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SedonaEmail

Presented by:

Jim Mayes
Carolyn Johnson

PERENNIAL SOFTWARE

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Overview

SedonaEmail is an exciting new feature added to the SedonaOffice application in 2017. Using SedonaEmail, you are able to send invoices to your customers through single and batch methods.   The email version of the invoice is based on the Bridgestone standard format and is embedded directly into the email avoiding attachment blocking by firewall and anti-virus software.   As of the publication date, over 60 security companies are actively using SedonaEmail!

What is Mandrill?

Mandrill is the service we use to convert information sent through their API into emails. For SedonaEmail, we have designed templates that sit on Mandrill's system and format this information into emailed invoices.   You can think of Mandrill as Bridgestone for emailing.

Getting Started

Once your company has updated to version 5.7.60 or higher, you have access to SedonaEmail.   No special installation or activation is required.   Access to the feature is controlled by permissions in SedonaSetup User Group security.
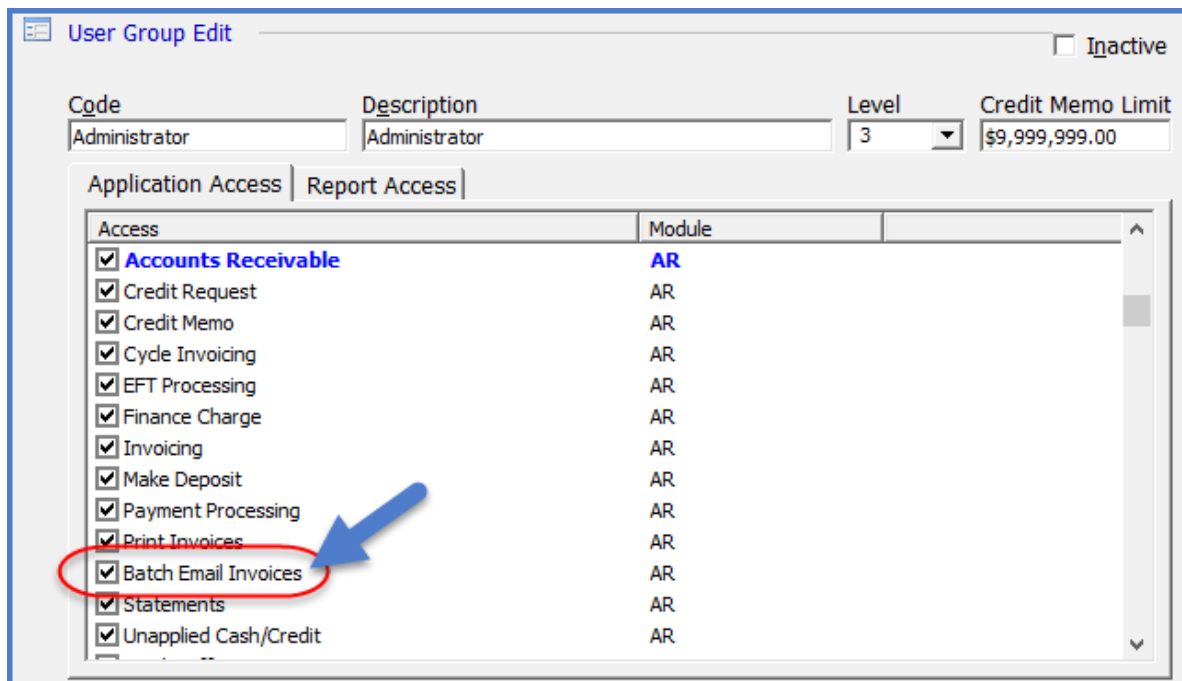
```
Notes:




```

Providing Email Functionality to Your Employees

You have two options for providing access to SedonaEmail: **Single Email Invoice** and **Batch Email Invoice**.   In *SedonaSetup*, navigate to *User Groups* and select the group(s) that will be using SedonaEmail.

Batch Email Invoices gives a user access to the Batch sending routine from the main A/R Tree.   Any user with this permission will have access to the email queue, be able to set filters for the listing and send out emailed invoices from that list.

SedonaSetup -- User Group Permissions 1

Notes:

Single Email Invoice gives a user access to all of the single email functionality available from the invoice form.

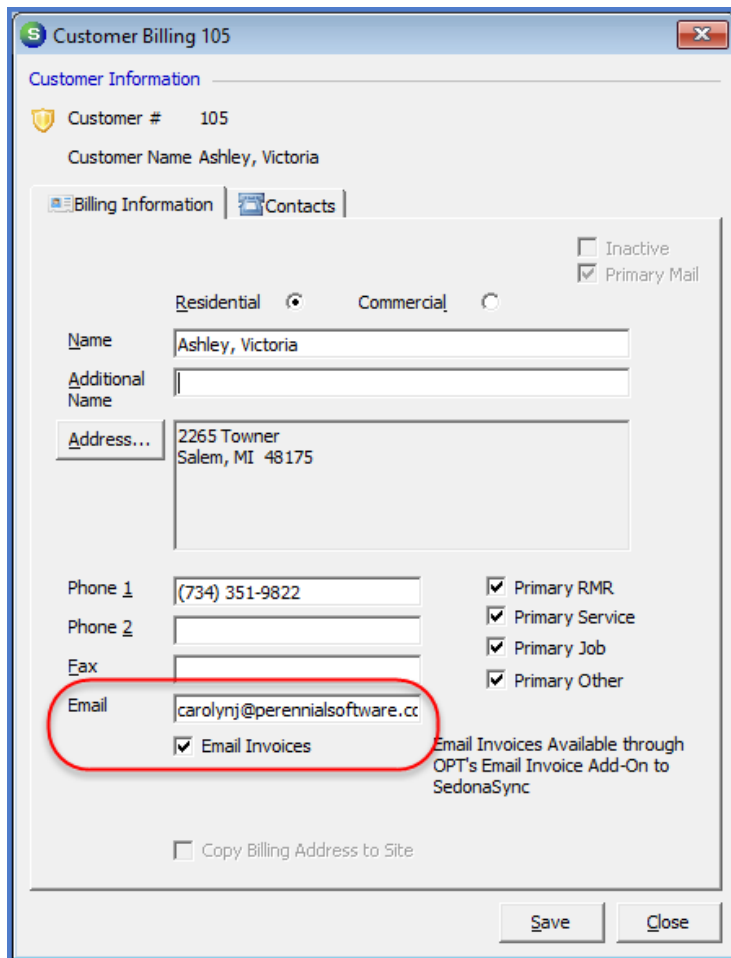**SedonaSetup -- User Group Permissions 2**

Important: These permissions are exclusive. If a User requires rights to perform both of these activities, you will need both permissions selected. Once you have checked the appropriate permissions for a User Group, anyone in that User Group will have access to these features.

Notes:

Flagging a Customer to Receive Emails

The Email address and Email preference is controlled on the Customer's Bill-To record.

Emails designated for this customer will default to the email address entered in the Email field of the Bill-To record.   If this field is blank, the Customer will not be eligible for emailing of invoices. The *Email Invoices* check box sets the preference for whether this Customer will receive invoices via email.   If the box is checked, all invoices created for this Bill-to will start with the *In Email Queue* setting checked.   This setting has no impact on whether the customer receives paper invoices.

Important: Each Bill-To record on a Customer is treated separately, so you must enter the email address and decide the email preference for each Bill-To record.

Single Invoice Emailing

If the user has the permission to *Single Email Invoice*, the invoice form will appear as pictured below showing the Single Email button and the Email History Button.

Notes:

Clicking the Email Invoice button brings up the following screen:

To

From here you can review and edit the destination email address listed in the **To** section.   The default value of this address is taken from the set-up of the bill-to record associated to the invoice.   You can add multiple recipients by separating additional email addresses with a comma.   Note in the above screen this invoice will be sent to carolynj@perennialsoftware.com.

Template

This is the invoice template that the email server will use to build the contents of the email sent to the customer.   Currently there is only one template available.

Subject

The default subject is your company name and the invoice number.   You can edit this as needed.

Additional Notes

This space is provided so that you may type in a specific note for this email.   The note will display at the top of the email, prior to the invoice section.

Sending the Email

Once you are satisfied with these entries, you click **SEND** to finish or **CANCEL** to abort. If you click **SEND**, the system will write a confirmation that the email went out successfully.
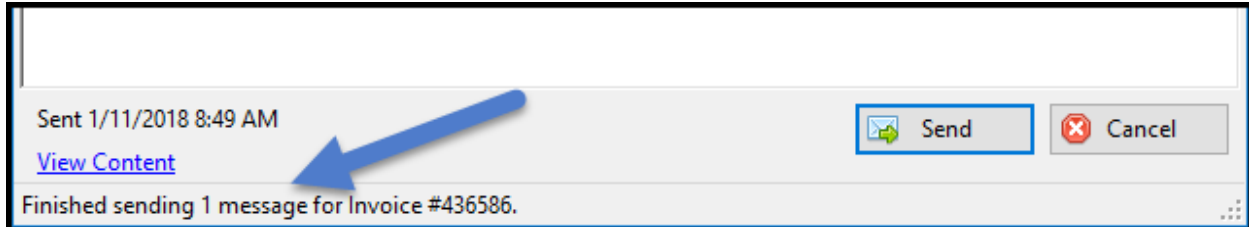
If you receive an error, the error message will indicate the issue. You may need to contact SedonaOffice Support for assistance with any issues.

Below is an example of the invoice that went out as a result of the above process:

Note the Additional Message printed at the top of the email. Once you send the email, you can click **CANCEL** or the **X** to leave the email screen.

Email History

If you click the Email History button, the below will display.

This provides a listing of all email attempts made for this invoice.   As this feature develops, additional messages from the email server will be displayed, including whether the email was viewed by the customer.

Notes:

Add/Remove Invoice from Email Queue

All users that have permission to edit invoices will have the ability to add or remove an email from the Email Queue.

Notes:

Batch Invoice Emailing

Starting Batch Email

If the user has the permission for **Batch Email Invoices**, they will see the below option on the main SedonaOffice tree.
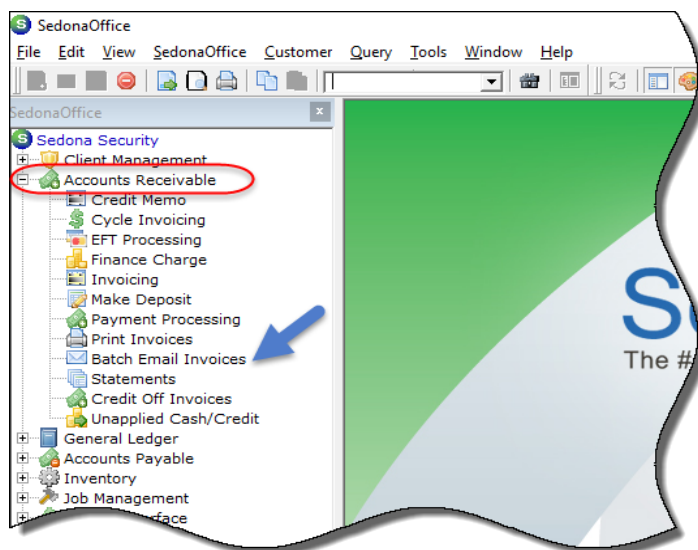
Double clicking this option will display the Email Invoice Queue as shown below.

The Email Invoice Queue is where the batch emailing of invoices takes place. The list of displayed invoices to be emailed depends upon the filters chosen by the User.

Choosing Filters

Master/Standard

You can select to filter Master Account Invoices, Non-Master Account Invoices or Both by clicking this button.

Invoices All/In Email Queue

This button switches the filter between items with *In Email Queue* checked and those that do not.

No Charge Invoices

If these are excluded, any invoice with a balance = $0 will not display.

Commercial/Residential

You can choose commercial customers, residential customers or both.

Invoice Type

Cycle, Service, Jobs, Other

Customer Type

Select the customer types you would like to include.   The default is all.

Customer Group

Select the customer groups you would like to include.   The default is all.

Single Master Account

Allows you to select all invoices associated with a selected Master account.   This does not include the invoices that are directly on sub-accounts.

Branches

Select the branches you would like to include.   The default is all.

Date Range

Checking this box allows the user to restrict the invoice selection to only invoices dated within this range.

Invoice Number Range

Checking this box allows the user to restrict the invoice selection to only invoices numbered within this range.

Bill-to/Contact Email

Switching this feature determines whether to use the email address associated to the bill-to address or the email address associated with the contact.   In cases where the contact is not provided or the email address for the contact is blank, the bill-to email address is used.

Format Type

Currently, "Invoice" is the only option.

Send to Email

When you check this box, you are provided with a box to input an override email address.   All emails sent while this box is checked are sent to the override email address instead of the designated email address.   This is highly useful for testing and when emailing invoices internally.   If you need to mark a large number of invoices as emailed without sending to the customer, you can select those invoices and then use this feature to send to yourself.

 Important: Do not use a non-functioning email address in the **Send To Email** field. Large numbers of rejected attempts may have an impact on your future ability to quickly send emails.
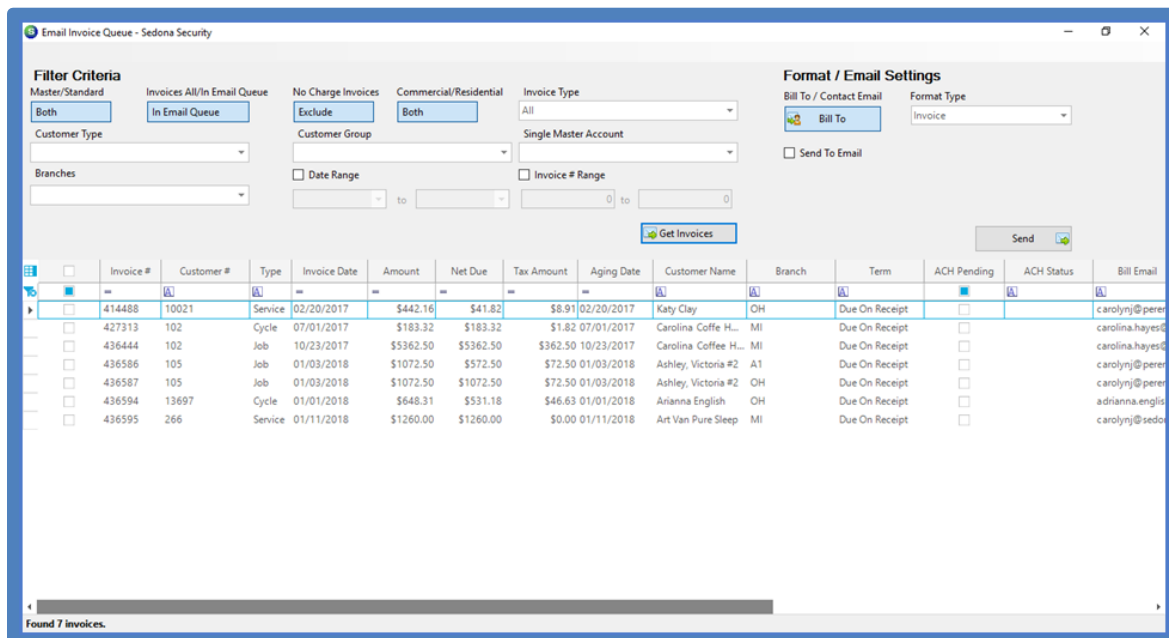
Notes:

Populating the Email Queue

Once you have your filters selected, click the **GET INVOICES** button.   This will populate the invoice listing using the filters.   If you decide that you need to change any filters, simply change the filter settings and then click **GET INVOICES** again.

Each column within the list of invoices to be emailed (the email invoice queue), provides the functionality to sort by that column and filter the items displayed based on the settings you choose within that column.

Once the list is populated, you can select the checkbox to the left of the invoice to mark it to be sent.   If you want to select all invoices in the queue, simply check the upper left checkbox and the system will check all.   If you need to uncheck all, you can uncheck that box (if all are checked) or check and then uncheck the box to clear everything.

Once you have the desired invoices selected, you initiate the email process by clicking the **SEND** button.
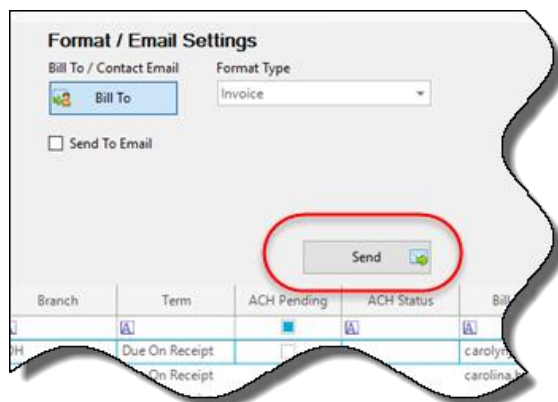
The system will prompt you to confirm that you are ready to email the selected items.
Click **OK** to continue or Cancel to abort.
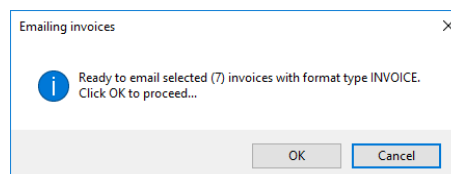
Once the emails have been sent, a confirmation message will be displayed indicating the success rate.   If there are items that failed, you can review the log to determine why the item failed.
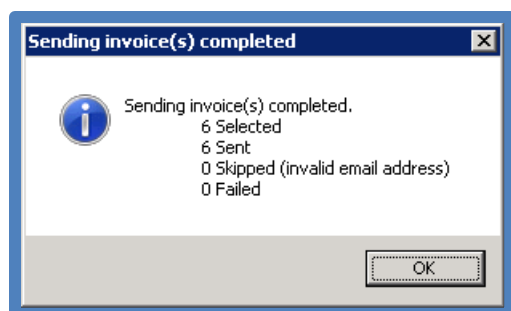
When you are finished emailing invoices, simply click the **X** in the upper right hand corner to exit the Email Invoice Queue.

Notes:

Configuring SedonaEmail

The default setup of SedonaEmail uses generic values including a *from* email address of NoReply@SecurityServicesBilling.Com.

Email Preferences

You are not able to set the email preferences.   If you need to change the current set-up, you will need to contact SedonaOffice support so that a data technician can make those changes.   You will need to determine:

What will your customer see as the "Sent From" email address?

Your customer will see this listed on the email program as the "sender".   This will also be the email address that your customer will use should they choose to reply to the email.

Whom will your customer see as the individual that sent the email?

Customers will see this as the individual or company that sent the email.

What do you want the email subject to show?

The subject will include the invoice number, so Invoice #12345.   You can add verbiage to the invoice number to further customize the subject line.   Some users have chosen their company name and others have provided an informational message.

Using Your Own Domain

If you want to use your own domain, there are several steps that you need to take to make this possible.

Validating the Domain Name

Once you notify SedonaOffice staff that you would like to use your own domain as a part of SedonaEmail, you will receive an email from Mandrill that looks something like this:

Mandrill domain verification

The Mandrill account with username SedonaOffice is attempting to use an email address at your domain (perennialsoftware.com). To allow this account to send from your domain, click the following link:

http://mandrillapp.com/settings/verify-domain?domain=perennialsoftware.com&key=afJHM4NLhDOJL0xbn287DQ

For more information on domain verification, check out this article http://eepurl.com/xKNar
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If you didn't request this, you can safely ignore this email.

--
The Mandrill Crew

Mandrill is the emailing service we use to manage the distribution of emails.   They will not let us use your prefered email domain until they are confident that you have authorized this.   Once you receive the above email, simply forward it to your SedonaOffice technician and will complete this part of the process.

Changes to your DNS server

You will need to contact whomever is responsible for maintaining your email domain so that they can install these changes and enable your DNS server to work with Mandrill. Once these changes are made, contact your SedonaOffice technician so that they can verify the settings are correct.

SPF

Add the following text to your existing SPF settings:

```
include:spf.mandrillapp.com
```

```
In the event that you do not have an existing SPF record, they will need to
add one with this setting.
```

```
include:spf.mandrillapp.com ~a
```

DKIM

Create a TXT record for mandrill._domainkey.*YOURDOMAIN*.com with the following value:
v=DKIM1; k=rsa;
p=MIGfMA0GCSqGSIb3DQEBAQUAA4GNADCBiQKBgQCrLHiExVd55zd/IQ/J/mRwSR
MAocV/hMB3jXwaHH36d9NaVynQFYV8NaWi69c1veUtRzGt7yAioXqLj7Z4TeEUoOLgr
Ksn8YnckGs9i3B3tVFB+Ch/4mPhXWiNfNdynHWBcPcbJ8kjEQ2U8y78dHZj1YeRXXVv
Wob2OaKynO8/lQIDAQAB;

Note: you replace *YOURDOMAIN* with whatever your email domain name is.

Adding Your Domain to SedonaEmail Configuration

After verifying the DNS changes, your SedonaOffice technician will update your SedonaEmail configuration to use your new settings and contact you to confirm the final setup is correct.

Notes:

SedonaEmail: Invoices Phase II

Based on customer feedback and our internal experiences with SedonaEmail, the following list of enhancements are either completed or in the works. Reference the Appendix for the projected layout of the new email template: Bridgestone-Advanced.

Changes at the Customer Level

Email/Print Options by Invoice Type

There will <u>not</u> be any print/email options for invoices at the customer level.

Notes:

Invoice printing and email options are controlled at the bill-to level, and are available for each invoice type.   You are free to select any combination of check boxes to ensure that, by customer and by invoice type, the correct delivery methods are used.   The current configuration is displayed in the information screen for each customer bill record.

Notes:

Changes to SedonaSetup - Data Entry Defaults

You are able to set the preferred combination of delivery methods for both email and print.   Data entry defaults apply to new customer creation.

Notes:

Multiple Email Addresses by Customer Bill-to (Distribution List)

You can track multiple email addresses per customer bill-to.   In the image below, you can see that this bill to address has two email addresses attached. CarolynJ@SedonaOffice.Com is designated the primary email address.   If you click the Email Address tab, you get the following screen.

Notes:

As you can see, there are two email addresses for this bill-to record.   When invoices attached to this bill-to are set for emailing, an email will be generated for each active and valid email address on that bill-to.   You may have any number of email addresses attached to a bill-to.

Primary

There can only be a single primary address per bill-to.   If you want to change the designated email address, simply click on the primary check box for that email address and the system will automatically switch the setting.   The primary email address is used for all basic reporting and email address displays.   This also preserves reverse compatibility with other SedonaOffice add-ons.

Notes:

Invalid

If an email sent to this address is bounced due to an invalid mailbox or domain, the system will flag this email address as invalid.   As long as the item is flagged as invalid, no additional emails will be sent to that address.   Once an email address is identified as invalid, you should contact the customer to determine the correct email address to use. In the event that the email address was temporarily invalid, you can uncheck the associated box and the system will again email that address.   Invalid email addresses display in red in the single email and batch email areas.

Inactive

If you wish to suspend emailing a specific address, but do not wish to remove that address, mark it as inactive.   No new emails will be generated to that address and, should you need to reactivate, simply uncheck the associated box.   Inactive email addresses do not display elsewhere in the system.
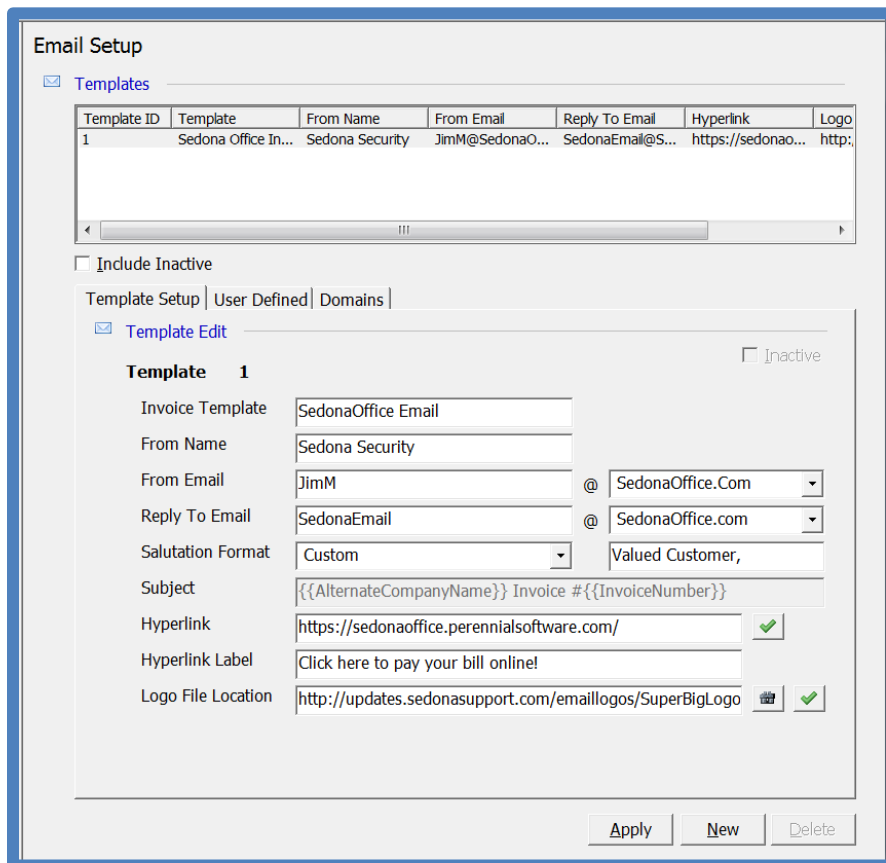
SedonaEmail Template User Configuration

You now have the ability to configure multiple email templates and assign those at the branch level (discussed later). This is a new option this is being added to SedonaSetup.

Template Setup

Invoice Template

This is the name you will use to reference the template.   There is no impact on the system based on this setting.

Notes:

From Name

Emails will show this value as the individual that sent the email.

From and Reply-to Email Addresses

The *From* and *Reply-to* email addresses are broken into two segments.   The first segment is the mailbox associated with the email address.   This should match an existing email address on your email server.   Usage of invalid mailboxes will result in errors should your customers attempt to reply to you! The second segment is the domain name.   The only options available for domain names are those previously validated and configured by SedonaOffice staff.   Each of these will appear in the drop down for selection.

Salutation Format

You have the option of choosing the configuration of your email salutation. The current options are either *Custom* or *Customer Name*. If you choose *custom*, the value in the adjacent field will be used as the salutation. Be sure to include any punctuation that you need. If you choose *Customer Name*, the customer's name will be used as the salutation.

Subject

The subject is attached to the invoice number as the subject line of the email.

Hyperlink & Hyperlink Label

If you populate these fields, the email will present an entry in several places on the emailed item. The intention is to be a "click her to pay online" option, so the associated areas of the email match that intent. The **Hyperlink Label** is what the entry will say and the **Hyperlink** is the web address that will be triggered when the link is clicked.

Hyperlink: https://sedonaoffice.perennialsoftware.com/
Label: To pay your bill on line click here!
Results in: To pay your bill on line click here!

Clicking the link takes you to the web address defined by **Hyperlink**.

Logo File Location

You have the option of a logo printed on the emailed invoice. The logo will print in the upper left portion of the invoice and replaces the company information. The logo should include whatever logo you wish to display AND any company or address information you feel is important. The file must be an image file. The logo file location is a URL and must be publicly available. You can accomplish this last part by creating a public directory on your web server or by uploading your logo to a public share directory. The ⊞ button allows you to search for existing files and the ✅ checks to make sure that the path is valid.

Notes:

User Defined Fields

Hyperlinks & Labels

These hyperlinks and labels are designed to work with the pictures that you can add to your email content (below). Hyperlink #1 maps to Picture File #1 and so on. If you define a hyperlink and leave the label blank, the hyperlink will attach to the associated picture file. If you populate the label, the label will appear below the associated picture and act as a hyperlink leading to the web address entered. Note: if the image file is left blank but the label is populated, the hyperlink will show. If the image is left blank and the label is left blank, this setting will have no effect.

Picture Files

The user defined images provided in this section are mapped to areas of the emailed content and designed to provide marketing and informational opportunities. The picture locations within the email content are still under consideration as of the writing of this document.

Notes:

Changes at the Branch Level

You can select a different email template for each branch in the system. Simply select the desired template for the branch and click apply. If no template is selected, it will default to the #1 template. Branch operation always follows the invoice Branch.

Notes:

New Features for Single Invoice Emailing

Parsing Multiple Email Addresses Using the Semicolon Character

SedonaEmail currently uses the comma character as a delimiter when email addresses are concatenated. You will now be able to use the semicolon character as a delimiter.
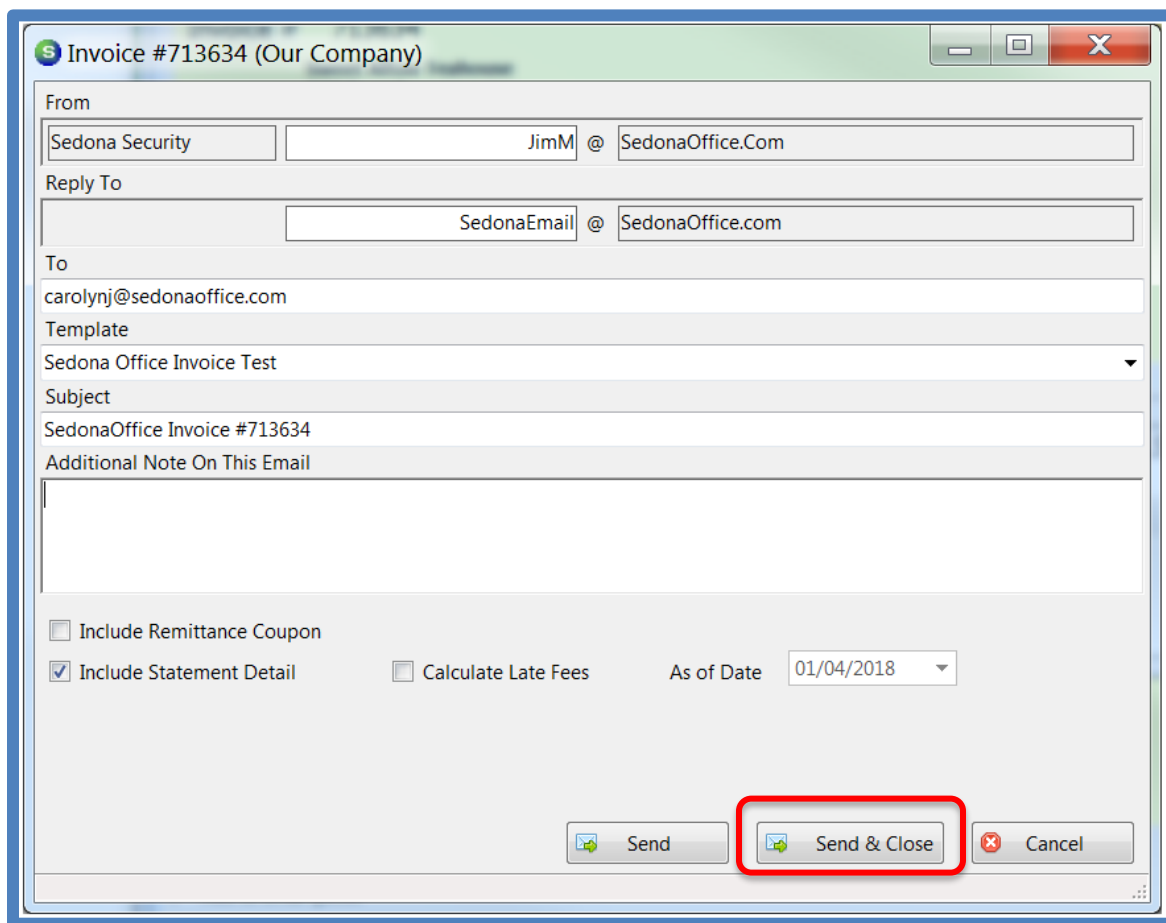
New Option Send & Close
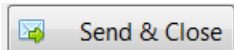
Send & Close Clicking on this button will exit the form after email transmission.

Send Clicking on this button will keep the form open and allows for further activity by the User.
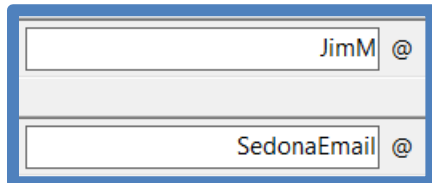
Notes:

Independent *From* and *Reply-to* Addresses

You are now able to specify separate email addresses for both the *From* and *Reply-to*.

Override *From* and *Reply-to* Addresses

There is a user group permission **Override of Company Email Address** that provides the User the ability replace the default values for the *From* and *Reply-to* when sending emails. Users are not permitted to override the email domain.

Notes:

Providing a Remit to Section as Part of the Email

Users are able to add a remittance section by clicking the [ ] Include Remittance Coupon check box. The remittance information is based on the *Alternate Company Address* setup *Alternate Remit-To Information* attached to the invoice Branch.

Notes:

Provide Statement Information (Invoice Statement)

☑ Include Statement Detail	☐ Calculate Late Fees	As of Date	01/04/2018 ▼

If you check *Include Statement Detail*, the email will include an information block representing a customer statement using the as-of-date selected. This will include open invoices, open credits and an aging detail using your company terms.   If you check the box calculate late fees, the customer's late fee will be calculated (based on the as-of-date) and presented within the email.

Notes:

New Features for Batch Invoice Emailing

Removing Invoices from the Email Queue
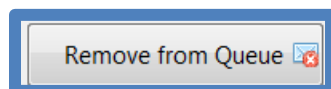
 After selecting the items from the email queue, you can click this button to remove all of these items from the email queue **WITHOUT** sending them.

Mark Sent Items as Emailed?

After performing a batch send of emails, the SedonaEmail application gives you the option of marking the selected items as sent.

If you choose **No**, those items that were already in the email queue will remain in the queue. If you select **Yes,** all items sent are removed from the email queue.
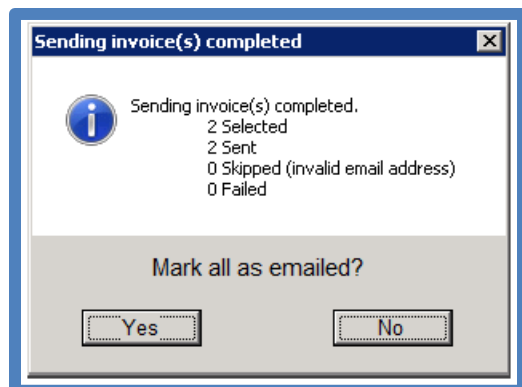
Notes:

Reporting Details for Skipped/Failed Emails

When batch emails are sent, the user is notified that # emails were sent, # skipped and # failed.
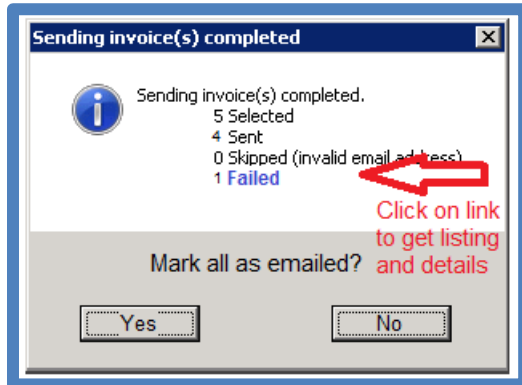
In the event that Skipped and Failed are non-zero, clicking on the highlighted item displays a listing of which items populate these categories with details of the errors that apply.

Batch Email Send Uses Threading

Emails will process using multiple threads to increase throughput. In this fashion, we will be taking better advantage of the connection speed of your internet access.
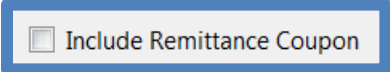
Single Customer and Master Account Filter for Batch Email

Currently the box **Single Master Account** limits single customer selection to master accounts only. You will be able to select any single account. In addition, if you select a master account you will have the option of including the sub-account invoices by checking the box **Include Subs**. This will list both the master account invoices and all of the associated sub-account's invoices.
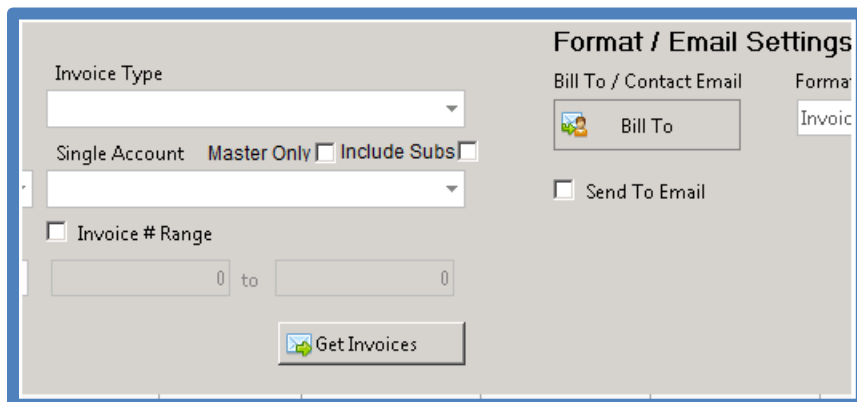
Providing a Remit to Section as Part of the Email

Users are able to add a remittance item to batch and single emailing by clicking the

☐ Include Remittance Coupon   check box. The remittance information is based on the Alternate Company Address setup → Alternate Remit To Information attached to the invoice Branch.

Providing Statement Information (Invoice Statement)

☐ Include Statement Detail
☑ Calculate Late Fees
As of Date: 01/04/2018 ▼

If you check Include Statement Detail, the email will include an information block representing a customer statement using the as-of-date selected. This will include open invoices, open credits and an aging detail using your company terms.   If you check the box calculate late fees, the customer's late fee will be calculated (based on the as-of-date) and presented in the email.

Notes:

Changes to Email Activity Reporting

Mandrill Email Statuses and Statistics Available to Users

Mandrill provides information regarding errors, sends, opens and clicks on each email. In the event there is an error, the error type is provided with the returned message from the destination email server. SedonaEmail polls Mandrill on a regular basis updating the records on each email sent.

Clicking "View Details" from Invoice Window Opens "Email History - Detail"

Notes:

Expanded Email History Display and Functionality

Clicking the Email History Button 🗐 opens the Invoice Email History window. The display below is an expanded version of the existing display. From this window you can click on Opens or Clicks, and a bubble window will show the details of that area for the listed item.

Double clicking the line item opens the Invoice Email History – Detail window. This window contains two tabs for displaying the Opens and Clicks. It also provides a button for View Message, which will show the HTML of the message sent to Mandrill. I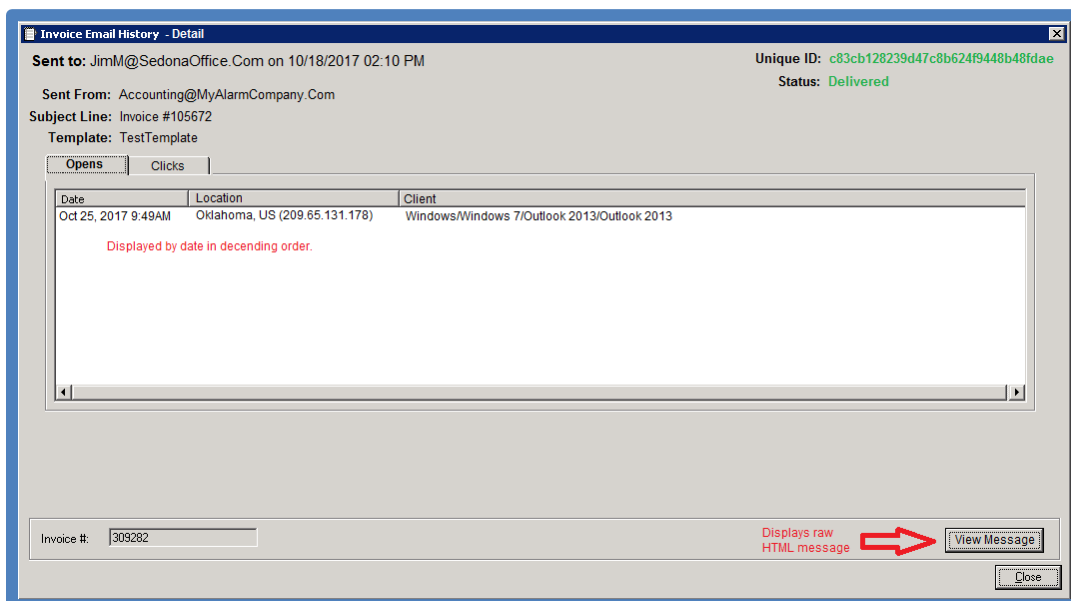n the event of an error status, an additional button is offered. When clicked, a window opens showing the full target server error response.
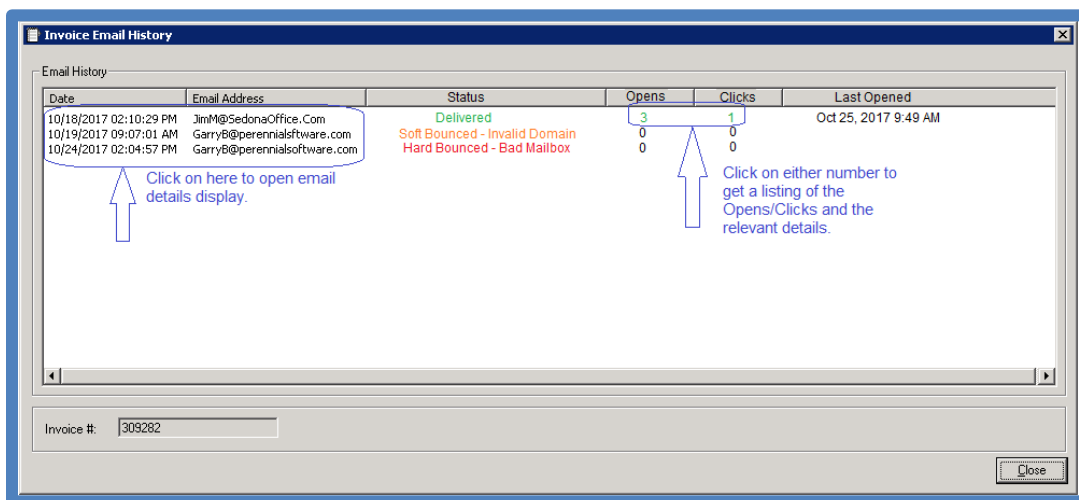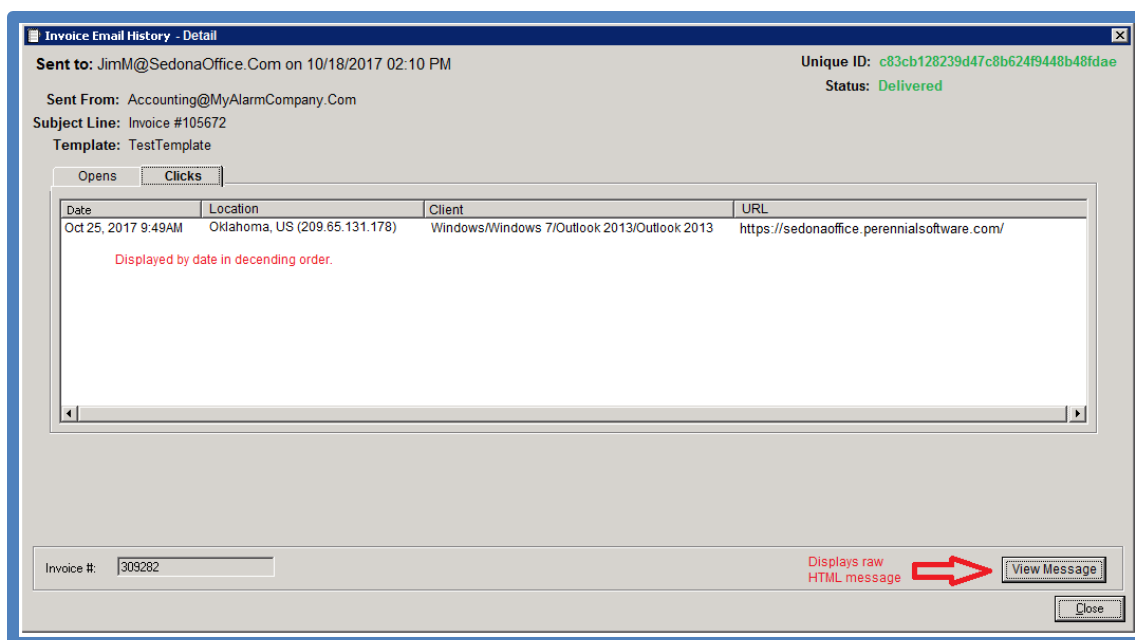
Clicking on response opens text window with the verbose server response from Mandrill.
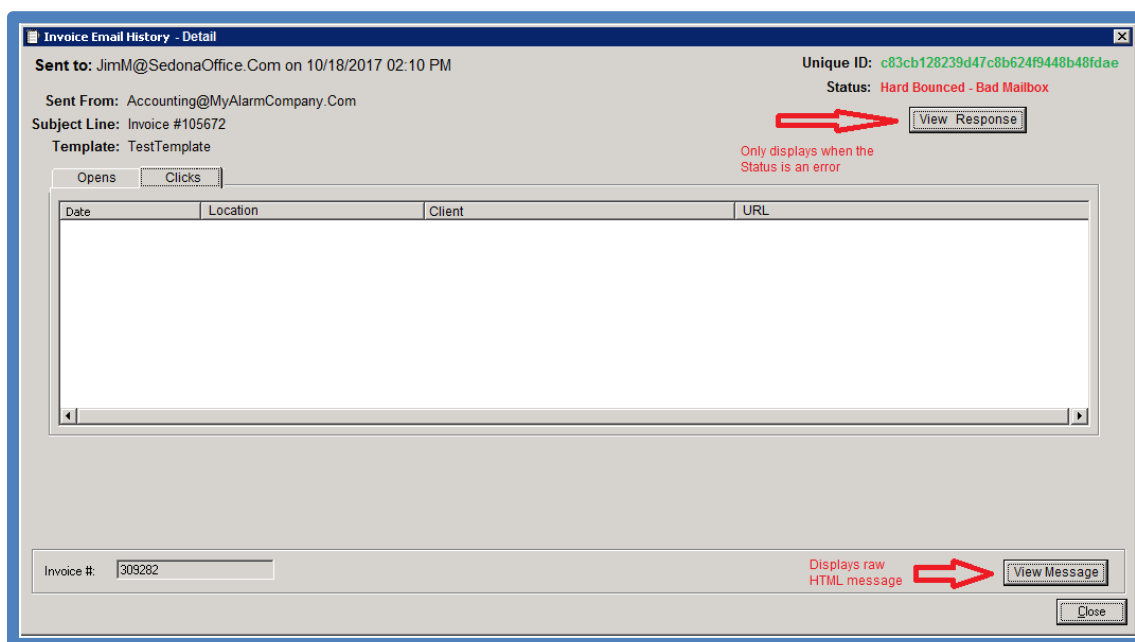
Notes:

Response information:

Notes:

Reporting

As we continue to roll out these new features for SedonaEmail, we will design reports to facilitate acting on that information. Some of the reports anticipated are:
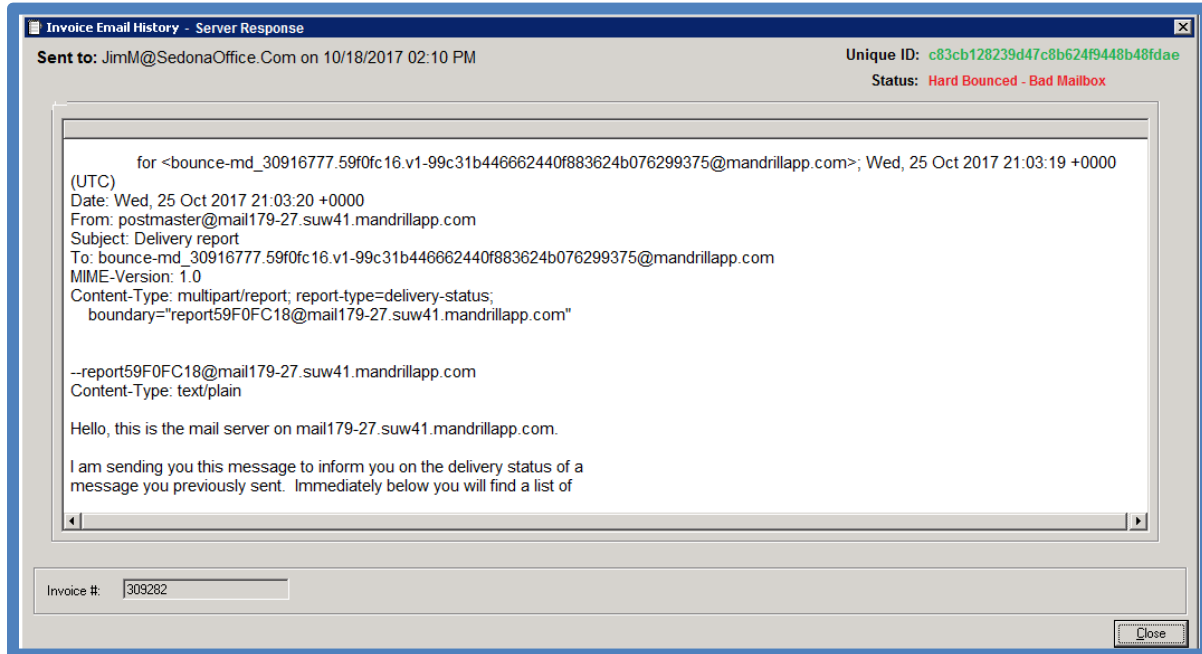
- Email Listing by Date Range with filters for branch, etc.
- Error Logs by Date Range
- Listing of Invalid Email Addresses

Query Builder

Support for SedonaEmail information will be added to the Customer Query Builder.

Next Steps for SedonaEmail

Additional Templates

As we continue to improve the application, we will build additional invoice templates. The current template is Bridgestone-Standard. The next template will be Bridgestone-Advanced. This ensures that the previous invoice formats are always supported.

Statements

We will add pure statements generated based on an as-of-date and allow for the recalculation of late fees.

Purchase Orders

Emailing of purchase orders involves adding a great deal of functionality to the Vendor side of the application. We will be adding vendor contacts and email tracking for those contacts.

Collection Letters

Credit Memos

Service Tickets

Appendix

Installing the Application

Some clients automatically installed the application as a part of updating to version 5.7.57, however others did not. If you click on the option for **Batch Email Invoices** and the SedonaEmail queue does not display, you may need to install the application. You can confirm this by browsing to your SedonaOffice directory and verifying the existance of the folder for SedonaEmail.

Verifying SedonaEmail Installation

Open Windows File Explorer

Browse to the SedonaOffice directory.
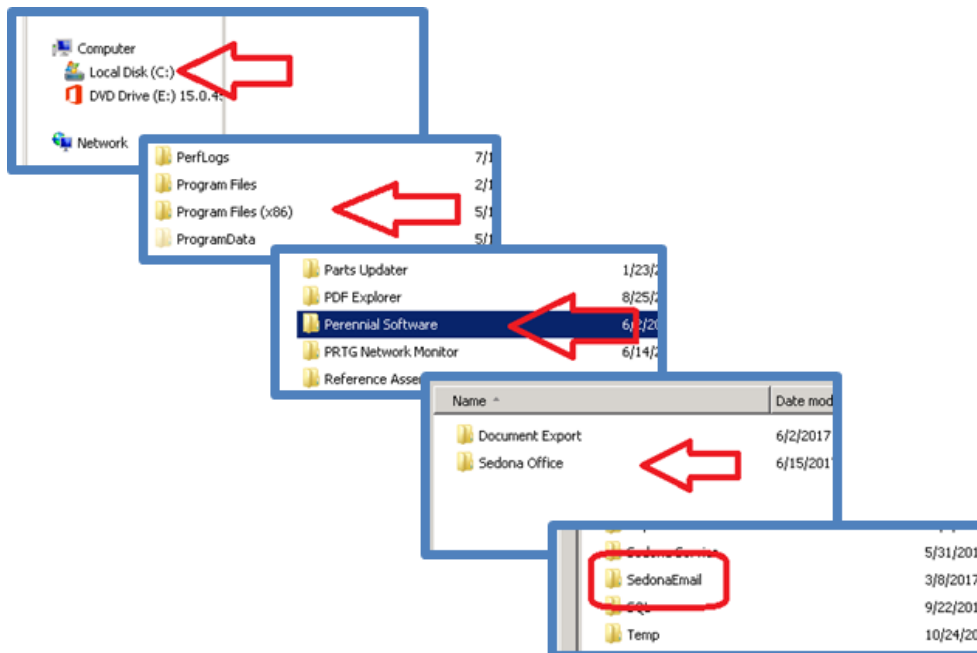
If the above directory does not exist, you will need to install the application files. If it does exist and you are unable to launch SedonaEmail, you will need to contact support for assistance.

Installing the Application Files

The file **SedonaEmail.zi_** was included as an attachment on the same email that included this document.
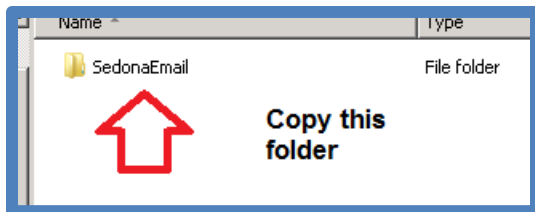
Copy that file and paste it into the SedonaOffice directory.

Rename the file to .zip (change the _ character to a p)

Double click on zip file and the following should open

Right click on the folder and select copy

Click the back button to return to the SedonaOffice directory

Paste the folder into the SedonaOffice directory

Return to the SedonaOffice application and double click on **Batch Email Invoices**.

The SedonaEmail application should start. If it does not, review the above steps to be sure you did not miss anything. If you are unable to get the application to start, you will need to contact support for assistance.

Bridgestone-Advanced Invoice Template

The email template is broken into a collection of blocks.

Note: This template is still in development; however, as of the creation of this document the following is completed or planned.

Introduction Block

Picture #1 and Hyperlink #1 are the first items displayed. If there are special notes attached to the email (from single invoice emailing), these are displayed after the picture and hyperlink.

Invoice Summary Block

This provides a quick summary of the invoice including the type of invoice and the amount due. If statement information is added to the invoice, this will include the total due for the customer and a message indicating that a customer statement appears at the end of the email. After the summary, picture #2 and hyperlink #2 appear. The company hyperlink will also be included in this section to facilitate the intended "pay online" option.

Remittance Block

This is a standard customer payment remittance including basic customer information, the invoice number, expected payment amount and a space for the actual payment amount. The company's remittance information (based on alternate company address) is displayed. Dotted lines are provided to help with separation when the item is printed. After the remittance, picture #3 and hyperlink #3 appear.

Notes:

The Invoice Block

Currently the site address appears prior to each line however, this is being changed to only display customer and/or site information when it is necessary to indicate a change on the invoice. This will facilitate master account invoices where it is especially important to indicate which line items attach to which sub-accounts. After the rendered invoice, picture #5 and hyperlink #5 are displayed.

Statement Information Block

Open invoices, open credits, detail of payments made and an aging list based on the as-of-date selected. Either the last late fee or the recalculated late fee will display based on the user preferences at time of generation.

Ending Block

As of this time, the only information in this block is picture #6 and hyperlink #6.

Notes