



Key Communications 5.6A

Key Communications simplifies sending documents via email to Customers & Vendors directly from within the Sage ERP Accpac environment. Sending via email has never been simpler to implement. Best yet - a copy of the email is recorded within Accpac for future reference.

Progress has changed the way that organisations distribute commercial documents - now more than ever the emphasis is on email delivery directly from the ERP.

The new Key Communications module from PTS addresses many of the challenges that organisations face when changing business processes to be email-centric. All emailing is handled directly from within the Sage ERP Accpac environment.

A great feature of this solution is that a copy of sent emails (including attachments) is stored right inside Accpac.

The Customer Document Log gives Accpac users an easy way to view everything that has been emailed to a Customer. From here an exact copy of what was originally sent by email can be resent or printed.

Unlimited Account Contacts

Key Communications introduces new unlimited Customer Contacts (and Vendor Contacts) into the Sage ERP Accpac.

A common requirement is for certain documents to be sent to multiple contacts. Another tricky requirement is to optionally print and post a hard copy to an admin address.

All scenarios are easily handled in the configuration of each Contact.

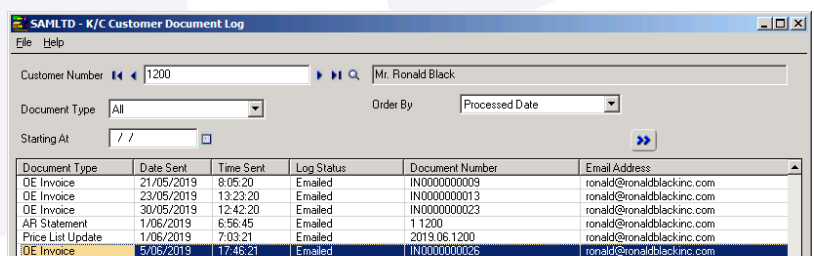
Sending Documents

With Key Communications, several new reporting or "Emailer" screens are added that send the standard AR, AP and OE documents in a simple & elegant method.

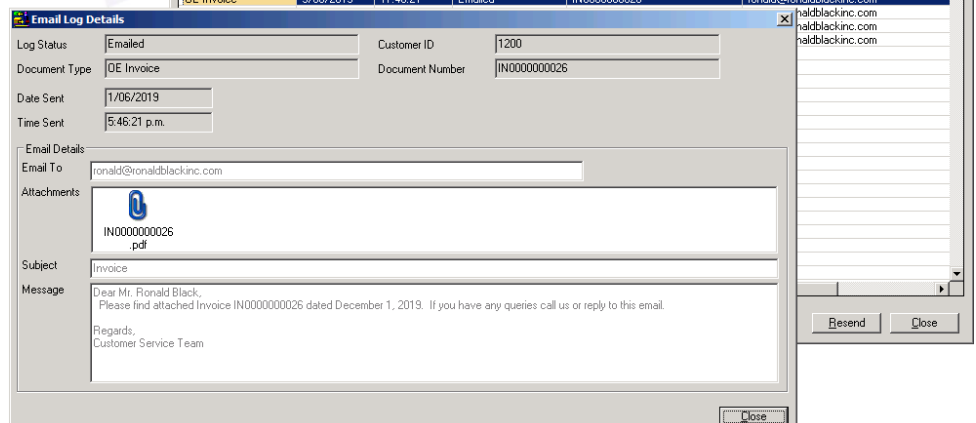
A document register is maintained so only new documents are selected for delivery; the various Emailer screens will resolve which documents and if they should be emailed (or printed) for distribution to the various recipients.

Supports 3rd Party & Custom Reports

Any reports from your favourite 3rd Party application can be added to use the Key Communications framework. Once the custom reports have been configured then these sent emails will be listed in the relevant Document Log.



Document Type	Date Sent	Time Sent	Log Status	Document Number	Email Address
OE Invoice	21/05/2019	8:05:20	Emailed	IN000000009	ronald@ronaldblackinc.com
OE Invoice	23/05/2019	13:23:20	Emailed	IN000000013	ronald@ronaldblackinc.com
OE Invoice	30/05/2019	12:42:20	Emailed	IN000000023	ronald@ronaldblackinc.com
AR Statement	1/06/2019	6:56:45	Emailed	1 1200	ronald@ronaldblackinc.com
Price List Update	1/06/2019	7:03:21	Emailed	2019.06.1200	ronald@ronaldblackinc.com
OE Invoice	5/06/2019	17:46:21	Emailed	IN000000026	ronald@ronaldblackinc.com



Email Log Details

Log Status: Emailed Customer ID: 1200

Document Type: OE Invoice Document Number: IN000000026

Date Sent: 1/06/2019

Time Sent: 5:46:21 p.m.

Email Details:

Email To: ronald@ronaldblackinc.com

Attachments: IN000000026.pdf

Subject: Invoice

Message: Dear Mr. Ronald Black,
Please find attached Invoice IN000000026 dated December 1, 2019. If you have any queries call us or reply to this email.

Regards,
Customer Service Team

Manageable Email Queue

All emails are sent via an email queue; by default the queue will immediately send email out via the configured email gateway.

Alternatively the queue can be configured **not** to send, but to accumulate emails. In this mode the queue can be manually cleared - or alternatively a scheduled task can be run that will clear the queue automatically at preset times.

Availability & System Requirements

Editions: 100, 200 & 500
 Databases: Microsoft SQL Server, Oracle & Pervasive
 Web Deployable: Yes

Maintaining Customer Contacts

The screenshot shows the 'SAMLTD - K/C Customer Contacts' application. The main window displays a table of contacts for customer 'ACME Plumbing' (Customer Number 1210). The table includes columns for First Name, Last Name, Position, Status, Email, Work Phone, Cell Phone, Fax Number, and Portal. Three contacts are listed: Jason Builder (CFO), Susan Wrightson (Office Admin), and Morris Fredericks (Store Manager). A secondary window, 'SAMLTD - K/C Customer Contacts Entry', shows a detailed view of the contact 'Jason Builder', including fields for First Name, Last Name, Email, and a 'Contact Details' section with a table of document types and actions.

First Name	Last Name	Position	Status	Email	Work Phone	Cell Phone	Fax Number	Portal
Jason	Builder	CFO	Active	JasonB@acmeplumbing.com				No
Susan	Wrightson	Office Admin	Active	SusanW@acmeplumbing.com				No
Morris	Fredericks	Store Manager	Active	Morris@acmeplumbing.com				No

OE Invoice Emler

The screenshot shows the 'SAMLTD - K/C OE Invoice Emler' application. The main window displays a list of invoices with columns for Send, Customer ID, Customer Name, Delivery Method, Email Address, and Document number. A secondary window, 'SAMLTD - K/C OE Invoice Emler Entry', shows a detailed view of an invoice, including fields for Customer Number, Customer Contact, First Name, Last Name, Email, and a 'Contact Details' section with a table of document types and actions.

Send	Customer ID	Customer Name	Delivery Method	Email Address	Document number
Yes	1210	ACME Plumbing - Jason Builder	Emailed	JasonB@acmeplumbing.com	IN0000000000014
Yes	1210	ACME Plumbing - Susan Wrightson	Printed		IN0000000000014
Yes	1210	ACME Plumbing - Morris Fredericks	Emailed	Morris@acmeplumbing.com	IN0000000000014
Yes	1210	ACME Plumbing - Jason Builder	Emailed	JasonB@acmeplumbing.com	IN0000000000015
Yes	1210	ACME Plumbing - Susan Wrightson	Printed		IN0000000000015
Yes	1210	ACME Plumbing - Morris Fredericks	Emailed	Morris@acmeplumbing.com	IN0000000000015
Yes	1210	ACME Plumbing - Jason Builder	Emailed	JasonB@acmeplumbing.com	IN0000000000016
Yes	1210	ACME Plumbing - Susan Wrightson	Printed		IN0000000000016
Yes	1210	ACME Plumbing - Morris Fredericks	Emailed	Morris@acmeplumbing.com	IN0000000000016
Yes	1210	ACME Plumbing - Jason Builder	Emailed	JasonB@acmeplumbing.com	IN0000000000044
Yes	1210	ACME Plumbing - Susan Wrightson	Printed		IN0000000000044
Yes	1210	ACME Plumbing - Morris Fredericks	Emailed	Morris@acmeplumbing.com	IN0000000000044
Yes	1210	ACME Plumbing - Jason Builder	Emailed	JasonB@acmeplumbing.com	IN0000000000050
Yes	1210	ACME Plumbing - Susan Wrightson	Printed		IN0000000000050
Yes	1210	ACME Plumbing - Morris Fredericks	Emailed	Morris@acmeplumbing.com	IN0000000000050
Yes	1210	ACME Plumbing - Jason Builder	Emailed	JasonB@acmeplumbing.com	IN0000000000056
Yes	1210	ACME Plumbing - Susan Wrightson	Printed		IN0000000000056
Yes	1210	ACME Plumbing - Morris Fredericks	Emailed	Morris@acmeplumbing.com	IN0000000000056

Pacific Technology Solutions has a long and successful history as a Sage Development Partner developing horizontal and vertical market products for Sage Accpac ERP.

Pacific Technology Solutions also provides advanced customisation services to Business Partners internationally, assisting Sage Accpac ERP to better fit customers' unique requirements.

Please visit our website www.pacifictechsol.com for further information on products and services that Pacific Technology Solutions provides to the Sage Accpac channel.



Development Partner

- Development Partner of the Year 2009 International Award
- Sage Asia Top Development Partner 2008

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