

# **Dynamic Email Setup**

Aptean Ltd  
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# 1 Dynamic Email Setup



## 2 Dynamic Email Notifications

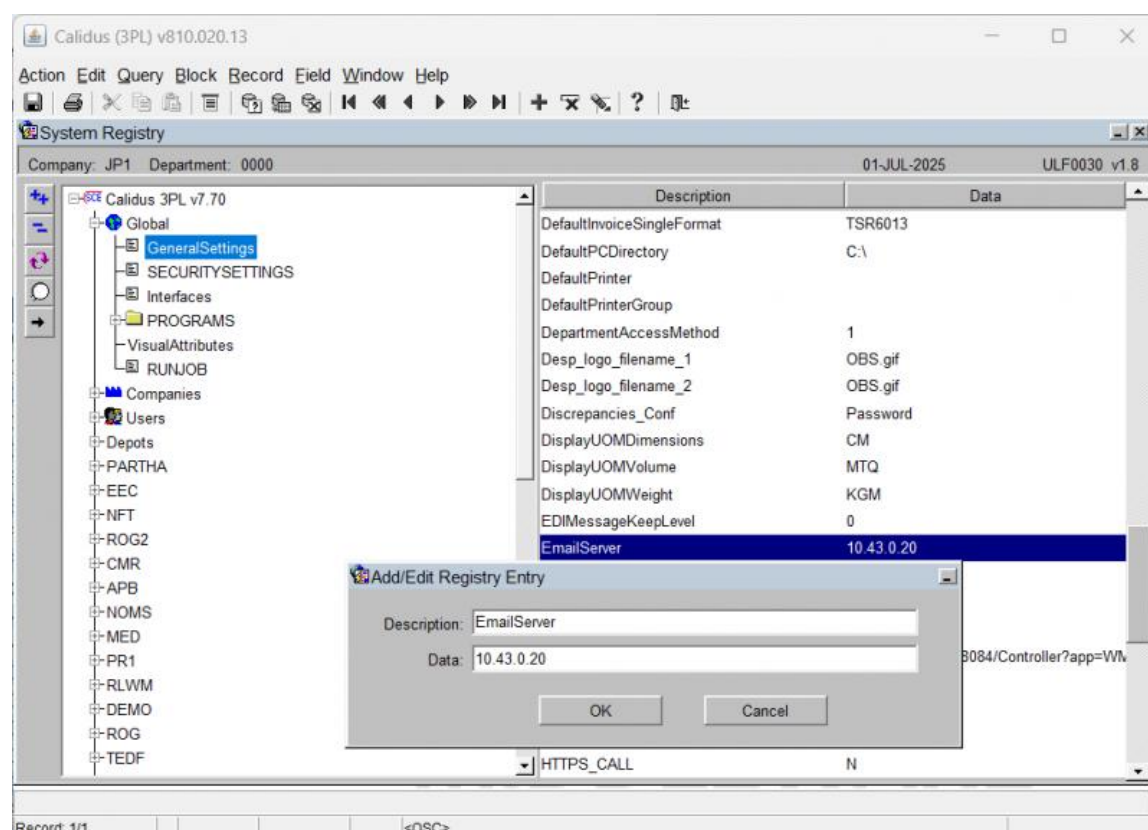
This functionality allows email to be sent to various parties, allowing for notifications under the following conditions:

- Despatch Confirmation: this will email the customer.
- Short Receipt: this will email the supplier or owner.
- Short Allocation: this will email the owner.

### 2.1 Setup

#### 2.1.1 System Setup

The system is required to be configured to forward emails via a email server. This server must accept SMTP connections. A parameter needs to be added to the registry of the system containing the IP address of the email server. This parameter is added under the description of ?EmailServer? and data is set to the IP address of the server.



**NB:** if in any doubt do not amend or change any settings within this screen as it will stop the system the working, contact Aptean who will advise.

### 2.2 Email Setup

To use this functionality the following three groups will need email address?s setup; Customers, Suppliers, and Owners.

#### 2.2.1 Customers Email

Customers requiring emails must be setup in the ?Customer Wizard? menu. Once the required customer is found change the ?Email Required? field to ?Yes?.



Also the owner of the product must be set to run the despatch email: OBS\_DESP, within the 'Owner Maintenance' menu under the ?Format? tab.

Now any customer who has an email address associated with an order will be emailed upon dispatch, providing the setup is complete. Please note that the orders FTA must have the email address populated otherwise this function will not be able to send the despatch confirmation.



### 2.2.1.1 Suppliers Email

This can be added to a supplier within the 'Supplier Wizard' screen, under the 'Buyer Address' tab.

Calidus (3PL) v810.020.13

Owner: ROB Warehouse: NFT 13-JUN-2025 WHSORA045 v4.10

Partner Code: CUERVO 001  
Full Name: Tequila Cuervo La Rojena

Supplier Details Further Details Buyer Address Payment Address

Address Type: BYE New Buyer Address

Name: Address Code: TEQUI00001

Address:

Town:

Post Code:

County:

Country:

Email Address:

Record: 1/1 -> OSC<

In addition, the owner must have the short allocation procedure set up and be setup to run the SHORT\_RECPT procedure within the 'Owner Maintenance' menu under the 'Format' tab.

Calidus (3PL) v810.020.13

Company: JP1 Department: 0000 13-JUN-2025 STS1000 v4.127

Owner: ROB 001 RM

Main General Sales Order Goods Rec'd SOP C/H External I EDI Inbound EDI Outbo... Charging Def Bulk L... Format Owner Rules Owner UOM Serial Nu... Additional... Container...

Print Formats

GRN Checklist: Goods Receipt Note: GRN Putaway Format: Pick List: Pick By: System Default Movement Pick List: Dispatch: Collection Note: External Dispatch:

Label Formats

Rotation Labels: Sup Code on Pail Label?: Case label - RECL: Picking Label control: Shipping Label control: Default Comm Inv Type: Shipping Labels at PL: Waybill Format: Pallet Label - PLBC: Product Label - PROL: Picking Label: Shipping Label: Transport Label: Ticket/label at PL: Print DNote When: Pallet Label:

Stock Take Formats

Despatch: Short Receipt: GRN Type: Non Purchase Order Alloc Email Format: Stock Re-Order Email Format: Receipt: Sales Order: Short Pick Email Format: Short Pick Email Address:

Record: 1/1 -> OSC<



Calidus (3PL) v810.020.13

Action Edit Query Block Record Field Window Help

Owner Maintenance

Company: JP1 Department: 0000

13-JUN-2025 STS1000 v4.127

Owner: ROB 001 RM

Main General Sales Order Goods Rec'd SOP C/H External I EDI Inbound EDI Outbo Charging Def Bulk L... Format Owner Rules Owner UOM Serial Nu Additional Container ...

Owner Group: ROB 001 Enable Users

Supplier: PL1 RM 001 RM - DEFAULT SUPPLIER

Customer: SL1 CUSTOMER 001 Mr Customer

Address 1: Owner Address Line 1

Address 2: Owner Address Line 2

Town: Owner Address Line 3

County: Owner Address Line 4

Country: GB Great Britain

Post Code: OWN 001

Telephone: 01234567890

Fax: 01234567891

Good Receipt By Po: No

VAT No:

Owner Email Addr:

Record: 1/1 <OSC>

Emails can be setup within the ?Email Maintenance? menu. This screen allows users to Add New email templates. Templates are dependent on the template description. The following template descriptions can be used:

- [illegible]

- Despatch
- Short Receipt
- Short Allocation

The ?Test Email To Address? field and ?Test? button can be used to forward emails to a specified address for testing purposes. The ?Email Body? field allows users to specify an email, either as plain text or as HTML. Tags can be entered into this field allowing for dynamic data to be inserted into the email. The following tags can be entered for short receipts:

- [SUPPLIER\_NAME]
- [OWNER\_NAME]
- [WAREHOUSE\_NAME]
- [GRN\_NO]
- [ADVICE\_NOTE\_NO]
- [CONTAINER\_NO]
- [RECEIPT\_DATE]

The following tags can be entered for short allocation:

- [ORDER\_NUM]
- [ORDER\_REF]
- [CUST\_PO\_REF]
- [CUST\_CODE]
- [CUST\_NAME]
- [DATE]

The following tags can be entered for despatch confirmation:

- [NAME]
- [ORD\_NUM]
- [ORD\_DESC]
- [DESPDATE]
- [TRACK\_START]
- [TRACKINGREF]
- [TRACK\_END]
- [DEL NAME]
- [DEL ADDR1]
- [DEL ADDR2]
- [DEL ADDR3]
- [DEL POST]
- (These tags can be used to produce a table of all items and quantities of the order, the following HTML code is recommended for use:

```
<table width="90%" border="0">
  <col align="left" />
  <col align="left" />
  <col align="right" />
  <tr>
    <th>Item Code</th>
    <th>Description</th>
    <th>Qty</th>
  </tr>

</table>
```

Once setup emails will be automatically triggered dependant on the defined ?Email Type?.

## 2.3 Usage

As mentioned previously once setup emails will be automatically sent based on the following conditions:

- An order is dispatched to a customer who has the ?email required? field set to ?Yes? and has an email associated with the order.
- An order is short received for a supplier/owner who has an email setup.
- An order is short allocated for an owner who has an email setup.

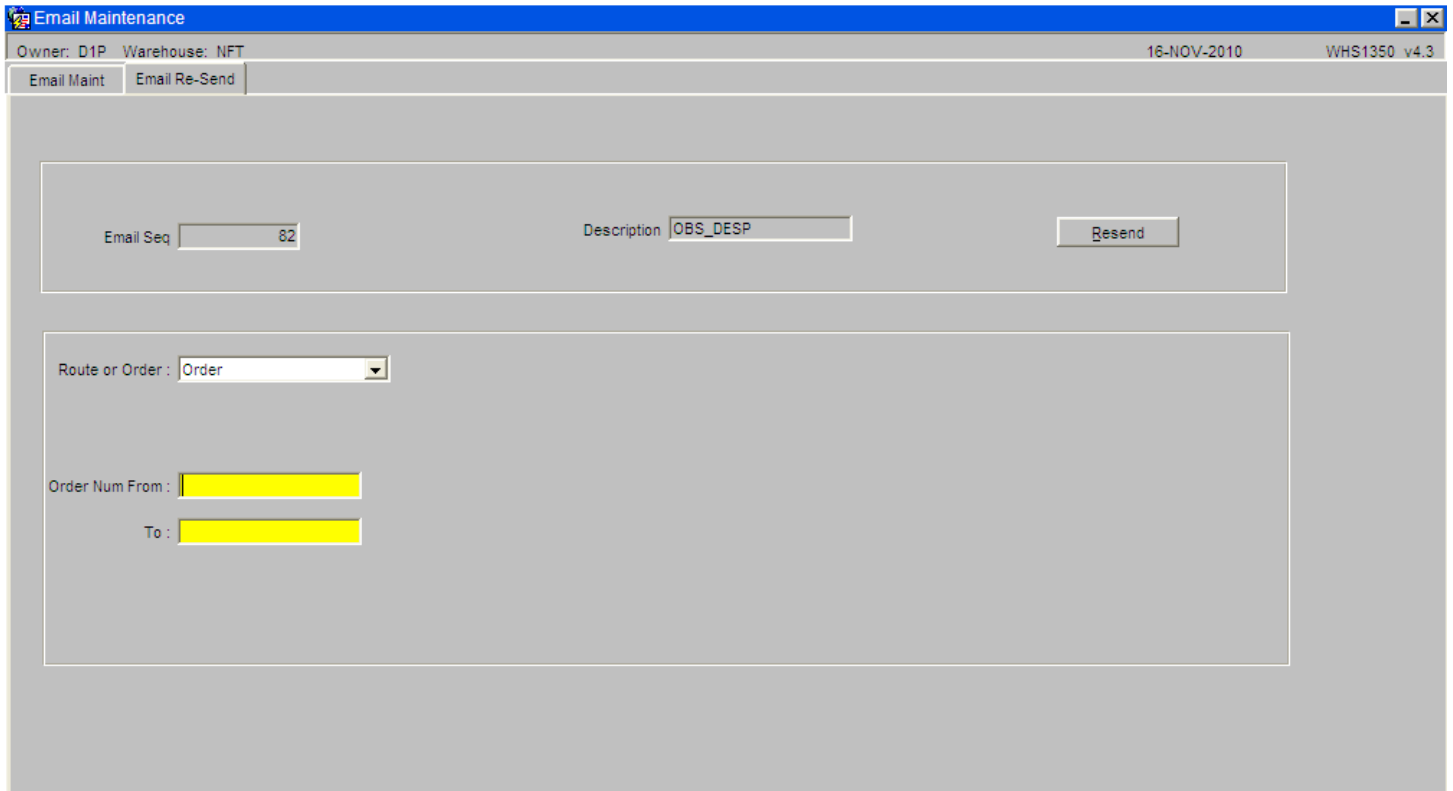
### 2.3.1 Resending

The 'Email Maintenance' menu also has a tab for resending emails. To use this select the report you wish to resend, then select the 'Email Re-Send' tab.





This will then present the user with a set of ranges to enter, for example a range of order numbers. Once the user clicks resend this will send the emails that are associated with the range of values again.



The screenshot shows a software window titled "Email Maintenance" with a blue title bar. Below the title bar is a status bar containing "Owner: D1P", "Warehouse: NFT", the date "16-NOV-2010", and the version "WHS1350 v4.3". Below the status bar are two tabs: "Email Maint" and "Email Re-Send", with the latter being the active tab. The main content area is divided into two sections. The top section contains a text input field labeled "Email Seq" with the value "82", a text input field labeled "Description" with the value "OBS\_DESP", and a "Resend" button. The bottom section contains a dropdown menu labeled "Route or Order:" with "Order" selected, and two yellow text input fields labeled "Order Num From:" and "To:".



### 3 Document History

Version	Date	Status	Reason	Initials
v0.1	16/11/10	User Guide	User Guide	LSM

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