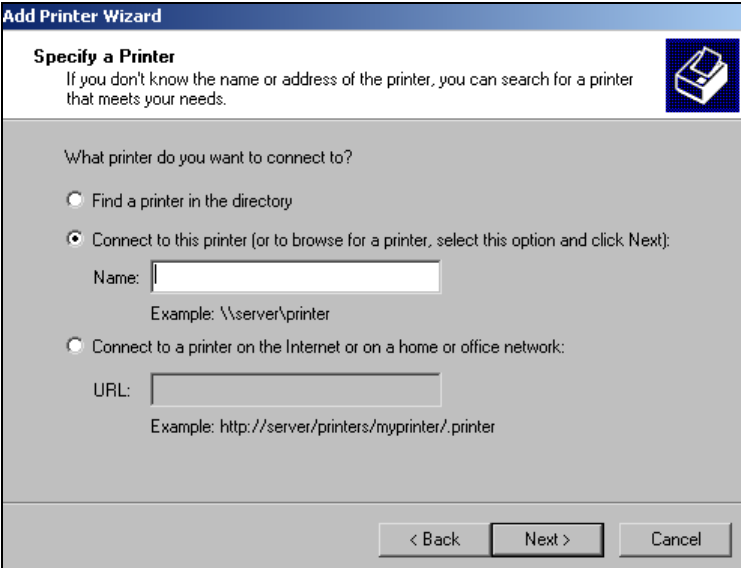
Select the option that describes the printer you want to use:

- Local printer attached to this computer
 - Automatically detect and install my Plug and Play 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

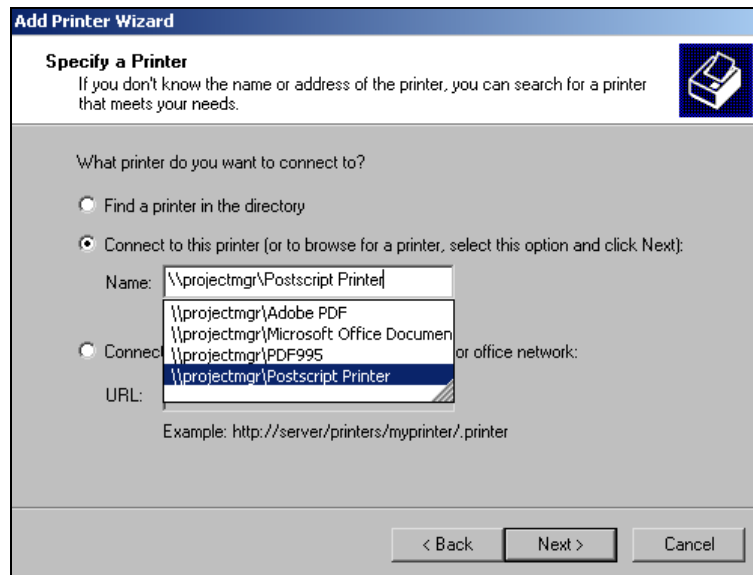
Specify a Printer
If you don't know the name or address of the printer, you can search for a printer that meets your needs.

What printer do you want to connect to?

- Find a printer in the directory
- Connect to this printer (or to browse for a printer, select this option and click Next):
 - Name:
 - Example: \\server\printer
- Connect to a printer on the Internet or on a home or office network:
 - URL:
 - Example: http://server/printers/myprinter/.printer

< Back Next > Cancel

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



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:

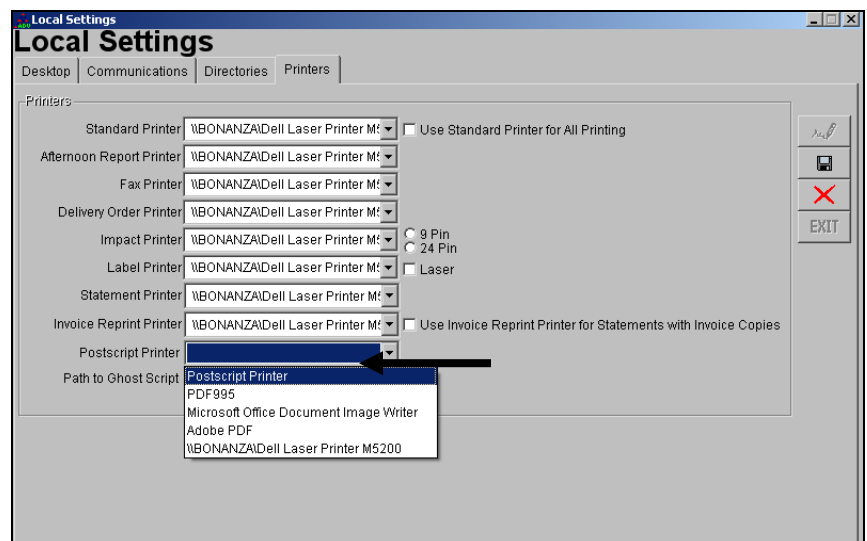
1. Update *Local Settings*
2. Create email *Statement Code*


Complete the items below to complete the configuration process.

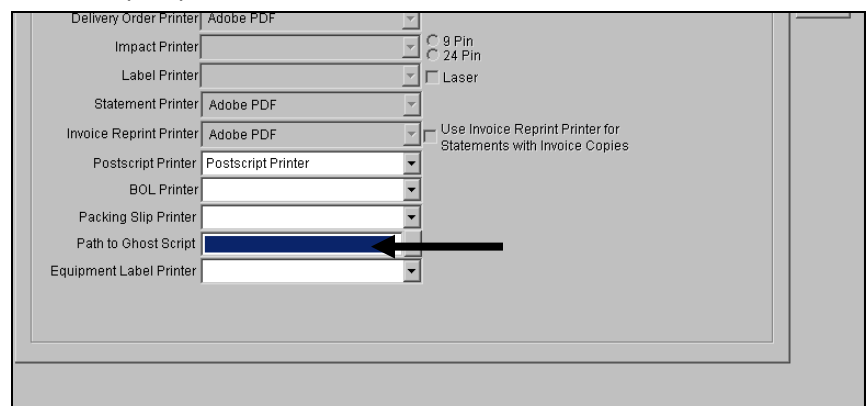
Update Local Settings

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.

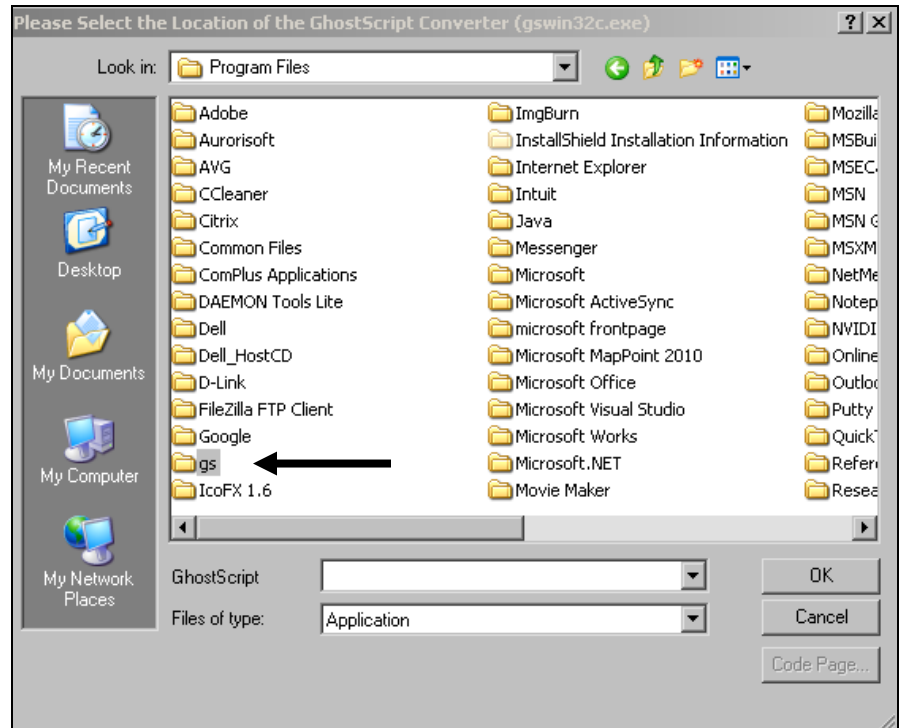


Next, select the  *Browse* button beside the 'Path to Ghost Script' option:

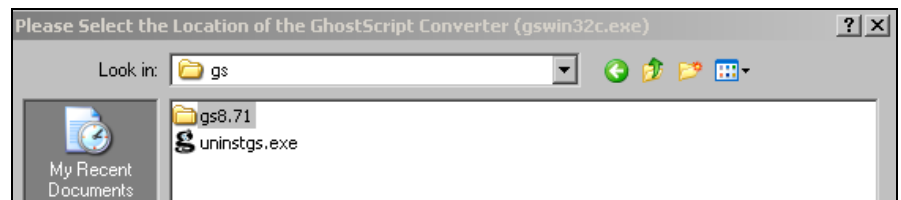


Double-click on the 'gs' (Ghostscript) folder in the *Program Files* directory of your PC, or within the installation directory on the network.

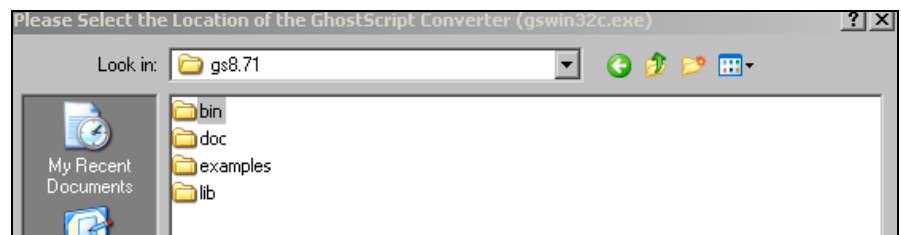
NOTE: 'gs' is the default Ghostscript program installation folder; substitute your installation directory if necessary.



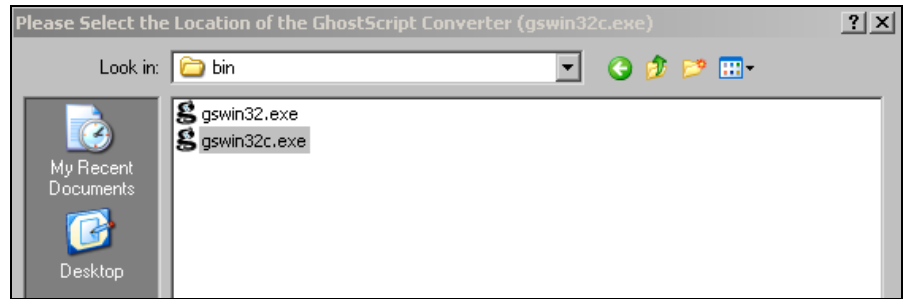
Double-click on the 'gs.XX' folder (depending on the version installed, the numbers displayed will vary).



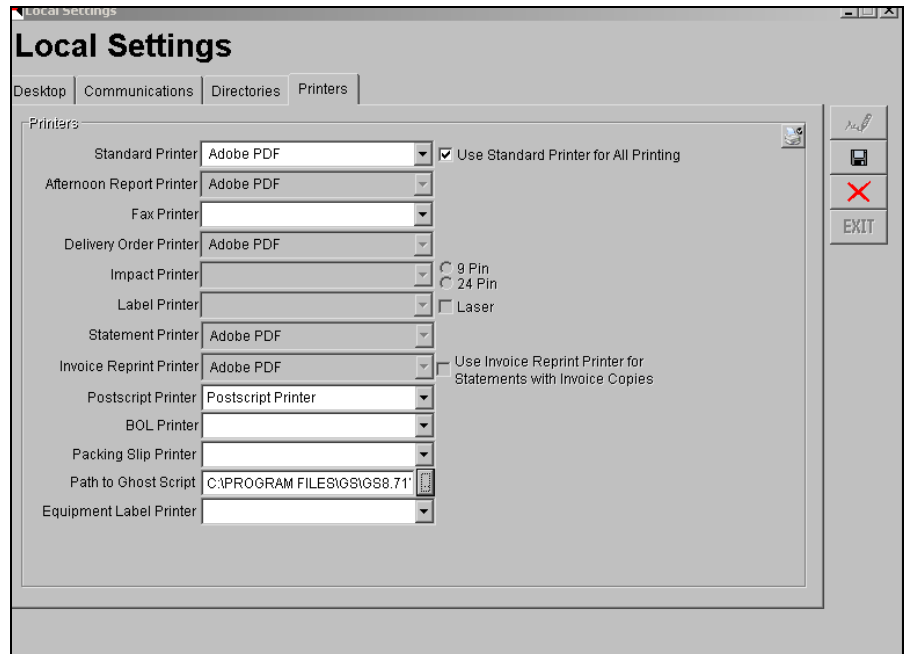
Double-click on the 'bin' folder.



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



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

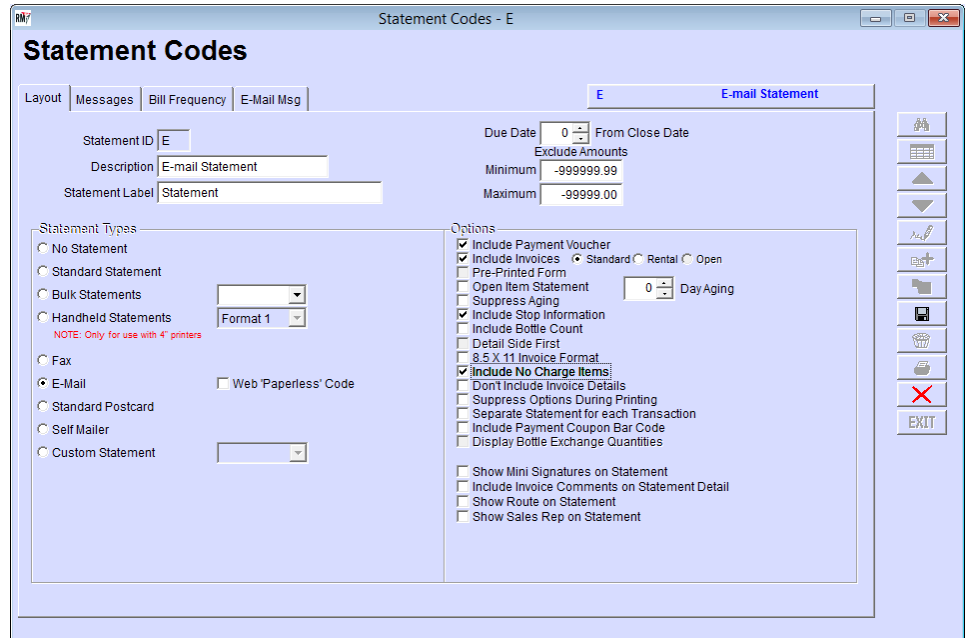


Repeat all of the steps above on each workstation.

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.



the *Statement Code*.

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

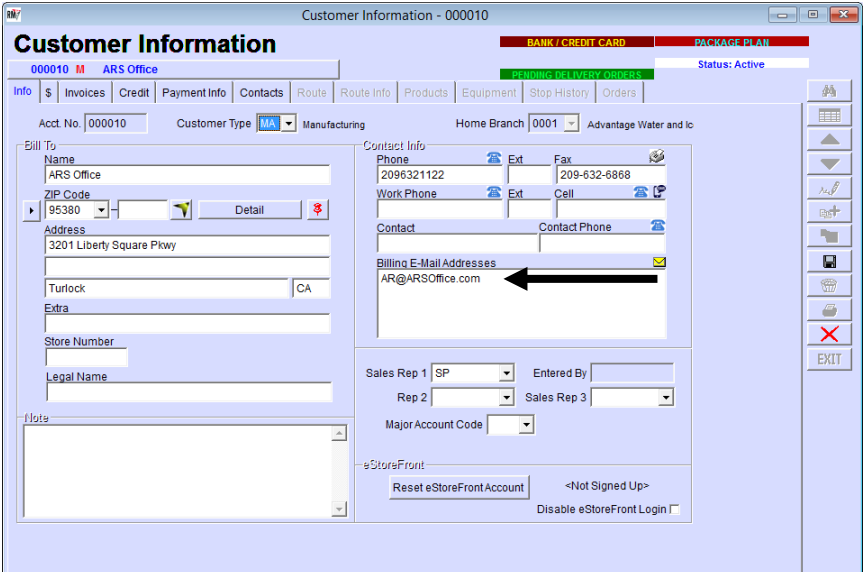
Updating Customer Information

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*.



The screenshot shows the 'Customer Information' form for account 000010. The 'Billing E-Mail Addresses' field is highlighted with a black arrow, indicating the email address 'AR@ARSOoffice.com'. The form includes various tabs like 'Info', 'Invoices', 'Credit', 'Payment Info', 'Contacts', 'Routes', 'Route Info', 'Products', 'Equipment', 'Stop History', and 'Orders'. The 'Billing E-Mail Addresses' field is located in the 'Contact Info' section.

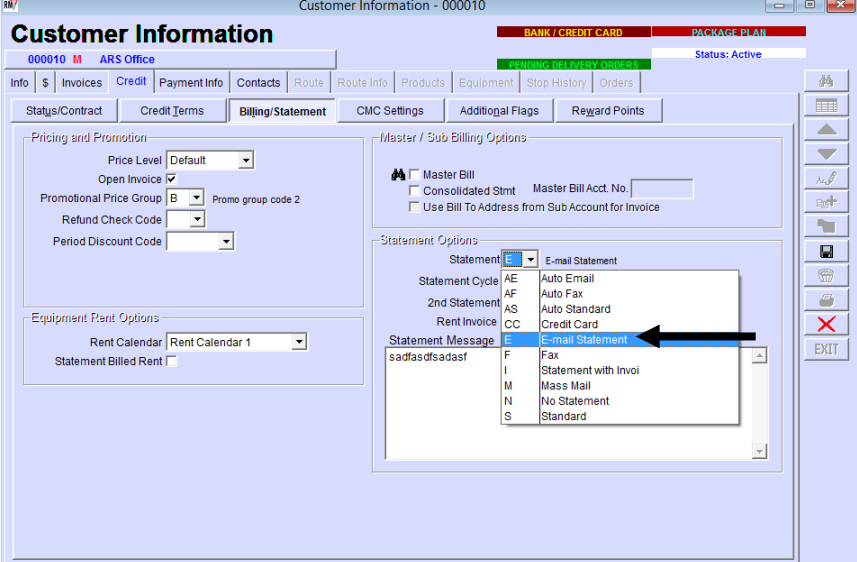
NOTE: Multiple e-mail addresses can be entered by using the following format:
email1@domain.com;email2@domain.com (there should not be any spaces after each semi-colon). Up to 254 characters can be used for all addresses in this field.

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 PLAN

000010 M ARS Office PREPARED BY: JERRY DIERBERG Status: Active

Info \$ Invoices **Credit** Payment Info Contacts Route Route Info Products Equipment Stop History Orders

Status/Contract Credit Terms **Billing/Statement** CMC Settings Additional Flags Reward Points

Pricing and Promotion

Price Level: Default

Open Invoice:

Promotional Price Group: B Promo group code 2

Refund Check Code: []

Period Discount Code: []

Equipment Plant Options

Rent Calendar: Rent Calendar 1

Statement Billed Rent:

Master / Sub Billing Options

Master Bill

Consolidated Stmt Master Bill Acct. No. []

Use Bill To Address from Sub Account for Invoice

Statement Options

Statement: E E-mail Statement

AE	Auto Email
AF	Auto Fax
AS	Auto Standard
CC	Credit Card
E	E-mail Statement
F	Fax
I	Statement with Invoi
M	Mass Mail
N	No Statement
S	Standard

Statement Message: E E-mail Statement

sadfasdfasadst

F

I

M

N


S

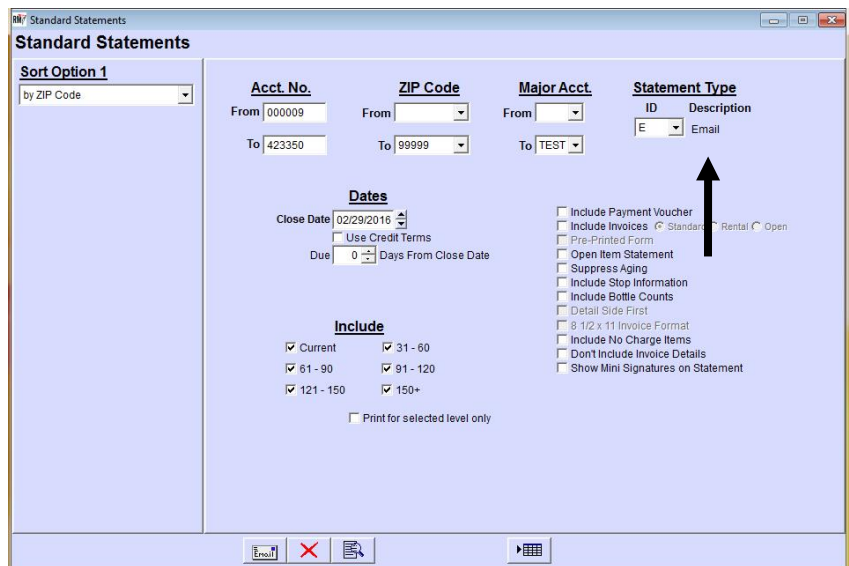
EXIT

Daily Processing

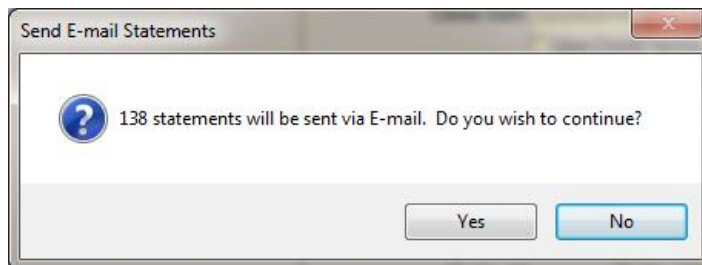
This section will guide you through the daily process followed when transmitting emails with .PDF attachments in Route Manager.

Generating E-Mail Statements

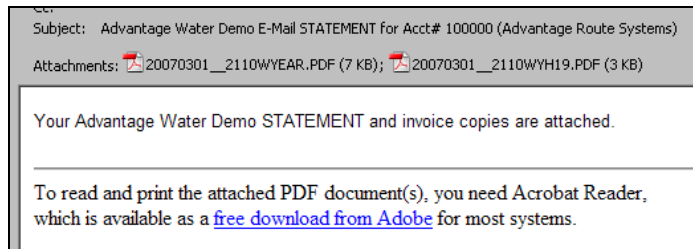
1. Navigate to *Reports > Statements > Standard Statements*, and choose the 'E-Mail Statement' code. Enter the criteria desired, and select the  *Email* button on the bottom of the screen.



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:

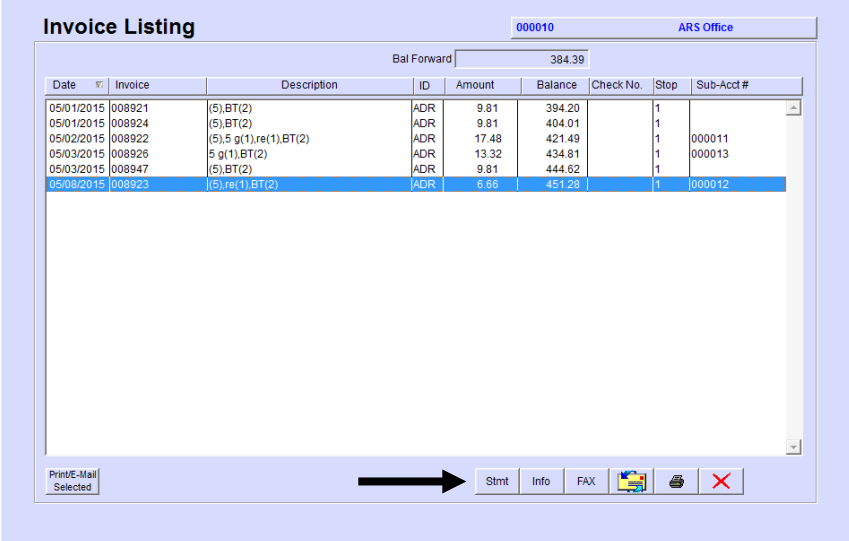


The first file attached contains the statement, and the second file contains the invoice copies (if included).

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.



Invoice Listing 000010 ARS Office


Bal Forward

Date	Invoice	Description	ID	Amount	Balance	Check No.	Stop	Sub-Acct #
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		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

Print/E-Mail Selected ➔

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  *Email* button on the bottom portion of the screen.

Invoice Listing 000010 ARS Office

Bal Forward 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	
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

Print/E-Mail Selected ▶

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

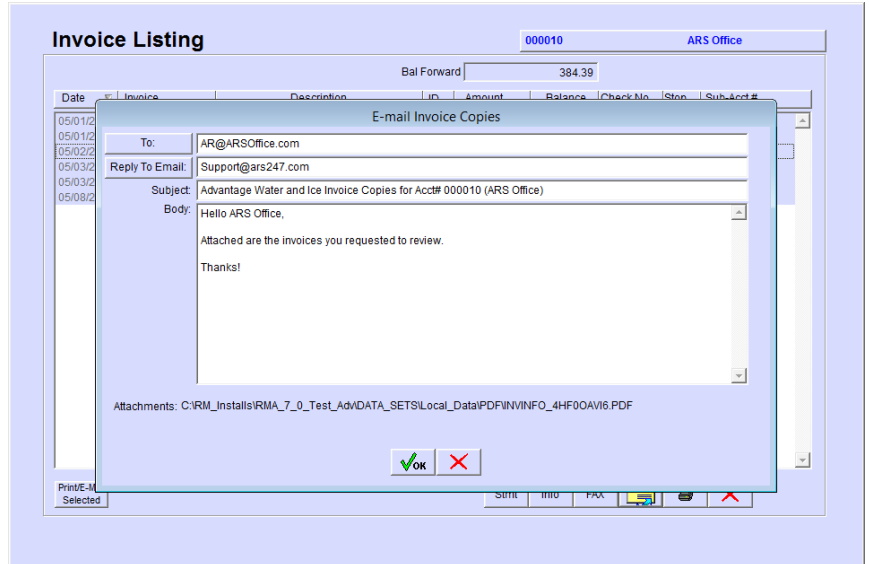
Invoice Listing 000010 ARS Office

Bal Forward 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	
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

Print/E-Mail Selected ▶ Stmt Info FAX

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




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:  20070301__2110YI42E.PDF (3 KB)

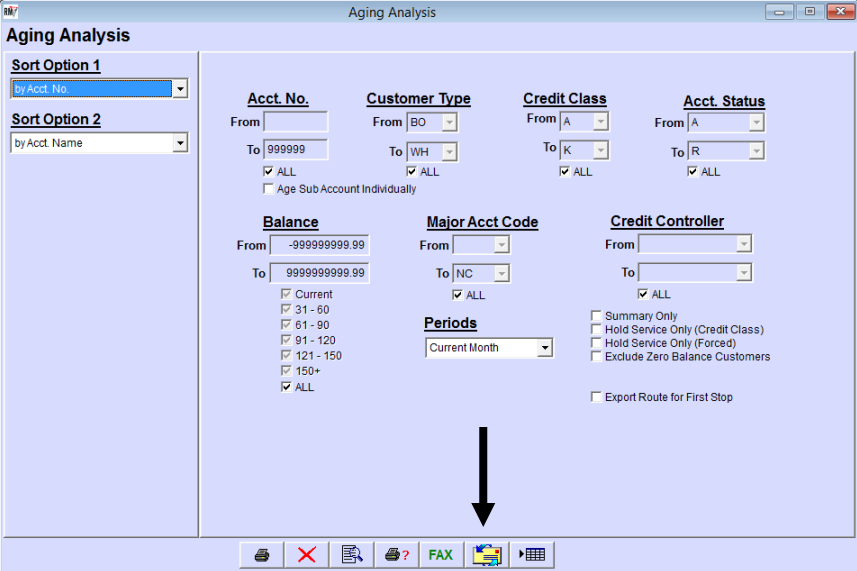
Sample Email Invoice Invoice copy attached.

To read and print the attached PDF document(s), you need Acrobat Reader, which is available as a [free download from Adobe](#) for most systems.

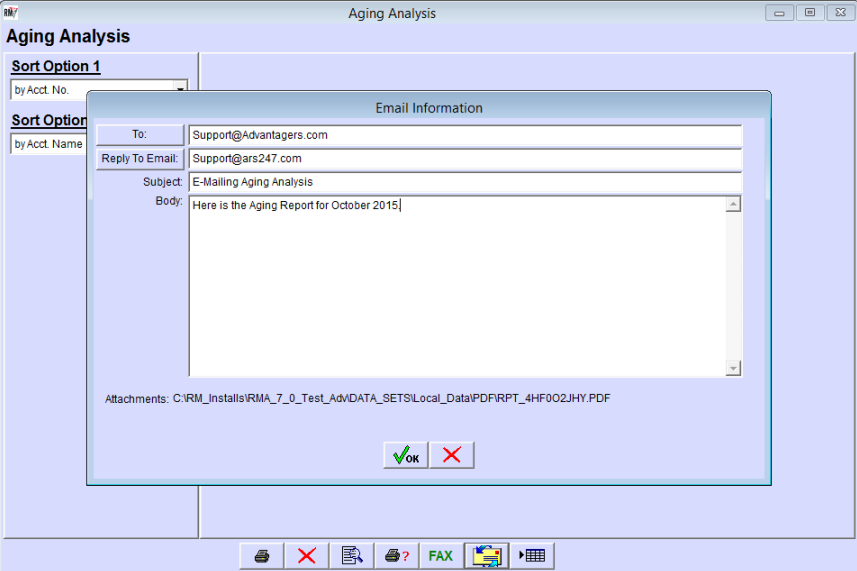
Processing Email PDF Reports

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  *Email* 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.



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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