



APPLICATION BRIEF ADMINISTRATION J-MAIL

Jonas' J-Mail feature allows you to e-mail a variety of documents from your Jonas Management System Software. Both reports and forms are available for e-mailing. However, if you require customization you will have to contact a Jonas Sales Team Authorized Representative or Gary Jonas Computing Ltd.

Jonas provides you with standard HTML templates. In addition, Jonas J-Mail gives you the flexibility to modify the design of the HTML template(s). That way, you can create your own unique design; add pictures, animation, hyperlinks to your website and sound.

To design your own HTML template(s), you have to be familiar with HTML web page layout language. If you need help with any new design, Jonas can provide this service at an additional cost.

Setup/Edit Parameters for J-Mail

Company: GJ The Jonas Country Club & Co.

Form Type: 00 Company Default Parameters

Mail Client: J - J-Mail

SMTP Server Name: [Empty]

Default Subject: [Empty]

From Name: [Empty]

From Address: [Empty]

Copy To Address: [Empty]

HTML Template: [Empty]

Attach.File 1: [Empty]

Attach.File 2: [Empty]

Attach.File 3: [Empty]

Attach.File 4: [Empty]

Attach.File 5: [Empty]

Blind Copy To: [Empty]

PickUp Directory: [Empty]

Send Messages Save Messages Request a receipt

Default Report Parameters

Format: HTML Font: @Arial Unicode MS Font size: [Empty]

Buttons: OK, Jmail Client, Help, Test E-mail, Authentication, Exit

ADMINISTRATION J-MAIL

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J-MAIL

Introduction

J-Mail is the Jonas name for a tool that allows you to e-mail a variety of documents from your Jonas Management System software. Both reports and forms are available for e-mailing, however, your forms may need additional customization to enable them to be e-mailed. The module is available for purchase as a separate addition to your Jonas system. See your Jonas Sales Team Authorized Representative or Gary Jonas Computing Ltd. for pricing.



Mail Client Choice

You have a choice of four mail clients to work with Jonas. You can use the Jonas J-Mail client, the *Microsoft Outlook* client, the *Microsoft Outlook* COM client, or the PVX mail client. These allow Jonas to interact with your mail server.



Outlook and Outlook COM Mail Clients

If you choose to use either the *Outlook* client or *Outlook* COM client, and want to be able to browse your *Outlook* Address Book, then you will need to install the CDO.DLL *Outlook* Address Book control on each workstation that will be e-mailing (it's found on your *Outlook* Installation CD – it's not normally installed when *Outlook* is setup.)

When using the *Outlook* or *Outlook* COM mail clients, you may experience a warning message from *Outlook* that an application is trying to send e-mails. This message is caused by the installation of the *Outlook E-mail Security Update* – it thinks that a virus may be trying to send itself. A drop box is offered to set a time limit between message pop ups – choose the maximum amount of time offered (10 minutes). If 10 minutes is not enough time to send all the e-mails, then the message will appear again. The behaviour of the *Outlook E-mail Security Update* can be controlled through the use of Administrative Tools from *Microsoft*; Jonas has no control over this behaviour.



J-Mail Mail Client

If you choose to use the Jonas J-Mail client, you will require the installation of the J-Mail client components on each workstation that will be sending e-mail from Jonas. This J-Mail client installation routine is also found in the Jonas Setups section of this document.

Requirements

If you intend on using the J-Mail or PVX mail clients, you will need to be running *Windows 95* or higher, and be using either your Internet Service Provider's remote Simple Mail Transfer Protocol (SMTP) server or your own local SMTP server.

You cannot use the J-Mail mail client if either your ISP's or your own SMTP server uses a protocol called "password authentication" to allow programs to send e-mail. If this is the case then you must use the PVX mail client or either of the *Outlook* mail clients.

If you intend on using the *Outlook* mail clients, you will need to be running *Windows 98* or higher and running a US version of *Outlook 98* or higher. You must have a working copy of *Outlook* installed on every workstation (or profile) that will be e-mailing.

You cannot use *Outlook Express* with either of the *Outlook* mail clients.

Jonas assumes that you have a properly configured mail server and firewall, and a normal account on the Internet with e-mail privileges. This document does not cover installation, setup and tuning of mail servers, or any firewall settings.

Jonas Setups

Printer Style



J-Mail Printer Style

To e-mail something out of Jonas, you must “print” it to a Printer Style. A Jonas Printer Style for J-Mail has already been created for you to use. This “J-MAIL” style is a “factory load” much like the way “LASER,” “LASER,” or “MS-DOS” is already setup for you.

The screenshot shows the "Printer Styles" dialog box with the following fields and options:

- Printer Style:** J-MAIL
- Description:** Jonas E-Mail
- Type of Printer:** LASER - Standard Laser Printer
- Device Type:** File, GUI, Text, View, Fax, J-Mail (selected), ODBC, BulkJM, XML
- Link File Name:** C:\11.8\DATA\DATA\CLUB\DATA\J-MAIL
- Device/File Name:** (empty)
- Device Driver:** GWEMAIL, USB Printer (checkbox)
- Location ID:** (empty), Suppress Form Feed (checkbox)
- Restrict To:** (empty)
- Restrict From:** (empty)
- Barcode Program:** GJBARC, Tray/Source ID: 0

Buttons on the right: OK, Undo, Delete, Pref's, Test, Co.Access, Exit.

Text box on the right: This sets up the global Printer rules for the JONAS Network. For explicit printer addresses for a workstation, see Terminal Setup.

Ignore the Location ID and use the Restrict To/From fields if you wish to “hide” this Printer Style from certain terminals.

Parameters for J-Mail



General Parameters for J-Mail

The first step in configuring Jonas to work with J-Mail is to define the J-Mail Parameters. This is done by proceeding to the Parameters for J-Mail program (System Administration > System Setup > Parameters for J-Mail).

Since e-mail can be created from a number of different areas within Jonas, this screen is used to define the rules for the specific types of e-mails that are to be generated. In multi-company Jonas installations, these setups can be different from company to company. If you setup parameters for different companies and different form types, the program will use the default parameters as the initial setup.

Company – Select your company code from the drop-down list or click the large down arrow to the right of the field to choose the company code. Always start with the “00 Default Parameters” setting first.

Form Type – This field defines the various rules for each area of Jonas where e-mails can be created. Use the "00 Company Default Parameters" for general e-mails (reports). Currently, the list includes: A/R Customer Statements; Banquet & Catering CEOs and Invoices; Club Member Statements; A/P Direct Deposit Audits; Hotel Confirmation Letters; A/R Job Invoices; Job Cost T&M Invoices; Job Scheduling; Personalized E-mail Letters; Service Contract Invoices; Tee Time Confirmations; Work Order Invoices, Tickets, and Quotations; Dispatch Paging; Purchase Orders; Parts Invoices; Subcontracts; and Canadian and US Earnings Statements.

Mail Client – This is the field where you tell the system which method of e-mail client you intend on using to interact with Jonas. Your choices are *Outlook*, *Outlook COM*, *J-Mail*, or *PVX Email*. Since the screen changes slightly depending on which mail client you choose, let's go through each choice explaining all the fields for each client method. Not every field is used with each **Form Type**, but the section on "Form Types – Their Setup & Use" will show the fields that are used.

Outlook and Outlook COM Clients

You will need to have Outlook installed on every workstation or profile that will be sending e-mails.

Profile Name – Your e-mail’s message properties (**Mail From** and **Reply To**) come from this field. It remains empty if you are using the default *Outlook* profile installed on your workstation. If you use more than one profile to log into *Outlook* (*i.e.* more than one person logs into your workstation and can send e-mail under their name), you need to type the name(s) of the profile(s) that you want to enable, in this field. If desired, you can create a separate profile to use specifically with Jonas e-mailing.

Default Subject – This field is used to define the default phrase that will be placed in the e-mail’s **Subject** line. Leaving it blank will create a clear Subject line for each e-mail you send from Jonas. Different types of forms may get different Default Subjects – for example, Club Member Statements might get something like “Your Monthly Member Statement,” whereas a Work Order Invoice might have something like “W/O Invoice for Work Performed.” You create the phrase.

Copy To Address – This field acts as a “Cc:” E-mails that are sent can also be echoed to this mailbox. If you’ve installed the Outlook CDO.DLL, you can use the button to the right of the field to browse your *Outlook Address Book* for valid mailbox addresses, or type it in. Having this field set up will slow down your system whenever it sends out e-mails, since it is duplicating each e-mail to both the sent location and this **Copy To** address.

HTML Template – The HTML (Hyper Text Markup Language) templates define what information is to be placed where on the e-mailed form. This field indicates the path to the template and sometimes the template design itself – by default, Jonas copies all the template designs into the \GJCWIN\HTML folder on the Jonas server. They all end with the “.htm” extension. Make sure that all users who will be using the design can access this location.

If you wish, you can modify the design of the HTML template. You should be familiar with HTML programming – if you wish to have Jonas modify a design for you, please contact your Jonas Sales Team Authorized Representative or Gary Jonas Computing Ltd. for a quotation. For example, you can change the text or background font, or you can add a background picture, or embedded graphics. Please leave the placeholders that look like:

%aaaaaaaa%

unchanged, otherwise you will get error messages or your form will be missing some necessary information. If you modify a template, Jonas will never override it if it resides in the \HTML folder.

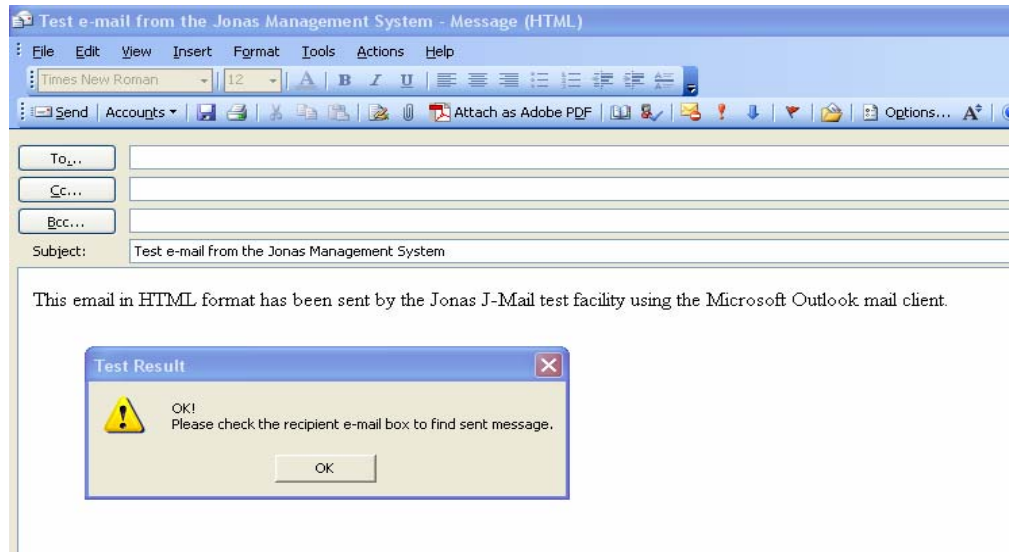
Attach. File 1 to 5 – You can attach up to five files to each e-mail form you send from Jonas. If you wish to send some sort of promotional material at the same time you are sending a form, this is the path to the desired files. Click on the folder icon to the left of the field(s) to browse the path(s) and filename(s). The maximum length of the browsed path and filename can be no longer than 50 characters long. Make sure that all users who will be sending e-mail from Jonas can access this location.

Blind Copy To – This field acts as a “bcc:.” E-mails that are sent out can also be echoed to this mailbox without the original recipient knowing. If you’ve installed the Outlook CDO.DLL, you can use the button to the right of the field to browse your *Outlook* Address Book for valid mailbox addresses, or type it in. Having this field setup will slow down your system whenever it sends e-mails, since it is duplicating each e-mail to both the sent location and this **Blind Copy To** address.

Send / Save Messages – These radio buttons control whether or not your e-mails from Jonas will be sent immediately (**Send**) or if they will accumulate in *Outlook’s* Drafts folder (**Save**). If saved in the Drafts folder, *Outlook* currently only lets you send them out one at a time, not all at once.

Test E-mail (button)

Clicking on the Test E-mail button will check the settings and create a test e-mail something like the following:

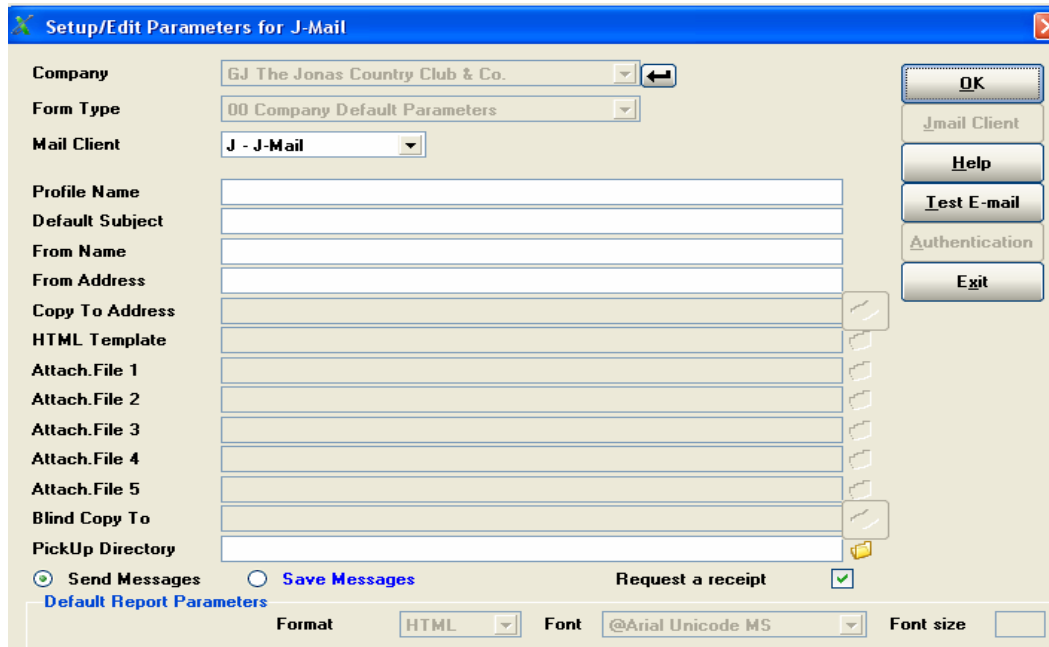


Once you click "OK" on the Test Result window, you can fill in a valid recipient e-mail address to check the delivery of an e-mail created in Jonas. If the recipient doesn't receive your test message, then you need to have your hardware/network professional check your mail server settings.

J-Mail Client



The **Company** and **Form Type** fields are the same as before. However, you will need to install the J-Mail client on every workstation that will be sending e-mails.



Setup/Edit Parameters for J-Mail

Company: GJ The Jonas Country Club & Co.

Form Type: 00 Company Default Parameters

Mail Client: J - J-Mail

Profile Name: [Empty]

Default Subject: [Empty]

From Name: [Empty]

From Address: [Empty]

Copy To Address: [Empty]

HTML Template: [Empty]

Attach.File 1: [Empty]

Attach.File 2: [Empty]

Attach.File 3: [Empty]

Attach.File 4: [Empty]

Attach.File 5: [Empty]

Blind Copy To: [Empty]

PickUp Directory: [Empty]

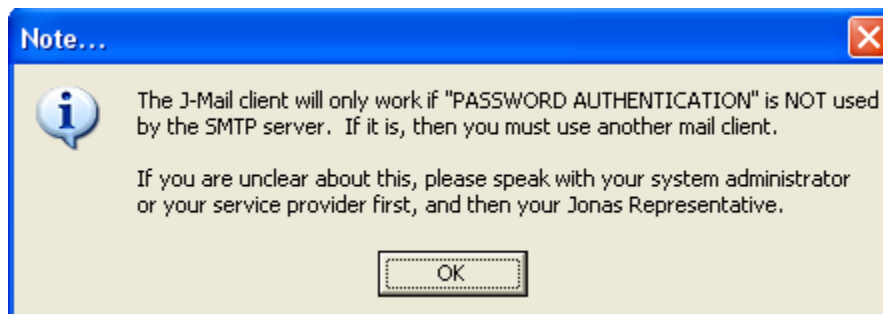
Send Messages Save Messages Request a receipt

Default Report Parameters

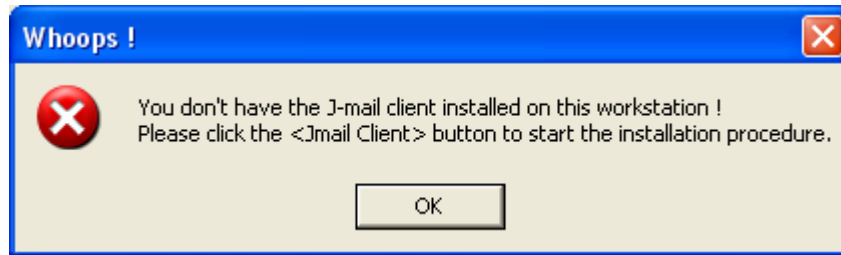
Format: HTML Font: @Arial Unicode MS Font size: [Empty]

Buttons: OK, Jmail Client, Help, Test E-mail, Authentication, Exit

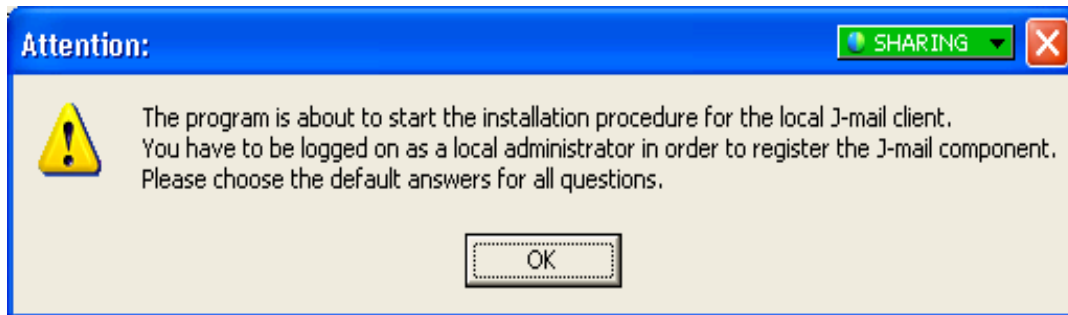
Changing the **Mail Client** field to “J-Mail” – you will immediately get the following warning box:



Then this message:



Click **OK** to close this warning box and then click on the “**Jmail Client**” button to begin the installation. You will then get another information box pop up:



The InstallShield wizard will begin to install the J-Mail client software on your local workstation. Choose the “Typical” setup type and the suggested default location (C:\Program Files\Dimac\...). Since *Windows* Registry settings changed, your machine may need to be restarted after the installation is complete. After installing the client files on a workstation, the **Jmail Client** button will be disabled (when seen from that machine). Repeat this installation process on all workstations that will be creating e-mails from Jonas.

After the installation of the client files are done, you can then proceed to setup the default J-Mail parameters.

SMTP Server Name – This field must be filled. It identifies the name or TCP/IP address of the SMTP server that will be handling your e-mails. If you are using the SMTP server of your Internet Service Provider (ISP), then they can provide you with this information. If you are hosting your own SMTP server, then your network techs can provide this address.

Default Subject – This field is used to define the default phrase that will be placed in each e-mail’s “Subject” line. Leaving it blank will create a clear Subject line for each e-mail you send from Jonas. Different types of forms may get different Default Subjects – for example, Club Member Statements might get something like “Your Monthly Member Statement,” whereas a Work Order Invoice might have something like “W/O Invoice for Work Performed.”

From Name – This field establishes the name that will appear on the “From” line in e-mails you create from Jonas. You may want this to be the Department name rather than an individual’s name. For example, if you are e-mailing Club Statements it could say: “Club Office” or “A/R Department.”

From Address – This field is used in conjunction with the **From Name**. The address specified here is the e-mail address of the **From Name** sender. It will appear with the **From Name** in the “From” field of the e-mail. If the recipient clicks “Reply,” this is the e-mail address where the reply will go.

Copy To Address – This field acts as a “Cc:.” E-mails that are sent can also be echoed to this mailbox. Having this field set up will slow down your system whenever it sends e-mails since it is duplicating each e-mail to both the sent location and this **Copy To** address.

HTML Template – The HTML templates define what information is to be placed where on the e-mailed form. This field indicates the path to the template and sometimes the template design itself – by default, Jonas copies all the template designs into the \GJCWIN\HTML folder on the Jonas server. They all end with the “.htm” extension. Make sure that all users who will be using the design can access this location.

If you wish, you can modify the design of the HTML template. You should be familiar with HTML programming – if you wish to have Jonas modify a design for you, please contact your Jonas Sales Team Authorized Representative or Gary Jonas Computing Ltd. for a quotation. For example, you can change the text or background font, or you can add a background picture, or embedded graphics. Please leave the placeholders that look like:

%aaaaaaaa%

unchanged, otherwise you will get error messages or your form will be missing some necessary information. If you modify a template, Jonas will never override it if it resides in the \HTML folder.

Attach. File 1 to 5 – You can attach up to five files to each e-mailed form you send from Jonas. If you wish to send some sort of promotional material at the same time you are sending forms, this is the path to the desired files. Click on the folder icon to the left of the field(s) to browse the path(s) and filename(s). The maximum length of the browsed path and filename can be no longer than 50 characters long. Make sure that all users who will be sending e-mail from Jonas can access this location.

Blind Copy To – This field acts as a “bcc:.” E-mails that are sent can also be echoed to this mailbox without the original recipient knowing. Having this field setup will slow down your system whenever it sends e-mails since it is duplicating each e-mail to both the sent location and this **Blind Copy To** address.

PickUp Directory – The PickUp directory location works with the **Send / Save Messages** radio buttons.

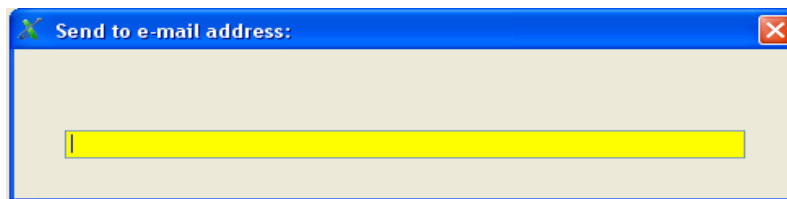
Send / Save Messages – These radio buttons control whether or not your e-mails from Jonas will be sent immediately (**Send**) or if they will accumulate in your **PickUp Directory** folder (**Save**).

Systems that have their SMTP servers located remotely should use the **Send** option. Systems that have their SMTP servers located in-house have the choice of whether they want e-mails to be sent immediately or stored for the SMTP server's own scheduled e-mail release. Jonas has no control over this aspect of your mail system, so for more information concerning SMTP mail scheduling, consult your hardware/network professional, not Jonas Software. From a performance point of view, "batching" your e-mails can improve your system's performance. You can preview saved e-mails by clicking on the saved e-mail files that end in the ".eml" extension.

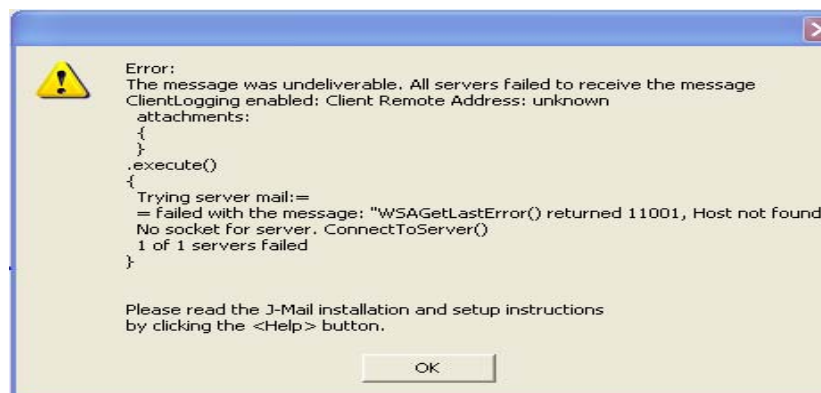
Request a Receipt – This is purely a tracking option. Check this box if you want to request a "delivery receipt" (not a read receipt) from the recipient of your e-mail's SMTP server. If their server supports this feature and your firewall allows you to get a delivery receipt back, the notification message will be sent to the address indicated in the **From Address** field.

Test E-Mail (button)

Clicking on the Test E-mail button will check the settings and create a test e-mail. You need to specify a valid recipient e-mail address for the program to test sending.



The program will then attempt to create and send a test message to the address specified. If it fails, you will see a message box with the error messages recorded:

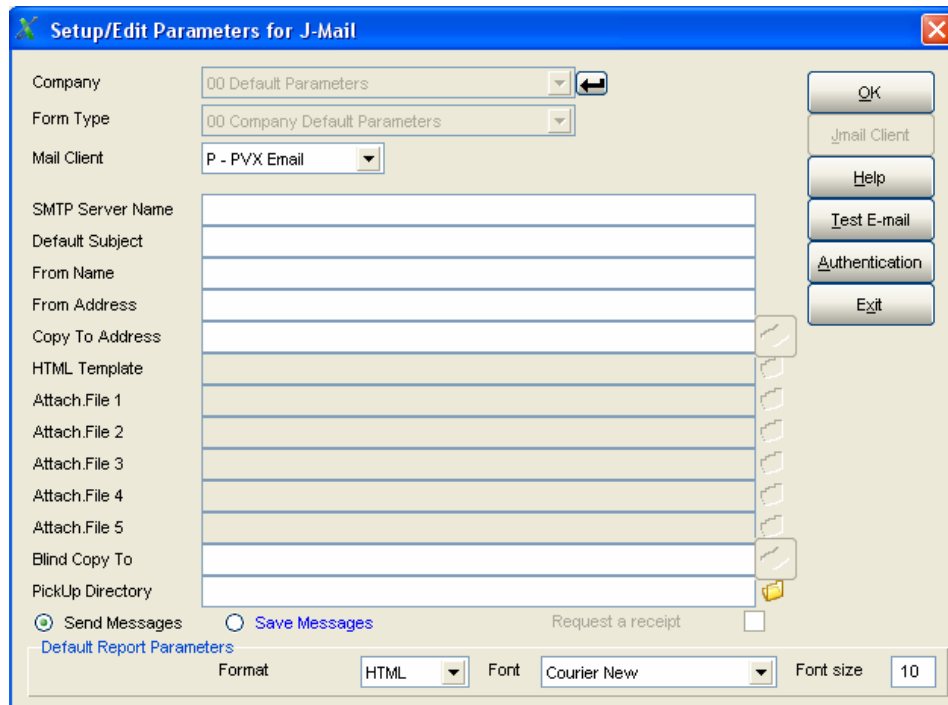


This will give you an idea about where to check your setups – in this example the SMTP server name was omitted.

PVX EMail Client



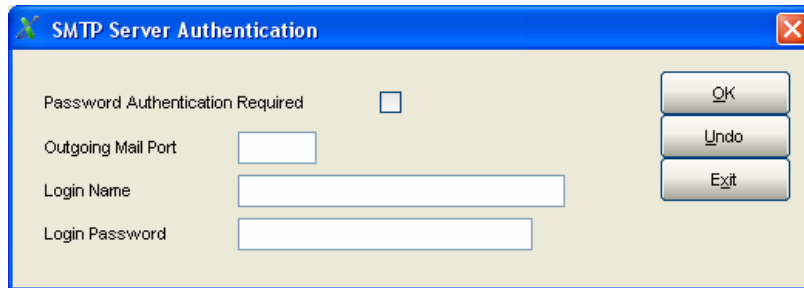
The PVX Email mail client is built into the operating system that Jonas runs on – there is nothing that needs to be installed on any of the workstations that will be sending e-mails. However, if your SMTP server requires password authentication, then you will need to configure the Authentication screen (accessed via the Authentication button.)



The **Company** and **Form Type** fields are the same as before.

SMTP Server Name – This field must be filled. It identifies the name or TCP/IP address of the SMTP server that will be handling your e-mails. If you are using the SMTP server of your Internet Service Provider (ISP), then they can provide you with this information. If you are hosting your own SMTP server, then your network techs can provide this address.

Password Authentication button - If your (or your ISP's) SMTP server requires password authentication, then you must fill in the parameters found in the Authentication button screen.



Default Subject – This field is used to define the default phrase that will be placed in each e-mail’s “Subject” line. Leaving it blank will create a clear Subject line for each e-mail you send from Jonas. Different types of forms may get different Default Subjects – for example, Club Member Statements might get something like “Your Monthly Member Statement,” whereas a Work Order Invoice might have something like “W/O Invoice for Work Performed.”

From Name – This field establishes the name that will appear on the “From” line in e-mails you create from Jonas. You may want this to be the Department name rather than an individual’s name. For example, if you are e-mailing Club Statements it could say: “Club Office” or “A/R Department.”

From Address – This field is used in conjunction with the **From Name**. The address specified here is the e-mail address of the **From Name** sender. It will appear with the **From Name** in the “From” field of the e-mail. If the recipient clicks “Reply,” this is the e-mail address where the reply will go.

Copy To Address – This field acts as a “Cc:” E-mails that are sent can also be echoed to this mailbox. Having this field set up will slow down your system whenever it sends e-mails since it is duplicating each e-mail to both the sent location and this **Copy To** address.

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If you wish, you can modify the design of the HTML template. You should be familiar with HTML programming – if you wish to have Jonas modify a design for you, please contact your Jonas Sales Team Authorized Representative or Gary Jonas Computing Ltd. for a quotation. For example, you can change the text or background font, or you can add a background picture, or embedded graphics. Please leave the placeholders that look like:

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Attach. File 1 to 5 – You can attach up to five files to each e-mailed form you send from Jonas. If you wish to send some sort of promotional material at the same time you are sending forms, this is the path to the desired files. Click on the folder icon to the left of the field(s) to browse the path(s) and filename(s). The maximum length of the browsed path and filename can be no longer than 50 characters long. Make sure that all users who will be sending e-mail from Jonas can access this location.

Blind Copy To – This field acts as a “bcc:.” E-mails that are sent can also be echoed to this mailbox without the original recipient knowing. Having this field setup will slow down your system whenever it sends e-mails since it is duplicating each e-mail to both the sent location and this **Blind Copy To** address.

PickUp Directory – The PickUp directory location works with the **Send / Save Messages** radio buttons.

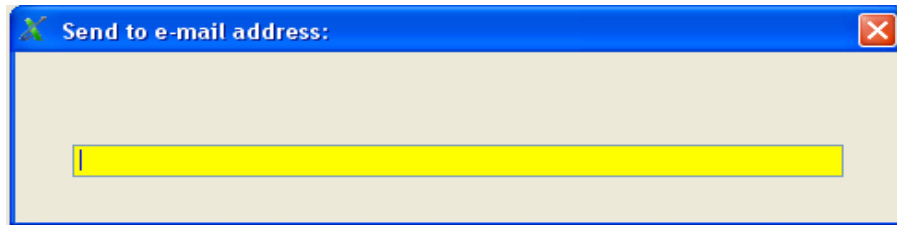
Send / Save Messages – These radio buttons control whether or not your e-mails from Jonas will be sent immediately (**Send**) or if they will accumulate in your **PickUp Directory** folder (**Save**).

Systems that have their SMTP servers located remotely should use the **Send** option. Systems that have their SMTP servers located in-house have the choice of whether they want e-mails to be sent immediately or stored for the SMTP server’s own scheduled e-mail release. Jonas has no control over this aspect of your mail system, so for more information concerning SMTP mail scheduling, consult your hardware/network professional, not Jonas Software. From a performance point of view, “batching” your e-mails can improve your system’s performance. You can preview saved e-mails by clicking on the saved e-mail files that end in the “.eml” extension.

Request a Receipt – This is purely a tracking option. Check this box if you want to request a “delivery receipt” (not a read receipt) from the recipient of your e-mail’s SMTP server. If their server supports this feature and your firewall allows you to get a delivery receipt back, the notification message will be sent to the address indicated in the **From Address** field.

Test E-Mail (button)

Clicking on the Test E-mail button will check the settings and create a test e-mail. You need to specify a valid recipient e-mail address for the program to test sending.



The program will then attempt to create and send a test message to the address specified. If it fails, you will see a message box with the error messages recorded:



This will give you an idea about where to check your setups – in this example, the From address was omitted.

Form Types – Their Setup & Use

Reports



E-Mailing Reports

The "00 Company Default Parameters" settings are used for general e-mails (reports, inquiries, etc.) You can e-mail any report that you are able to see using the "**View**" button. Reports will be sent in the format you specified in the **Default Report Parameters** section:

Format, Font, Font size – These are fields that allow Jonas to control the formatting of reports that are e-mailed out of Jonas. Only reports are affected by these settings, other Form Types are hardcoded already. You can set the format to create the e-mail in either an HTML or Text manner (we recommend HTML), using whatever font and font size you specify. The list of fonts is dependent on the actual fonts loaded on the machine you are setting the Parameters up on. If another machine creating a report doesn't have the font that you specified on your machine, Jonas will use its default Courier New font.

To e-mail a report you have to click on the **J-Mail** button and use the J-MAIL Printer Style in the "Where Would You Like It Printed?" window.

You will then see one of the **Sending E-Mail** windows shown below (depending on your choice of mail client.) Since this isn't a form type where the program can obtain an e-mail address from a master file (like the Customer Master File, or Member Master File) you will need to enter the recipient's e-mail address. Depending on the type of report being "printed," you may have to move the **Cancel Print** message box out of the way to access all the fields on the **Sending E-Mail** screen. Type in the desired Send To:, Copy To:, or Blind Copy To: addresses. After entering the recipient(s)'s valid e-mail address(es), click the **Send** button to e-mail the report. To cancel, click the **Cancel All** button.

Sending E-Mail

Send To Name:

Send To Address:

SMTP Server Name:

Message Subject:

From Name:

From Address:

Copy To Address:

HTML Template:

File Attachment 1:

File Attachment 2:

File Attachment 3:

File Attachment 4:

File Attachment 5:

Blind Copy To:

PickUp Directory:

Send Messages Save in SMTP Server PickUp Directory

Request a receipt:

Buttons: Send, Send All, Skip, Cancel All

Untitled - Message (HTML)

File Edit View Insert Format Tools Actions Help

Courier New 10

Send

To:

Cc:

Bcc:

Subject:

GJ - The Jonas Golf and Country Club Pg 1
 Trial Balance for Oct, 2008
 Closing Period Balances

Account	Description	Closing Bal Debit	Closing Bal Credit
0100	new g/l starts with a zero, no F/S	1,112,172.76	0.00
0500	test-Imran	524,892.92	0.00
1000	Imprest Petty Cash	0.00	-568,404.10
1010	Bank Account - General	0.00	-135,103,135.56
1020	Bank Account - Operating	16,490.02	0.00
1030	Bank Account - Cap Improvements	0.00	-753.57

A1 A/R Customer Statements



A/R Customer Statements

Using whatever choice of mail client, the setup for A/R Customer Statements is done in the same way. Your choice of standard e-mailable Customer Statement designs (set in Accounts Receivables > Files > Select A/R Form Designs) is limited to GJR44AA or GJR44AAA.

For this Form Type, the **HTML Template** field is just a path, not the actual .HTM template design. The standard HTML template used with e-mailing Customer Statements is GJR44AA.HTM when used with GJR44AA. If GJR44AAA is used, no .HTM template is used - it creates and sends the statement as a PDF attachment to the e-mail.

E-Mail addresses are setup in the Customer Master File (Accounts Receivables > Files > Setup/Edit/List Customers > Preferences screen.) Proceed to run your Customer statements as normal. Go to Accounts Receivables > Reports > Customer Statements and proceed to make your usual choices. When you go to choose the printer, click the **J-Mail** button.

The next window that will appear is the "Sending E-Mail" dialog box. Its appearance varies depending on the mail client you have chosen. You can make changes to who you are Sending To, Copying To, or Blind Copying To at this point. Click **Send** (or **Send All**) to send the Customer Statements as an e-mail. If you wish to skip a particular Customer, use the **Skip** button. Using the **Cancel All** button will stop the process of sending e-mails.

B1 Banquet & Catering Statements



Banquet & Catering CEO's

Regardless of the mail client you use, the setup for e-mailing Banquet & Catering (B&C) Catering Event Orders (CEO's) is the same. At one point only three standard CEO form designs could be e-mailed using the **HTML Template** (GJNR20A, B, and C.HTM) method, but that list has been expanded by the technique of sending the CEO as a PDF attachment to an e-mail. Either method can be used.

To use the HTML Template method, you must set the CEO design to be used in Banquet & Catering > Files > Select Forms & Form Options to either GJNR20A, GJNR20B or GJNR20C. In the Parameters for J-Mail screen, the **HTML Template** field must include the .HTM template design.

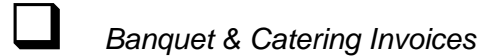
To use the PDF attachment method, you still have to setup the B1 Form Type screen, but it's mainly used for the mail client choice and settings. Ignore the **HTML Template** field as it does not need an .HTM template to work. Next, in the Select Forms & Form Options screen (B&C > Files menu), select the **Email CEO as PDF** flag and optionally attach a Letter Designer module Document Code for the CEO. Using a Document Code allows you to have a body message on your e-mail with the actual CEO as a PDF attached to the e-mail.

You can print CEO's in three ways: directly through the Booking screen (using the **Print CEO** button); through the Print Event Order program (Banquet & Catering > Reports); and when Invoices are printed (only if the 'Print CEO with each invoice' flag in the System Profile > Page 2 is turned on.) Each of the ways depends on the e-mail address on the main Booking Details screen.

The process remains the same whichever place you print CEO's. When you go to choose the printer, click the **J-Mail** button and the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the CEO(s) as an e-mail.

B2 Banquet & Catering Invoices



Regardless of the mail client you use, the setup for e-mailing Banquet & Catering (B&C) Invoices is the same. There are two standard Invoice designs that support e-mailing as a PDF attachment to an e-mail: GJNP30B and GJNP30C.

You still have to setup the B2 Form Type screen, but it's mainly used for the mail client choice and settings. Ignore the **HTML Template** field as it does not need an .HTM template to work. Next, in the Select Forms & Form Options screen (B&C > Files menu), optionally attach a Letter Designer module Document Code for the Invoice. Using a Document Code allows you to have a body message on your e-mail with the actual B&C Invoice as a PDF attached to the e-mail.

The e-mail address of the Booking is found on the main Booking Details screen. You print Invoices through the Settlement/Billings program. When you go to choose the printer, click the **J-Mail** button and the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the CEO(s) as an e-mail.

C1 Club Statements



Club Statements

Although there are several standard Club Member Statement designs that support e-mailing using any mail client, there are two methods used to e-mail Member Statements: an older method that uses an HTML Template as the body of an e-mail; and a newer method that creates a PDF of the statement and attaches it to the e-mail. A Letter Designer module Free Form Document Code can be used as a personalized body message on the e-mail.

To use the HTML Template method, you must set the Club Statement design to be used in Club Management > Club Admin. > Select Club Forms Design. In the Parameters for J-Mail screen, the **HTML Template** field must include the .HTM template design. The standard GUI User Configurable Member Statement GJK25GU has a corresponding HTML Template called GJK25GU.HTM

To use the PDF attachment method, you still have to setup the C1 Form Type screen, but it's only used for the mail client choice and attachment settings. Ignore the **HTML Template** field as it does not need an .HTM template to work. Next, in the Select Club Forms Design screen (Club Management > Club Admin menu), select the **Email as PDF Attachment** flag and optionally attach a Letter Designer module Club Free Form Letter code. If your club uses pre-printed Statement stock, you can (optionally) even have the PDF reproduce this by attaching an image file (JPG or BMP) to act as the background of your PDF statement.

Next, for both methods, ensure that all members who wish to receive their Statement by e-mail have a valid e-mail address indicated on the first screen of their Member Master File (Club Management > Member File > Setup/Edit Members). Using an invalid e-mail address will result in error messages being reported when sending. You must also indicate if they want their statement Printed, E-Mailed, or Both (printed & e-mailed), and which format the e-mailed statement should be sent in (HTML or Text). For maximum flexibility for the member's e-mail reader, Jonas suggests that HTML format be used. If you use the PDF attachment method, copies of the e-mailed Statement can be sent to the 199 additional e-mail addresses setup on the Member Master File main screen.

Proceed to run your members' statements as normal. Go to Club Management > Inquiries/Stmts > Print Statements and proceed to make your usual choices. When you go to choose the printer, click the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the statement(s) as an e-mail.

If you encounter an error while sending your Club Statements, the member in question may have an invalid e-mail address in their file. You can sometimes see the member number of the statement currently being processed in the bottom left section of the screen. This can aid you in checking which member is having a problem with their e-mail address.

D1 A/P Direct Deposit Audit



AP Direct Deposit

Although there are several standard A/P Direct Deposit Audit designs that support e-mailing using any of the mail clients, there are two methods used: one that uses an HTML Template as the body of an e-mail; and another that creates a PDF of the audit and attaches it to the e-mail.

To use the HTML Template method, you need to select the standard GJP13A Direct Deposit Audit Form (in Accounts Payable > Files > Select Ck Design.) In the Parameters for J-Mail screen, you need to select the path to the GJP13A.HTM Template design in the **HTML Template** field.

To use the PDF attachment method, you need to be using either the standard GJP13AA or GJP13AB Direct Deposit Audit Form (in Accounts Payable > Files > Select Ck Design.) In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design since it is not used.

To send e-mails, both methods depend upon a valid e-mail address being present in the Supplier Master file main screen. Using an invalid e-mail address will result in error messages being reported when sending.

Proceed to the Accounts Payable > Processing > Print Direct Deposits Audit. Print your direct deposit audit as normal. The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the direct deposit audit.

HC Hotel Confirmation Letter



Hotel Confirmation Letters

There is only one method for e-mailing Hotel Confirmation Letters using any of the mail clients: use a corresponding .HTM Template design as the body of the e-mail. In the Parameters for J-Mail screen, the **HTML Template** field needs to be filled with the path and .HTM Template name. The standard Hotel Confirmation Letter template design is HR050CL.HTM.

To automatically send e-mails, the system depends upon a valid e-mail address being present in the guest's Reservation File, setup at the time of making the reservation. If it is not present, it can be added later at the time of printing, but this will interrupt the flow of sending e-mails. Using an invalid e-mail address will result in error messages being reported when sending.

Confirmation Letters can be e-mailed from three places: the Reservations screen when the Reservation is made, changed or cancelled (if configured); the Reports > Confirmation/Deposit/Reg Cards program; and from the Reports > Letter Designer Confirm. Letters program. Wherever you choose to print Confirmation Letters, choose the **J-Mail** button in the "Where Do You Want It Printed?" dialog box and select the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the letter(s) as an e-mail.

J1 A/R Job Invoices



Job Invoices

Although there are several standard A/R Job Invoice designs that support e-mailing using any of the mail clients, there is only one method used: one that creates a PDF of the Job Invoice and attaches it to the e-mail.

To use the PDF attachment method, you need to be using either the standard GJR08AA or GJR08AN Job Invoice designs (in Accounts Receivable > Files > Select A/R Form Designs.) In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design in the **HTML Template** field since it is not used.

Next, ensure that an e-mail address is specified within the Customer Master File > Preferences screen. This address will be the one used when e-mailing the invoice to the customer. Proceed to print your Job Invoices as normal. The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the Invoice(s) as an e-mail.

J2 Job Cost Manual T&M Invoices



Job Cost T&M Invoices

There is only one standard Job Cost Manual T&M Invoice design GJJMI11G that can be e-mailed using any of the mail clients. It works by attaching the Invoice to the e-mail as a PDF.

First, ensure that GJJMI11G is setup as the design in Job Costing > Job Billing > Manual T&M Billing > Manual T&M Profile. In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design in the **HTML Template** field since it is not used.

Next, ensure that an e-mail address is specified within the Customer Master File > Preferences screen. This address will be the one used when e-mailing the invoice to the customer. Proceed to print your Manual T&M Invoices as normal. The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the Invoice(s) as an e-mail

JS Job Scheduling



Job Cost Scheduling

To e-mail a Job Schedule, you only need to indicate the mail client. Any of the mail clients will work. The **HTML Template** field is not used.

Choose the **Print** button in the Schedule View screen (Job Costing > Job Scheduling menu) to launch the "Where Would You Like It Printed?" window – choose the **J-Mail** button and use the J-MAIL Printer Style. This in turn launches the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** to send the screen as an e-mail

PA Parts Invoices



There is only one method used for e-mailing Parts Invoices: one that creates a PDF of the Invoice and attaches it to the e-mail.

To use the PDF attachment method, you need to be using the standard GJR03AA Parts Invoice design (in Accounts Receivable > Files > Select A/R Form Designs.) In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design in the **HTML Template** field since it is not used.

Next, ensure that an e-mail address is specified within the Customer Master File > Preferences screen. This address will be the one used when e-mailing the invoice to the customer. Proceed to print your Parts Invoices as normal. The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the Invoice(s) as an e-mail.

PO Purchase Orders



Purchase Orders

Both Construction and Club Inventory Purchase Orders can be e-mailed using any of the mail clients. However, they differ in the methods that they use. The standard Construction P.O. designs attach the P.O. to the e-mail as a PDF. The standard Club Inventory P.O. design creates an e-mail with the P.O. making up the body of the e-mail. This difference has an effect on the use of the **HTML Template** field.

Construction P.O.s

For Construction P.O.s, first select one the standard designs that support e-mailing (Purchase Order > Files > P.O. System Profile). In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design in the **HTML Template** field since it is not used.

To send e-mails, a valid e-mail address must be present in the Supplier Master file main screen. Using an invalid e-mail address will result in error messages being reported when sending. Proceed to print your Purchase Orders as normal (from within Setup/Edit Purchase Orders or Print Purchase Orders.) The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the P.O.(s) as an e-mail attachment.

Club Inventory P.O.s

For Club Inventory P.O.s, you need to select any of the standard P.O. designs (Club Inventory > Purchasing > Files > P.O. System Profile.) In the Parameters for J-Mail screen, the **HTML Template** field needs to be filled with the path and .HTM Template name. The standard Club Inventory P.O. template designs are GJYM20A.HTM and GJYM20UK.HTM.

To send e-mails, a valid e-mail address must be present in the Supplier Master file main screen. Using an invalid e-mail address will result in error messages being reported when sending. Proceed to print your Purchase Orders as normal (from within Setup/Edit Purchase Orders or Print Purchase Orders.) The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the “Sending E-Mail” dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the P.O.(s) as an e-mail attachment.

PL Personalized E-mail Letters



Personalized E-mail Letters (Bulk e-mail)

Personalized E-mail Letters is a Form Type that can be used in the Club Management Report Generator to perform a type of bulk e-mailing mail merge. It uses the results of a Report Generator report as the data source that is merged into an HTML template, which in turn is the basis for a mass e-mail to Club Members. You will need to setup the Personalized E-mail Letters Form Type in the Parameters for J-Mail, create a Bulk J-Mail Type Printer Style, create a report in the Club Report Generator, and create an HTML and Text version template.

Parameters for J-Mail:

You must use either of the *Outlook* mail clients with Personalized E-mail Letters.

Setup/Edit Parameters for J-Mail

Company: GJ The Jonas Country Club & Co.

Form Type: PL Personalized E-mail Letters

Mail Client: O - Outlook

Profile Name: [Empty]

Default Subject: [Highlighted]

From Name: [Empty]

From Address: [Empty]

Copy To Address: [Empty]

HTML Template: [Empty]

Attach.File 1: [Empty]

Attach.File 2: [Empty]

Attach.File 3: [Empty]

Attach.File 4: [Empty]

Attach.File 5: [Empty]

Blind Copy To: [Empty]

PickUp Directory: [Empty]

Send Messages Save Messages Request a receipt

Default Report Parameters

Format: HTML Font: @Arial Unicode MS Font size: [Empty]

Buttons: OK, Jmail Client, Help, Test E-mail, Authentication, Exit

Printer Style

Next, you will need to create a Printer Style for your Personalized E-mail Letters. Proceed to System Administration > System Setup > Printer Styles and add a new Printer Style. In this example we've called it "JMAILP", but you can call it anything.

The screenshot shows the 'Printer Styles' dialog box with the following fields and options:

- Printer Style: JMAILP
- Description: Personalized Emails
- Type of Printer: LASER - Standard Laser Printer
- Device Type: File, GUI, Text, View, Fax, J-Mail, BulkJM, XML
- Link File Name: C:\11.BVGJC\JMAILP
- Device/File Name: (empty)
- Device Driver: GWEMAIL
- Location ID: (empty)
- Restrict To: (empty)
- Restrict From: (empty)
- Barcode Program: GJBARC
- Tray/Source ID: 0

Buttons on the right: OK, Undo, Delete, Pref's, Test, Co.Access, Exit.

Note: This sets up the global Printer rules for the JONAS Network. For explicit printer addresses for a workstation, see Terminal Setup.

Device Type – Choose the radio button for the 'BulkJM' type.

Ignore the Location ID and Suppress Form Feed fields. Use the Restrict To/From fields if you wish to "hide" this printer style from certain terminals. Then press "OK" to finish.

Club Report Generator

Now you can proceed to the Club Report Generator (Club Management > Reports > Report Gen: Design) to create a report that will be the data source for your mass e-mail.

In this example we have created a report that will dump the Credit Book balances in each of the three Credit Books for all Members who have a positive balance in each of their Credit Books.

Design Club Reports

Club: GJ Jonas Golf and Country Club

Report Code: CR-CREDIT (F9 - Report of Designs)

Title: Credit Book Balances

Sorted By: A01 (Total Char. 72)

Subtotals ? No Yes Only

Report Layout

1	2	3	4	5	6
Data	A01	A09	A80	CRA	CRB
Form	NA	NA	NA	C1	C1
# Chrs	10	25	10	11	11
Hdq 1		Formal	Credit Book	Credit Book	
Hdq 2	Member #	Name	'A' Balance	'B' Balance	
Calc					

Buttons: Delete Col, Insert Col, Code Info, Print

Report Conditions

Data: CRA Credit Book 'A' Balance
 Rule: < Must be Less Than Condition: 0

N/A AND OR

Data: CRB Credit Book 'B' Balance
 Rule: > Must be Greater Than Condition: 0

Data: []
 Rule: = Must be Condition: []

Data: []
 Rule: = Must be Condition: []

Store Column For later use in Misc Charges OR Alter Member Category OR Statement Messages OR Alter Member Status #2

If Column = Is Equal to [] 0.00 []nting the line

If a Chit or TeeTime based report, include 'cash' info
 If a Chit or TeeTime based report, populate all col's
 If a PAP/LOCKERS based report, show all

Buttons: OK, Undo, Delete, Custom Update, Exit

Be careful when designing your report – if a Member appears on more than one line (*i.e.* they meet more than one criterion) they will receive multiple e-mails.

Create An HTML & Text Template

You have to be familiar with HTML web page layout language to create the HTML template, or have a third-party program like *Microsoft FrontPage* to create the template.

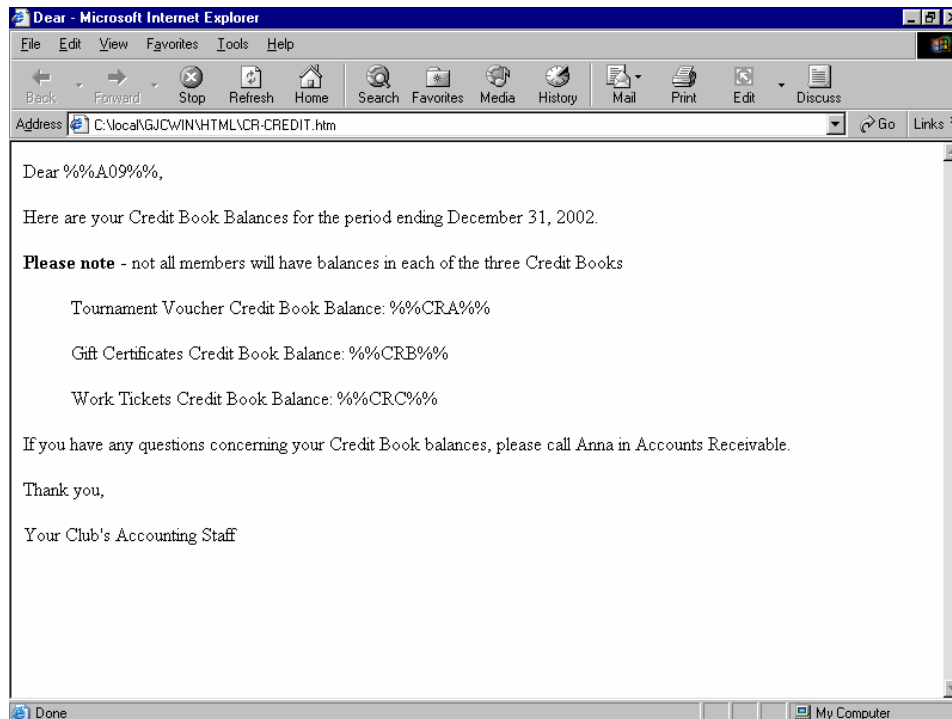
Since each Member has the choice of receiving e-mail in either HTML or Text format (set in the Member Master File), you will need to design an HTML template and a Text template. If all your Members are set one way or the other, you can omit the creation of the unused format (e.g. if everybody is set to HTML, you can skip the creation of a Text version of the template.)

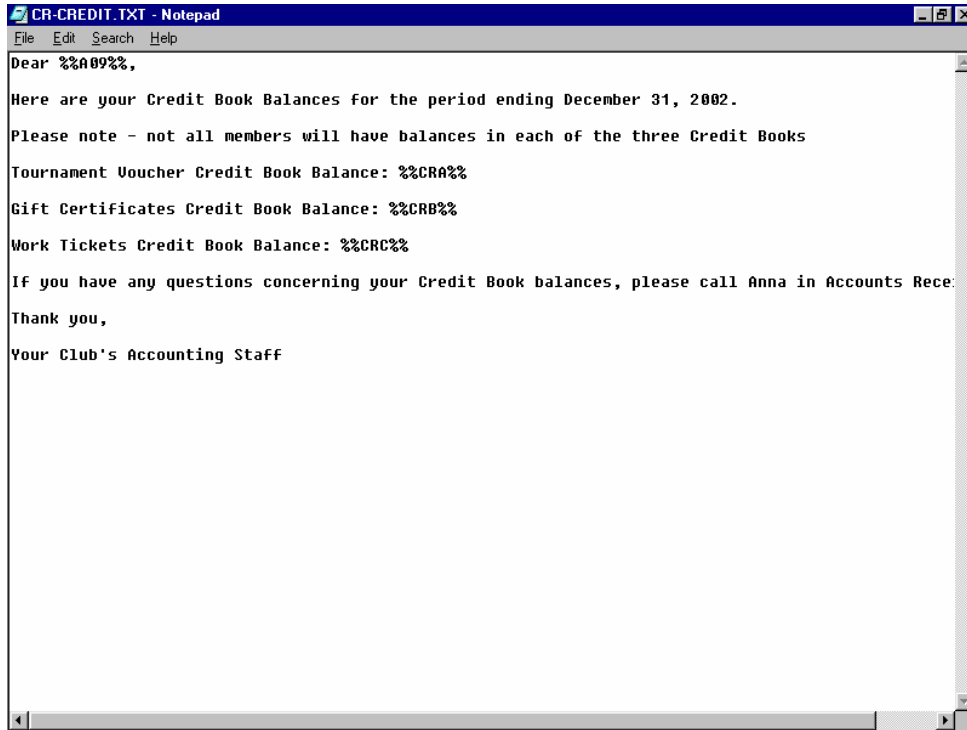
The templates must be named the same as the Report Code that you have created in the Club Report Generator – in our example above; the report code is called 'CR-CREDIT' so its corresponding HTML template is called 'CR-CREDIT.htm'. Use the Club Report Generator codes that you wish to use from your report as 'mail merge' tags in the HTML template. Don't forget to format them like this:

%%xxx%%

where xxx is the desired Report Generator code. Save them in the \GJCWIN\HTML\ folder.

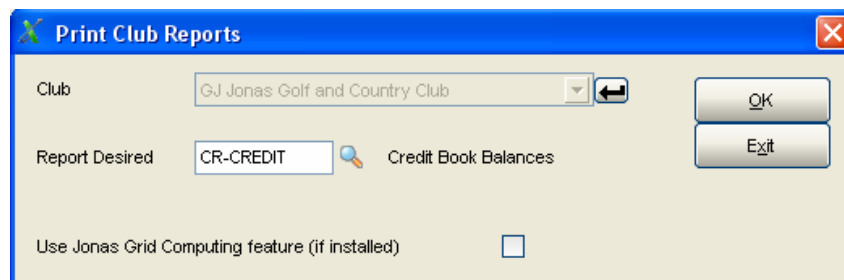
Here is the finished HTML and Text templates from our CR-CREDIT example:





Running Personalized E-mail Letters

Once you have performed all the necessary setups outlined above, you are now ready to run your Club Report Generator report. Proceed to Club Management > Reports > Report Gen: Print, select the desired report and answer any questions that the report design may pose (in our CR-CREDIT example, the use of the Credit Book codes demands that the program have some dates when running to determine cutoffs).



Report Generator Dates

Aging Date for Balances: 20080529 May 29/08

Apply Payments received on or before: 20080629

Enter the Sales Reporting Month: 200806

Calc. Members Age/Seniority at: 20080629

Golf Rounds for which year: 2008

Enter Start Date for Minimums/Chits/TeeTime: 20080629

Enter End Date for Minimums/Chits/TeeTime: 20080629

Enter the Starting Date for Visits: 20080629

Enter the Ending Date for Visits: 20080629

Enter the Starting Time for Visits:

Enter the Ending Time for Visits:

Enter As Of Date for Report: 20080629

Buttons: OK, Exit

Once you click OK, the “Where Would You Like It Printed ?” screen appears – choose your Bulk J-Mail Printer Style that you setup above.

Where Would You Like It Printed ?

Buttons: View, PDF, Smart Viewer, Print, Preferences, File, J-Mail, Fax, Exit

Style: LASER Laser Printer

Printer: HP Deskjet F4100 series (Copy 3)

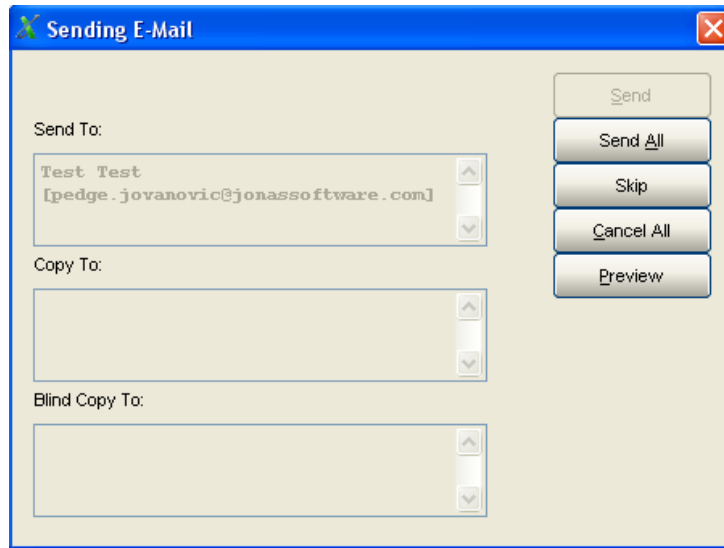
File: ASCII ASCII Text Format

J-Mail: JMAILP J-mail Personalized Email

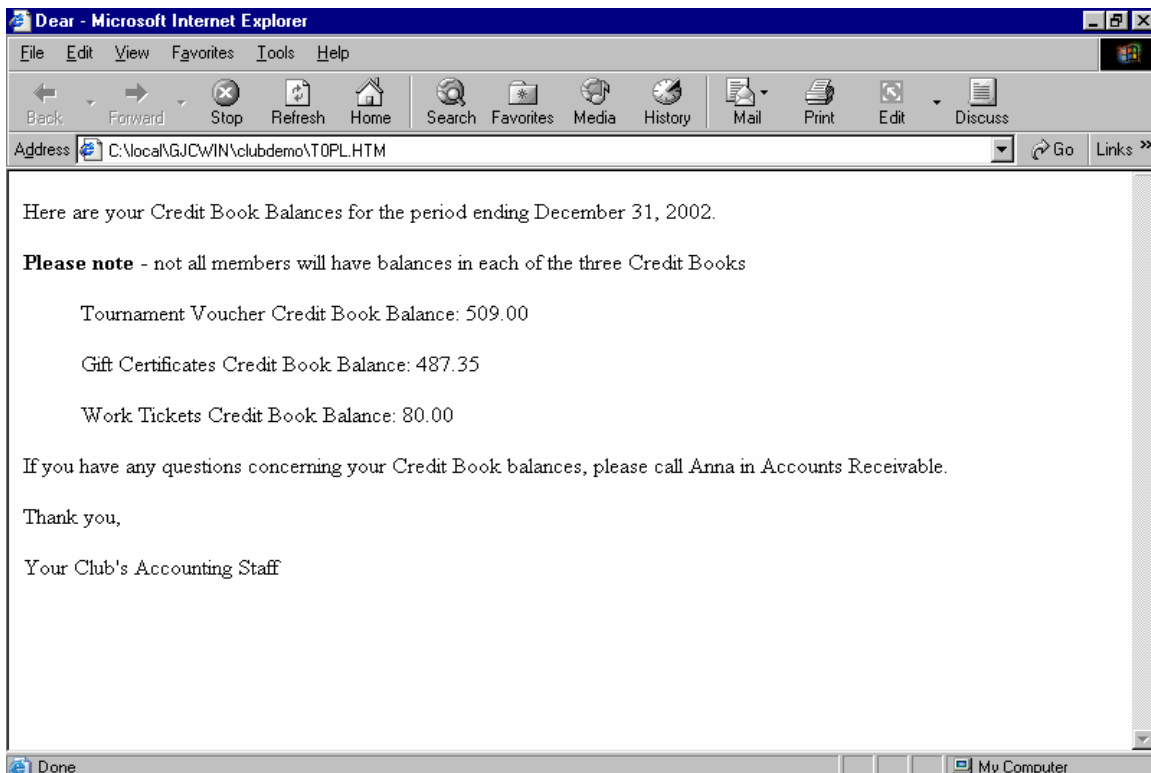
Fax:

No. of Copies: 1

The Sending E-Mail screen will appear. You can choose to **Send All**, **Skip**, **Cancel All**, or **Preview**.



Choosing Preview will show you what the merged letter will look like when sent:



S1 Service Contract Invoices



Service Contract Invoices

Although there are several standard Service Contract Invoice designs that support e-mailing using any of the mail clients, there is only one method used: one that creates a PDF of the Service Contract Invoice and attaches it to the e-mail.

To use the PDF attachment method, you need to be using any of the standard Service Contract Invoice designs (in Service Billing > Service Contract > Service Contract Profile.) In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design in the **HTML Template** field since it is not used.

Next, ensure that an e-mail address is specified within the Customer Master File > Preferences screen. This address will be the one used when e-mailing the invoice to the customer. Proceed to print your Service Contract Invoices as normal. The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the Invoice(s) as an e-mail.

S2 Subcontracts



Job Subcontracts

There is only one method used for e-mailing Subcontracts: one that creates a PDF of the Subcontract and attaches it to the e-mail.

To use the PDF attachment method, you need to be using the standard GJS30AA Subcontract design (in Subcontract Control > Subcontract Profile.) In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design in the **HTML Template** field since it is not used.

Next, ensure that an e-mail address is specified within the Supplier Master File on the main screen. This address will be the one used when e-mailing the Subcontract details to the Supplier. Proceed to print your Subcontracts as normal. The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the Invoice(s) as an e-mail.

W1 Work Order Invoices



Work Order Invoices

Although there are several standard Work Order Invoice designs that support e-mailing using any of the mail clients, there is only one method used: one that creates a PDF of the Invoice and attaches it to the e-mail.

To use the PDF attachment method, you need to be using any of the standard Work Order Invoice designs that support e-mailing (in Service Billing > Files > Service System Profile.) In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design in the **HTML Template** field since it is not used.

Next, ensure that an e-mail address is specified within the Customer Master File > Preferences screen. This address will be the one used when e-mailing the invoice to the customer. Proceed to print Invoices and Register as normal. Go to Service Billing > Billings > Print Invoices and Register and proceed to make your usual choices. The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the Invoice(s) as an e-mail.

W2 Work Order Tickets



Work Order Tickets

Although there are several standard Work Order Ticket designs that support e-mailing using any of the mail clients, there is only one method used: one that creates a PDF of the Ticket and attaches it to the e-mail.

To use the PDF attachment method, you need to be using the standard Work Order Ticket designs GJB14AAA or GJB14AAN (in Service Billing > Files > Service System Profile.) In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design in the **HTML Template** field since it is not used.

Next, ensure that an e-mail address is specified within the Customer Master File > Preferences screen. This address will be the one used when e-mailing the ticket to the customer.

Once you have created a Service Call for the customer, the "Where Would You Like It Printed?" window will appear (provided, of course you have specified "ASK", or left blank, in the W/O Ticket Printer field of the Service System Profile). Choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the ticket(s) as an e-mail.

W3 Work Order Quotations



Work Order Quotations

There are two standard Work Order Quotation designs that support e-mailing using any of the mail clients, and there are two methods used: one that uses an HTML Template as the body of an e-mail; and another that creates a PDF of the audit and attaches it to the e-mail.

To use the HTML Template method, you need to select the standard GJB12P Work Order Quotation design (in Service Billing > Files > Service System Profile.) In the Parameters for J-Mail screen, you need to select the path to the GJB12P.HTM Template design in the **HTML Template** field.

To use the PDF attachment method, you need to be using the standard GJB12AA Work Order Quotation design (in Service Billing > Files > Service System Profile.) In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design in the **HTML Template** field since it is not used.

To send e-mails, both methods depend upon a valid e-mail address being present in the Customer Master File > Preferences screen. Using an invalid e-mail address will result in error messages being reported when sending.

Quotations can be created and printed from two areas within the Service Billing System: within the Service Calls – Work Orders screen (using the **PrepQuote** button) or from the Prepare Quotations program (Service Billing > W/O's & Dispatch menu.) It doesn't matter which one you choose, they both run the same program. Prepare the quotation, and when finished, click the **Print Quote** button. The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

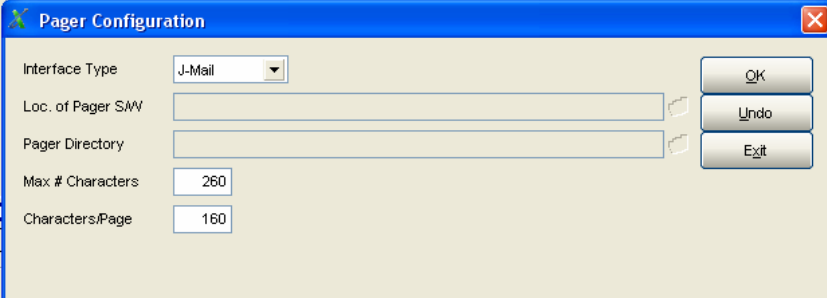
The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the quotation(s) out.

WP Dispatch Paging



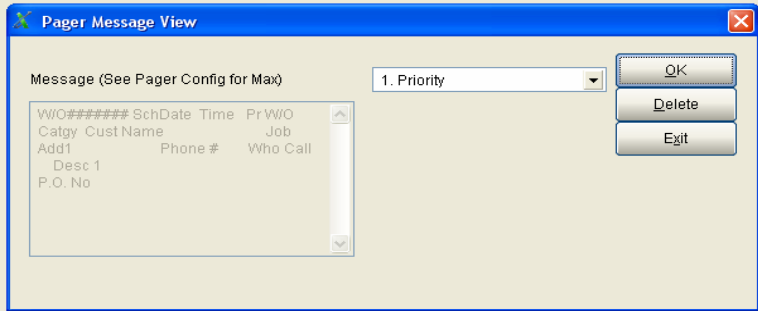
Dispatch Paging works on the basis of sending an e-mail to the Work Order Technician assigned to the Work Order. It can work with any of the mail clients. You must be using a paging service that supports e-mailed text messages. There is no HTML template required for Dispatch Paging since a page is only displayed as text and there is no need for an HTML layout.

However, you still need to tell the system that you are using J-Mail for Paging and to define what information you wish to send to your technician in the field. The former is done in the Pager Configuration (found in System Administration > System Setup > Pager Configuration).



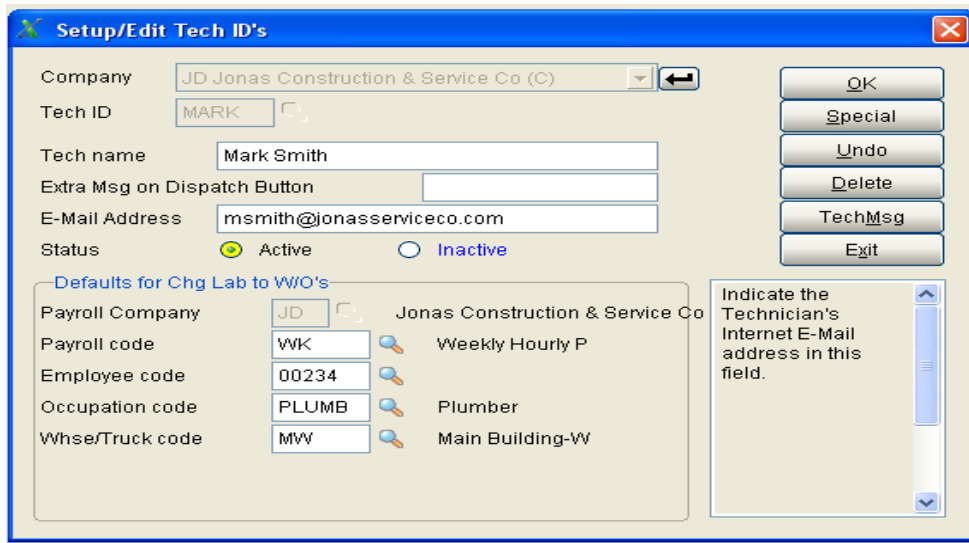
Choose “J-Mail” as the **Interface Type** and indicate the maximum number of characters that your pager company can handle for one entire page. Also indicate the number of characters that can appear on a single screen of a page – the pager company will then split pages that are longer than this page limit into separate screens.

To define what information you wish to send the technician in the field, you need to setup the Pager Message View (found in System Administration > System Setup > Pager Message View).

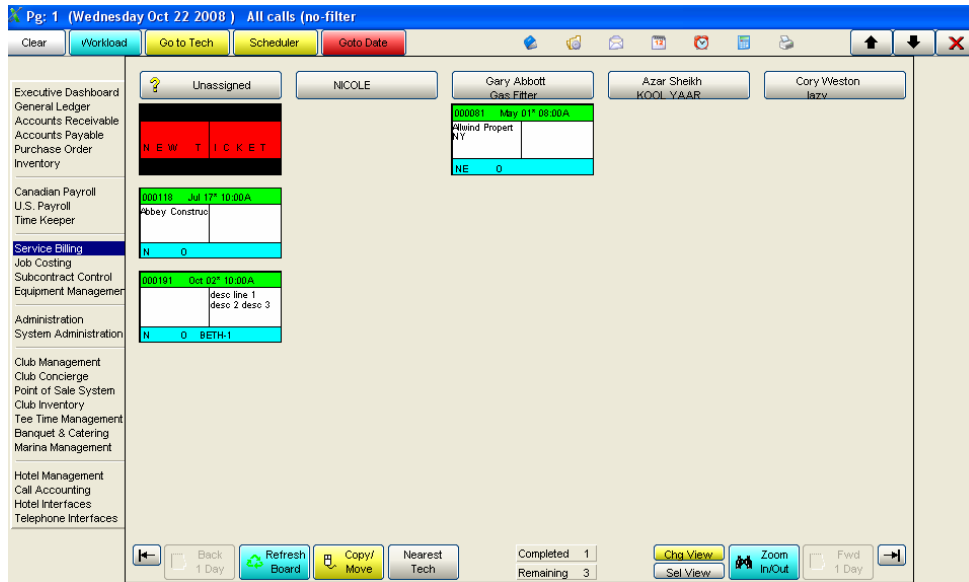


This program allows you to define which information (and in what order) you wish to send the tech when they are paged. It will limit you to the maximum number of characters you specified in the pager Configuration screen. To clear your choices and start again, use the "99. Clear Choices" selection.

Each technician (and their pager) is linked to an e-mail address in the Setup/Edit Tech ID's program (Service Billing > Files > Setup/Edit Tech ID's.)



To page a technician, proceed to the Dispatch Board and select the desired ticket (W/O) on the board.



In the Service Calls – Work Order screen that appears, click the **Page** button to send the page.

The “Page’ a Technician” screen allows you to send a page to this technician for this Work Order, or to choose any other technician or Work Order by clicking on the F2 Lookup button to the left of the Technician or Work Order fields. Corrections can be made in the Pager Message field, or completely new messages can be placed there.

Z1 Canadian Payroll Earning Statements



CDN Earning Statements

There is only one method used for e-mailing Canadian Payroll Earning Statements: one that creates a PDF of the earnings statement and attaches it to the e-mail.

To use the PDF attachment method, you need to be using the standard GJW23AA Canadian Payroll Earning Statement design (in Canadian Payroll > Payroll Config > Select Cheque Design.) In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design in the **HTML Template** field since it is not used.

Next, ensure that an e-mail address is specified within the Employee Master File > Misc Info screen. This address will be the one used when e-mailing the earning statement to the employee. Proceed to print your Earning Statements as normal. The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the statements as an e-mail.

Z2 US Payroll Earning Statements



US Earning Statements

There is only one method used for e-mailing U.S. Payroll Earning Statements: one that creates a PDF of the earnings statement and attaches it to the e-mail.

To use the PDF attachment method, you need to be using the standard GJV23AA U.S. Payroll Earning Statement design (in U.S. Payroll > Payroll Config > Select Cheque Design.) In the Parameters for J-Mail screen, you don't need to select the path or an .HTM Template design in the **HTML Template** field since it is not used.

Next, ensure that an e-mail address is specified within the Employee Master File > Misc Info screen. This address will be the one used when e-mailing the earning statement to the employee. Proceed to print your Earning Statements as normal. The "Where Would You Like It Printed?" window will appear – choose the **J-Mail** button and use the J-MAIL Printer Style.

The next window that will appear is the "Sending E-Mail" dialog box. You can make changes to who you are Sending To, Copying To, or Blind Copying To. Click **Send** (or **Send All**) to send the statements as an e-mail.

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Date

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