

# Functional Specification

## Docmail for Sage200

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## Version History

Version Number	Date	Author(s)	Notes	Quotes
1.0	21/05/13	Neil Gilbert	Initial Draft	

## Background and Solution Overview

Docmail is an intelligently designed attachment to Sage 200 that allows the user to send documents from the business to the user with little stress or expenditure. Docmail handles everything for you, as soon as you've hit send Docmail will print, sort and stamp all your documents and letters for you, ensuring they are delivered properly and on time.

The Sapphire Docmail extension allows Sage 200 Documents to be sent automatically by email, print or post. When items are sent by post they use the Docmail service, Docmail are a 3rd party printing company who print and post out the documents for us.

And all of this for as little as 35p per letter!



## Docmail Settings

The "Docmail for Sage200" settings screen contains the core settings for the Docmail program to function correctly.

The Logon details section contains all the settings for the Docmail web service (the Docmail web service is a 3<sup>rd</sup> part web service provided by Docmail). In order to pass documents to Docmail, users must sign up to a Docmail account via <https://www.cfhdocmail.com/live/signup.aspx>. When signing up make sure the referred box is completed with "Sapphire", this is how Docmail associate the account with us. The web service should be set to : <https://www.cfhdocmail.com/LiveAPI2/DMW S.aspx> or for testing purposes : <https://www.cfhdocmail.com/TestAPI2/DMW S.aspx>

**Docmail Settings**

Logon Details

Username:

Password:

Webservice:

SMTP Settings

SMTP Server:

Default Email:

Save Cancel

The SMTP Settings section is used for the Email distribution, if the SMTP Server has not be entered then "Docmail for Sage200" will try and send the emails via the users Outlook (this can be blocked by windows and SMTP is the preferred method).

The Default email address is used when emailing documents via the SMTP service. When creating/amending user accounts in Sage200 using the Sage200 System Administration program, users are able to enter an email address against the users accounts. When documents are distributed via Email (using the SMTP server), the users email address set in system administrator will be used as the "From" address, if this has not been set then the "Default Email" (From Docmail Setting) will be used.

**NEILGILBERT Properties**

Company Access Mobile Access

General User Details Member of

Details

Name:

Telephone:

Email:

Fax:

Job Title:

Manager's Name:

Address:

OK Cancel Apply Help

## Document Settings

The Document Settings Screen contains the settings for each individual document that can be sent out using "Docmail for Sage200".

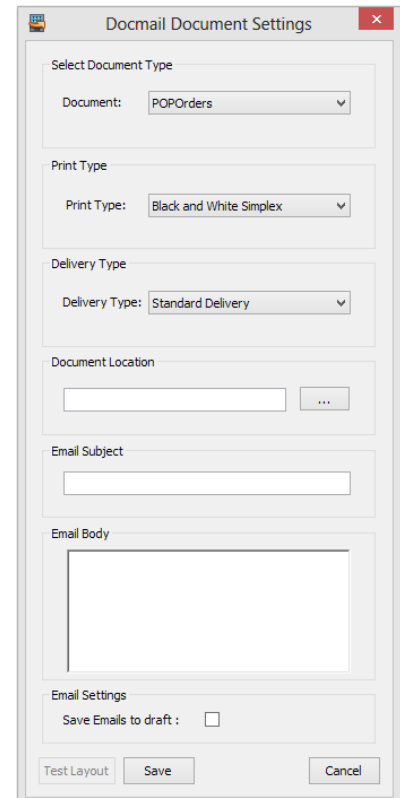
The Document drop down contains all the documents that can currently be processed by "Docmail for Sage200", picking a different item from the drop down will load the settings for the selected Document. The current list of Documents that can be processed by "Docmail for Sage200" are:

- POP Orders
- SOP Orders
- SOP Invoices
- Sales Ledger Statements

The Print Type and Delivery Type are used when we distribute the documents using Docmail (Print and Post), these will affect the cost i.e. First Class Delivery is more expensive than Standard Delivery and Colour print is more expensive than Black and White.

The Document location is the location of the Sage200 Layout. When printing documents in Sage200, if the Document location has been filled in then "Docmail for Sage200" will try and distribute the document, if this has been left blank then the bespoke is ignored and the document will be printed using standard Sage200 functionality.

The layouts have to be amended when using Docmail because of how Docmail print the address on the document (they print the address on the document and not the envelope). Docmail will always print the address on the top left of the document (Sample layouts are provided as part of the Docmail install).



The screenshot shows the "Docmail Document Settings" window with the following fields:

- Select Document Type:** Document: POPOrders (dropdown)
- Print Type:** Print Type: Black and White Simplex (dropdown)
- Delivery Type:** Delivery Type: Standard Delivery (dropdown)
- Document Location:** [Text field] ...
- Email Subject:** [Text field]
- Email Body:** [Large text area]
- Email Settings:** Save Emails to draft: ☐
- Buttons: Test Layout, Save, Cancel



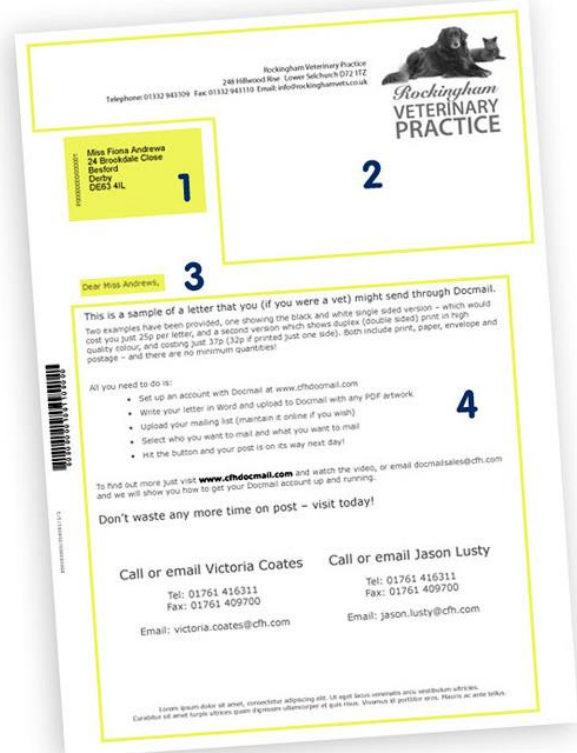
From the Docmail Website:

### 1. The Address Area

This is the address area, which must be left blank. We automatically insert the addresses of your recipients here so that they appear correctly within the address window of the Docmail envelope.

The Email Subject and Email Body fields are used when documents are distributed via Email.

When documents are sent using email and the SMTP server has not been set, emails will be sent using the users Outlook. If "Save Emails to draft" has been ticked, the emails will not be sent automatically but will be in the Outlook draft folder.



## Amend Sales\Purchase Ledger account

SL - Amend Account Details for Cook's Cookers Company

Company: **Cook's Cookers Company**

Account: A/C ref: **BTR002** Account balance: £ **43030.21**

Name: **Cook's Cookers Company** Credit limit: £ **0.00**

Short name: **CooksCoo**

Currency details: Currency: **Pounds Sterling**

Company details: Address: **Plot 4** Docmail: **Docmail**

**New Road Business Park**

**Lyng**

**West Bromwich**

City: **West Bromwich**

County: **West Midlands**

Postcode: **B70 7AA**

Country: **United Kingdom**

Telephone: **+44 1212 867222** Web site: **www.cookscooks.co.uk**

Fax: **+44 1212 867223**

Contacts: **Yes**

Default Name: **Yes** Telephone: **0121 234 5678** E-mail: **info@cookscooks.co.uk**

Save Clear Delete Close

When amending\entering\viewing sales and purchase ledger accounts, a new "Docmail" drop down will now be visible.

When printing any of the support documents with "Docmail for Sage200", Docmail will check the distribution type for the account and send the document accordingly. If the account has not been set then "Docmail for Sage200" will simply print the document (i.e. not email or Docmail).

When sending documents via Email, "Docmail for Sage200" will first check for a role that matches the name of the

document i.e. POPOrders, SOPOrders, SOPInvoices, SLStatements, if a contact has been setup with that role "Docmail for Sage200" will send the document to the email address of the contact associated with the role. If the role has not been setup, the email will be sent to the default email address held against the account.



SL - Add Customer Contact

Contact  
Customer: Cook's Cookers Company

Salutation: Mr. First name: Neil Middle name: Last name: Gilbert

Details  
Telephone: Country: Area: Number: More ...  
Mobile: More ...  
Fax: More ...  
E-mail: neil@saslimited.com More ...  
Web site: More ...

Roles  
Role Preferred Contact  
SOPOrders ☐

Add Delete

OK Duplicate... Cancel

When sending documents out using Email or Docmail, a PDF copy of the document is stored against the account (these can be viewed using the attachments tab).

SL - Amend Account Details for Cook's Cookers Company

Company Contacts Trading Payment Credit Documents Attachments Memo

Attachments

Name	Type	Date	Size
.pdf	PDF File	23/08/2012	6 KB
ST-23082012 15-06.pdf	PDF File	23/08/2012	6 KB
ST-23082012 15-24.pdf	PDF File	23/08/2012	6 KB
ST-23082012 16-29.pdf	PDF File	23/08/2012	6 KB
ST-23082012 16-30.pdf	PDF File	23/08/2012	6 KB

## Printing Documents

When printing any of the support documents with "Docmail for Sage200", Docmail will first check if the Document location field has been set (found in the Document Settings), if the Document location field has been set then "Docmail for Sage200" will start to process the documents.



Order No	Order Date	A/C Ref	Customer Name
0000004989	01/10/2010	SIN001	Sinead Smith
0000004990	01/10/2010	KIT002	Kitsch Kitcher
0000004991	01/10/2010	MOL001	Molly Inc
0000004992	01/10/2010	KNO001	Knobs and Kn
0000004993	01/10/2010	TOT005	Total Home C
0000004994	01/10/2010	TOT003	Total Home C
0000004995	01/10/2010	EPOS10	Store:Newcas
0000004996	01/10/2010	HUGGINS	Abbey Retail
0000004997	01/10/2010	KNO001	Knobs and Kn

"Docmail for Sage200" will next check the send method (found in Amend Account) and count how many documents are going to be sent via print, email and Docmail.

A new confirmation screen will appear, the screen details how many documents are going to be sent via print, email and Docmail. The screen will be populated with the defaults set in the document settings screen, these can be overridden at this point i.e. normally purchase order are printed in black and white, however for this batch we can change the "Print Type" to colour.

The screen can also be used to send all documents via one method i.e. we have 10 documents that are going to be distributed via email, 10 via print and 10 via Docmail, changing the "Send all using" drop down we can set all documents to be distributed via one method (print, email or Docmail).

## Processing Documents

A new screen with a progress bar is displayed as "Docmail for Sage200" processes and sends each document.



## Docmail Sent Summary

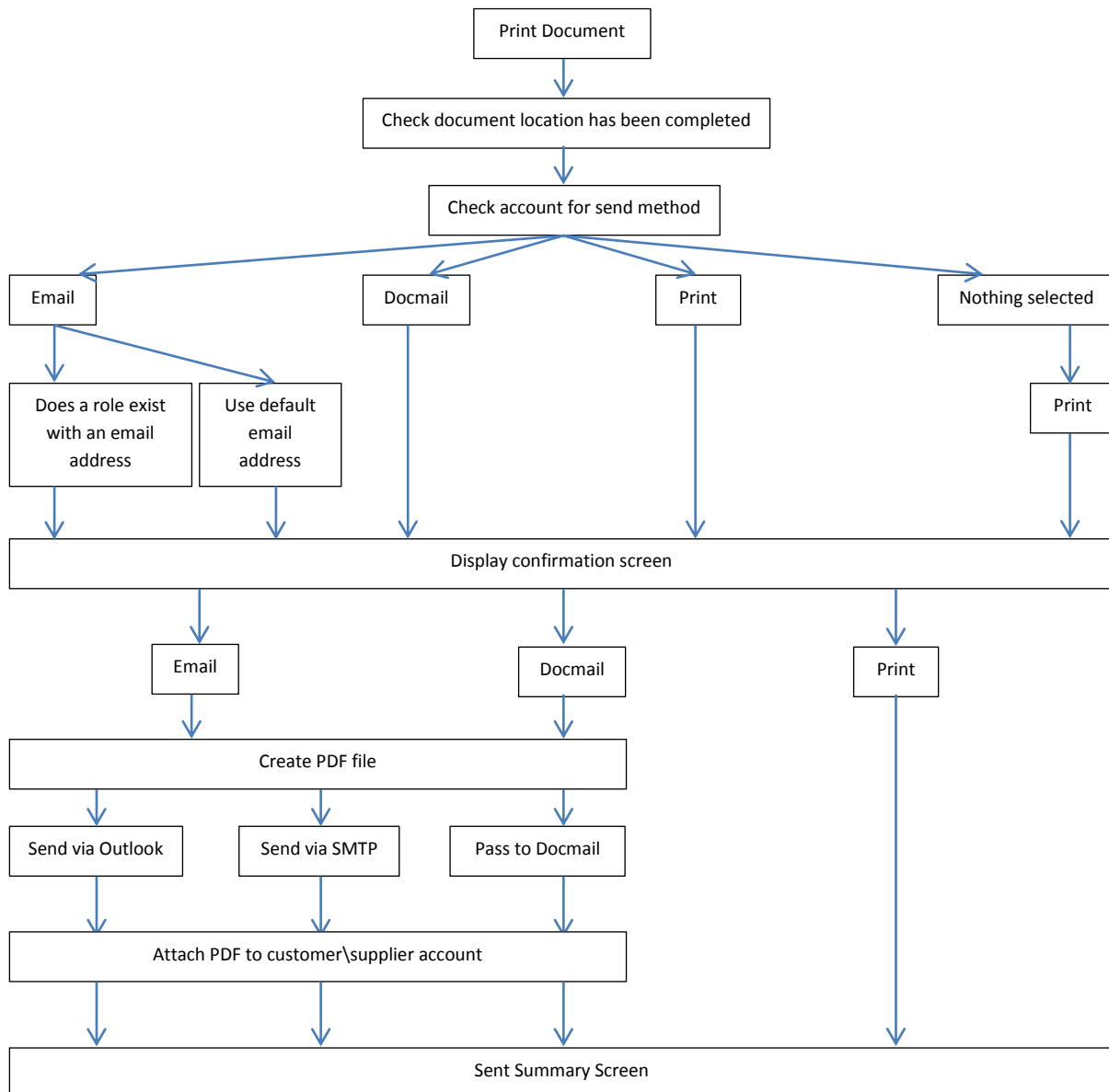
Once "Docmail for Sage200" has finished distributing all the Documents, a Docmail Sent Summary screen will be displayed.

Delivery Method	Account Ref	Document No.	Email	Address 1	Postcode	Outcome	Error Message
Docmail	SIN001	0000004989-f138c	Sinead Smith Int...	AB23 2JA	Success		

The Docmail Sent Summary screen displays any successes and failures. The screen will only detail documents sent via Email or Docmail, printed documents are not listed.



## Docmail Process





## Docmail Website

Documents sent via Docmail can be reviewed using the Docmail website, the website displays the current status of the order and also allows for documents to be cancelled. The website can be accessed with the following URL:  
<https://www.cfhdocmail.com/live/login.aspx>

[home](#) > [admin](#) > [my mailings](#)



### My mailings

Results per page:

Product:

Submitted between:  and

Mailing name / order ref:  [SEARCH](#) | [DOWNLOAD](#)

☐ Show outstanding mailings only

☒ Show mailings from other account users

☐ Show historic mailings (over 15 months old)

Order ref ▼	Mailing name	Created	Status code	Price			
49400	0000004989-f138c	20/05/2013	Approved	£0.58	<a href="#">VIEW</a>	<a href="#">EDIT</a>	<a href="#">DELETE</a>
48721	5884-c6960	30/04/2013	Approved	£0.42	<a href="#">VIEW</a>	<a href="#">EDIT</a>	<a href="#">DELETE</a>
48717	0000005116-62e3f	30/04/2013	Approved	£0.58	<a href="#">VIEW</a>	<a href="#">EDIT</a>	<a href="#">DELETE</a>
48433	ST-24042013 09-32	24/04/2013	Approved	£0.58	<a href="#">VIEW</a>	<a href="#">EDIT</a>	<a href="#">DELETE</a>

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### Mailing proof



[VIEW PROOF](#)

### Mailing summary

Mailing name	0000004989-f138c
Product type	A4 Letter
Created by	Sapphire Accounting Systems
Status	Approved
Mail pack contents	1 sheet 1 template
Print options	Mono print Single-sided
Mailing list total	1 good address
Despatch type	Standard class
Despatch date	ASAP
Approval	Mailing was approved by Sapphire Accounting Systems on 20/05/2013 16:27:32.
Cost	£0.48
VAT	£0.10
Total Cost	£0.58
C5 envelope	x 1
Surcharge standard postage	x 1

Selecting the "VIEW" option in "My Mailings" allows the user to generate a proof of the document, check costs, Address information, etc