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## **Working With Document Distribution Records**

The Work With Document Distribution application is used to automatically email:

- Invoices and credit memos when a user prints these documents.
- Remote order confirmation messages to the customer or to the sales rep when their remote order (via DAC Express, Pre-book orders, etc.) appears in DAC "live" orders.
- Velocity reports when they are printed.
- Notify of Price Changes reports (also called price change notifications) when they are printed.
- Accounts Receivable statements when a user enters Y for **Email Statements?** field of the Statements By... prompt screen used.
- Customer Pre-book Notification Reports or Pre-booked Items reports.
- Super item promotional flyers when a user manually processes them.

Refer to Working With Outbound Email for information about using the Purchase Order eMail Interface optional module to email purchase orders to vendors.

## **Emailing Invoices and Credit Memos**

Invoices and credit memos can be automatically emailed as PDF files attached to messages with the subject of *I#s.PDF* (where #s is the invoice number), and the message *Attached is invoice in PDF format*. The landscape/plain paper version H of the invoice is used for the attachment, but the distributor's designated version is used for printing the invoices. The PDF files that are emailed are also saved as documents in the DACEMAIL folder of the system.

Refer to the Billing document for additional information about printing invoices. Refer to SYS051 (General System Options) of the DAC Default System Options document for information about the **Enable Auto Emailing?** field.

Before invoices and credit memos can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC users who print the invoices and credit memos. Refer to Working With Directory Entries for additional information.

## **Emailing Remote Order Confirmations**

An Order Acknowledgement report can be automatically emailed as a PDF file attached to a remote order confirmation message with the subject of OA#s.PDF (where #s is the customer's number), and the message *Thank you for your order*. Attached you will find the acknowledgement report of the order in a PDF file.

The remote order confirmation email message is emailed to the customer (and optionally to the sales rep) when their remote order (via DAC Express, Pre-book orders, etc.) appears in DAC "live" orders.

No reports are printed on the distributor's system when they are emailed, but the files that are sent as attachments will appear as documents in the DACEMAIL folder of the distributor's system.

Before remote order confirmations can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC users who process remote orders and the users who start the CV1COM job. Refer to Working With Directory Entries for additional information.

## **Emailing Velocity Reports**

Velocity reports can be emailed as PDF or CSV files attached to messages with the subject of *VA#s.PDF* or *VA#s.CSV*, respectively, where #s is the customer or corporate number.

When a PDF file is attached, the email's message is *Attached you will find the velocity report you requested*. An item summary report can be attached as a PDF file to a second email message if designated by the user. These messages have the subject of *VC#s.PDF* (where #s is the customer or corporate number) and message of *Attached you will find the velocity item summary you requested*.

When a CSV file is attached, the email's message is Attached you will find the velocity report data in CSV format as you requested.

Velocity reports are not printed on the distributor's system when they are emailed, but the PDF files that are sent as attachments will appear as documents in the DACEMAIL folder of the distributor's system. The CSV files will appear as documents in the DACEMAIL folder unless another folder is designated by the user. Refer to Printing A Velocity Report of the Customer File Maintenance document for additional information.

Before velocity reports can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC users who print the velocity reports. Refer to Working With Directory Entries for additional information.

## **Emailing Price Change Notifications**

Notify of Price Changes reports, also called price change notifications, can be automatically emailed as PDF file attachments to customers who:

- Require notification. Refer to Working With Customers of the Customer File Maintenance document for information about the Notify Price Chg field.
- Are authorized to purchase the items that are changed using global price changes. Refer to Working With Global Price Changes of the Item File Maintenance document for additional information.

Price change notifications are attached to email messages with the subject of *PC#s*. *PDF* (where #s is the customer or corporate number), and the message *Attached* is your price change notification report. The reports are also printed when the documents are emailed.

The price change notifications are automatically emailed when option 5 (Price Change Notification) of the Special Customer Reports menu screen is used to print price change notifications. Refer to Printing Price Change Notifications of the Customer File Maintenance document for additional information.

Before price change notifications can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC user who generates the price change notifications. Refer to Working With Directory Entries for additional information.

## **Emailing Accounts Receivable Statements**

Accounts Receivable statements can be emailed as PDF files attached to messages with the subject of *ST#s.PDF* (where #s is the customer or corporate number), and the message *Attached is your A/R statement in Adobe Acrobat format*.

The plain paper version of the statement is used for the attachment. The PDF files that are emailed are also saved as documents in the DACEMAIL folder of the system.

Refer to the Accounts Receivable document for additional information about printing statements.

Before statements can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC user who prints the statements. Refer to Working With Directory Entries for additional information.

## **Emailing Pre-book Notifications**

Customer Pre-book Notification Reports or the Pre-booked Items report can be emailed as PDF files attached to messages with the subject of *PB#s.PDF* (where #s is the customer or corporate number), and the message *Attached is your pre-book notification*. *If you have any questions, please contact your sales person*. The PDF files that are emailed are also saved as documents in the DACEMAIL folder of the system.

Refer to Emailing Pre-book Notifications of the Pre-book Orders document for additional information. Refer to SYS015 (General System Options) of the DAC Default System Options document for information about the **Prebook Notification Ver.** field.

Before pre-book notifications can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC user who generates the price change notifications. Refer to Working With Directory Entries for additional information.

## **Working With Super Item Promotional Flyers**

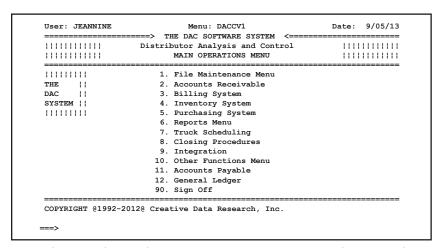
Super item promotion flyers can be emailed as PDF files attached to messages with the subject of *EP#s.PDF* (#s is the customer or corporate number), and the message *Promotional Specials*. The PDF files that are emailed are also saved as documents in the DACEMAIL folder of the system.

Outbound email functionality must be enabled on the distributor's system before users can automatically email promotional flyers. Contact CDR support personnel for information about enabling outbound email and about automatically emailing promotional flyers with use of a scheduled job entry.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC users who email super item promotional flyers. Refer to Working With Directory Entries for additional information.

Refer to the Billing File Maintenance document for additional information about working with the super item type of selling allowances.

The instructions below are used to *manually* email promotional flyers *after all* the required document distribution records are created. Refer to the Adding A Document Distribution Record for additional information.



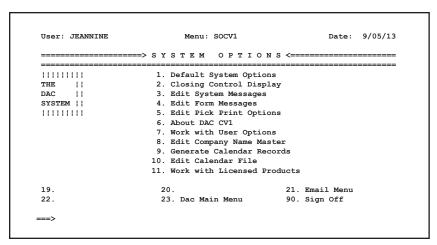
1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.

```
Har: JEANNINE
                                                   Date: 9/05/13
                         Menu: FMCV1
THE !!
DAC !!
SYSTEM !!
                    1. Customer Related Maintenance
                    2. Product Related Maintenance
                   3. Billing Related Maintenance
                    4. System Options Maintenance

    Inquiry Options
    Price Maintenance

                    7. G/L Interface Maintenance
                    8. Scan Code Maintenance
                    MENU CALLS
19. Deletions
                                           21. Reports
                     20.
                     23. Dac Main Menu
                                           90. Sign Off
COPYRIGHT @1992-2004@ Creative Data Research, Inc.
```

2. Select option 4 (System Options Maintenance) from the File Maintenance screen. The System Options screen appears.



3. Select option 21 (Email Menu) from the System Options screen. The Email Menu screen appears.

4. Select option 6 (Manual EPROMO Process) from the Email Menu screen. The Work With Document Distribution screen appears.

- 5. When the *Run the EPROMO list by entering a date range on the next screen* message appears, press < Enter > .
- 6. When the *To cancel leave the date ranges empty and press F3* message appears, press < Enter > . The Enter Date Range screen appears.
- 7. Enter the date range within which the super item selling allowance starts for the **Start Date** and **End Date** (6,n) fields, and press < Enter > .
- 8. Press < Enter > when prompted to confirm.

#### PROMOTIONAL FLYER

From 9/01/13 - 9/30/13

Customer 100802 CRANKY CORNER QUICK STOP

Start Page Item # Description

9/01/13 1 500067 POWER BAR AUTUMN SHIPPER

Promo	Contents						
Qty	Contents		Count	Item	Retail	UPC	
5	POWER BAR	R ENERGY C/BERRY OATMEAL	15	500002	. 60	097421450200	
5	POWER BAR	R HARVEST APPLE CRISP	15	500004	. 60	097421450606	
5	POWER BAR	R HARVEST STRAWBERRY CRUNCH	15	500006	. 60	097421050202	

#### 

Customer Cost \$	60.00		
Retail . : \$	0.33	Promotion Qty	225
Gross Profit \$	15.00		
Gross Prof.Pct	20.00		

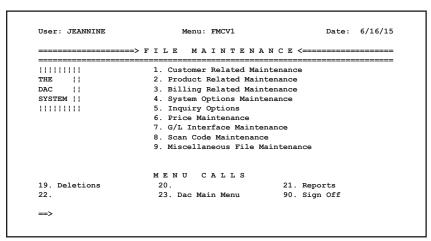
## **Adding A Document Distribution Record**

```
User: JEANNINE
                                Menu: DACCV1
                                                               Date: 6/16/15
                     ==> THE DAC SOFTWARE SYSTEM <==
                                                                 1111111111111
1111111111111
                     Distributor Analysis and Control
                            MAIN OPERATIONS MENU
1111111111111
                                                                 1111111111111
111111111
                         1. File Maintenance Menu
THE ||
DAC ||
                         2. Accounts Receivable
                         3. Billing System
SYSTEM ||
                         4. Inventory System
111111111
                         5. Purchasing System

    Reports Menu
    Truck Scheduling

                         8. Closing Procedures
                         9. Integration
                        10. Other Functions Menu
                        11. Accounts Payable
                        12. General Ledger
                        90. Sign Off
COPYRIGHT @1992-2012@ Creative Data Research, Inc.
```

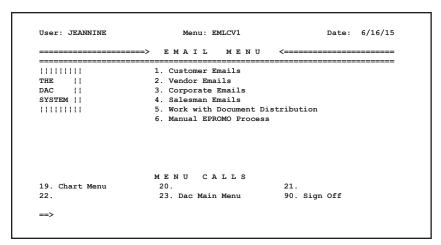
1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.



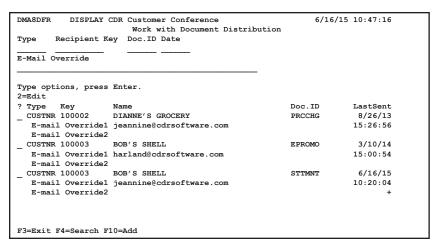
2. Select option 4 (System Options Maintenance) from the File Maintenance screen. The System Options screen appears.

```
User: JEANNINE
                             Menu: SOCV1
                                                         Date: 6/16/15
      111111111
                      1. Default System Options
THE ||
DAC ||
                      2. Closing Control Display
                     3. Edit System Messages
4. Edit Form Messages
5. Edit Pick Print Options
SYSTEM | |
111111111
                      6. About DAC CV1
                      7. Work with User Options
                      8. Edit Company Name Master
                       9. Generate Calendar Records
                      10. Edit Calendar File
                      11. Work with Licensed Products
19.
                                                21. Email Menu
                        23. Dac Main Menu
                                                90. Sign Off
==>
```

3. Select option 21 (Email Menu) from the System Options screen. The Email Menu screen appears.



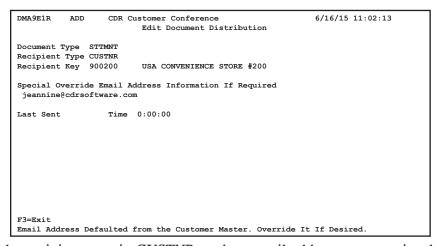
4. Select option 5 (Work With Document Distribution) from the Email Menu screen. The Work With Document Distribution screen appears.



5. Press <F10> (Add). The Edit Doc. Distribution KEY SCREEN screen appears.

DMA9E1R ADD CDR Customer Conference	6/16/15 10:49:45
Edit Doc. Distribution KEY SCREEN	
mh-: m-+	
Type choices, press Enter.	
Document ID	
Recipient Type	
Recipient Key	
F3=Exit F4=Search F9=Go to 'Change' mode	
F3=Exit F4=Search F9=Go to `Change' mode	

- 6. Enter one of the following values for the **Document ID** (6,a) field, and press < Field Exit > :
  - *INVOCE* for emailing invoices.
  - *CRMEMO* for emailing credit memos.
  - *ORDACK* for emailing remote order confirmation messages.
  - *VELOC* for emailing velocity reports.
  - *PRCCHG* for emailing price change notifications.
  - STTMNT for emailing A/R statements.
  - *PREBOK* for emailing pre-book notifications.
  - *EPROMO* for emailing super item promotional flyers. Refer to Emailing Super Item Promotional Flyers below for additional information.
- 7. Enter one of the following values for the **Recipient Type** (6,a) field, or press <F4> to select a recipient type:
  - CUSTNR to email documents to a customer's address.
  - CORPNR to email documents to a corporate customer's address.
  - EMPLNR to email documents to the address of an account's sales rep.
- 8. If the recipient type is *CUSTNR*, enter the desired customer number for the **Recipient Key** (6,a) field, or press <F4> to select the customer from the Select Customer Master screen.
- 9. If the recipient type is *CORPNR*, enter the desired corporate customer number for the **Recipient Key** (6,a) field, or press < F4 > to select the corporate customer from the Select Corporate Master screen.
- 10. If the recipient type is *EMPLNR*, enter the desired employee number for the **Recipient Key** (6,a) field, or press <F4> to select the employee from the Select Employee Master screen.
- 11. Press < Enter > . The Edit Document Distribution screen appears.



If the recipient type is *CUSTNR*, and an email address was previously entered for the **Primary Email Address** or **2nd Email Address** fields of the customer's record, it will appear by default.

- 12. Enter one or two email addresses. If necessary, new addresses can be entered to override addresses appearing by default on the Edit Document Distribution screen. The addresses stored in the Customer Master files are not affected.
- 13. Press < Enter > when data entry is complete, and press < Enter > when prompted to confirm.
- 14. When the Edit Doc. Distribution KEY SCREEN screen appears, continue adding document distribution records, or press <F3> to exit.

## **Working With Outbound Email**

To enable outbound email functionality on the distributor's system, contact CDR support personnel. After it is enabled, the DAC System administrator must create and edit directory entries to enable specific DAC users to use it. Refer to Working With Directory Entries for additional information.

Refer to Working With Document Distribution Records for information about the various documents and reports that can be emailed when outbound email functionality is enabled.

Outbound email functionality is also required for use of the following DAC optional modules:

- Purchase Order eMail Interface. Refer to Getting Started With Purchase Order eMail Interface below.
- DAC Connect's email functionality is optional. If implemented, users can email invoices, custom order guides, price lists, customer price books and velocity reports. For user setup information, refer to the Working With New Users section of the DAC Connect Administrator User Guide.
- DAC Trade Show Manager's email functionality is optional. If implemented, administrative users of TSM can email the Trade Show Booth Recap report to attendees, and email a CSV file of attendee information to recipients of their choosing. For user setup information, refer to the Creating User Profile Records, Creating User Options Records and Working With Directory Entries sections of the DAC TSM Administrator User Guide.

The email functionality of the DAC Express module is limited to remote order acknowledgement. See Working With Document Distribution Records for additional information.

## **Working With Directory Entries**

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality.

To create a user's directory entry, enroll the user in iSeries Access:

- 1. Type GO MAIN.
- 2. Select option 11 (Client Access/400 Tasks).
- 3. Select option 21 (Enroll Client Access...).
- 4. Enter user ID for User Profile field.
- 5. Enter user ID for User ID field. If the user's ID is longer than eight characters, abbreviate it to enter in the User ID field.
- 6. Add to system directory = \*YES.

To enable use of the DAC email functionality:

- 1. Use WRKDIRE <Enter> and 2 (Change) with the new directory entry.
- 2. Use  $\langle F19 \rangle$  and  $\langle Enter \rangle$ .
- 3. Enter the user's email name (*jeannine*) for SMTP user ID field.
- 4. Enter the user's email domain name (i.e. *cdrsoftware.com*) for the SMTP domain field.
- 5. Press < Enter > to add the data, and press < Enter > to update.

## **Getting Started With Purchase Order eMail Interface**

Before proceeding with the instructions below, the Purchase Order eMail Interface optional module and outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

Purchase orders are emailed as attachments to the vendor by using the E (Email) option on Work With Purchase Orders screen after the PO is printed. The PO is printed again with \*\*\* E-MAILED \*\*\* appearing at the top to the right of the vendor number, and an S (for Sent) code appears in the column to the left of the open Status code (O) on the Work With Purchase Orders screen. If an emailing error occurs, an E (for Error) code appears in the column to the left of the open Status code (O). After the cause of the error is resolved, the E option can be used again to email the PO.

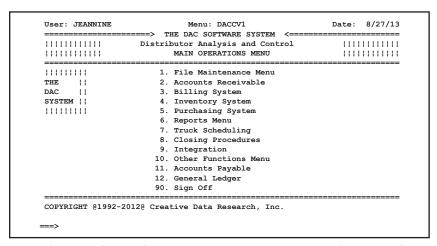
The email message sent to the vendor will have the subject of *POEMAIL.PDF* and the message as defined during outbound email setup, and ending with *The PO number is ######*. (##### is purchase order's number)

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC user who uses the Email option described above. Refer to Working With Directory Entries for additional information.

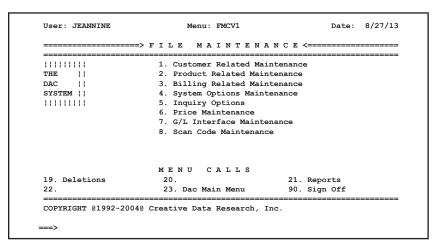
Refer to Adding Vendor Email Addresses after the above prerequisites are complete.

# **Working With Email Address Records**

The Email Menu application can be used to add email addresses for customers and vendors.



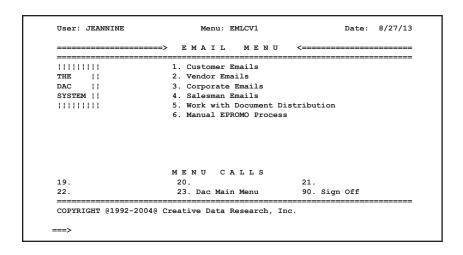
1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.



2. Select option 4 (System Options Maintenance) from the File Maintenance screen. The System Options screen appears.

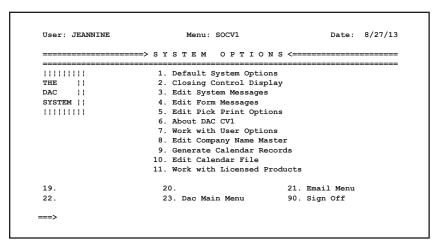
```
User: JEANNINE
                                   Menu: SOCV1
                                                                       Date: 8/27/13
                       ==> SYSTEM OPTIONS <===
111111111
                            1. Default System Options
THE ||
DAC ||
                            2. Closing Control Display
                         2. Closing Control Display
3. Edit System Messages
4. Edit Form Messages
5. Edit Pick Print Options
6. About DAC CV1
SYSTEM ||
111111111
                            7. Work with User Options
                            8. Edit Company Name Master
                            9. Generate Calendar Records
                           10. Edit Calendar File
                           11. Work with Licensed Products
                                                            21. Email Menu
                             23. Dac Main Menu
                                                            90. Sign Off
```

3. Select option 21 (Email Menu) from the System Options screen. The Email Menu screen appears.

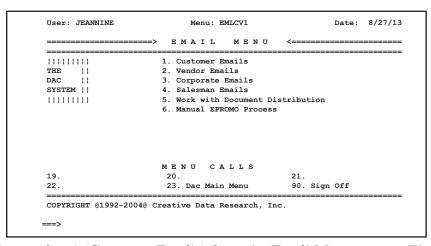


## **Adding Customer Email Addresses**

The instructions below are used to add email addresses for individual customers.



1. Select option 21 (Email Menu) from the System Options screen. The Email Menu screen appears.



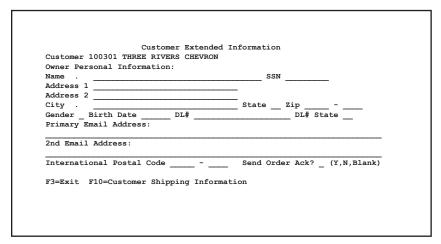
2. Select option 1 (Customer Emails) from the Email Menu screen. The Work With Customer Emails screen appears.

```
8/27/13 11:19:56
       DISPLAY CDR Customer Conference
                          Work with Customer Emails
Cust# Email 1
2=Edit
? Cust# Customer Name
  99000 99 MART PLUS
Email 1 jeannine@cdrsoftware.com
_ 100001 STOP 'N SHOP
Email 1
Email 2
100002 DIANNE'S GROCERY
-
Email 1
Email 2
 100003 BOB'S SHELL
_
Email 1
Email 2
F3=Exit F4=Search F6=Print F15=Export
```

3. Use the **Cust#** restrictor field (or < Page Down > ) to locate the desired customer.

```
HTY5DFR
          DISPLAY CDR Customer Conference
                                                               8/27/13 11:19:56
                           Work with Customer Emails
       Email 1
100301
2=Edit
? Cust# Customer Name
 100301 THREE RIVERS CHEVRON
_ 100801 BARON EXPRESS #2 BP
Email 1
_ 100802 CRANKY CORNER QUICK STOP
Email 1
_ 100850 EXPRESS WAY FOOD MART
Email 1
Email 2
F3=Exit F4=Search F6=Print F15=Export
```

4. Enter 2 (Edit) next to the customer's number, and press < Enter > . The Customer Extended Information screen appears.

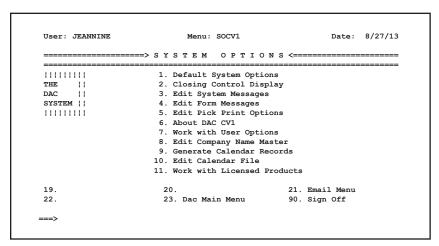


- 5. Enter the customer's email address for the **Primary Email Address** field.
- 6. If desired, enter a second email address for the 2nd Email Address field.

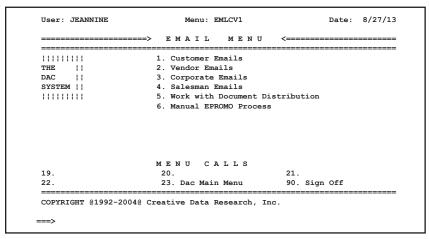
- 7. Enter *Y* for the **Send Order Ack?** field only if the addresses will be used for emailing price change notifications or remote order confirmations to the customer.
- 8. Press < Enter > when data entry is complete, and press < Enter > when prompted to confirm. The Work With Customer Emails screen appears.
- 9. Repeat the previous instructions to continue adding email addresses, or press <F3> to exit.

## **Adding Vendor Email Addresses**

The instructions below are used to add email addresses for vendors.



1. Select option 21 (Email Menu) from the System Options screen. The Email Menu screen appears.



2. Select option 2 (Vendor Emails) from the Email Menu screen. The Work With Vendor Emails screen appears.

```
DISPLAY CDR Customer Conference
                                                             8/27/13 12:55:42
                           Work With Vendor Emails
Vendor E-Mail Address 1
Type options, press Enter. 2=Edit
  Vendor Vendor Name
  Number
  ALTOO1 ALTADIS USA
E-mail 1
E-Mail 2
E-Mail 3
E-Mail 4
  AMER01 AMERICAN SNUFF COMPANY
E-mail 1 jeannine@cdrsoftware.com
E-Mail 3
E-Mail 4
F3=Exit F4=Search F6=Print F15=Export
```

3. Use the **Vendor** restrictor field (or < Page Down > ) to locate the desired vendor.

```
HIY9DFR
          DISPLAY CDR Customer Conference
                                                             8/27/13 12:55:42
                           Work With Vendor Emails
       E-Mail Address 1
Vendor
Type options, press Enter. 2=Edit
? Vendor Vendor Name
  Number
  HEI001 HEINZ USA
E-mail 1
E-Mail 2
E-Mail 3
E-Mail 4
  HER001 HERSHEY CHOCOLATE
E-mail 1
E-Mail 2
E-Mail 4
F3=Exit F4=Search F6=Print F15=Export
```

4. Enter 2 (Edit) next to the vendor's code, and press < Enter > . The Enter Vendor Notes screen appears.

Vendor HEI001	HEINZ US	A	PIN	
Primary E-Mai	1:			
CC E-Mail				
CC E-Mail				
		Sort PO By MFR (A,L,I,B,M)	#? _ Portal Show Pri Tax Paid Vendor	

- 5. Enter the vendor's email address for the **Primary E-mail** field.
- 6. If desired, enter additional email addresses for the CC E-mail 1, CC E-mail 2 and CC E-mail 3 fields.

- 7. Press < Enter > when data entry is complete, and press < Enter > when prompted to confirm. The Work With Vendor Emails screen appears.
- 8. Repeat the previous instructions to continue adding email addresses, or press <F3> to exit.