

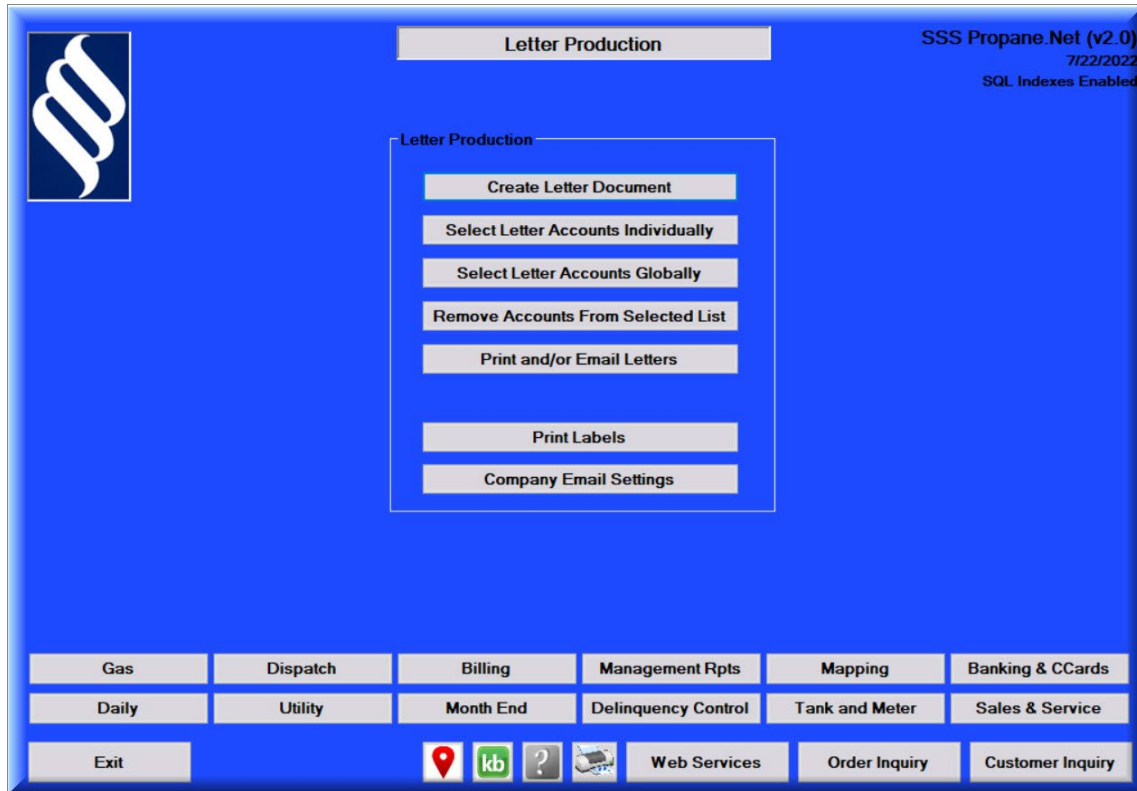


Letter Production

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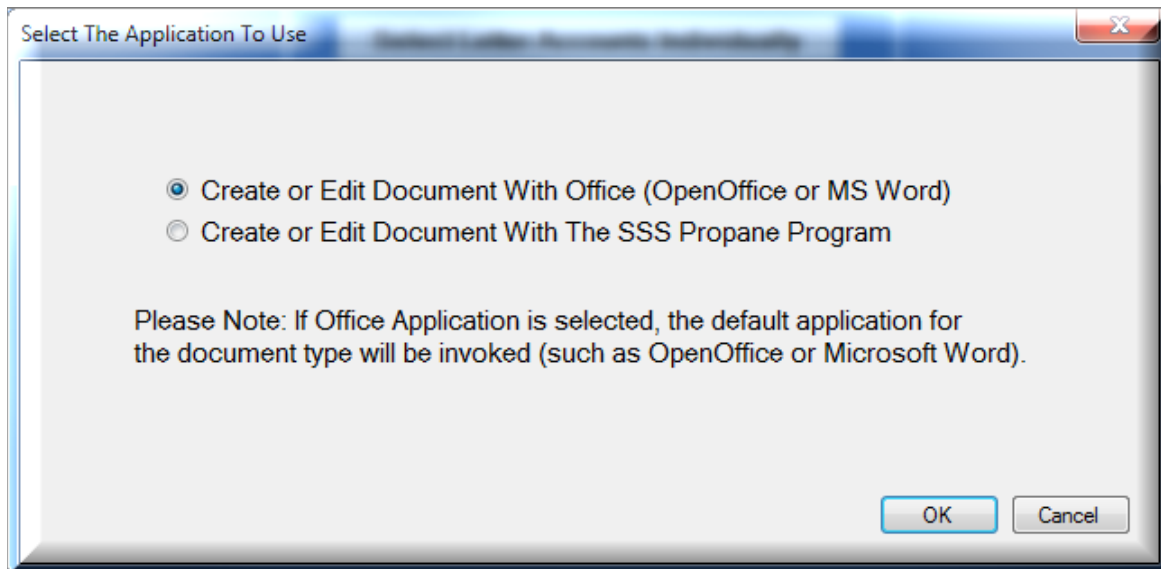
Letter Production Menu:



This allows the user to:

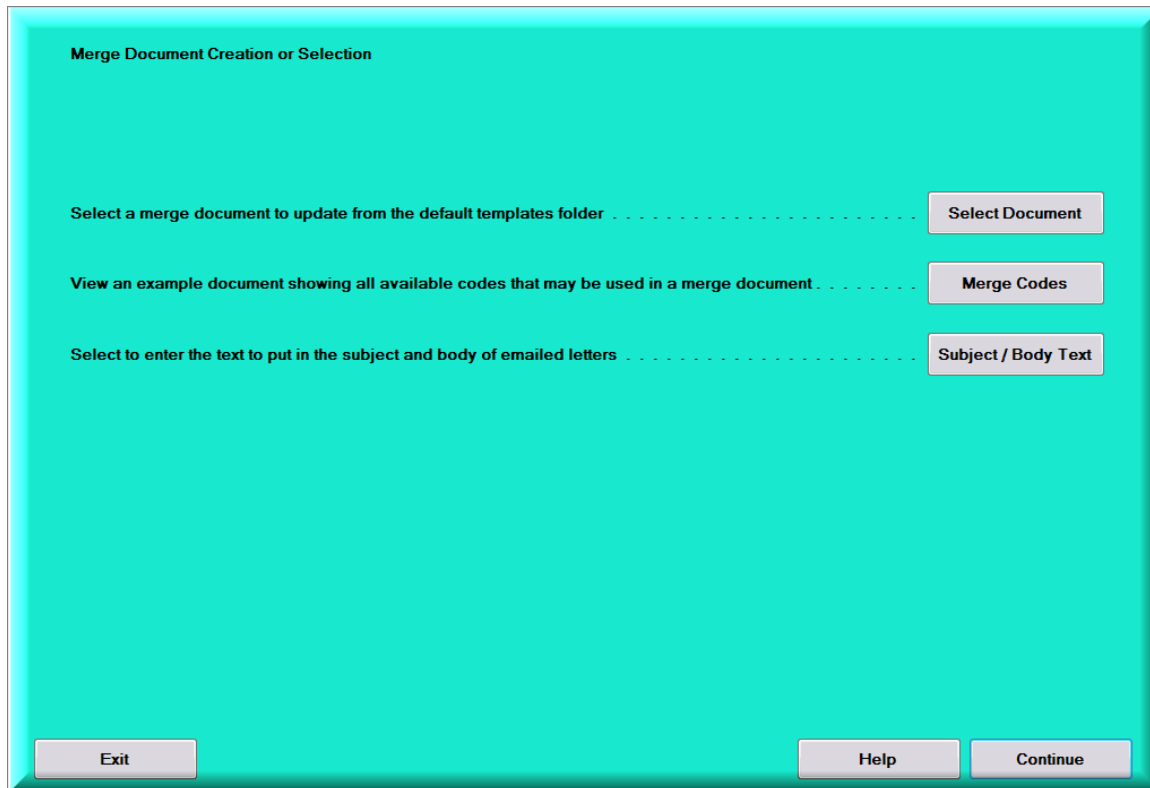
- Create or modify either Suburban Legacy letters or External Application Documents such as Microsoft Word.
- Select who is to receive Sales Letters either individually by account or globally.
- Deselect accounts not receive letters.
- Print and or EMail letters.

Create Letter Document



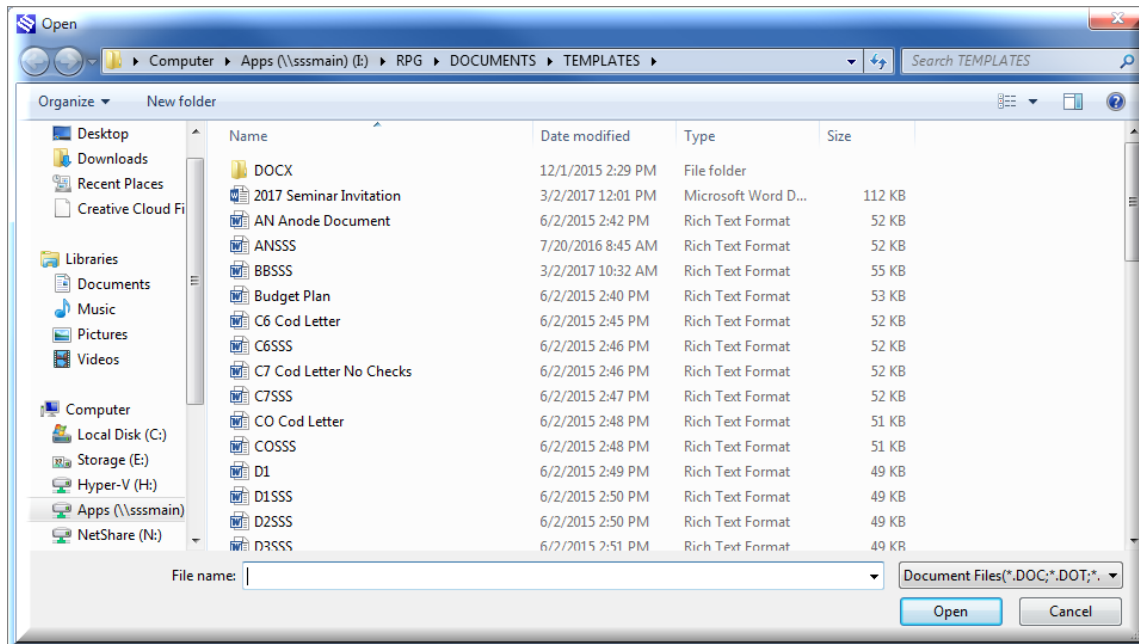
Allows the user to choose between creating and editing a document through an external application such as Microsoft Word or through Suburban.

Creating/ Editing Document Using External Application:



- Allows the user to select which letter is to be written or modified from existing examples.
- Shows the available “SSS Merge Codes” that can be integrated into any document.
- Allows you to enter the Subject and Body of the email

Select Document:



Allows the user to select from existing letter document templates or add a new document template.

Merge Codes:

Click on Merge Code Document to get a list of all merge codes that can be placed in the External Sourced Letter.

The merge codes below must be placed into the external source document (Word, Excel, etc.) **Exactly** as shown below including the brackets in order to merge Data.

SSS Merge Codes

The following codes may be used in a Word Document when merging with SSS Letter Writing Features.

[COID]	[TANKSERIAL]
[STATUS]	[TANKTYPE]
[ACCOUNT#]	[TANKU]
[COMPANYTANK]	[LOCKCODE]
[FULLNAME]	[TANKSIZE]
[LASTNAME]	[NROFTANKS]
[MIDDLEINIT]	[GAL/DD]
[FIRSTNAME]	[GAL/DAY]
[CAREOF]	[LASTDELIVERYDATE]
[STREET]	[PREVIOUSFILLPCT]
[CITY]	[FORECASTEDPCTFULL]
[ST]	[GASCHECKDATE]
[ZIPCODE]	[YTDDELIVERIES]
[ZIP4]	[YTDGAS]
[AREA]	[LASTYRGAS]
[PHONE]	[LASTDELIVEREDGAS]
[TAXCD]	[DELIVERYSTREET]
[CREDITCD]	[DELIVERYTOWN]
[TYPECUSTOMER]	[DELIVERYSTATE]
[FINCHG]	[DELIVERYZIP]
[STATEMENT/INVOICE]	[TAXID]
[OPENITEM/BALFWD]	[MASTERBILLACCTNR]
[PRICECLASS]	[LATITUDE]
[TERMS]	[NORTH]
[PRODUCTCODE]	[LONGITUDE]
[DESCRIPTION]	[WEST]
[U]	[STANDINGPO]
[TYPE2]	[PHONETYPE2]
[BALANCE]	[PHONE2]
[CURRENT]	[PHONETYPE3]
[OVER30]	[PHONE3]
[OVER60]	[EMAILADDRESS]
[OVER90]	[ELETTER]
[OVER120]	[EPOSTCARD]
[PASTDUE]	[ESTATEMENT]
[PREVSTAMTBALANCE]	[EINVOICE]
[DEPOSIT]	[GAINCODE]
[RECEIPTDATE]	[GAINDATE]
[RECEIPTAMOUNT]	[LOSTCODE]
[BUDGETRATE]	[LOSTDATE]
[BUDGETBALANCE]	[SALESMAN]
[RECOMMENDEDBUDGETRATE]	[DIRECTIONS]
[STARTDATE]	[DIRECTLINE2]
[CREDITLIMIT]	[DIRECTLINE3]
[DELIVERYCODE]	[DIRECTLINE4]
[USECODE]	[DIRECTLINE5]
[DRIVER]	[CURRENTPRICE]
[ROUTE]	[PAYBYDATE]
[SEQUENCE]	

Create or Edit Document with SSS Propane Program:

Merge Document Creation or Selection

Company Identification Code SPI

Please enter 2 character letter code BB - Budget Billing Letter

Exit Help Continue

Allows the user to edit a letter within Suburban.

```
&DT

&NM
&ADD
&CTY &ST

&FN

Dear &FN

Thank you for allowing us to be your propane provider.
Thank you for your business
```


Select Letter Accounts Individually:

SELECT CUSTOMER'S INDIVIDUALLY

Company Identification Code SPI

Branch and Account Number 01 F5-Search

Account:	<input type="text"/>	Status:	<input type="text"/>	Credit Code	<input type="text"/>	Current	<input type="text"/>
Name	<input type="text"/>			Delivery	<input type="text"/>	Over 30	<input type="text"/>
Address	<input type="text"/>			Tax Code	<input type="text"/>	Over 60	<input type="text"/>
City/State	<input type="text"/>			Fin Chg	<input type="text"/>	Over 90	<input type="text"/>
Zip Code	<input type="text"/>			Cust Type	<input type="text"/>	Over 120	<input type="text"/>
Phone	<input type="text"/>					Total	<input type="text"/>

Letter Number BB - BUDGET BILLING LETT

Exit Previous Screen Continue

Allows the user to choose specific accounts that the letter is to be sent.

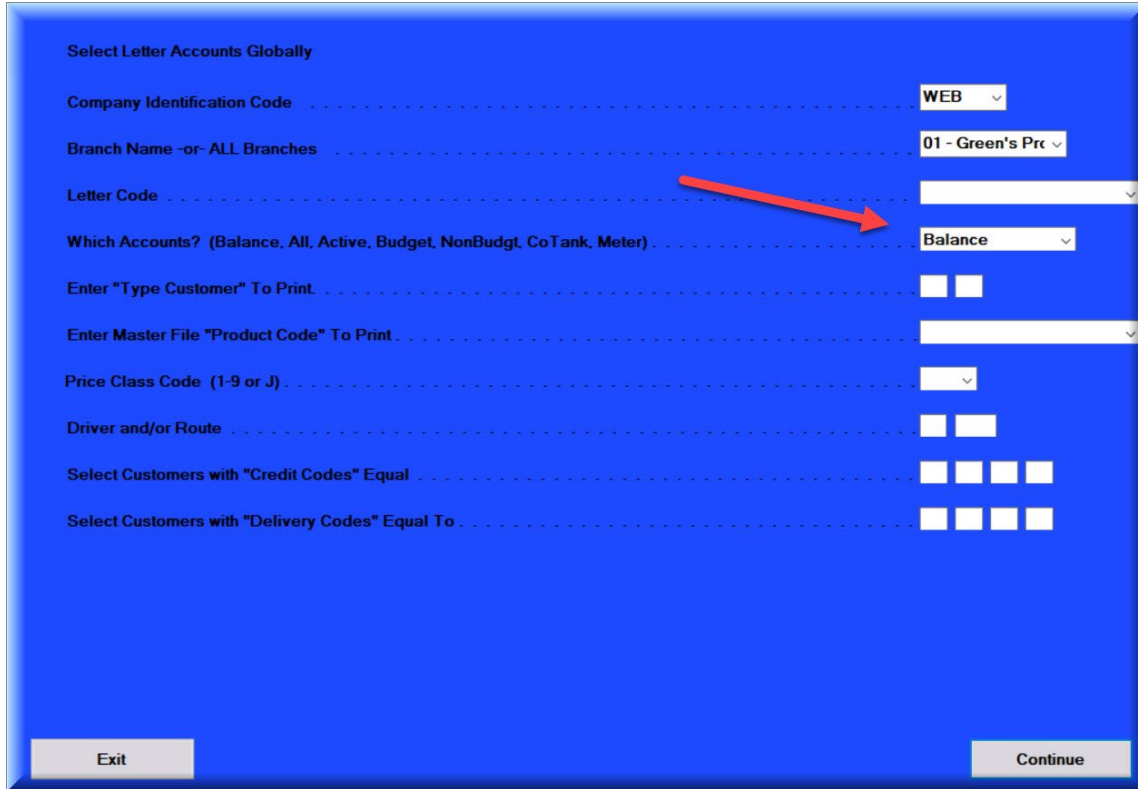
Note:

- Choose what type of letter is to be sent by the 2 Character Letter Number.
- If the Letter Code does not exist for the letter you have created, you can add it by going to the following: **Utility Menu > User Defined Fields > Sales Letter Codes**

&AC Branch and Account Number
&NM Full Name
&TL Title
&FN First Name
&LN Last Name
&CO Care/of or Extra Name
(will not print a line for this code if the extra name line
is blank).
&BL Balance
&PD Past Due Balance 1 months or more &P2
Past Due Balance 2 months or more &P3 Past
Due Balance 3 months or more &P4 Past Due
Balance 4 months or more &DT Letter Date
&AD Address from Master File
&CZ City, State, Zip from Master File
&CN Company Name NOT USED
&CA Company Address &CC
Company City/Street
&CS Company Signer
&CT Company Title
&BN Branch Name
&BA Branch Address
&BC Branch City / St / Zip
&RD Receipt Date of last payment
&PY Last Payment Amount
&DD Payment Due Date
&DN Number of days before payment is delinquent
&PR Customer Price
&PU Price Unit of Issue &EB
Estimated Budget Rate
&BR Budget Rate (positive or negative)
&BP Budget Rate (positive amounts only)

Select Letter Accounts Globally:

The letter can be selected by individual account number one account at a time, or they can be selected by group based on the options below.



Select Letter Accounts Globally

Company Identification Code WEB ▾

Branch Name -or- ALL Branches 01 - Green's Prc ▾

Letter Code ▾

Which Accounts? (Balance, All, Active, Budget, NonBudgt, CoTank, Meter) Balance ▾

Enter "Type Customer" To Print

Enter Master File "Product Code" To Print ▾

Price Class Code (1-9 or J) ▾

Driver and/or Route

Select Customers with "Credit Codes" Equal

Select Customers with "Delivery Codes" Equal To

Exit Continue

Remove Accounts from Selected List:

The screenshot shows a blue window titled "Show Accounts Selected To Receive Printed or Emailed Letters". At the top, there is a label "Company Identification Code" followed by a dotted line and a dropdown menu currently showing "SPI". Below this, the main area is empty. At the bottom, there are four buttons: "Clear All Currently Selected Accounts" and "Restore Accounts Previously Printed" in the center, and "Exit" on the bottom left and "Continue" on the bottom right.

Once the accounts are chosen enter the Remove Accounts From Selected List option and do a final review all the accounts there that were picked individually or selected as a group and de-select any that you do not want to send a letter to.

Proceed with the Final Step to Print Letters. This will merge data requested in the External Letter and print out letters to be mailed.

Print and/or Email Letters:

Print And/Or Email Sales or Promotional Letters

Company Identification Code WEB ▾

Branch Name -or- ALL Branches 01 - Green's Pro ▾

Select File Type of Document to Print or Email
The PDF option merges data with a preformatted MS Word or Open Office Merge File (.doc)
● Text (Legacy)
● Adobe PDF

Letter Code to Print BB - Budget Billing Letter ▾

Letter Date 08/03/22

Due By Date [Empty Field]

Output in Zip Code Sequence? N - No ▾

Configure Company Email Settings EMail Details (Subject, Body, BCC) Select Document Letter File(s)

Exit Continue

Allows the user to print selected letters.

Notes:

- The PDF option merges data with a preformatted MS Word or Open Office Merge file

Email Letters:

Before sending an email, customers should be setup to receive the type of email that you are sending. To do this go into the Customer's Master file and click on Contact Information. Select what type of email you want them to receive.

Your Company Name, Inc.

Customer Information

Account: 01 Account Started: 11 2005

Account Status: A - Active

Name (Last, First): A.B. MILLER CONCRETE PROD

Street Address: BOX 199, BRIDGE STREET

City: SPRING CITY

State, Zip: PA - Pennsylvania 19475 Zip Ext:

Area / Phone:

Balance

Current	0.00
Over 30 days	0.00
Over 60 days	0.00
Over 90 days	0.00
Over 120 days	0.00
Total	0.00
Deposit	0.00

eMail Contact Options

	eMail Address	Invoice	Statement	Postcard	Delinquent Letter	Sales Letter
✓	A-Active abmillerconcrete@genericemail.com	B-Print & Email	E-Email only	N-Neither	P-Print only	E-Email only
*						

Tax Identification Number:

Standing Purchase Order:

Alternate Phone Number: Phone Type:

F1 - General Info F2 - Directions F3 - Forecasting Info F4 - Contact Info F5 - Miscellaneous Info F6 - Timed Deliveries

Exit Save

Creating an Email:

Click on Print letter as if you were printing a letter.

Choose Subject/Body Text

Merge Document Creation or Selection

Select a merge document to update from the default templates folder

View an example document showing all available codes that may be used in a merge document

Select to enter the text to put in the subject and body of emailed letters

Choose what type of letter you are sending from the drop-down message and then enter the Subject and Body of the email and click Continue to save the letter. Then Exit.

Electronic Letters Subject and Body Text

Company Identification Code SSS

Subject Line: test

Body Text

test

- Budget Billing Letter
- BB - Budget Billing Letter
- SL - Sales Letter
- IN - Seminar Invite
- WS - Web Services
- BK - Bank Screw Up Response Letter

Continue like you would if you were sending out a regular letter, by choosing what accounts will receive the email see above:

Click on Print Letter:

Fill in the appropriate blanks for the email you are sending. Click Email Details and fill in the needed information.

Print And/Or Email Sales or Promotional Letters

Company Identification Code WEB ▾

Branch Name -or- ALL Branches 01 - Green's Prx ▾

Select File Type of Document to Print or Email
The PDF option requires that you have a valid Acrobat PDF Reader installed on your PC.
● Text (Legacy)
● Adobe PDF

Letter Code to Print BB - Budget Billing Letter ▾

Letter Date 08/03/22

Due By Date

Output in Zip Code Sequence? N - No ▾

Configure Company Email Settings Email Details (Subject, Body, BCC) Select Document Letter File(s)

Exit Continue

Letter Production

Letter Code BB

From Email

BCC Email

Subject

Body

Save

Label Printing:

The screenshot shows a software window titled "Label Printing" with a blue background. It contains several rows of input fields and controls:

- Company Identification Code**: A dropdown menu with "WEB" selected.
- Branch Name -or- Company I.D. for all branches**: A dropdown menu with "01 - Green's Proj" selected.
- Which: (BALANCE, ALL, ACTIVE, BUDGET, NONBUDGT, COTANK, METER, DELQLETR)**: A dropdown menu with "All" selected.
- Enter "Type Customer" to print**: A checkbox labeled "Type 2" which is currently unchecked.
- Enter Master File "Product Code" to print**: A small empty text box.
- "Driver" and/or "Route" to print: (Blank for all)**: Two small empty text boxes.
- Enter "Credit Codes" to print**: Four small empty text boxes.
- Enter "Delivery Codes" to print**: Four small empty text boxes.
- Output in Zip Code sequence?**: A dropdown menu with "N - No" selected.
- Print Account Number?**: A dropdown menu with "Y - Yes" selected.
- Form Name**: A dropdown menu with "3UP" selected. To its left is a checkbox labeled "Avery 5160 Labels" which is unchecked.
- Printer Type:**: A dropdown menu with "P1" selected.

At the bottom of the window, there are two buttons: "Exit" on the left and "Continue" on the right.

Allows you to print labels by customer type, product code, driver, route, credit code, or deliver code.

Customer Email Settings

See setting company email settings in Utility Menu setup.

The screenshot shows a software interface with a blue background. On the left, there is a sidebar with the text "Email Settings" and "Company Identification Code". On the right, there is a dropdown menu showing "WEB". In the center, a dialog box titled "SMTP Settings" is open. The dialog box has two sections: "Email Settings" and "Email Testing".

Email Settings

- Company Id: WEB
- Branch Number: 1
- SMTP Server: [Empty text box]
- SMTP Port: [Empty dropdown menu]
- Authentication Type: None
- Server Requires Authentication
- SMTP Username: [Empty text box]
- SMTP Password: [Empty text box]

Email Testing

These settings are for testing only.

FROM Email Address: dotnet@suburbansoftware.com

TO Email Address: dotnet@suburbansoftware.com

Enable Detailed SMTP Logging

Send Test Email

Exit Save

Exit Continue