

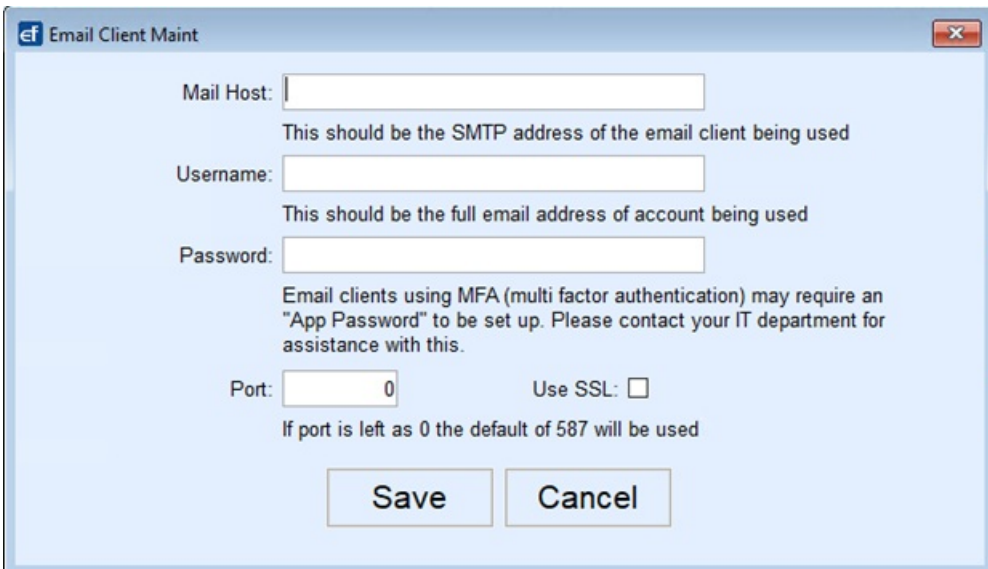
Emailing from Energy Force

Last Modified on 11/18/2024 3:39 pm EST

Email Setup Started in 17.240

Supervisor Menu / Maintenance Menu / Email Client Maintenance

Mail Host, Username, and Password fields must be filled in.



ef Email Client Maint

Mail Host:
This should be the SMTP address of the email client being used

Username:
This should be the full email address of account being used

Password:
Email clients using MFA (multi factor authentication) may require an "App Password" to be set up. Please contact your IT department for assistance with this.

Port: Use SSL:
If port is left as 0 the default of 587 will be used

A new user right is required. Please have your IT email Energy Force Support to have this right added.

To email drivers from the call-in screen, the Driver Emails maintenance table needs to be filled out. This is located at *Supervisor Menu / Maintenance Menu / Maintenance tables / Driver Emails*.

Enter the driver's *Last Name, First Name, Email Address, Route, Truck #*, and the entry must have an *A* for active.

To send a text to a cell phone, enter the cell phone email address. The phone email address will be the 10-digit phone number and the appropriate @gateway address on the end. If the appropriate @gateway address is unknown, send a text from the cell phone to an email address to see the address the email came from.


RRN	Last Name	First Name	Email Address	Route #	Route Description	Truck #	Truck Name	Cell Phone #	Alt
1	SMITH	JOHN	john.smith@energy.com	10	ROUTE 10	101	TRUCK 101	555-555-5555	A
2	SMITH	JANE	jane.smith@energy.com	10	ROUTE 10	102	TRUCK 102	555-555-5556	A

Select the **Email** button on the *Call-In* screen. Check the box in the *Selected?* column. More than one email can be selected.


Selected?	RRN	Driver Last Name	Driver First Name	Route #	Truck #	Cell Phone #	Active/Inact
<input type="checkbox"/>	1	NEWFER	JENNIFER	1	1	() -	A
<input type="checkbox"/>	2	WILLIAMS	BRANDY	2	1602	() -	A

Email Address

Sample of the email:


Mon 3/13/2023 3:39 PM
Noreply EnergyForce
Call In

To Jennifer Newfer; Brandy Williams

 We removed extra line breaks from this message.

Customer #: 42359497
 Customer Name: [REDACTED], Tank Serial #: [REDACTED] Tank Type: P Total Tank Capacity: 1000.00 Call in
 Percent Left: 20 Tank Name: [REDACTED] Default Product: 12000 PROPANE AG USE MISC Delivery Address: 1
 [REDACTED]

Call In Date: 12/19/2022
 Entered by: [REDACTED]
 Minimum Delivery Gallons: 0
 Minimum Delivery Amount: 0.00
 Requested delivery date: 01/30/2023

Call In Comments: 12/19/22 rc-call Joe to know what tanks to fill-I

Sample of the text to a cell phone:

Customer #: [REDACTED]
 Customer Name: [REDACTED]
 Tank Serial #: [REDACTED]
 Tank Type: P
 Total Tank Capacity: 500.00
 Call in Percent Left: 5
 Tank Name: house
 Default Product: 102008 LP GAS
 Delivery Address: [REDACTED]

 Call In Date: 03/07/2023
 Entered by: [REDACTED]
 Minimum Delivery Gallons: 200
 Minimum Delivery Amount: 210.87
 Requested delivery date: 00/00/0000

 Call In Comments: only fill 200 liters at \$3.299

Ability to Email a Single Invoice Started in 17.243

- To email an invoice to a customer, navigate to *Customer Maintenance*, open the customer's account and select *History Inquiry*.
- The **Email** button in the history will only be enabled once the Mail Host is set up. See the previous section for the setup process.
- Select the invoice to email and choose **Email** at the bottom. An email address selection window will open with email addresses listed found by selecting the **Other Phone/Email** button on the customers account. Multiple email addresses can be selected.

Date	Transf	Dr	Am	Ticket#	Code	Dept	Posting Reference	Quantity	Cost	Unit Price	Line Amt	Sales Tax	Debit Amt
04/02/23	99	7	255182	23467009	14	11000	PROPANE RESIDENTIAL	0.00	600.00	2.4100	\$1,470.00	\$36.75	\$1,506.75
10/09/22	0	0	189572	2180046	21	2	CHECK	0.00					
10/05/22	2585	325	189571	2181236	14	11000	PROPANE RESIDENTIAL	0.00	441.00	2.4500	\$1,080.45	\$27.01	\$1,107.46
12/22/21	0	0	48963	6961	21	2	CHECK	0.00					
12/17/21	2451	372	47522	1820679	14	11000	PROPANE RESIDENTIAL	0.00	716.40	2.4900	\$1,783.84	\$39.24	\$1,823.08

Select - Customer Emails

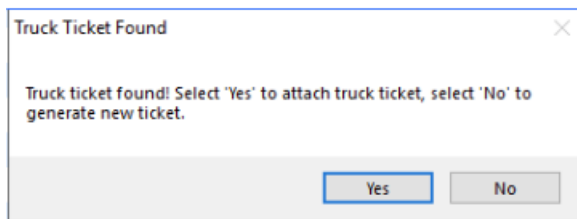
Selected?	Disctm	Customer Number	Email
<input type="checkbox"/>	1	518914	janefu@energyforce.net
<input type="checkbox"/>	1	518914	twilliams@energyforce.net

Email Address: janefu@energyforce.net

OK Cancel

Image(s) **Email** Show in Ascending Order History Transactions

- If the email address needed is different, then select **Cancel** and type in the address on the email. When there is no email address on the customer's account, one can still be added directly to the email by selecting *Modify*, entering the email address, and saving.
- Users have the option on delivery invoices from EnergyTrack to send the PDF of the truck ticket or to have a new PDF generated. This is beneficial if an item has been voided.



- When an item on a ticket is voided, that item will not print on an invoice if it is sent to a printer or if a PDF is created for emailing.
 - A pop-up notification will display to indicate if the email was sent successfully.
 - There is a **View** button on the email preview window that will open the PDF for review before sending it.
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