Electronic Billing and Order Confirmation

ECi

ECi DDMS®

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Contents

About the Electronic Billing and Order Confirmation Enhancements

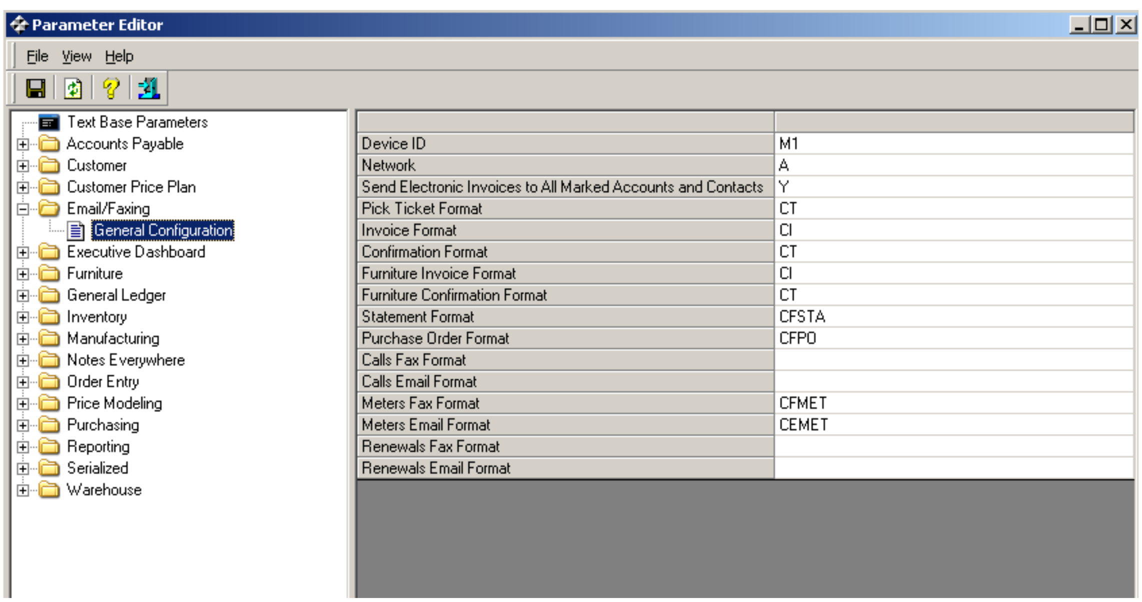
This handout discusses how to set up and use two new enhancements. First, we've made enhancements to the (TR) [M] Send Invoices Electronically function to let you send invoices to multiple contacts. To use the new Electronic Billing feature, you must set up the new Email/Faxing Parameters, shown in Figure 1. For more information on this new enhancement, see the heading **Setting Up Electronic Billing**.

Secondly, the new Order Confirmation enhancement lets you automatically send electronic confirmation back to a customer when an order is placed. With just a few steps you can set up your system to automatically fax or email order confirmation to a default contact or to multiple contacts. You can also tie an attention to a contact and automatically send them order confirmation. In this handout, we'll go over each of these scenarios.

With each scenario, the system checks the fax and email settings to determine how each contact receives the order confirmation. Each contact receives the order confirmation as it is set up in the system. One contact could receive a fax and another might receive an email.

There are new boxes to set up in the Email/Faxing Parameters and the Customer database. See the heading **Setting Up Order Confirmation**.

Figure 1: Email/ Faxing Parameters



Setting Up Electronic Billing

Enhancements have been made to the TR) [M] Send Invoices Electronically function to allow you to send electronic invoices to multiple contacts automatically. The system sends the correct document based on order type. First, it checks to see if the order is a contract furniture order using the formats specified in the Email/Faxing Parameters.

If you specify a Contact Type in the Customer Shipto/Attention tab, you can run the (TR) [M] function multiple times, limiting to a different Contact Type each time. If a Customer's Contact Type does not match what you specified, no electronic invoice is sent.

Another advantage of this new feature is that it allows you to use the Hold Invoices box in the Customer Order Entry 1 tab in a new way. You can use the new Use Email or Fax box in the Customer Order Entry 2 tab to specify whether to send electronic invoices as fax or emails. This opens up several new options for you to use in the Hold Invoices box. (For more information on the Hold Invoices box, see your online help.)

To use the new electronic billing feature, you must set up the following:

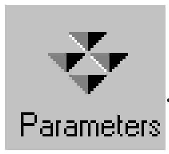
- Set up formats in the Email/Faxing Parameters
- Set the Use Email or Fax box in the Customer Order Entry 2 tab to specify whether to send electronic invoices as fax or emails
- Set up Customer Contacts
- Enter a contact type in the new Contact Type box in the Customer Shipto/Attention tab
- Contact Type in the (TR) [M] function must be blank.

Important! To use this feature, you must set select the contacts to use or no invoices are sent.

Note: This feature allows you to send invoices to multiple contacts. If you choose to use this feature and you use a proc for sending electronic invoices, you must modify your proc *if* your proc specifies a contact name. If your proc specifies a contact name and you do not modify it for this new feature, your electronic invoicing works as before.

Setting Up Email/Faxing Parameters

1 From the DDMS Master Menu, double-click 

, then double-click 

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2 From the Parameter Editor window, double-click Email / Faxing.

3 Double-click General Configuration.

Note: These parameters override the fields in the (L6T) screen.

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4 In the Send Electronic Invoices to All Marked Accounts and Contacts box, enter Y to send electronic invoices to all marked accounts and contacts. The system checks the Use Email or Fax box in the Customer Order Entry 2 tab to determine whether to fax or email the invoices.

Entering N in this box lets you use settings in the (TR) [M] Send Invoices Electronically function. The system checks the Customer database and sends the invoice just as before.

Note: If you choose to use this feature and you use a proc for sending electronic invoices, you must modify your proc *if* your proc specifies a contact name. If your proc specifies a contact name and you do not modify it for this new feature, your electronic invoicing works as before.

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5 In the Invoice Format box, enter the name of the format to use for invoices. Your response in this box becomes the default for the Inv field in the Invoice subscreen of the (&) screen and for the Format box in the Order Entry window. You can enter up to four characters.

If you're using the standard Faxing module or the U / Fax program, the default invoice format is FI.

If you're using AutoFax, the default invoice format is AI.

If you're using AutoComm II, the default invoice format is CI.

These default formats are used automatically if no formats are specified.

6 In the Furniture Invoice Format box, enter the name of the format to use for furniture invoices. The default format is CI. You can enter up to four characters. When sending confirmations or invoices, if the order is contract furniture, the furniture format is used. If not, the furniture format is not used.

Note: For more information on the Email/Faxing General Configuration Parameters, see your online help. These parameters override the fields in the (L6T) screen.

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7 When you enter the information, Email/Faxing and General Configuration appear in bold. Click  to save your changes.

Setting Up Fax/Email Options

1 From the DDMS Master Menu, double-click 

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2 Select the customer as you normally would. Click the Order Entry tab.

3 The Order Entry 1 tab opens. Click the Order Entry 2 tab.

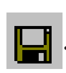
4 To send order confirmation, click the Send Order Confirmation box.

5 The Use Email or Fax box can be used to specify whether to send an email or fax to this contact. However, the system first uses the response in the F/E box in the Customer Contact window for this contact. If the F/E box in the Customer Contact window is blank, the system uses the response in this box.

   Type E in this box to email invoices to this contact.

   Type F in this box to fax invoices to this contact.

   The response in this box overrides the Hold Invoices box in the Order Entry 1 tab.

6 Click .

Setting Up a Customer Contact

1 From the DDMS Master Menu, click Databases, then click Contacts. The Contact window opens, displaying the Customer Contact window.

2 Select the customer for which you are adding a contact. Complete the boxes in this window. For more information on these boxes, see your online help.

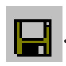
3 After you enter the information in all applicable boxes, click .

Setting Up a Customer

1 In the Customer database, select the customer as you normally would. Click the Ship / Attention tab.

2 You can add an attention by right-clicking the cursor in the Attention box and select Add Attn.

3 A blank line appears. Fill in the boxes with the appropriate information. For more on this tab, see your online help. You must enter a name in the Contact Type box.

4 Click .

Using Electronic Billing

1 From the DDMS text-based Master Menu, type TR.

2 In the (TR) Order Entry Reports screen, type M.

3 The Enter Contact Type field appears. Press Enter to leave this field blank.

4 Continue with the process as you normally would.

Setting Up Order Confirmation

The Order Confirmation enhancement lets you automatically send electronic confirmation back to a customer when an order is placed. With just a few steps you can set up your system to automatically fax or email order confirmation to a default contact or send to multiple contacts. You can set up the account to send a confirmation to a standard contact, to a contact attached to an attention (if attention chosen), or send to both. If you have an attention linked to a contact and a default order confirmation contact set, both receive order confirmation.

This feature works in both commercial order entry and furniture order entry.

In this section, we'll discuss how to set up this feature to achieve the scenario you need.

With each of these scenarios, a dialog box opens in Order Entry showing you that the order confirmation was sent. There are three scenarios:

- Send order confirmation to your default contact
- Send order confirmation to the attention
- Send order confirmation to both.

When you set up a customer to use this feature, the system knows to fax or email the order in Order Entry. If the Send Order Confirmation box in the Customer Order Entry 2 tab is checked, the E-mail Order box is marked by default. When completing the order in Order Entry, the E-Mail Order or Fax Order dialog box opens.

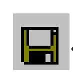
If you do not clear the E-mail Order check box in the Order Entry Order Totals tab, the invoice is sent to the Default Confirmation Contact Type and person who sent the order. However, you can override the attention contact. In addition, if you select an attention for the order, a confirmation email is sent to the attention as long as the attention is linked to a contact. If a default contact type is chosen, the contact also receives a confirmation email. The system checks your customer set up and uses the customer's format when sending the email or fax. The system uses the furniture formats when appropriate.

Scenario #1 - Send order confirmation to your default contact

To send order confirmation to your default contact, you must have the following set up:

- The contact must be set up in the Customer Contact database.
- The F/E box in the Customer Contact database must be set up for fax or email.
- You must set up the contact in the Customer Order Entry 2 tab.
- Optionally, you can enter formats in the Commercial Confirmation/Invoices and Furniture Confirmation Invoices formats boxes in the Customer Order Entry 2 tab or set up formats in the Email/Faxing General Configuration Parameters. The formats set up in the Customer Order Entry 2 tab override the formats set in the Email/Faxing Parameters.

Setting Up a Customer Contact

1. From the DDMS Master Menu, click Databases, then click Contacts. The Contact window opens, displaying the Customer Contact window.
2. Select the customer for which you are adding a contact. Complete the boxes in this window. You must set up the F/E box for fax or email. For more information on these boxes, see your online help.
3. After you enter the information in all applicable boxes, click .

Setting Up the Customer Order Entry 2 Tab

1 From the DDMS Master Menu, double-click 

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2 Select the customer as you normally would. Click the Order Entry tab.

3 The Order Entry 1 tab opens. Click the Order Entry 2 tab.

4 To send order confirmation, click the Send Order Confirmation box.

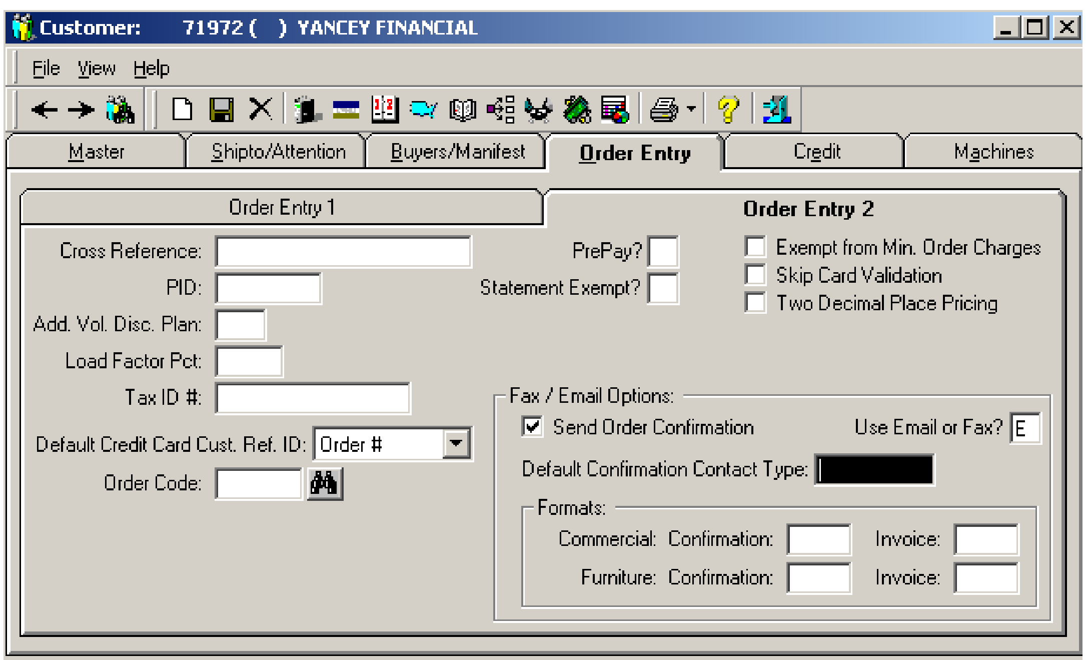
5 The Use Email or Fax box can be used to specify whether to send an email or fax to this contact. However, the system first uses the response in the F/E box in the Customer Contact window for this contact. If the F/E box in the Customer Contact window is blank, the system uses the response in this box.

Type E in this box to email invoices to this contact.

Type F in this box to fax invoices to this contact.

The response in this box overrides the Hold Invoices box in the Order Entry 1 tab.

Figure 2: Customer Order Entry 2 Tab



6 Use the Default Confirmation Contact Type box to enter a contact to which to send all order confirmations, shown in Figure 2. Entering a contact in this box allows you to fax or email a specific person. (This contact must be set up in the Customer Contact window.)

Note: Optionally, you can enter formats in the Commercial Confirmation/Invoices formats and Furniture Confirmation Invoices formats boxes. These formats override formats set in the Email/Faxing Parameters.

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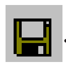
7 Click .

Note: For more information on the boxes in the Customer Order Entry tab, see your online help.

Scenario #2 - Send order confirmation to the attention

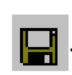
To send order confirmation to the attention, you must have the following set up:

- The contact must be set up in the Customer Contact database.
- The F/E box in the Customer Contact database must be set up for fax or email.
- You must set up the contact in the Customer Order Entry 2 tab.
- You must link the attention to the contact name in the Contact Type box in the Customer Shipto/Attention tab.
- Optionally, you can enter formats in the Commercial Confirmation/Invoices and Furniture Confirmation Invoices formats boxes in the Customer Order Entry 2 tab or set up formats in the Email/Faxing General Configuration Parameters. The formats set up in the Customer Order Entry 2 tab override the formats set in the Email/Faxing Parameters.

Setting Up a Customer Contact

1 From the DDMS Master Menu, click Databases, then click Contacts. The Contact window opens, displaying the Customer Contact window.

2 Select the customer for which you are adding a contact. Complete the boxes in this window. You must set up the F/E box for fax or email. For more information on these boxes, see your online help.

3 After you enter the information in all applicable boxes, click .

Setting Up the Customer Order Entry 2 Tab

1 From the DDMS Master Menu, double-click 

.

2 Select the customer as you normally would. Click the Order Entry tab.

3 The Order Entry 1 tab opens. Click the Order Entry 2 tab.

4 To send order confirmation, click the Send Order Confirmation box.

5 The Use Email or Fax box can be used to specify whether to send an email or fax to this contact. However, the system first uses the response in the F/E box in the Customer Contact window for this contact. If the F/E box in the Customer Contact window is blank, the system uses the response in this box.

   Type E in this box to email invoices to this contact.

   Type F in this box to fax invoices to this contact.

   The response in this box overrides the Hold Invoices box in the Order Entry 1 tab.

6 The Default Confirmation Contact Type box must be blank for the system to send the order confirmation *only* to the contact specified in the Contact Type box.

Note: Optionally, you can enter formats in the Commercial Confirmation/Invoices and Furniture Confirmation Invoices formats boxes. These formats override formats set in the Email/Faxing Parameters.

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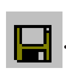
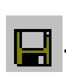
7 Click .

Setting Up the Contact Type in the Customer Shipto/Attention Tab

1 In the Customer database, select the customer as you normally would. Click the Ship/Attention tab.

2 You can add an attention by right-clicking the cursor in the Attention box and select Add Attn.

3 A blank line appears. Fill in the boxes with the appropriate information. For more on this tab, see your online help. You must enter a name in the Contact Type box.

4 Click .

Scenario #3 - Send order confirmation to your default contact and order taker

To send order confirmation to multiple contacts, you must have the following set up:

- The contact must be set up in the Customer Contact database.
- The F/E box in the Customer Contact database must be set up for fax or email.
- You must set up the contact in the Customer Order Entry 2 tab.
- You must enter the contact name in the Contact Type box in the Customer Shipto/Attention tab.
- Optionally, you can enter formats in the Commercial Confirmation/Invoices and Furniture Confirmation Invoices formats boxes in the Customer Order Entry 2 tab or set up formats in the Email/Faxing General Configuration Parameters. The formats set up in the Customer Order Entry 2 tab override the formats set in the Email/Faxing Parameters.

Setting Up a Customer Contact

1 From the DDMS Master Menu, click Databases, then click Contacts. The Contact window opens, displaying the Customer Contact window.

2 Select the customer for which you are adding a contact. Complete the boxes in this window. You must set up the F/E box for fax or email. For more information on these boxes, see your online help.

3 After you enter the information in all applicable boxes, click .

Setting Up the Customer Order Entry 2 Tab

1 From the DDMS Master Menu, double-click 

.

2 Select the customer as you normally would. Click the Order Entry tab.

3 The Order Entry 1 tab opens. Click the Order Entry 2 tab.

4 To send order confirmation, click the Send Order Confirmation box.

5 The Use Email or Fax box can be used to specify whether to send an email or fax to this contact. However, the system first uses the response in the F/E box in the Customer Contact window for this contact. If the F/E box in the Customer Contact window is blank, the system uses the response in this box.

Type E in this box to email invoices to this contact.

Type F in this box to fax invoices to this contact.

The response in this box overrides the Hold Invoices box in the Order Entry 1 tab.

6 Use the Default Confirmation Contact Type box to enter a contact to which to send all order confirmations. Entering a contact in this box allows you to fax or email a specific person. (This contact must be set up in the Customer Contact window.)

Note: Optionally, you can enter formats in the Commercial Confirmation/Invoices and Furniture Confirmation Invoices formats boxes. These formats override formats set in the Email/Faxing Parameters.

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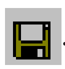
7 Click .

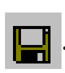
Setting Up the Contact Type in the Customer Shipto/Attention Tab

1 In the Customer database, click the Ship/Attention tab.

2 You can add an attention by right-clicking the cursor in the Attention box and select Add Attn.

3 A blank line appears. Fill in the boxes with the appropriate information. For more on this tab, see your online help.

You must enter a name in the Contact Type box.

4 Click .