

# Setting Up Customer Contacts for Email Invoices

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## Setting Up Customer Contacts for Email Invoices



A customer contact for a customer must be set up to receive invoices as email attachments when the **Final and Print Invoice** process is run. These emails are sent automatically by Core-CT 9.1. This setup is done in the **Contact Information** component.

The **Finalize and Print Invoices** process generates pdf files for all customer invoices, including those set up to receive invoices as attachments to an email. Only customers set up for receiving invoices as attachments to an email will automatically receive their invoice as an email attachment after the **Finalize and Print Invoices** process has run.

Users can manually email invoices to customers who are not set up to receive invoices as email attachments when the **Finalize and Print Invoice** process is run.

In this example a user creates a new customer contact and sets that contact to receive invoices as an email attachment for a selected customer.

### Procedure

Navigation: Customers > Contact Information

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Customers > Contact Information

New Window | Help | http

**Contact Info**

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | **Add a New Value**

Search Criteria

SetID: = [ ]

Contact ID: begins with [ ]

Contact Name: begins with [ ]

Customer SetID: begins with [ ]

Customer ID: begins with [ ]

Customer Name: begins with [ ]

Include History  Correct History  Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Find an Existing Value | [Add a New Value](#)

Step	Action
1.	<p>Use the <b>Add a New Value</b> tab to create a new customer contact. Use the <b>Find an Existing Value</b> tab to locate and edit an existing contact.</p> <p>Click the <b>Add a New Value</b> tab.</p> <p><b>Add a New Value</b></p>

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Customers > Contact Information

New Window | Help | http

**Contact Info**

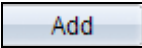
Find an Existing Value | **Add a New Value**

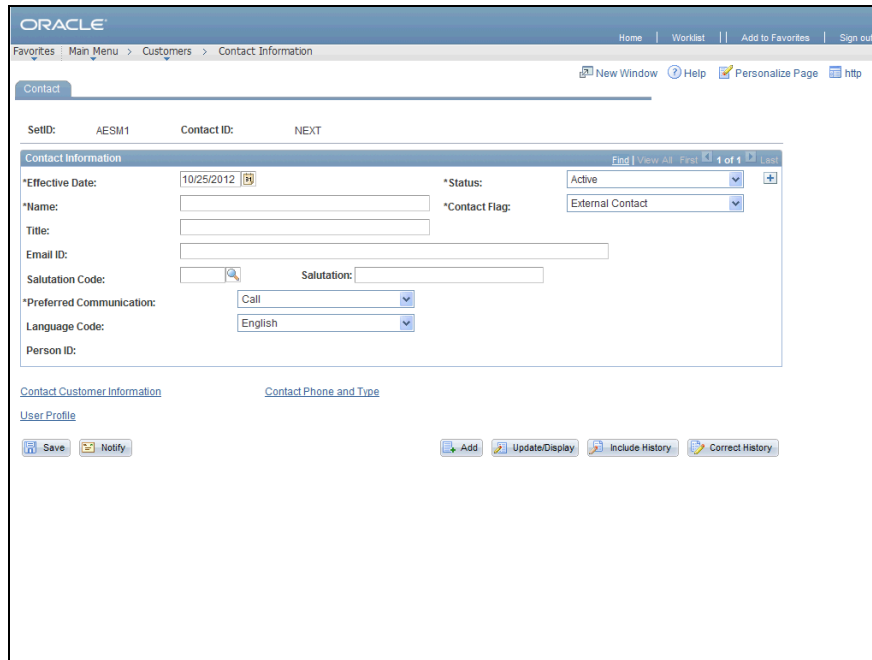
SetID: [ ]

Contact ID: NEXT [ ]

Add

Find an Existing Value | [Add a New Value](#)

Step	Action
2.	Enter <b>AESM1</b> into the <b>SetID</b> field.
3.	Click the <b>Add</b> button. 



ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Customers > Contact Information

Contact

New Window | Help | Personalize Page | http

SetID: AESM1    Contact ID: NEXT

Contact Information

\*Effective Date: 10/25/2012    \*Status: Active

\*Name:    \*Contact Flag: External Contact

Title:

Email ID:

Salutation Code:    Salutation:

\*Preferred Communication: Call



Language Code: English

Person ID:

Contact Customer Information    Contact Phone and Type

User Profile

Save    Notify    Add    Update/Display    Include History    Correct History

Step	Action
4.	Use the Contact page to enter basic information about the customer contact. Enter <b>John Jones</b> into the <b>Name</b> field.
5.	Enter <b>jjones@net.edu</b> into the <b>Email ID</b> field.
6.	Click the <b>Preferred Communication</b> list. 
7.	Click the <b>E-mail &amp; Print</b> list item. 

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Customers > Contact Information

New Window | Help | Personalize Page | http

SetID: AESM1    Contact ID: NEXT

**Contact Information**    Find | View All | First | 1 of 1 | Last

\*Effective Date: 10/25/2012    \*Status: Active

\*Name: John Jones    \*Contact Flag: External Contact

Title: \_\_\_\_\_

Email ID: jjones@net.edu

Salutation Code: \_\_\_\_\_    Salutation: \_\_\_\_\_

\*Preferred Communication: E-mail & Print

Language Code: English

Person ID: \_\_\_\_\_

[Contact Customer Information](#)    [Contact Phone and Type](#)

[User Profile](#)

Save    Notify    Add    Update/Display    Include History    Correct History

Step	Action
8.	Click the <b>Contact Customer Information</b> link. <a href="#">Contact Customer Information</a>

ORACLE

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Customers > Contact Information

New Window | Help | Personalize Page | http

SetID: AESM1    Contact ID: NEXT

**Contact Customer**

Contact Information    Find | View All

Effective Date: 10/25/2012    John Jones

**Link Contact to Customer**    Personalize | Find | View All | Print

Customer    Self Service Security


*Customer SetID	*Customer ID	Customer Name	Location	Credit Card	Documentation	Primary Bill To	Primary Ship To	Prim
_____	_____	_____	_____	<a href="#">Credit Card</a>	Documentation	<input type="checkbox"/>	<input type="checkbox"/>	

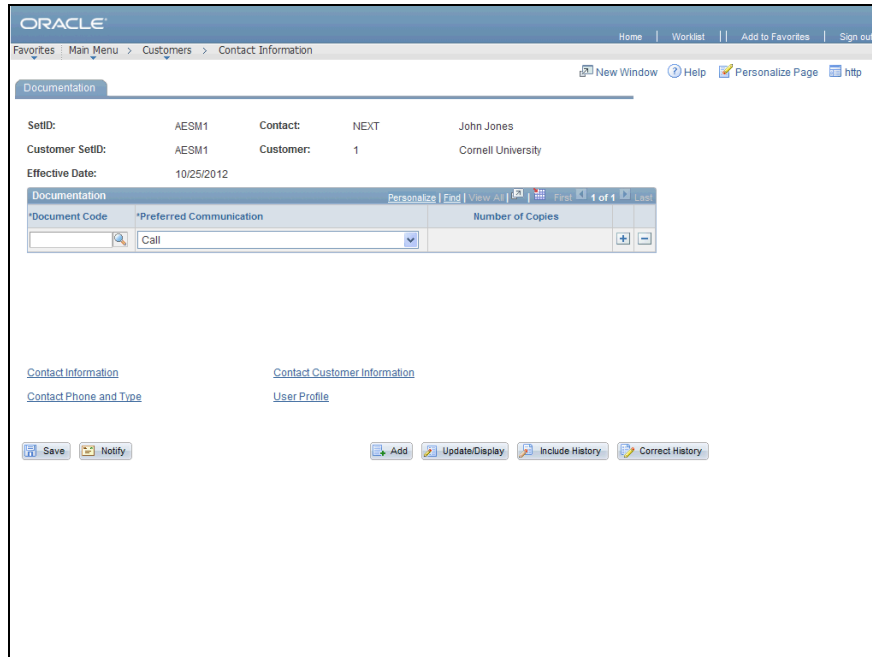
[Contact Information](#)



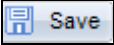
[Contact Phone and Type](#)    [User Profile](#)

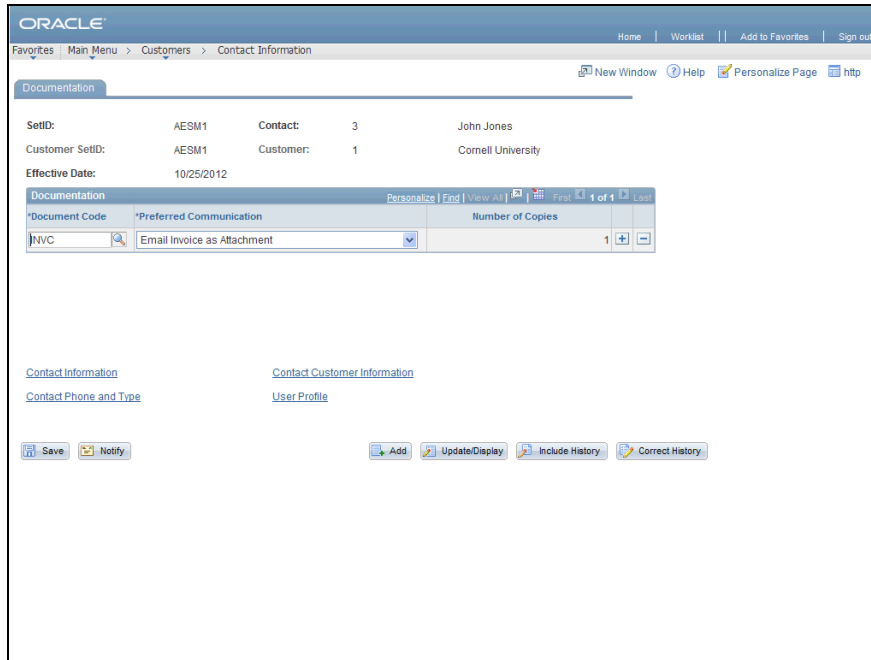
Save    Notify    Add    Update/Display    Inc

Step	Action
9.	Use the <b>Contact Customer</b> page to associate a contact with a customer. A contact can be a contact customer for multiple customers.

Step	Action
10.	Enter <b>AESM1</b> into the <b>Customer SetID</b> field.
11.	Enter <b>1</b> into the <b>Customer ID</b> field.
12.	Enter <b>1</b> into the <b>Location</b> field.
13.	Click the <b>Documentation</b> link. 



Step	Action
14.	Use the <b>Documentation</b> page to indicate that the customer will receive invoices as email attachments.
15.	Click the <b>Look up Document Code</b> button. 
16.	Click the <b>INVC</b> link. 
17.	Click the <b>Preferred Communication</b> list.
18.	Click the <b>Email Invoice as Attachment</b> list item.
19.	Click the <b>Save</b> button. 



Step	Action
20.	Core-CT added a Contact ID in the <b>Contact ID</b> field.  The customer is now set up to receive invoices as email attachments through the <b>Finalize and Print Invoices</b> process.
21.	<b>End of Procedure.</b>