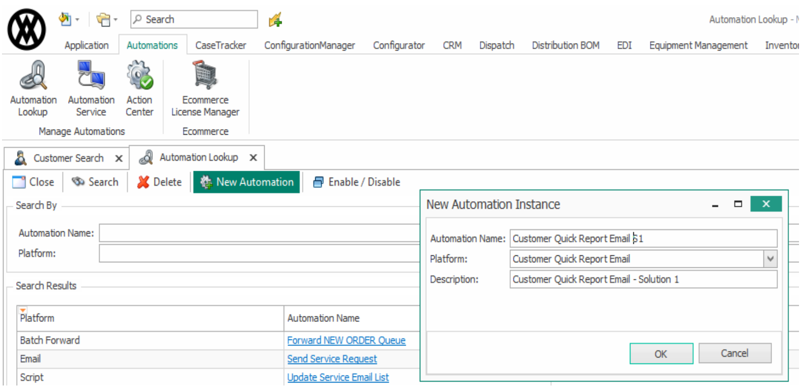
Customer Quick Report Email

Megan De Freitas - 2024-12-03 - Miscellaneous

Overview

This documentation goes over the configuration of the *Customer Quick Report Email* platform in Automation Agent.

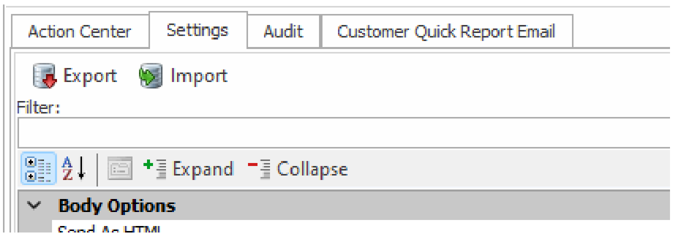
To create a new *Customer Quick Report Email* automation, select the Automations tab on the ribbon and then Automation Lookup. Click the New Automation button, enter the name of the automation, and select the *Customer Quick Report Email* platform. Click the OK button to create the automation.



For more information on how to create automations, please refer to the **Automation Agent** documentation.

Settings

Once the Customer Quick Report Email automation has been created, select the Settings tab to view available settings.



Required Settings

Email Field - Customer address email field that contains the email address to which the email will be sent. Defaults to 'Email'.

Email Template - The email template that will be used for the email subject and body.

From Email - Required Email Address to send email through the Email Server. The Email Server User must have access to this email.

Quick Report - The quick report that will be sent when the automation is run.

Email Options

Email Attachment Name - Optional name to specify for the name of the attached Excel (.xlsx) report. If left blank, this will default to the name of the quick report.

Email BCC Field - Customer address email field that contains the email address to which the blind carbon copy (BCC) email will be sent.

Email CC Field - Customer address email field that contains the email address to which the carbon copy (CC) email will be sent.

From Name - Optional display name. If left blank, the mail server will use the default stored on the server itself.

Body Options

Send As HTML - If enabled, the email body will be formatted in HTML. Defaults to false.

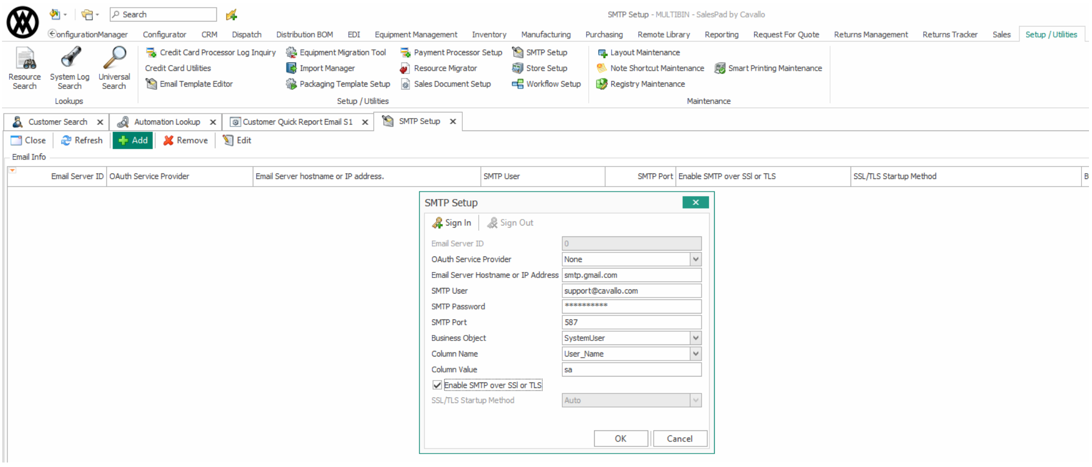
Filters

Contact Email Address Type - Specifies the contact address type to be used when the automation runs. Defaults to 'Primary'.

Contact Matching - Specifies the customer address matching logic to be used when the automation runs.

SMTP Setup

You can use the SMTP Setup screen to configure email for each system user. To access the SMTP Setup screen, go to Modules -> Setup / Utilities -> SMTP Setup. Make sure each field is populated and click OK to save your changes.



For more information on the SMTP Setup screen, please refer to the **SMTP Setup** documentation.

Contact Filters

Customer addresses to which an email will be sent can be filtered using the contact email address type or more advanced contact matching.

Contact Email Address Type

You can select which customer addresses an email will be sent by specifying the address type. For example, to only send email to the primary billing address, you would select the 'PrimaryBilling' option.

Available options are:

- None
- Primary
- PrimaryShipping
- PrimaryBilling
- PrimaryStatement

Note: Selecting the ‘None’ option will send email to all available customer addresses.

Contact Matching

The more advanced way to filter customer addresses is with contact matching. Contact matching provides a powerful editor that allows you to specify the exact filtering parameters.

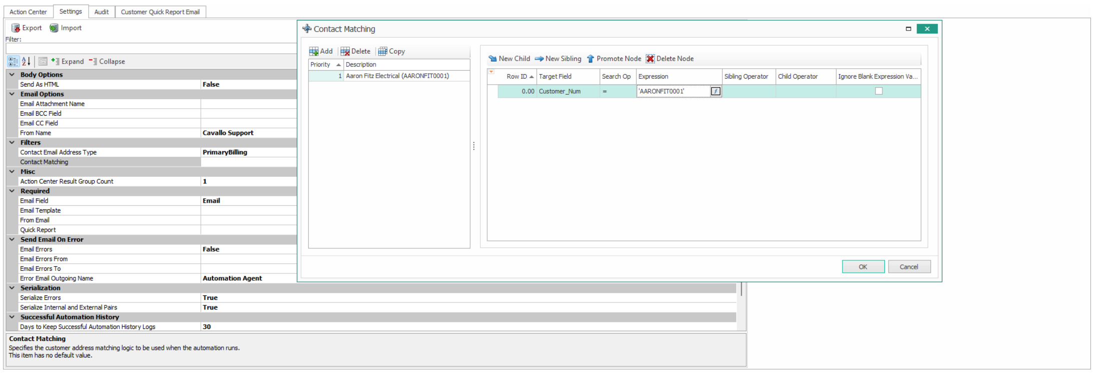
Important points to keep in mind when using contact matching:

- Contact matching works in conjunction with the contact email address type (if set).
- Contact matching editor allows only one priority tier. Changing the priority has no effect on how the search clause is built.
- The Expression column value must be wrapped in single quotation marks to prevent undesired behavior. For example, if the expression for customer number is set to 0001 instead of ‘0001’, it will be evaluated as 1 and produce no results.
- If there are single quotation marks as part of the expression, they will need to be escaped by using double single quotation marks. For example, the correct expression for O’Reilly would be ‘O’’Reilly’.

Example 1

Use case: Send email to Aaron Fitz Electrical (AARONFIT0001) customer addresses only.

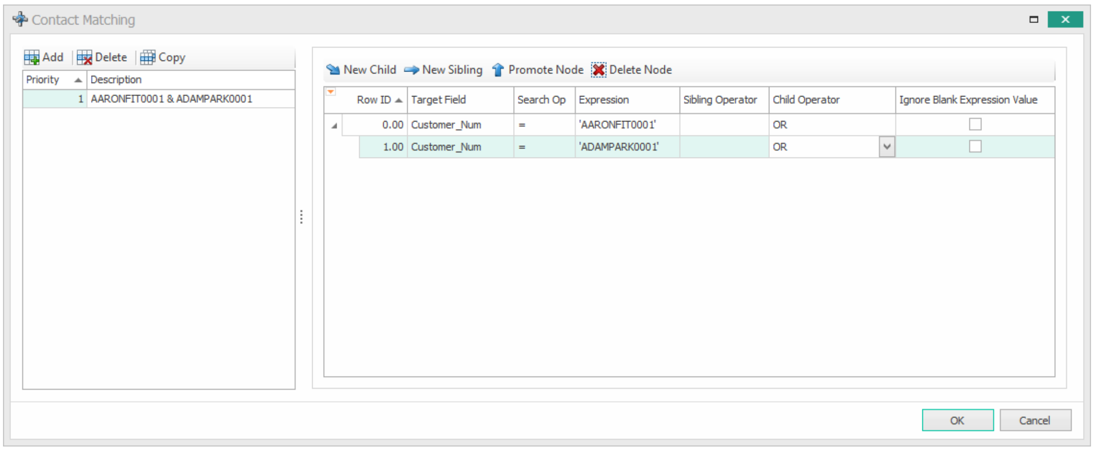
Solution:



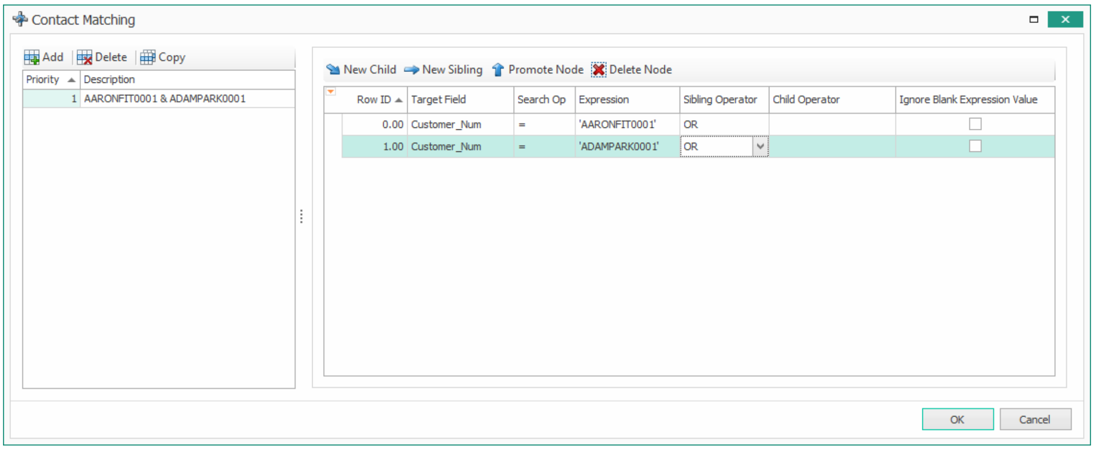
Example 2

Use case: Send email to Aaron Fitz Electrical (AARONFIT0001) and Adam Park Resort (ADAMPARK0001) customer addresses only.

Solution 1:



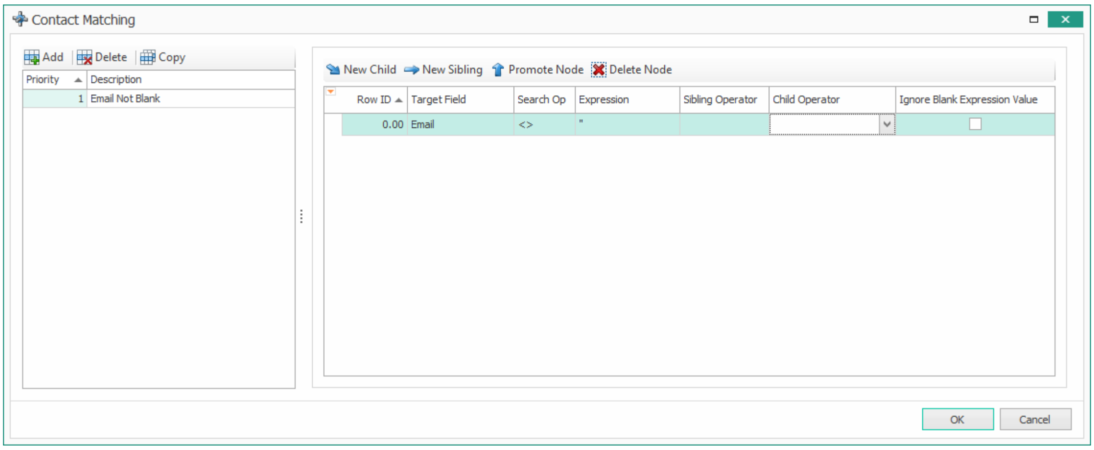
Solution 2:



Example 3

Use case: Send email for all customer addresses where the Email field is not blank.

Solution:

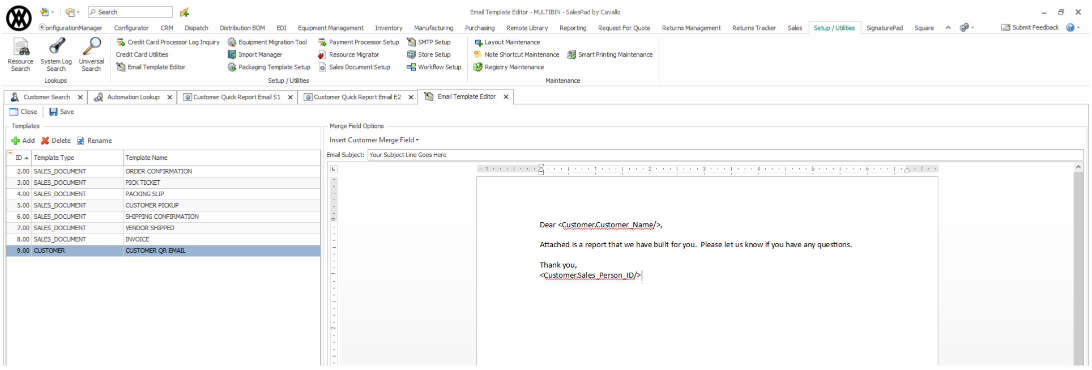


Email Templates

The Email Template Editor screen can be used to create email templates that will be used when generating emails. To access the Email Template Editor, go to Modules -> Setup / Utilities -> Email Template Editor.

Supported template types are:

- CUSTOMER
- CUSTOMER_ADDRESS



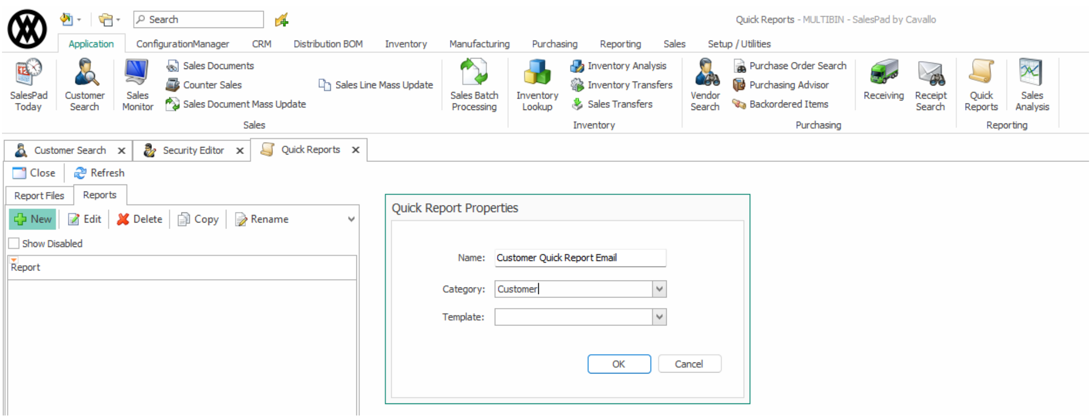
For more information on how to create an email template, please refer to the **[Emailing and Email Templates]** documentation.

Quick Reports

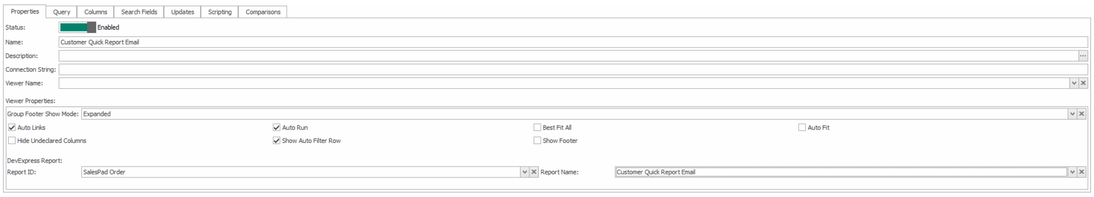
In order to email a quick report, the report must have a customer number search field. To create a new quick report using the Quick Report Editor, go to Modules -> Reporting -> Quick Reports, select the Reports tab, and click the New button.

Valid customer number search fields are:

- Customer_Num
- CUSTNMBR
- Customer_Number



If a quick report is configured as a printed report, it will be sent as a PDF document instead of an Excel spreadsheet. To configure a quick report as a printed report in the Quick Report Editor, set the *Report ID* and *Report Name* fields to an existing printed report.



For more information on how to create quick reports, please refer to the **Quick Report Editor** documentation.