

E-STATEMENTS IN FRED OFFICE

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SETUP FRED OFFICE FOR E-STATEMENT SENDING

Setting up your email server

Before you can begin sending e-statements, set up and configure the email server to be used. A new *Statements Email From* field has been added in the *Email* tab (Figure 1) to add a sender's email address.

To setup your email server:

1. In Fred Office, click the **Tools** menu, point to **System**, and then choose **Options**.
The *Options* screen appears.
2. In the **Statements Email From** field, enter the email address to send statement emails from.
3. Enter the appropriate email server details as required.
4. To save the changes, click **[Apply]**.

The screenshot shows the 'Options' dialog box with the 'Email' tab selected. The 'Email Address' section contains two text input fields: 'Reports Email From' with the value 'Reports@FredOffice.com.au' and 'Statements Email From' with the value 'Statementemails@fred.com.au'. The 'Email Server' section includes a 'Server' field with 'mail.nunet.com.au', a 'Port' field with '25', and two checked checkboxes: 'Server Requires SSL' and 'Server Requires Authentication'. Below these are 'User Name' and 'Password' fields. The 'Test Email' section has an 'Email' input field and a 'Send Test Email' button with a dropdown arrow. The 'Restore Defaults' section has a 'Restore Default Mail Server Settings' button. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

FIGURE 1: STATEMENTS EMAIL FROM FIELD



TIP! To send a test email from the email address, select the **[Send Test Email]** drop-down, and then choose **From Statement Email**.

Setting up email templates

The *E-Statement* feature lets you save an email as a reusable template. You can then use that template when composing and sending email statements to your account customers. There is no limit to the amount of templates you can set up.



TIP! Creating email templates will save you from retyping emails repeatedly.

To setup your email template:

1. In Fred Office, click the **Tools** menu, point to **Account**, and then choose **Options**.

The *Account Options* screen appears.

2. In the **Email Templates** tab, click the **[Add]** button.

The screenshot shows the 'Account Options' dialog box with the 'Email Templates' tab selected. The dialog has a title bar 'Account Options' and four tabs: 'Statements', 'Account Types', 'Account Matching', and 'Email Templates'. The 'Email Templates' tab is active and contains the following content:

Email Templates
Define below the email templates that you would like for your statement emails. The email template will provide the content that will populate the subject line and body of the email to the customer.

Name	Default
Standard Template	<input checked="" type="checkbox"/>

Buttons on the right side of the table: Add, Edit, Delete, Set Default.

Email Address
When Fred Office sends Statements, send from the following Email address.
Statements Email From:

Buttons at the bottom: OK, Cancel, Apply.

The *Email Template* screen appears.

3. In the **Name** field under **Template**, enter an appropriate name for your email template.
4. Under **Email Content**, compose the body of your email.



TIP! You can cut and paste your pharmacy logo.

The screenshot shows the 'Email Template' dialog box. It has three main sections: 'Template', 'Email Content', and 'Test Email Template'.
1. **Template**: A 'Name' field with the placeholder text 'Enter template name here'.
2. **Email Content**: A 'Subject' field with the text 'Your pharmacy account statement is now due'. Below it is a 'Body' text area with a rich text editor toolbar. The body text reads: 'Dear Customer, Please find your current statement attached. Kind Regards, FRED.OFFICE'. The Fred Office logo is displayed in green.
3. **Test Email Template**: A section with the instruction 'To test your email template enter an email address below and press Test Email'. It contains an 'Email' field with the address 'email.template@fred.com.au' and a 'Test Email' button.
At the bottom right of the dialog are 'OK', 'Cancel', and 'Apply' buttons.



TIP! To test the email, enter a valid email address in the **Email** field under *Test Email Template* group, and then click the **[Test Email]** button.

5. To finish, click **[OK]**.
6. Click **[OK]** once more to return to Fred Office.

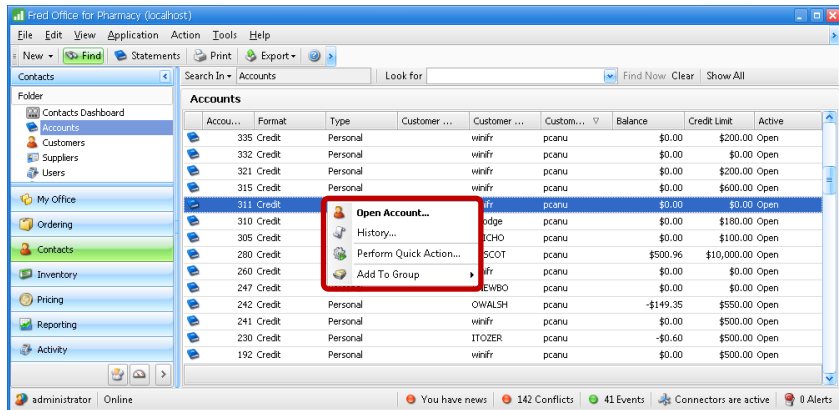
SENDING E-STATEMENTS

Send e-statements to a single account

During the upgrade process from Fred Office version 3.4 to Fred Office version 3.5, Fred Office will automatically use the customer's existing email address (via billing address) for e-statement sending. Customers with no existing email address will need to be entered once-off manually.

To send e-statements to a single account card:

1. In Fred Office, select the **Contacts** tab, and then choose **Accounts**.
2. Search for the account.
3. Right-click the appropriate account card and select **Open Account**.



The *account card* appears.

4. Select the **Statements** tab.
5. Under **Send Statement Option**, select the **Email Statements to** checkbox and enter the new email address.
6. To email the statement, click the **[Email]** button.

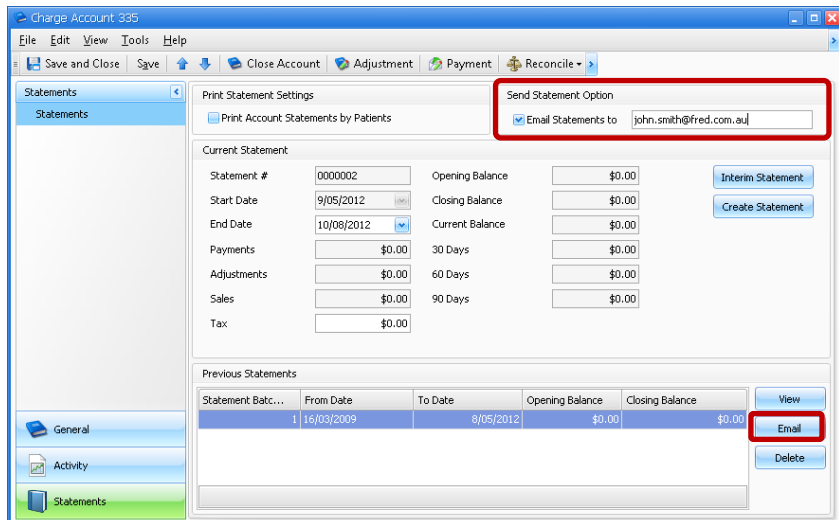
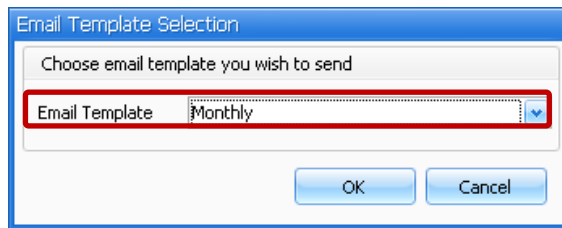


FIGURE 2 SEND STATEMENT OPTION

7. Choose the template you wish to use for this account customer.



8. To send the email, click **[OK]**.
A confirmation message appears.
9. To finish, click **[OK]**.



Set up e-statements for multiple accounts from a report or accounts list

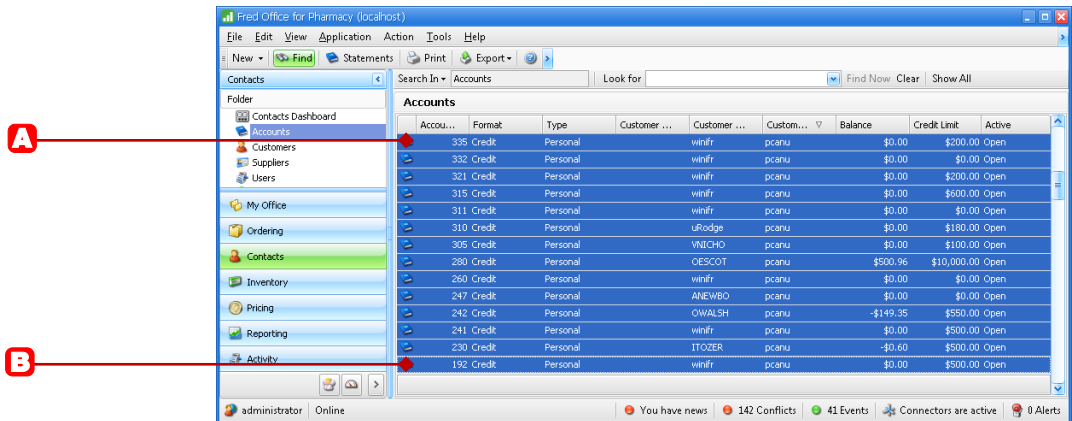
E-statements can be set up for multiple accounts using a new (bulk) option via *Quick Action*. Before setting this option, ensure that customer email addresses have been setup.



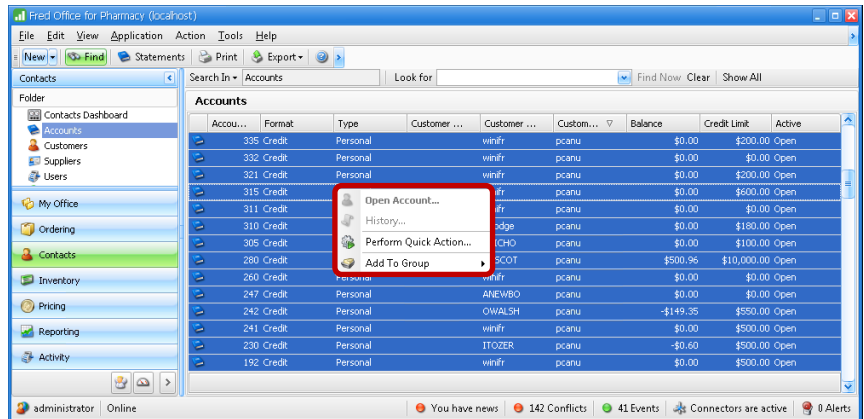
TIP! This *Quick Action* can be performed from wherever a list of accounts can be selected, e.g. from *Main Contacts*, *Accounts* screen or from a report.

To setup e-statements for multiple accounts from a report or accounts list:

1. Use the [SHIFT] or [CTRL] keys + left-click to select the accounts to email statements to.

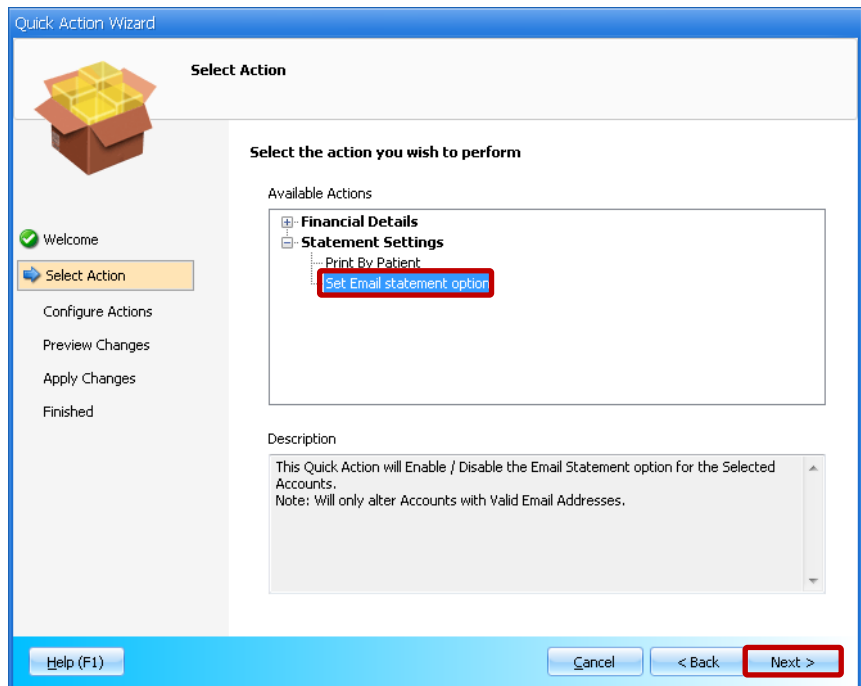


2. Right-click the highlighted account cards, and the select **Perform Quick Action**.

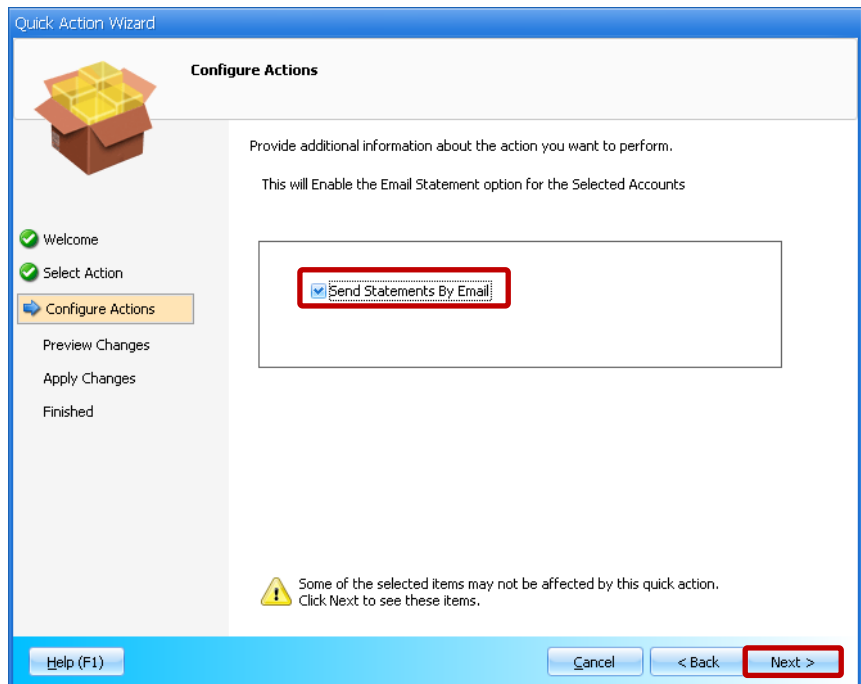


Quick Action Wizard appears.

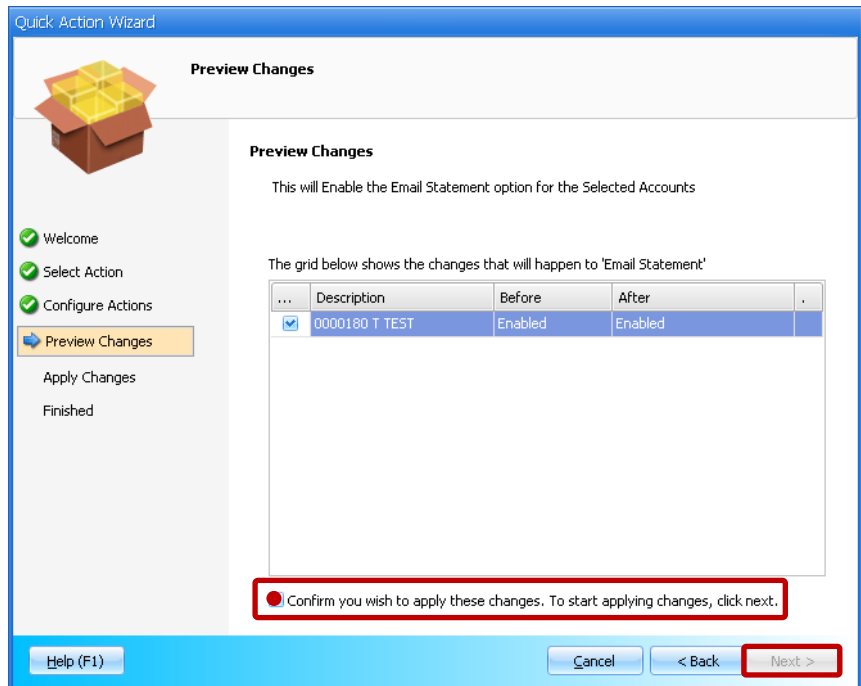
3. In the *Select Action* window, expand **Statement Settings**, choose the **Set Email statement** option, and then click **[Next]**.



4. In the *Configure Actions* window, tick **Send Statements By Email**, and then click **[Next]**.



5. In the *Preview Changes* window, tick/un-tick the accounts where statements will be emailed to.
6. When finished, select the **Confirm** checkbox, and then click **[Next]**.



7. In the *Finished* window, click **[Finish]**.

STATEMENTS SCREEN CHANGES

In addition to the print-based features, the *Statements* screen has undergone multiple changes to accommodate the new e-statement feature in Fred Office (see Figure 3).

To see these options in the *Statements* screen:

1. In Fred Office, select the **Contacts** tab, and then choose **Accounts**.
2. Click the **[Statements]** button on the toolbar.

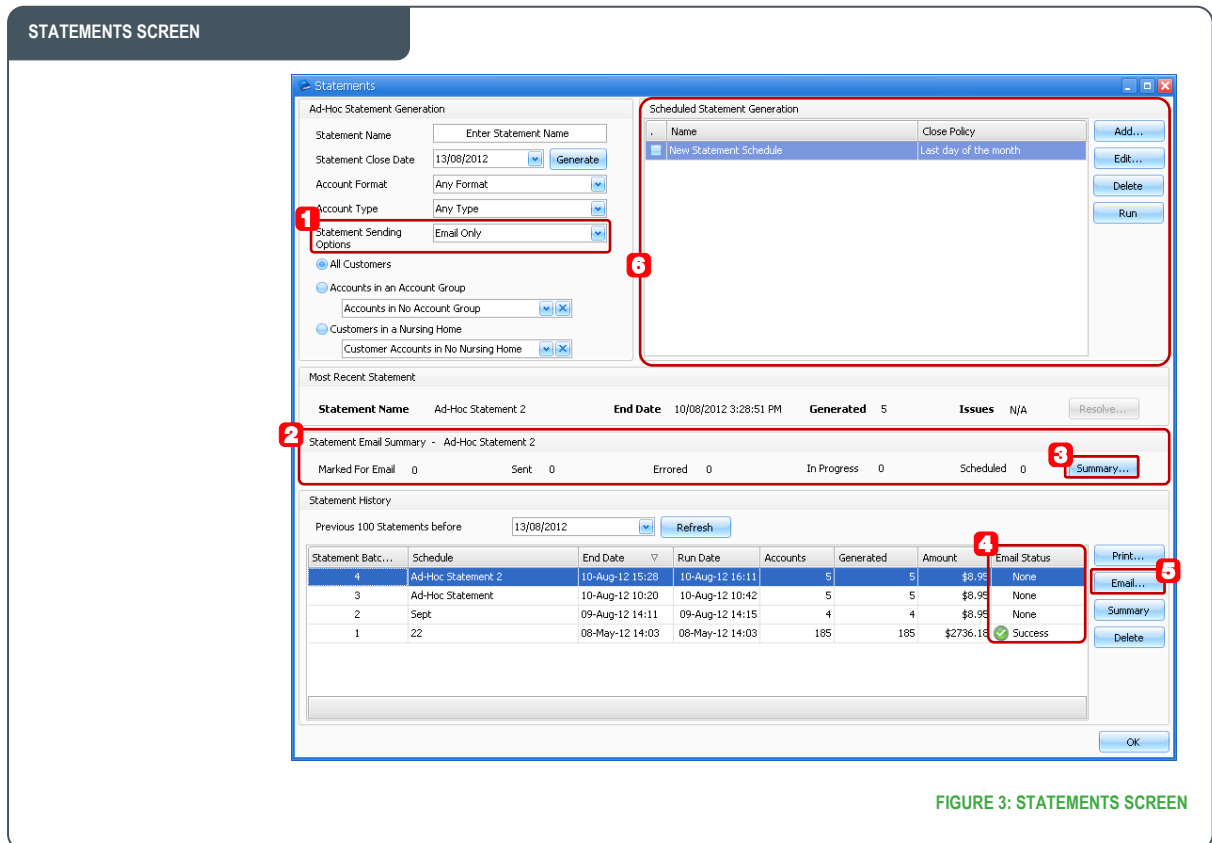
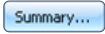
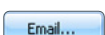


FIGURE 3: STATEMENTS SCREEN

Item	Description
① Ad-Hoc Statement Generation group	The <i>Ad-Hoc Statement Generation</i> group now has an additional email option in the Statement Sending Options field.
② Statement Summary Email group	Displays a summary of statements marked for <i>email</i> for a selected batch.
③ 	Open the <i>Email Summary</i> screen for the selected statement batch. See <i>Email summary (batch)</i> (page 10).
④ Email Status column	Displays the status of batch statement emails.
⑤ 	Opens the <i>Email Statement</i> screen to send batch emails. See <i>Statement email options</i> (page 12).
⑥ Scheduled Statement Generation group	<i>Scheduled Statement Generation</i> now has an additional email option in the Statement Sending Options field. Click the [Add] or [Edit] button to open the <i>Edit Statement Schedule</i> screen.

Email summary (batch)

A new **Summary...** button from the *Statements* screen will launch the *Email Summary* screen for a chosen statement batch (see Figure 5, page 11).

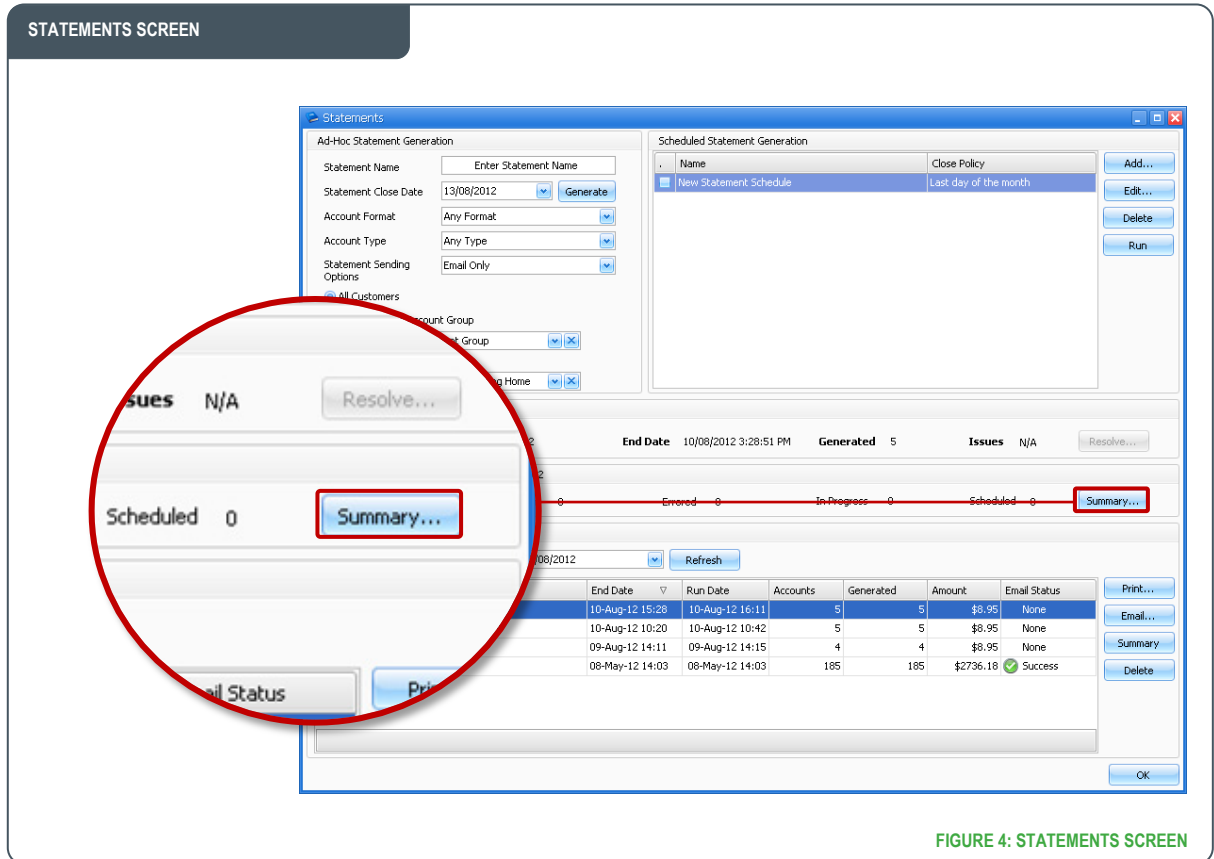


FIGURE 4: STATEMENTS SCREEN

Use the *Email Summary* screen to:

- export the data to PDF, Excel, or CSV format **A**
- manage and fix any errors **B**
- resend e-statements to accounts **C**
- print paper-based statements. **D**

EMAIL SUMMARY SCREEN


The screenshot shows the 'Email Summary for Statement Batch - #1.22' window. It features a table with columns for 'Account Name', 'Company', 'Statement Email', and 'Status'. A context menu is open over the table, showing options: None, Scheduled, In Progress, Success, and Errored. On the right side, there are buttons for 'Select All', 'Resend', 'Remove', and 'Print Statement'. A 'Close' button is at the bottom right. Red callouts A, B, C, and D point to the 'Export' button, the 'Status' dropdown menu, the 'Resend' button, and the 'Print Statement' button respectively.

FIGURE 5: EMAIL SUMMARY SCREEN

TIP! To open the account card, right-click a row and then choose **Open Account**.

TIP! If the wrong email address has been used for an account, click into the **Statement Email** column to change the email instantly.

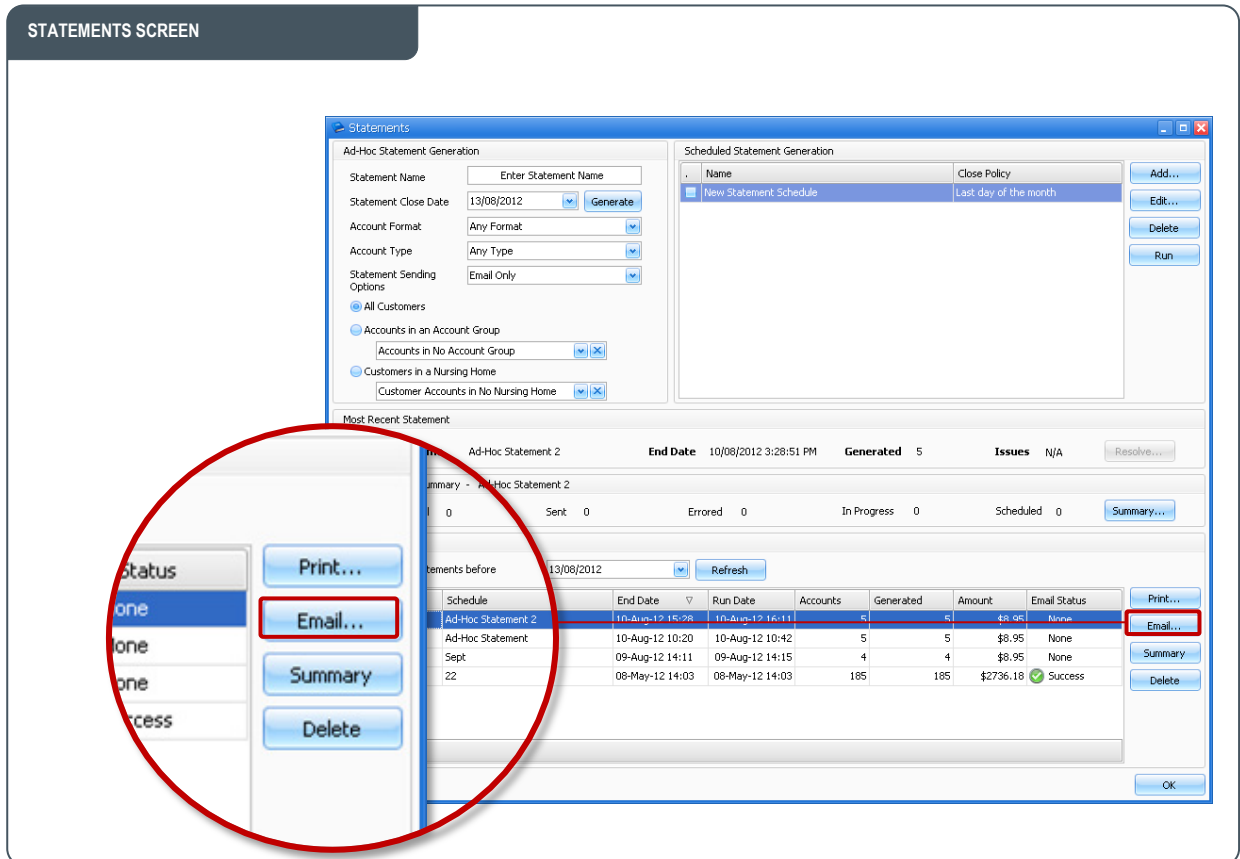
Statement email options

A new  button from the *Statements* screen will now launch the *Email Statement* screen (Figure 6, page 13) where you can select the accounts you wish to email statements for.



WARNING! If emailing a large number of statements, it is highly recommended to schedule them to send after business hours.

STATEMENTS SCREEN



The screenshot displays the 'Statements' application window. It is divided into two main sections: 'Ad-Hoc Statement Generation' and 'Scheduled Statement Generation'. The 'Ad-Hoc' section includes fields for 'Statement Name', 'Statement Close Date' (set to 13/08/2012), 'Account Format', 'Account Type', and 'Statement Sending Options' (set to 'Email Only'). It also has radio buttons for selection: 'All Customers', 'Accounts in an Account Group', and 'Customers in a Nursing Home'. The 'Scheduled' section has a table with columns for 'Name' and 'Close Policy', with one entry 'New Statement Schedule' and 'Last day of the month'. Below these are buttons for 'Add...', 'Edit...', 'Delete', and 'Run'. A 'Most Recent Statement' section shows details for 'Ad-Hoc Statement 2' with an end date of 10/08/2012. A summary table shows counts for 'Sent', 'Errored', 'In Progress', and 'Scheduled'. A table of statements is shown with columns: 'Schedule', 'End Date', 'Run Date', 'Accounts', 'Generated', 'Amount', and 'Email Status'. The 'Email Status' column has a 'Success' indicator for the first row. A red circle highlights a sidebar menu with buttons for 'Print...', 'Email...', 'Summary', and 'Delete'. The 'Email...' button in the sidebar and the 'Email...' button in the table are both highlighted with red boxes.

Schedule	End Date	Run Date	Accounts	Generated	Amount	Email Status
Ad-Hoc Statement 2	10-Aug-12 15:28	10-Aug-12 16:11	5	5	\$8.95	None
Ad-Hoc Statement	10-Aug-12 10:20	10-Aug-12 10:42	5	5	\$8.95	None
Sept	09-Aug-12 14:11	09-Aug-12 14:15	4	4	\$8.95	None
22	08-May-12 14:03	08-May-12 14:03	185	185	\$2736.18	Success

Email Statement

Statement Email Options

Use the options below to select which accounts you wish to email statements for. If no options are chosen then all statements will be emailed.

1 **Statement Restrictions**

- Email only statements in and over this amount
- Email statements from the selected Account Group
- Email statements for the patients from the selected Nursing Home
- Email statements where first letter of account last name is between and
- Email only statements which have had account activity

2 **Email Settings**

Email Template:

Send Statements: Immediate Choose Date

Note : If emailing a large number of statements it is recommended to schedule them to send after hours.

FIGURE 6: STATEMENT EMAIL OPTIONS

Item	Description
① Statement Restrictions	Restrict which accounts should be included for emailing. Focus on a specific account group such as accounts in a Nursing Home or a user-defined account group.
② Email Settings	Choose a predefined email template. See also <i>Setting up email templates</i> (page 2). Schedule when to send the email.

Print Statement screen

Customers selected for e-statement sending will automatically be deselected for paper-based printing. To enable statement printing for these customers, select the **Print statements for accounts that are enabled for email statements** checkbox from the *Print Statement* screen.

PRINT STATEMENT SCREEN

Print Statement

Statement Print Options

Use the options below to select which accounts you wish to print statements for. If no options are chosen then all statements will be printed.

Statement Restrictions

- Print only statements in
Debit and over this amount
- Print statements from the selected Account Group
- Print statements for the patients from the selected Nursing Home
- Print statements where first letter of account last name is between
 and
- Print only statements which have had account activity
- Print statements for accounts that are enabled for email statements**

Print Settings

Group statements by

- Dont group statements
- Print statements grouped by Account Group
- Print statements grouped by Nursing Home

Order statements by

- Print statements ordered by Account Number
- Print statements in alphabetical order (Company name then last name)
- Print statements in alphabetical order (Last name)

OK Cancel



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The word "FRED" in a large, bold, dark blue sans-serif font.