AutoLetter for AutoMate

Contents

Introduction

AutoLetter for AutoMate is a Windows application that provides options to print, email or SMS formed letters from templates created in AutoLetter.

Template letters, created in AutoLetter, are written in HTML format which includes the use of text formatting, colour, inclusion of images for print and email, hyperlinks to web pages in email and SMS, and more.

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Options in AutoLetter permit any combination of output for generated letters. If required, SMS sending may be globally disabled to permit just printing and emailing features.

AutoLetter uses data retrieved from AutoMate to create generated letters to Customers, Vehicles, Vehicle Recalls and Document Follow-ups. The created letters merges data from AutoMate to a selected template letter in AutoLetter. If recalls are not being maintained, no problem, Follow-up letters are very powerful and almost duplicate the function of Recalls, without the overhead of maintaining vehicle recall information in AutoMate.

AutoLetter provides the facility to send basic emails and/or SMS directly from 2 areas within AutoMate version 8 onward. Template selection and code merging is not provided for messages sent from within AutoMate. (i.e. Sending a basic email or SMS from within AutoMate should be limited to "Hi, Your vehicle is ready for pickup." or "Hi, please contact us about your vehicle. Issue found requiring immediate attention.")

AutoLetter does not and will not work with (incorporate) pre-existing AutoMate letters templates.

AutoLetter is registered and licensed on a per data set basis (multiple company data sets require individual registration and licensing).

Only one instance of AutoLetter can access a data set at any one time. i.e. if AutoLetter is run a second time on a data set, the second instance of AutoLetter will display a message and menu options in the second instance will be disabled.

AutoLetter is compatible with all 32-bit and 64-bit versions of Windows operating systems, from Windows98.
Testing platforms were Windows XP, Windows Vista, Windows7, Windows8 and 8.1 and Windows10.

Requirements

- AutoMate version 7.8 or higher. (NOTE: AutoMate v7.8x and v8.x only run on a 32-bit Windows operating system, up to and including Windows10 32-bit.)
- Windows 32-bit or 64-bit operating system running on a desktop or laptop PC. (AutoLetter may reside on the same 32-bit Windows operating system used by AutoMate, or on another PC with 32-bit or 64-bit Windows operating system when AutoLetter is in a network environment. AutoLetter must have access to the AutoMate data files.)
- Most recent version of Microsoft Internet Explorer, at least version 8 as components of IE are used to edit, display and print template letters.
- If using SMS: Account with SMS vendor. SMSGLOBAL recommended: http://www.smsglobal.com.au , email2SMS.
- A personal or business email account, which permits sending via a SMTP server, and also on which replies may be received. It is recommended that

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a "special" email account is used specifically for the with AutoLetter emails and SMS. Also that the email is received on the same PC that AutoLetter runs. (NOTE: Recent changes to Gmail servers in the area of authentication and security has made it impractical to use the Gmail SMTP server for sending. This excludes Gmail as being an option for sending generated emails through AutoLetter.)

- High ppm (pages per minute) output printer, laser or inkjet, for printed output. Colour is optional.
- High speed broadband for message transport.
- Optional: MS Office suite installed, used by AutoLetter when exporting browse and list content.

Installation

AutoLetter installer (Setup AutoLetter.exe), is available for download from http://www.ruslingprogramming.com/downloads. Download the installer file and run the installer on the computer which AutoLetter is to be installed on. Unless there are special conditions, do not change values during installation, just accept the defaulted values in the installer.

The installer will place a shortcut named "AutoLetter for AutoMate" on the desktop of the logged in user and also on the Start page. Either of these shortcuts may be double clicked to run AutoLetter. Refer First Run before running AutoLetter.

Backup Consideration

AutoLetter creates template files in a sub folder of the AutoMate data location. Backup routines should be altered to include all subfolders of the AutoMate data location.

AutoLetter's main configuration file, an INI file, is located in the folder to which AutoLetter is installed. Though not absolutely necessary, INI files may be included in backup.

AutoLetter may be reinstalled at any time using the provided installation file. Existing INI files, other files such as logs and template files are not overwritten by a reinstallation of AutoLetter.

First Run

You will need to know the location of AutoMate data before running AutoLetter for the first time. The first time AutoLetter is run, it will prompt for the location of AutoMate data. If this is not know, cancel out of the "AutoMate Data Location" window as making the wrong selection will create issues.

AutoMate data may reside on the local machine or, if run on a network, at any accessible location on the network. The entry for AutoMate Data in the "AutoMate Data Location" window, may be a fixed or mapped drive, or an UNC location if over a network. There is no strict rule or preference which is used.

Provide the location of AutoMate data that AutoLetter is to use for generating letters, then click the accept button, the Tick, which if the data loaction is set correctly, will open the main window of AutoLetter for AutoMate.

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Refer to [Initial Setup](#) for the next steps that must be performed before using any component of AutoLetter.

Initial Setup

SMTP settings and SMS Email2SMS account details will need to be known in the following. SMTP details are provided by the organisation that hosts your email services. SMS Email2SMS account details are provided by the organisation with which an SMS account is provided. SMSGlobal is recommended, but not limited to. (http://www.smsglobal.com) AutoLetter was developed using SMSGlobal and is known to work with SMS provider. If an organisation other than SMSGlobal is to be used, please do not create an account with them unless the criteria for using Email2SMS in AutoLetter is met.
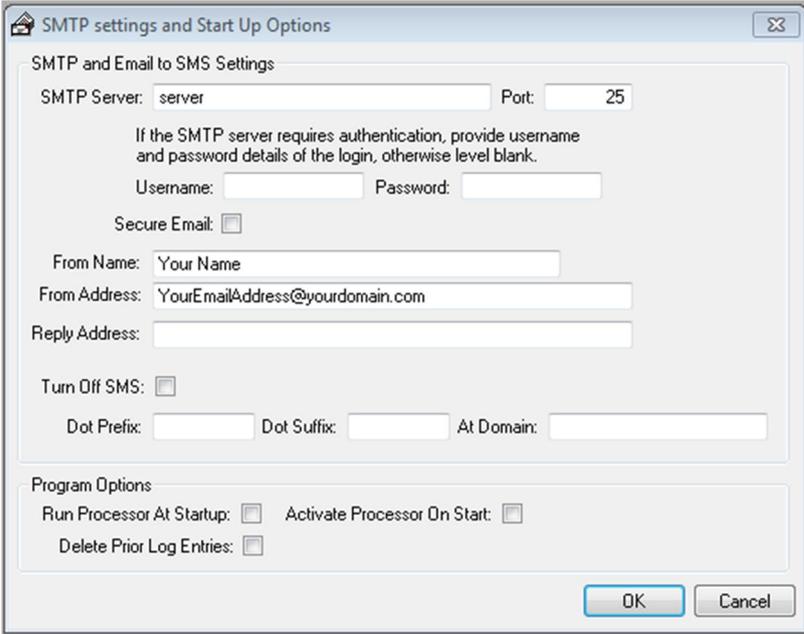
1. In AutoLetter, on the main menu, select SETUP | SMTP AND STARTUP OPTIONS.
2. From details obtained from your email account provider, enter the SMTP server name and the SMTP server port.
3. If the SMTP requires your access to be authenticated in order to send email, provide the Username and Password that should be used. Leave these 2 settings blank if authentication is not required.
4. If email is to be sent over secured protocols, check the Secure Email option and provide the additional details that are displayed as a result of the option being checked. (Secure email is not recommended and would normally be left unchecked.)
5. Provide the From Name, which is displayed to the recipient of emailed messages. This would typically be your business's name.
6. Provide the From Address. this would also typically be the email address of your business. The from address may also be used by the SMS service provider to identify you as being a valid entity for using

the Email2SMS account. The email address provided may also receive replies from SMS sent. This option is dependent on the SMS provider's facilities and setup. It s recommended that a "special" email account is created if the email account is to receive replies to emailed and/or SMS sent in order to separate these replies from general emails.

7. The Reply Address, if blank, is automatically filled when the From Address is changed and accepted. The reply address is used if a recipient of an emailed message replies to one you have sent.

8. If SMS services are to be used, leave the option Turn Off SMS unchecked and provide the settings required by the SMS provider for Dot Prefix, Dot Suffix and At Domain.

   a. Dot prefix is used only if the SMS provider requires a code which prefixes the phone number that is to receive SMS that are sent.

   b. Dot suffix is used only if the SMS provider requires a code which suffixes (appends) the phone number that is to receive SMS that are sent.

   c. At Domain is the domain name of where the SMS email is to be sent.
   In SMSGlobals case:
   Dot prefix is left blank;
   Dot suffix is left blank;
   At Domain is email.smsglobal.com

9. If SMS services are not to be used, check the Turn Off SMS option.

10. The option Run Processor At Startup, may be checked or uncheck to open, or leave closed, the processor window each time AutoLetter is run. The processor window is part of the AutoLetter program that does all the work for sending or printing letters and messages. Sending and printing does not take place if the window is closed. The window may be opened in an inactive state.

11. The Activate Processor On Start option, determines whether the processor window is opened in an active state with the Set Processor Active option in the processor window set and ready to send emails or print letters after an initial timeout of 2 minutes. (Best left unchecked until the operation of AutoLetter and option is understood.)

12. The Delete Prior Log Entries when checked will cause all previously processed (generated) email messages and printed letter log entries to be deleted before generating a new set of emails or printed letters. The option may be left unchecked to keep records of all previously generated letters for reference.

Example of completed form:

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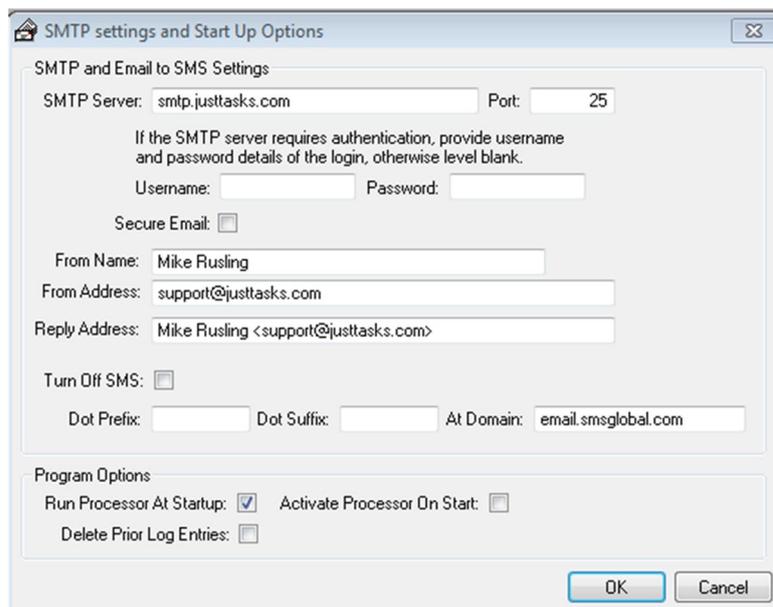
Send A Test Email

To confirm the capability of sending an email message after completing initial setup, select the main menu options SETUP | SEND SMTP EMAIL TEST to open the Quick Email window.

The entries in the window are defaulted to the entries provided in SMTP setup.

1. Provide an email address in the To entry, ensure it is a valid email address that can be checked to see if the test email is delivered.
2. Change the Subject and/or message body text and then click SEND.

If all details that have been provided are correct, a "Message Sent" message box will be displayed and the message will be received by the recipient of the message in the TO email address.

A failed message will produce any number of different messages in place of the successful message. These messages may be helpful in providing guidance in working through the reason for a failure.

Failures are generally related to incorrect information provided for the connection to the SMTP server and/or issues created by firewalls, both locally or by the internet connection provider.

The capability of being able to send an email must be confirmed before progressing to other functions in AutoLetter. In other words, make sure emails work before doing anything else.

AutoLetter Registration and Licensing

About Registration and Licensing

AutoLetter is by default installed as a Demo application. In Demo mode, AutoLetter will be fully operational for a period of 30 days from the day of first installation. Uninstalling and reinstalling AutoLetter will not extend or provide an additional demo period over the initial 30 days.
Additional time may be provided but is at the digression of Rusling Programming Services. The 30 day period is considered sufficient time in which a decision can be made to purchase or not.

AutoLetter is registered and licensed for use on a single AutoMate dataset (company). The licence for use does not extend to use across multiple datasets. However, multiple datasets may be registered and licensed individually.

AutoLetter will begin to warn when within 14 days of the date registration is due to expire.

Purchasable updates containing additional features may be available from time to time. Updates will be priced on the features being made available.

Registration and Licensing Process

A registration file is required to register and licence AutoLetter. The file is generated and sent via email at the time the payment for AutoLetter is receipted. The registration file enables AutoLetter to operate on the AutoMate data set AutoLetter is using at time of completing the registration process.

 A registration file is sent as an attachment to you via email when the payment for AutoLetter is receipted.
After receiving the email with the registration file attached:
1. Save the file attachment to a location that is accessible by the PC that AutoLetter is installed on. If your emails are received on the same PC that has AutoLetter installed, this would typically be the desktop, but may also be a network location if on a network or a thumb drive. Take note of the name of the file.
2. Open AutoLetter.
3. Resize the AutoLetter window so it is not maximised and other parts of the desktop can be seen.
4. In AutoLetter, select the main menu options SECURITY | REGISTER PRODUCT to open the Register Product window.
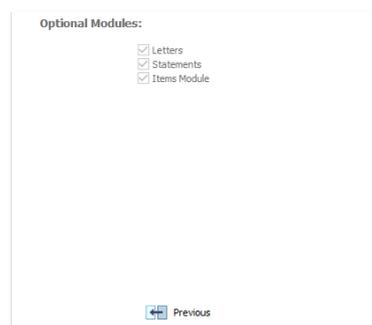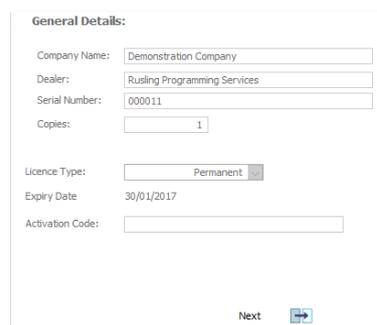
AutoLetter for AutoMate
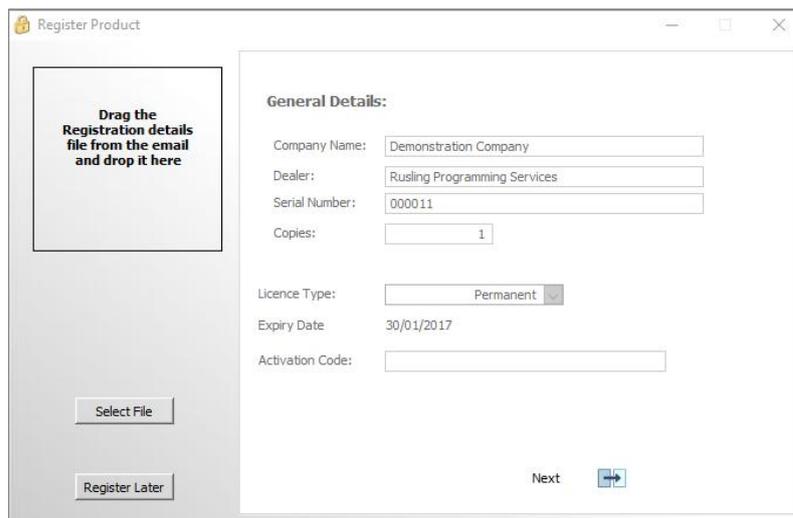
5. Click the Select File button in the Register Product window.
6. Navigate to the location where the file attachment was saved.
7. Select the file and click Open.
8. A successful message will be displayed and AutoLetter will need to be restarted, closed and reopened, for registration to take effect.

Review Registration

1. Open AutoLetter.
2. In AutoLetter, select the main menu options SECURITY | REGISTER PRODUCT to open the Register Product window.
3. Use the Next and Back buttons in the Register Product window to display registration details.
4. General Details of the licence is displayed on the first page with other details of the licence made accessible by using the Next option. The next and Back options provide navigation through the licence pages.

Multiple AutoMate Data Sets

Command Line Variables

The following command line variables may be set in the Windows shortcut which is used to run AutoLetter.

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ini=

The *ini=* command line variable defines the INI file to use by AutoLetter and is used to override the default name of the INI file. The command line variable should only be used if AutoLetter needs to operate on different AutoMate data sets.

NOTE: Using the *ini=* command line variable is the preferred method of controlling data set access.

For a mapped drive
"C:\Program Files\AutoLetter\AutoLetter.exe" ini=Company2.ini

For UNC path
"C:\Program Files\AutoLetter\AutoLetter.exe" ini=Company2.ini

datapath=

The *datapath=* command line variable defines the location of AutoMate data files and is used to override the data location set in the INI file. The command line variable should only be used if AutoLetter needs to operate on different AutoMate data sets.

NOTE: The INI file used by AutoLetter, may also be overridden by using the *ini=* command line variable. Using the *ini=* command line variable is the preferred method of controlling data set access.

The data path used to run AutoLetter.exe must be either stipulated in the INI file or stipulated on the command line of the Target entry in a shortcut created to run AutoLetter. Both command line variables, *ini=* and *datapath=*, may coexist on the same command line.

The following examples for the Target entry of an AutoLetter shortcut may be used to override the AutoMate data location.

For a mapped drive
"C:\Program Files\AutoLetter\AutoLetter.exe" datapath=d:\am2\data1

For UNC path
"C:\Program Files\AutoLetter\AutoLetter.exe" datapath=\\server\am2\data1

NOTE: If the data path contains a space, the data path entry must be enclosed in double quotes. E.G. datapath="\\server\user shares\am2\data1".

Operation

The operation of the AutoLetter application is twofold.
1. AutoLetter provides facilities to merge master file and document data contained in AutoMate to letter templates.
2. AutoLetter contains a processor which, when open and set to active, will send, via email or to printer, the generated letters.

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There are a number of letter generation selections which determine the information that is available to be merged in a selected letter template. The generation selections are listed on the drop down menu of the application, under **OPEN.** Currently, the submenu selections available under the main menu option OPEN are:

- Vehicle and Recall Letters
- Follow up Letters
- Customer Letters
- Supplier Letters (Not yet operational)
- Contact Letters (Not yet operational)

In AutoMate, the old method for generating letters, it was possible to select a letter template which contained inappropriate merge codes for the type of letter being generated producing an unexpected result; e.g. Using a letter template that had been created in AutoMate and which contained recall merge codes but was selected and used when generating customer letters. Vehicle recall information is not available in such a situation and the vehicle recall merge codes were not filled, producing an unexpected result, and an embarrassment if the issue was not noticed before the letters were sent.

To avoid this situation, AutoLetter introduces the use of CONTEXT. Each letter template has a context defined for it. The context determines how, and where in AutoLetter, the template letter may be used. Context also determines which merge codes are available for selection at the time of creating or revising a template letter, reducing if not illuminating the issue of having incorrect merge codes in a template letter.

Template Construction Considerations

Unfortunately, it is always a possibility that the information, retrieved from AutoMate data and being merged, is blank. To some degree, blank merge data may be compensated for in the way the template letter is constructed or written. e.g. instead of writing a template letter which begins with "Dear $$Contact$$,", use "Hi $$Contact$$," or "Hello $$Contact$$,". As a result, if the data in the $$Contact$$ merge code is blank, instead of the blank merge code producing a result of "Dear ,", which reads oddly, the result would be "Hi ," or "Hello ,". Yes, the result is less formal, but a little more readable and the error of a blank code is less obvious as a result.

The creation of SMS templates impose size restrictions, and cost of generation considerations. SMS templates should be constructed very differently than a HTML template that is printed or emailed. The formalities used in formation of SMS need to be far more relaxed with a lot of the "niceties" removed. The message content itself much more decisive (direct and to the point), so not to increase the size of SMS templates beyond what is absolutely necessary to get the point of the SMS across.

SMS technology sends a message in 160 character blocks. Each block is generally charged for. That means, although as we humans see it as only one message being sent, when considered from the SMS technology perspective

the charge incurred for sending that one message is calculated on how many SMS blocks or parts it has taken to transport the number of characters in the full message. Not a strictly correct example, but good enough to indicate the importance of considering the numbers of characters typed in to a messages, is a message that is 160 characters in length attracts a fee of one SMS. However, a message that is 161 characters in length attracts a fee of two SMS. Still much cheaper than printing, folding, enveloping, licking, sealing and posting, but never the less a consideration.

And do not forget the unknown factor. The unknown factor is the number of characters that are added in place of a merge code. For instance, the merge code $$Contact$$ is only 11 characters long, but the number of characters that may replace the merge code can be as few as zero or as many as 20 characters.

SMS text messages are generally properly cased, more the point, they are not all upper case. An all upper case message, in SMS etiquette, may be interpreted as shouting, or at least exclaiming, something to avoid. Mixed case, is a little less intimidating.

Size of images. Resize the image on disk instead of in the HTML letter itself. An image used in a HMTL format letter, should be kept as small as possible. A large image takes more time to print and also large images in letters that are sent by email can unnecessarily congest the transportation of email messages and your internet connection. If you connect to the internet using wireless broadband, the upload of email to the SMPT server may impact on measurable usage. Check the internet plan you subscribe to. Ensure that the size of the image ON DISK is as small as it can be.

For HTML letters, and specifically those that may be printed, include an address block in the construction of the letter and insert the name and address in the address block. Position the address block so it displays correctly in a windowed envelope. When a new HTML template is created, the template content is initially filled with formal address blocks. This may be deleted or changed to suit. The formal address block structure is suited for printing with left, right and top page margins set to 10 millimetres in Internet Explorer, and will fit correctly if DL size windowed envelopes are used.

SPAM Act

The SPAM Act is such that a business could incur fines if specific types of messages are sent without consent of the receiver. Read the components of the act that are relevant to the material you are sending and ensure you are in compliance. (References : Anti-spam : SPAM Act)

There are some general interpretations. If a message is sent and the message is primarily to do with marketing, there must be a clear statement within the message, or letter, which indicates how the recipient can stop further messages/letters being sent to them. The general term for this is providing an "Opt Out" clause in the message. In the case of a SMS, this may be as short as "OptOut reply STOP", 17 characters. In the case of an emailed message, the

length of the opt out clause is less of a concern, never the less, it must be there and you may choose to use the same format, but remember, the letter may not be emailed as a message, it may be printed so the clause which just says "OptOut reply STOP" when printed would not make a great deal of sense. In the case of a HTML template, which could be printed or sent as an email message, it may be better to change the clause to read something like "If you do not wish to receive this type of material, please contact us.". Your responsibility is then fulfilled in terms of what is in the material.

The SPAM Act primarily governs electronic transport of marketing material. AutoLetter provides a register, the Opt Out Register, to which addresses (phone numbers and email addresses) may be added. By adding a phone number or email address to the register, the phone number or email address is recognised as being one that should not receive marketing material.

Arguably, every form of message you send is marketing material, with the exception of notifications and note, recall letters are not a form of notification. No matter what form the HTML or SMS template letter takes, a Customer, Vehicle, Vehicle Recall or Follow-up letter may be in some part determined as falling into the category of being marketing material and so at time of generating letters using these context types, the opt out register is checked for the address which the letter is to be sent, the phone number in the case of an SMS or the email address in the case of an email message. If the number or address is found in the opt out register, and if the record in the opt out register is not expired, the letter is not generated.

Merge Codes

The following tables display the merge codes available. Although a merge code may be hand entered into a message template, it is not recommended to do so. The template maintenance windows in AutoLetter provide lookup buttons which display all the merge codes available to be merged relative to the context which the template is to be used. e.g. if a context of a template is set to CUSTOMERS, the list of lookup merge codes does not display codes associated with vehicles or documents.

Field	Merge Code					
System Codes (Available in all Merge Processes)						
Name	$$sysName$$	Retrieved from system file.				
Desc	$$sysDesc$$		"			
ABN	$$sysABN$$		"			
Add1	$$sysAdd1$$		"			
Add2	$$sysAdd2$$		"			
Add3	$$sysAdd3$$		"			
ACode1	$$sysACode1$$		"			
Phone1	$$sysPhone1$$		"			
ACode2	$$sysACode2$$		"			
Phone2	$$sysPhone2$$		"			
ACode3	$$sysACode3$$		"			
Phone3	$$sysPhone3$$		"			

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Email	$$sysEmail$$	SMTP details From address.		
Date	$$sysDate$$	System date.		
Current Year	$$sysCY$$	System year.		
Next Year	$$sysNY$$	System year + 1.		
Entered at time of run				
Greeting	$$Greeting$$	Defaults to "Dear". May be changed or blanked.		
Addressee	$$Addressee$$	Will be set to the entered value for ALL letters. If left blank, Addressee will be filled with master file Contact details. If master file Contact detail is also blank, Addressee will remain blank.		

Processing Codes (Available in specific Merge Processes)				
		Recall	**Vehicle**	**Customer**	**Supplier**	**Contact**

Master File Details Merge Codes						
Code	$$Code$$	☑	☑	☑	☑	☑
Name	$$Name$$	☑	☑	☑	☑	☑
Comment	$$Comment$$	☑	☑	☑	☑	☑
Email	$$Email$$	☑	☑	☑	☑	☑
Contact	$$Contact$$	☑	☑	☑	☑	☑
Add1	$$Add1$$	☑	☑	☑	☑	☑
Add2	$$Add2$$	☑	☑	☑	☑	☑
Add3	$$Add3$$	☑	☑	☑	☑	☑
State	$$State$$	☑	☑	☑	☑	☑
PCode	$$PCode$$	☑	☑	☑	☑	☑
Terms	$$Terms$$	☑	☑	☑	☑	
Last_Pay_Dte	$$Last_Pay_Dte$$	☑	☑	☑	☑	
Last_Pay_Amt	$$Last_Pay_Amt$$	☑	☑	☑	☑	
Balance	$$Balance$$	☑	☑	☑	☑	
Vehicle Details Merge Codes						
Item	$$Item$$	☑	☑			
ItemComment	$$ItemComment$$	☑	☑			
Make_Mod	$$Make_Mod$$	☑	☑			
Desc	$$Desc$$	☑	☑			
SDesc1	$$SDesc1$$	☑	☑			
SDesc2	$$SDesc2$$	☑	☑			
SDesc3	$$SDesc3$$	☑	☑			
LStatus	$$LStatus$$	☑	☑			
Colour	$$Colour$$	☑	☑			
Spec	$$Spec$$	☑	☑			
MFDate	$$MFDate$$	☑	☑			
Rego_Date	$$Rego_Date$$	☑	☑			
Rcl_type	$$Rcl_type$$	☑				
Rcl_Date	$$Rcl_Date$$	☑				
Rcl_Klms	$$Rcl_Klms$$	☑				
Rcl_Sent	$$Rcl_Sent$$	☑				
War_Date	$$War_Date$$	☑				
War_Klms	$$War_Klms$$	☑				
Document Merge Codes						
Date	$$LastDocDate$$					
DocNo	$$LastDocNo$$					
JCode	$$LastJCode$$					
JDesc	$$LastJDesc$$					
Operator	$$LastOperator$$					
Curr_Klms	$$LastCurrKlms$$					
Rcl_Type	$$LastRcl_Type$$					

|						
RclDate	$$LastRcl_Date$$					
Rcl_Klms	$$LastRcl_Klms$$					
Follow-up Letter Merge Codes						
Details available for merge depend on options selected in the generation of the letter.						
Letter for each Customer option						
All Customer merge codes. All document merge codes of the last document finalised to the Customer within the selected period. All Vehicle merge codes contained in the last document for the Customer in the selected period.						
Letter for each Vehicle option						
All Vehicle merge codes. All document merge codes of the last document finalised to the Vehicle within the selected period. All Customer merge codes contained in the last document for the Vehicle in the selected period						
Customer Statement Generation Merge Codes						
Reference		All Customer merge codes. Default customer code, $$Code$$, if blank and BSB or PayID details filled.				
Remittance Instruction		All Customer merge codes.				
Email Subject		All Customer merge codes.				
Email Body		All Customer merge codes.				

Menu Options

File

Start Processor

The Processor window is titled Print, Email and SMS Queue. The processors function is to, as it suggests, process all generated records in the queue. The processor must be open, not in the grace period and the Set Processor Active option checked for any letters will print or be sent.

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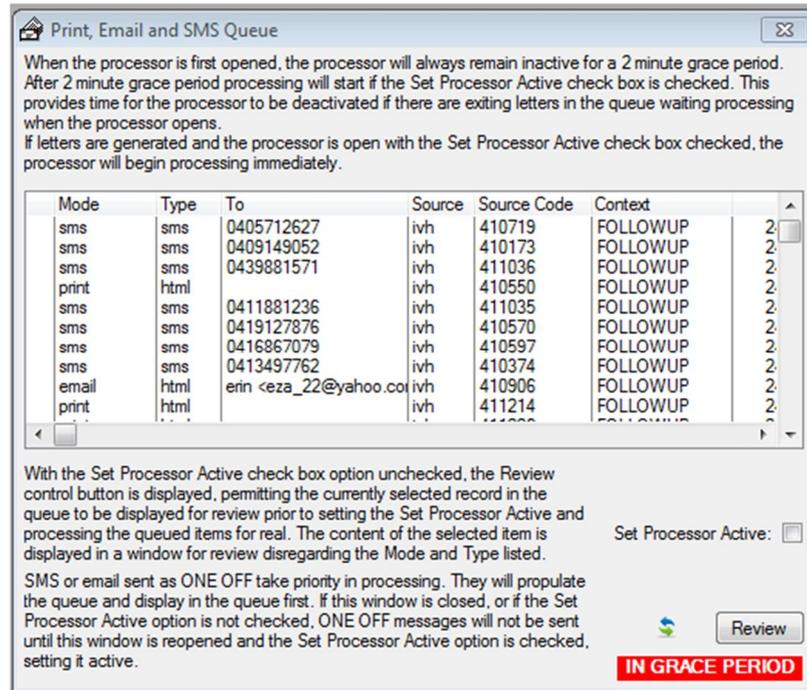
Columns in the list:

Mode: indicates the method of transport. SMS the record, email the record or print the record.

Type: indicates the format or the record. SMS is text format; HTML is HTML format.

To: indicates the phone number or email address the record will be sent to. Records that are to be printed, do not display To information.

Source: The primary area in AutoMate where this record gained information. ivh = customer invoice header, dbm = debtor or customer master file, itm = item or vehicle master file, crm = creditors or suppliers master file, con = contacts master file.

SourceCode: the code or document number the primary source relates to.

Context: the context of the letter the record contains.

Created: the date the record was created (generated).

At: the time of day the record was created.

Set Processor Active:

Even though the processor window may be open, processing the records in the list will not begin until the Set Processor Active option is checked. When the processor is first opened, processing will not begin until a "grace period" has transpired. The status of the processor window is displayed

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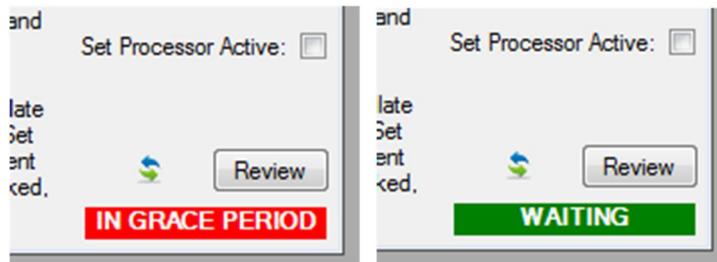
The grace period provides an opportunity to uncheck the Set Processor Active option is the window is opened in an active state, the window opens with Set Processor Active option checked.

If the Set Processor Active option is checked outside of the grace period, processing begins immediately.

The Set Processor Active option also displays or hides the refresh and Review buttons. The buttons are visible when the option is unchecked, but are hidden when the option is checked.

Queued records in the list may be removed in the Processor Log window. Close the processor window. Open the Processor Log. Locate and select the message to be deleted. Tap the delete key or click the delete button. Close the processor log window and Start Processor.

Refresh button (left and right arrows):

The refresh button is displayed when the Set Processor Active option is unchecked. Clicking the refresh button will cause the queue of records displayed in the list to be rebuilt. This option does not rebuild the message content, only the list of records that are "lined up" ready for sending.

Review:

The review button is displayed when the Set Processor Active option is unchecked. Clicking the review button will display the content of the letter in the format it is to be sent. A record in the list may also be double left clicked to perform the same function as clicking the Review button.

Printer Setup

Select the printer to direct the next printed output to a different device other than the default printer set in Windows.

Exit

Exit and close AutoLetter. Note, the processor will close. SMS and emails will not be sent.

Open

Vehicle and Recall Letters

AutoLetter for AutoMate

(Licenced option LETTERS.)
Generates letters to customers with merged information from vehicles, their assigned customer records and the system record. With an additional option set, also generates recalls letters and recall responded letters.

Followup Letters

(Licenced option LETTERS.)
Generates letters to customers with merged information from documents, the vehicle assigned to the document, the customer assigned to the document and the system record.

Customer Letters

(Licenced option LETTERS.)
Generates letters to customers with merged information from customer records and the system record.

Customer Statements

(Licenced option STATEMENTS.)
Generates customer statements which may then be emailed as attachments or printed for mailing. Additional information, refer Customer Statements.

Supplier Letters (Not currently available.)

Generates letters to suppliers with merged information from supplier records and the system record.

Contact Letters (Not currently available.)

Generates letters to contacts with merged information from contact records and the system record.

Browse

Assignments

The 2 options in this submenu item, Contexts and Merge Codes open browse list windows that display system Context types and Merge Codes.
Records in these 2 windows may not be deleted or revised as they are maintained by AutoLetter.

Opt Out Addresses

This window displays a list of all addresses that exist in the OptOut file (Opt Out register)
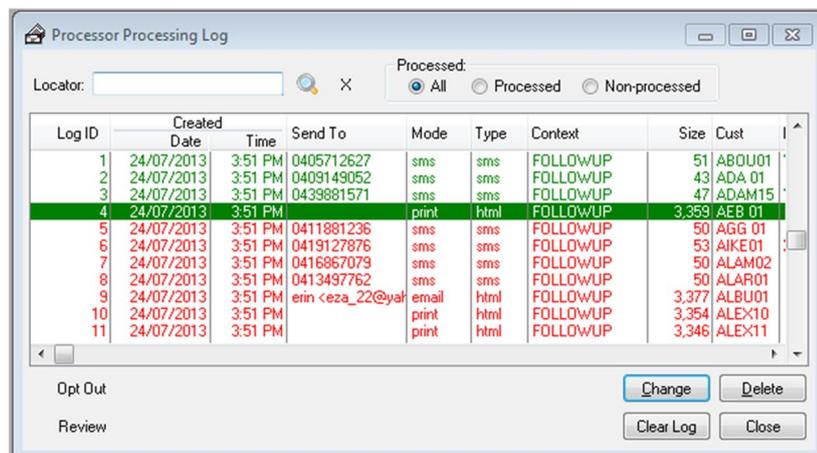
AutoLetter for AutoMate
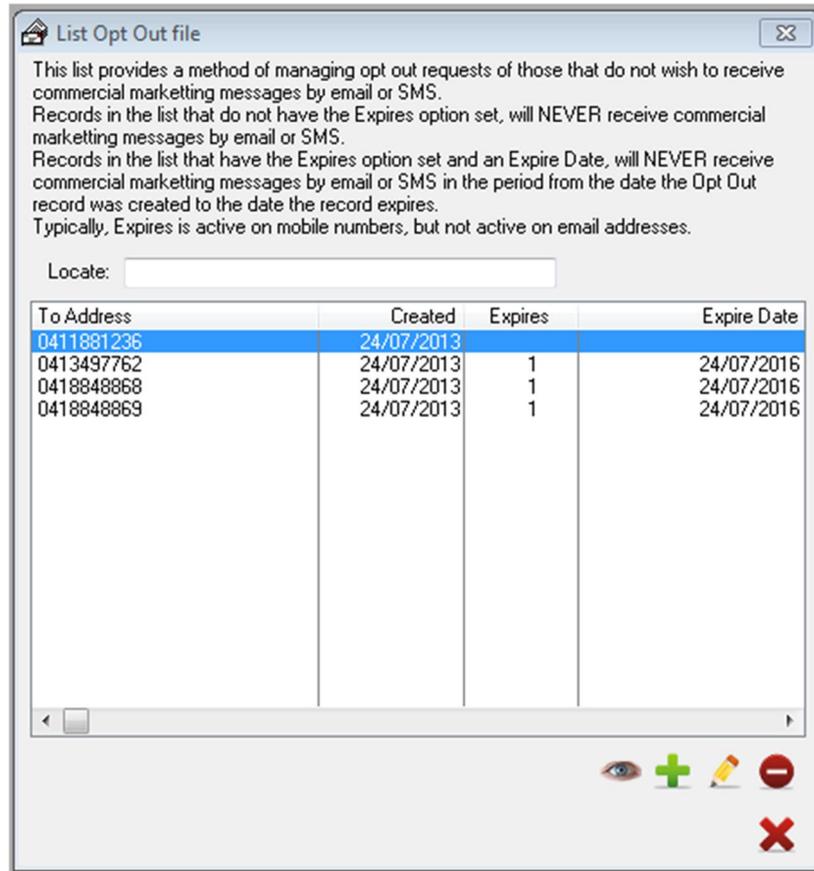
Records may be added, changed or deleted from the list.

Processor Log

The Processor Log window displays all records that have been processed or that are still to be processed. Processed records are displayed in green, and records that are not yet processed in red.

NOTE: if the processor is active, the Processed state may be changed by the record being printed or sent, but this may not be reflected in the Processor Log window.

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Records in the list may be deleted, the log may be cleared (either all log entries or just those that have been processed), the selected log record may be reviewed, or the selected log record can be placed on the Opt Out register (Refer Browse Opt Out Addresses).

Modules

Items

Item Histories. (Licenced option ITEMS.)
Creates a browse list which may be viewed and/or exported. The list is selectable by date of documents that have been generated in a provided period. All documents in the period may be displayed or may be filtered to display finalised only and/or financial only documents within the period.
Columns in the browse list display pertinent information about the item and the customer that owns the item, the document and current billing details such as the originally billed customer code document value and current outstanding amount.

Setup

SMTP and Startup options

Details provided by your email provider and SMS Email2SMS service provider are entered in this window.

Refer Initial Setup for more details.

AutoLetter startup options are also set in this window, in the Program Options group.

Run Processor At Startup, if checked will open the processor window, refer the Start Processor option under File .

Activate Processor On Start, if checked will enable the processor window to begin processing queued records in the list after the grace period has expired.

Delete Prior Log Entries, if checked will delete all previously processed records before queuing any further records to be processed.

OK button saves the current entries and closes the window.

Cancel button does not save the current entries and closes the window.

Send SMTP Email Test

Opens a window that permits sending an email using the system entered SMTP details. Refer Send A Test Email.

Message Templates

The Message Templates window lists all message template in a browse list. Those that may be selected when generating letters are termed released and are coloured green in the list. Those that are not released are filtered out from being selected as a template for generating letters and are coloured red in the list. Templates are assigned a context which defines the merge codes and area in which the template is used, and also if the template is one that will generate an SMS or suitable for emailing (or printing).
The context of a template and the type of the template may not be changed when a template is revised.

A HTML editor is provided if a template being created for the purpose of emailing or printing. The HTML editor provides comprehensive format facilities for writing the template letter.

Help

Open Help Document

This document opened from within AutoLetter.

About

Location of folders and files used by AutoLetter.

Register Product

Refer AutoLetter Registration and Licensing.

AutoLetter for AutoMate

Security

Register Product

Refer [AutoLetter Registration and Licensing](#).

Customer Statements

With the cost of snail mail rising, and the popularity of businesses and the general public having access to receiving email, this cost effective option for transporting customer statements has been provided. The option provides a direct clone of AutoMate's customer statement generation.

A customer statement can be sent to those customers that have valid email address entries on their master file record.

By default, when the list of customers to receive a statement is built, the output method of email is defaulted, if a valid email address is provided. The output method may be changed, toggled from email to print, if the preferred output method is not via email.

The list of customer statements is built from the same options that AutoMate uses. The list is displayed to the operator, after the options are set and the Build icon button is clicked. The built list may then be examined.

Examining the Customer List

After setting the options in the top part of the window, click the Build icon button to build and display in the list box, all customers that fix the options set.

The list provides a means of validating customers that should have a statement generated.

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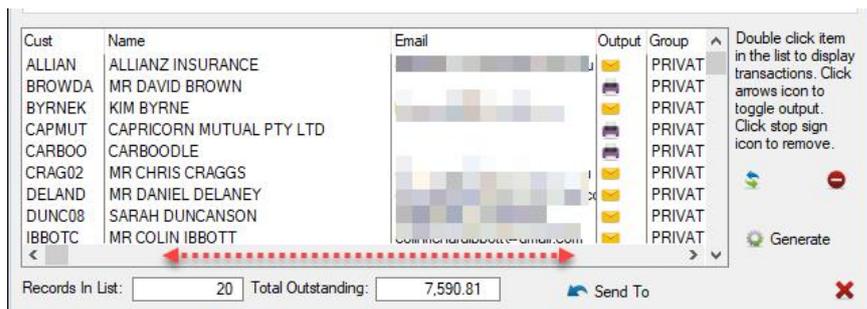
The list may be scrolled to display the customer's balance as at the To Date of the statement period, set as an option of the top part of the window. A customer count and outstanding value total of all customers displayed in the built list is displayed below the list box, as well as individual customer outstanding total which is visible in each row of the list when scrolled. A list of customer transactions may be viewed by double clicking the customer record in the list.


Customise The Statement

Place a logo image in the data directory. To reduce distortion during resizing, the image should be square and may be of a PNG, JPG of GIF type. Name the image "logo", e.g. logo.png. The image will self-size and display top left of the statement page prior to your company name. Priority of display is PNG then JPG then GIF.

Place a background image, to be used as a form of each page, in the data directory. The image should be rectangular, with the same aspect ratio as an A4 page, and may be a PNG, JPG of GIF. Name the background form print image "backprint", e.g. backprint.png. The image will self-size and display as the form of each statement page. Priority of display is PNG then JPG then GIF.

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Example Email Setup

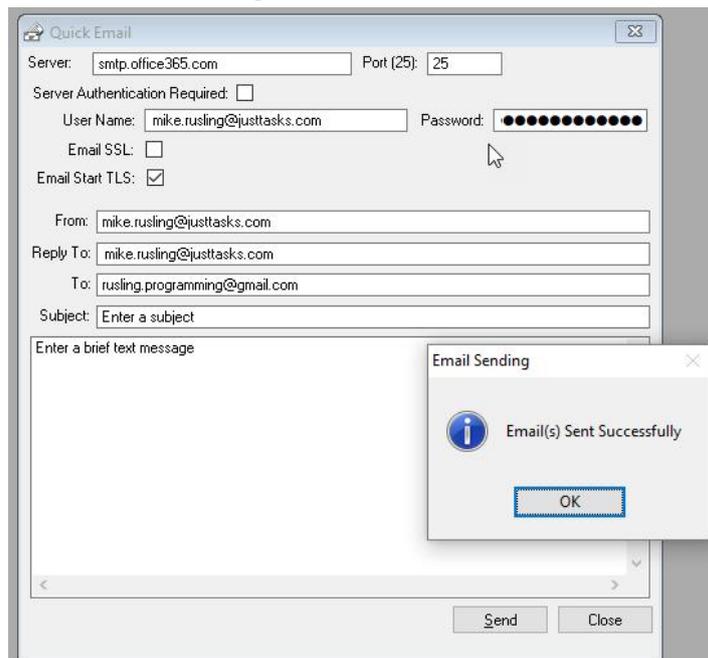### *ISP Provided SMTP server:*
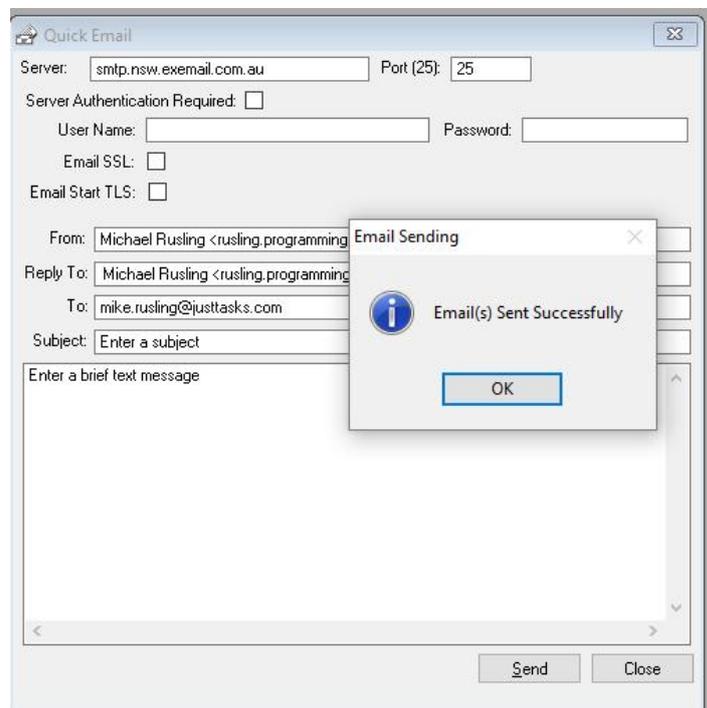
This connection is provided by most ISPs as part of an internet connection. Authentication is provided by the ISP "sensing" the email is being sent from one of its own customer's internet connections. As such, the from/reply email address need not be the same as the account under which the internet connection is registered.

These connections most often do not use a secure layer to transmit the email message, resulting in a much faster delivery. However, less secure.

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Office 365 Pro Setup

Current as at 26 April 2018.
Provide the Server SMTP address of the Office 365 SMTP server.
Set the Port to 25.
User name and password of your Office 365 Pro account.
Email must Start TLS.
Set From and Reply To address to the email account used by the associated User Name.

These connections use a secure layer to transmit the email message, resulting in a slower delivery. However, the transmission is more secure.