POS Solutions

Australia Pty Limited

ABN 91 006 195 400

Please address all correspondence to: POS Solutions Australia, PO Box 2194 MOORABBIN   VIC 3189   Email: support@possolutions.com.au

Emailing Customer Statements

INTRODUCTION

PosBrowser has the ability to send statements to customers via email. This document will outline how to set this up, and the different options available to you:

1: Initial Setup & Customer Options

2: Sending

    (a) Using Outlook

    (b) Directly through PosBrowser

3: Adjusting Customer Fees

1: INITIAL SETUP & CUSTOMER OPTIONS

First of all, you need to collect the email addresses of customers. Once you have them, you can enter them into Customer Maintenance. Whilst in Customer Maintenance, make sure the "Email Statement" option is ticked for each customer.

POS Solutions

Australia Pty Limited

ABN 91 006 195 400

Please address all correspondence to: POS Solutions Australia, PO Box 2194 MOORABBIN   VIC 3189   Email: support@possolutions.com.au

2: SENDING

(A) Sending emails using Microsoft Outlook

This method is great if you would like to edit the emails before they are sent to your customers. For example, you might want to attach a newsletter, or add a message to the email, then send it to the customer.

When running your statements, select your criteria as normal, except after you tick 'Update Customer Statement(s)', tick the option below: 'Create Statement run only, do not print out any statements', then click RUN STATEMENTS

This will process the statements, but not print at this stage. Click on the Reprint tab. At the bottom here, you will see the following options:

1: Print Statements (Excluding Customers set for email) – Select this option, and click CONTINUE. You should see the top statement run in the list has the current date on it. Tick this run, and click REPRINT STATEMENTS. This will print all of your normal statements. Once this is done, click on the 'Criteria' tab to go back and select:

2: Email Statements (Customers set for Email Only) – Select this option, and you will see some more options appear. Ensure "Via Outlook" is selected, and select either:

(a) "Save Statements in Drafts Folder" – if you would like to edit the emails in Outlook before you send them

(b) "Send Statements Now" – if you would like Outlook to begin sending the emails immediately.

POS Solutions

Australia Pty Limited

ABN 91 006 195 400

Please address all correspondence to: POS Solutions Australia, PO Box 2194 MOORABBIN   VIC 3189   Email: support@possolutions.com.au

Also select one of the following:

(a) 'Send as HTML' – This will send a plain text version of the statement, that can be viewed directly through the customer's email software

(b) 'Send as PDF' – This will send the statement as an Adobe Acrobat PDF attachment, which will look exactly like a paper statement, complete with barcode. This is the preferred option, as most people have the ability to read PDF files.

Once these options have been selected, click CONTINUE. **AT THIS POINT, MAKE SURE MICROSOFT OUTLOOK IS RUNNING!** Again, as above, tick the top statement run, and click REPRINT STATEMENTS. This will send your email statements to Outlook. You can now switch to Outlook to see the result, either in the Outbox, or the Drafts folder.

POS Solutions

Australia Pty Limited

ABN 91 006 195 400

Please address all correspondence to: POS Solutions Australia, PO Box 2194 MOORABBIN   VIC 3189   Email: support@possolutions.com.au

(B) Sending Emails Directly Through PosBrowser

This method will use your internet connection to send the emails directly through your Internet Service Provider. This is great if you do not have Microsoft Outlook, or want to send the emails from a computer without Outlook installed.

Before you use this method, you need to set your ISP's details:

(You only need to do this once)

- Open the Side Menu, and then 'System Maintenance'
- Double-click on 'System Setup Values'
- Click on the 'Statements' tab
- Scroll to the 'ISP Email Details' heading, and click EDIT
- Enter your mail details here. Every ISP is different, you should be able to get the correct settings by contacting your ISP. If in doubt, contact POS Solutions
- Click SAVE

When running your statements, select your criteria as normal, except after you tick 'Update Customer Statement(s)', tick the option below: 'Create Statement run only, do not print out any statements', then click RUN STATEMENTS

This will process the statements, but not print at this stage. Click on the Reprint tab. At the bottom here, you will see the following options:

1: Print Statements (Excluding Customers set for email) – Select this option, and click CONTINUE. You should see the top statement run in the list has the current date on it. Tick this run, and click REPRINT STATEMENTS. This will print all of your normal statements. Once this is done, click on the 'Criteria' tab to go back and select:

POS Solutions

Australia Pty Limited

ABN 91 006 195 400

Please address all correspondence to: POS Solutions Australia, PO Box 2194 MOORABBIN   VIC 3189   Email: support@possolutions.com.au

2: Email Statements (Customers set for Email Only) – Select this option, and you will see some more options appear. Ensure 'Direct via ISP' is selected. You can also choose to tick the option below, to email you a copy of all statements sent.

Also select one of the following:

(c) 'Send as HTML' – This will send a plain text version of the statement, that can be viewed directly through the customer's email software

(d) 'Send as PDF' – This will send the statement as an Adobe Acrobat PDF attachment, which will look exactly like a paper statement, complete with barcode. This is the preferred option, as most people have the ability to read PDF files.

Once these options have been selected, click CONTINUE. Again, as above, tick the top statement run, and click REPRINT STATEMENTS. This will send your email statements.

POS Solutions

Australia Pty Limited

ABN 91 006 195 400

Please address all correspondence to: POS Solutions Australia, PO Box 2194 MOORABBIN   VIC 3189   Email: support@possolutions.com.au

3: ADJUSTING CUSTOMER FEES

Now that you are using PosBrowser to send email statements to some customers, you may want to exclude them from attracting a statement or account keeping fee. To do this:

- Open the Side Menu, then go to Customers
- Double-click on "Customer Maintenance"
- Use the search box to bring up a customer who now receives email statements
- Go to the 'Other Details' tab, and click EDIT
- In the bottom-right hand corner, un-tick the option "Allow charging of account keeping fee"
- Click SAVE
- Repeat for each customer receiving email statements

These customers will now be excluded from a statement / account keeping fee.

When setting up a customer for email statements, it would be wise to un-tick the above option then, to save having to come back and do it later.