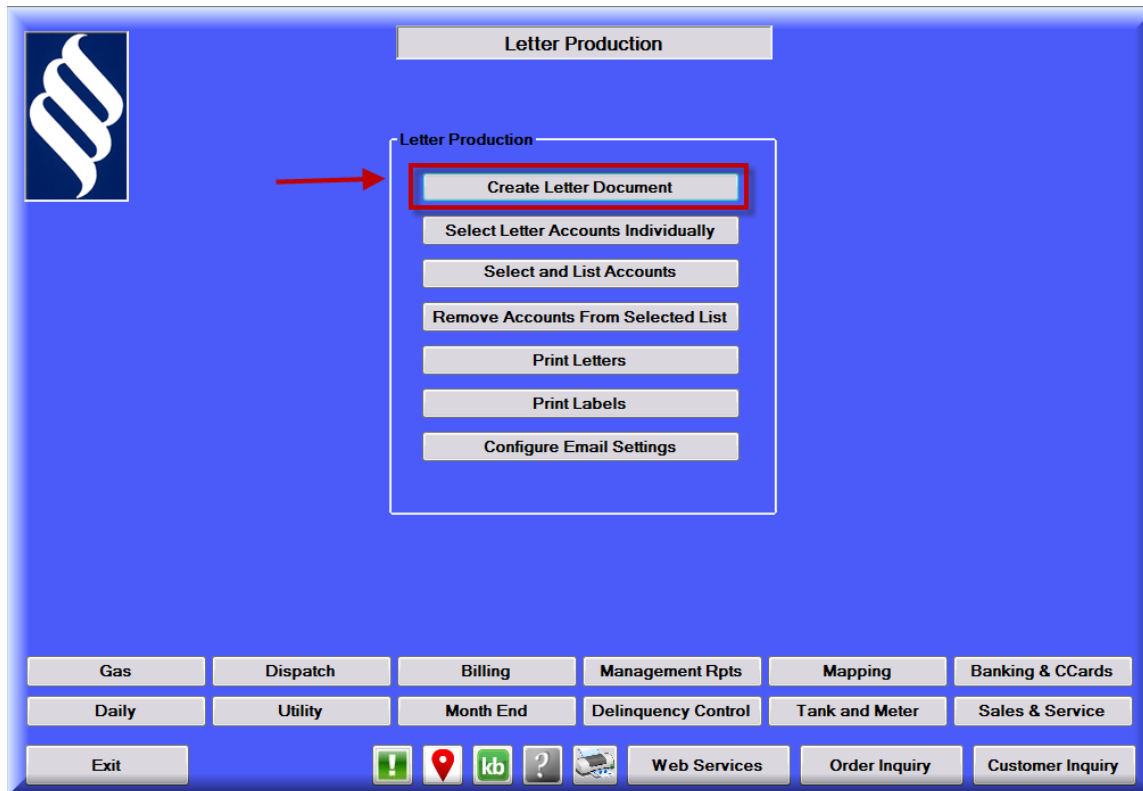




***Suburban  
Software  
Systems***

**LETTER PRODUCTION**

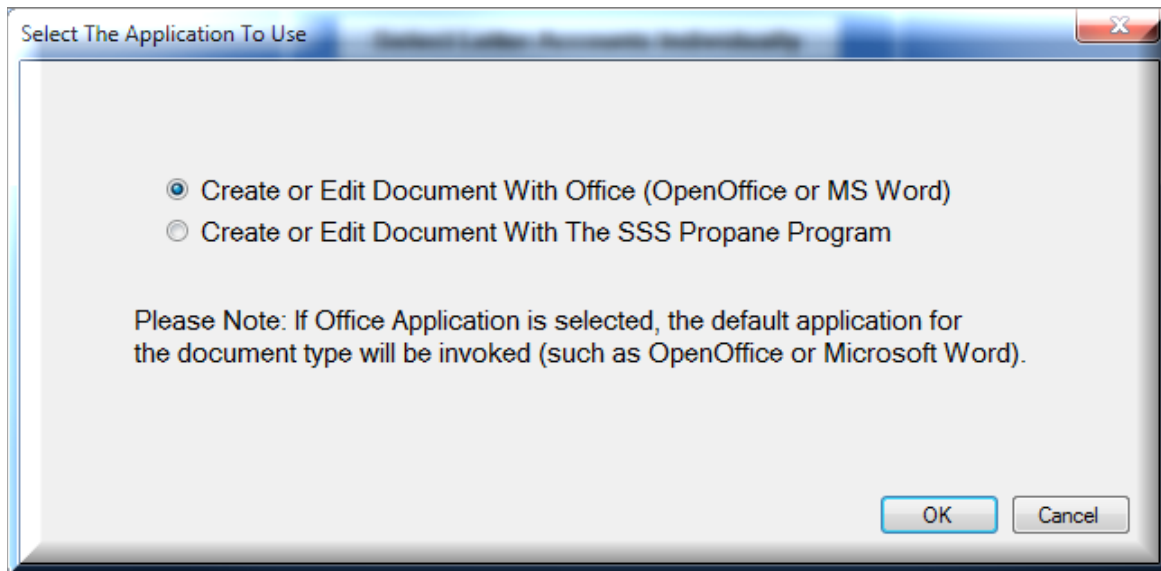
## Letter Production Menu:



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:

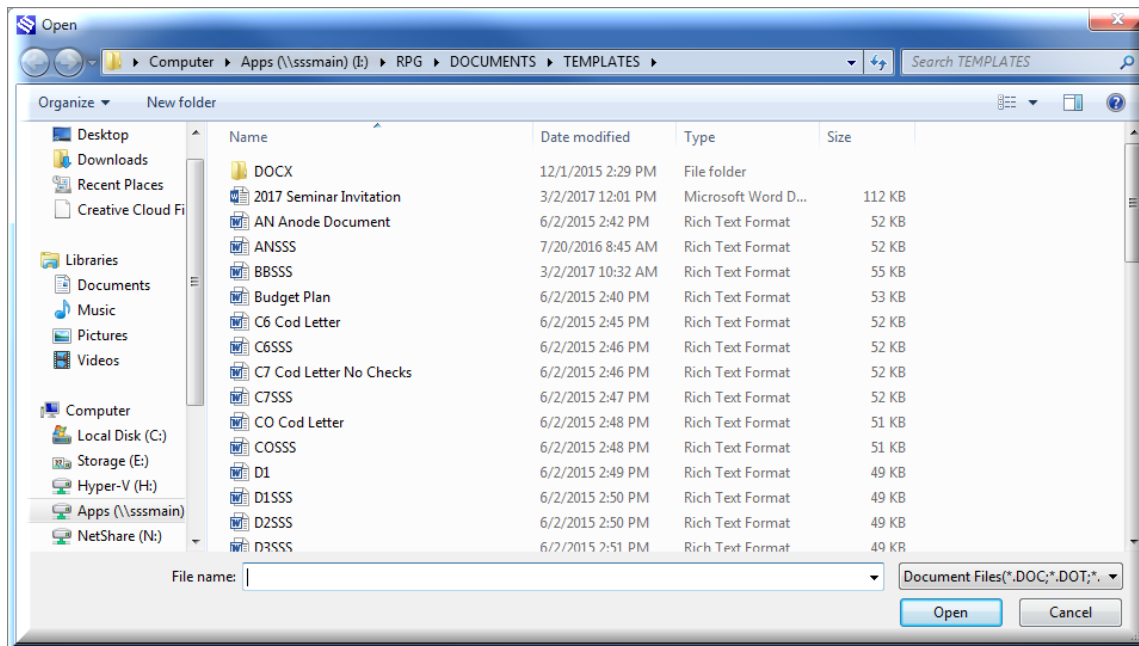
The screenshot shows a dialog box with a light blue background and a dark blue border. The title bar reads "Merge Document Creation or Selection". Inside the dialog, there are three rows of text, each followed by a button:

- Row 1: "Select a merge document to update from the default templates folder . . . . . Select Document"
- Row 2: "View an example document showing all available codes that may be used in a merge document . . . . . Merge Codes"
- Row 3: "Select to enter the text to put in the subject and body of emailed letters . . . . . Subject / Body Text"

At the bottom of the dialog, there are three buttons: "Exit" on the left, "Help" in the middle, and "Continue" on the right.

- 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#]	[TANKUI]
[COMPANYTANK]	[LOCKCODE]
[FULLNAME]	[TANKSIZE]
[LASTNAME]	[NROFTANKS]
[MIDDLEINIT]	[GAL/DD]
[FIRSTNAME]	[GAL/DAY]
[CAREOF]	[LASTDELIVERYDATE]
[STREET]	[PREVIOUSFILLPCT]
[CITY]	[FORECASTEDPCTFULL]
[ST]	[GASCHECKDATE]
[ZIPCODE]	[YTDELIVERIES]
[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]
[UI]	[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 Customers 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**



## Select and List Letters Automatically:

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 and List Letters Automatically**

Company Identification Code ..... SPI ▾

Branch Name --or- ALL Branches ..... 01 - Your Comp. ▾

Letter Code ..... BB - Budget Billing Letter ▾

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

Enter "Type Customer" To Print .....

Enter Master File "Product Code" To Print ..... ▾

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 Letters:

Print And/Or Email Sales or Promotional Letters

Company Identification Code ..... SPI ▾

Branch Name --or-- ALL Branches ..... 01 - Your Comp. ▾

Select File Type of Document to Print or Email .....  
*The PDF option merges data with a preformatted MS Word or Openoffice Merge File (.docx, .rtf).*

Letter Code to Print ..... BB - Budget Billing Letter ▾

Letter Date ..... 08/28/17

Due By Date .....

Output in Zip Code Sequence? ..... N - No ▾

BCC Email Address (Blind Carbon Copy) . . . . .  
*Only used for ELetters. Leave blank if not needed.*

[Click to Configure Merge Document Path for Letter Type\(s\)](#)

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
- Allows you to BCC (Blind Carbon Copy). This is used only for E-letters. Leave blank if not needed.

## Email Letters:

To Send 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  Account Started

Account Status:

Name (Last, First)

Street Address:

City:

State, Zip:   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
✓	<input type="text" value="abmillerconcrete@genericemail.com"/>	<input type="text" value="B-Print &amp; Email"/>	<input type="text" value="E-Email only"/>	<input type="text" value="N-Neither"/>	<input type="text" value="P-Print only"/>	<input type="text" value="E-Email only"/>
*	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Tax Identification Number:

Standing Purchase Order:

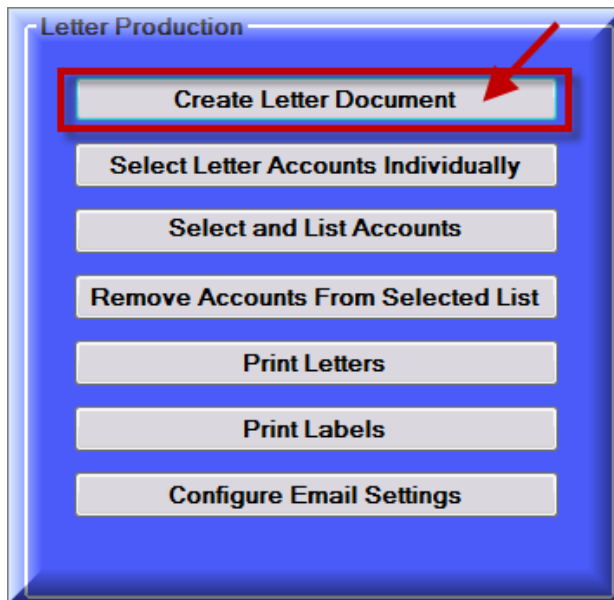
Alternate Phone Number:   Phone Type

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

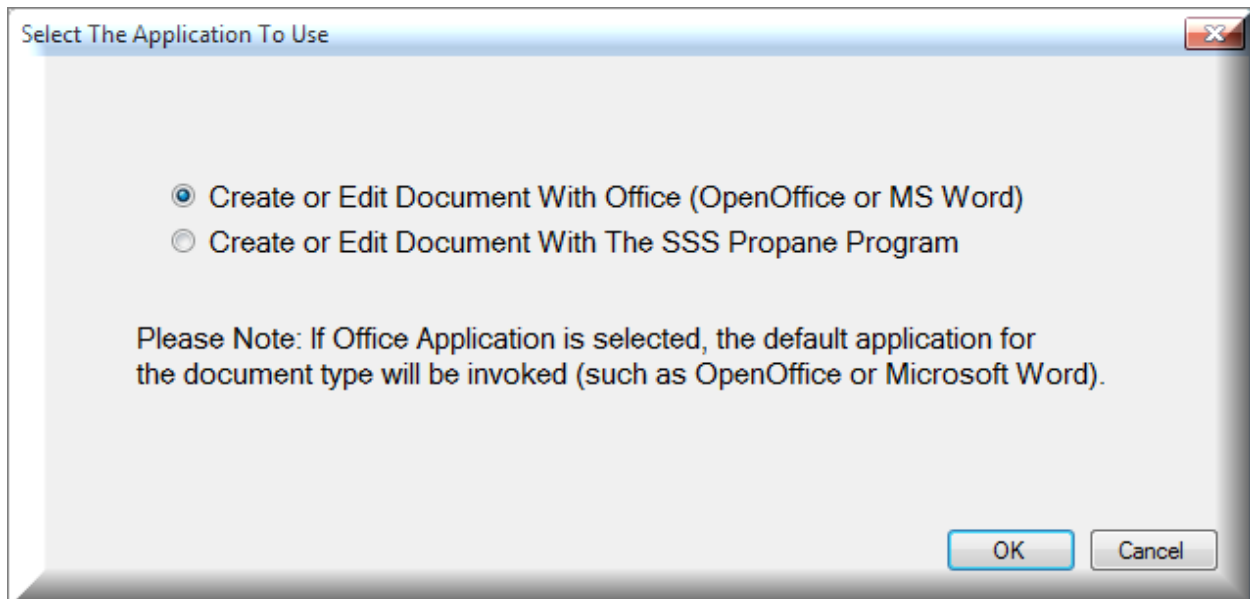
Exit Save

## Creating an Email:

Just like printing a letter click on Create Letter Document:



Create or Edit with Office:



## 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 BCC for email Address if needed and then Continue:

Print And/Or Email Sales or Promotional Letters

Company Identification Code ..... SSS ▾

Branch Name --or- ALL Branches ..... 01 - Suburban S ▾

Select File Type of Document to Print or Email .....  
*The PDF option merges data with a preformatted MS Word or Openoffice Merge File (.docx .rtf)*

Letter Code to Print ..... WS - Web Services ▾

Letter Date ..... 04/19/18

Due By Date .....

Output in Zip Code Sequence? ..... N - No ▾

BCC Email Address (Blind Carbon Copy) .....  
*Only used for ELetters. Leave blank if not needed.*

Click to Configure Merge Document Path for Letter Type(s)

Exit Continue

A pop up box will appear that will ask are you ready to send email. Click yes to send or no to cancel:

Confirm Send

Ready to email documents coded for email.

Do you wish to send?

Yes No

## Configure email Settings:

See E Bill Setup

Company ID:  **Ebill Setup Screen**

**Document Send Method**

Insert document into email body  
 Attach document to the email

**Email Settings**

Company Name:   
Email Server:   
SMTP Port:   SSL Enabled  
From Email:   
Username:   
Password:   
Copy To Email:

Username password may not be required for your email server. Check with your email host to determine if it is needed.

**Email Body** Type:

HTML Body

Enable unsubscribe on footer  
Unsubscribe Email:

**Attachments**

Please Note: The filesize & number of attachments severely affects the time it takes to send the emails.

Flyer/Attachment 1:  >>  
Flyer/Attachment 2:  >>