

Tips & Tricks

Written by the firm's resident super user, Victoria, Accredo's user tips provide helpful information, short-cuts and general pointers to help customers improve their use of Accredo.

Emailing attachments with statements

We have been asked by a few users whether it's possible to bulk email attachments with statements without having to manually add them to each email.

This can be done with a script which is run in place of the 'Email Statements' option.

Note: The script requires the DI module. If you would like to run the script contact your QSP to discuss purchasing the DI module.

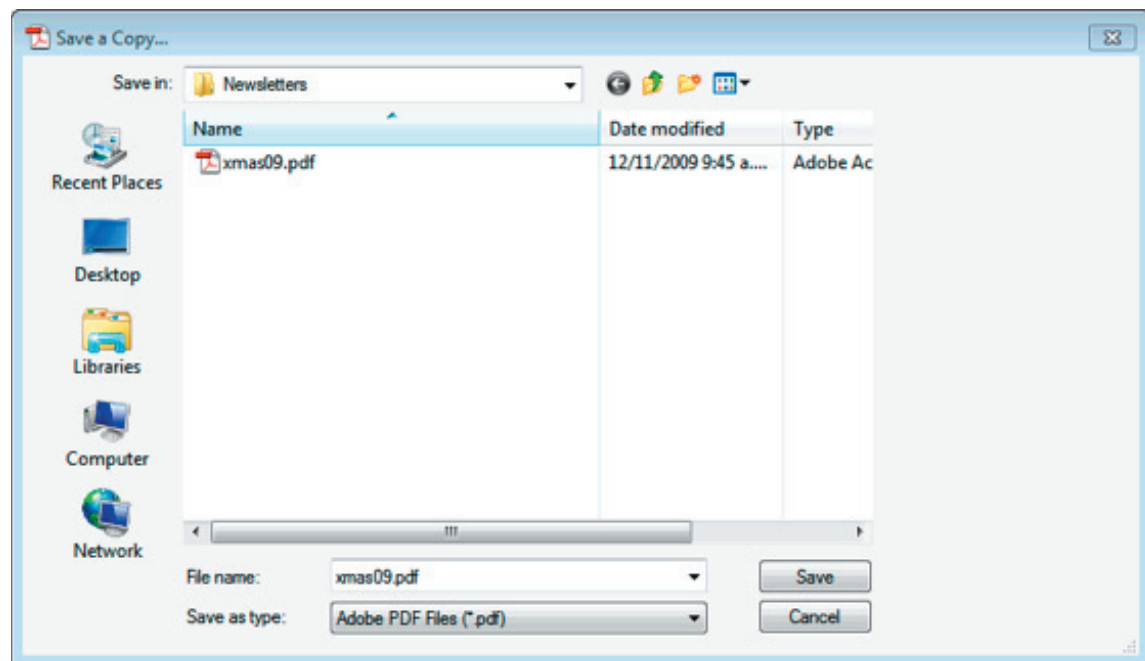
Before running the script you must be using SMTP mailing. See topic above for setup procedure.

File Location of Attachment to Include

Save the attachment to a folder on the C drive so the script can find it.

In this example create a folder on your C drive and save it to:

C:\Newsletters\Xmas09.pdf

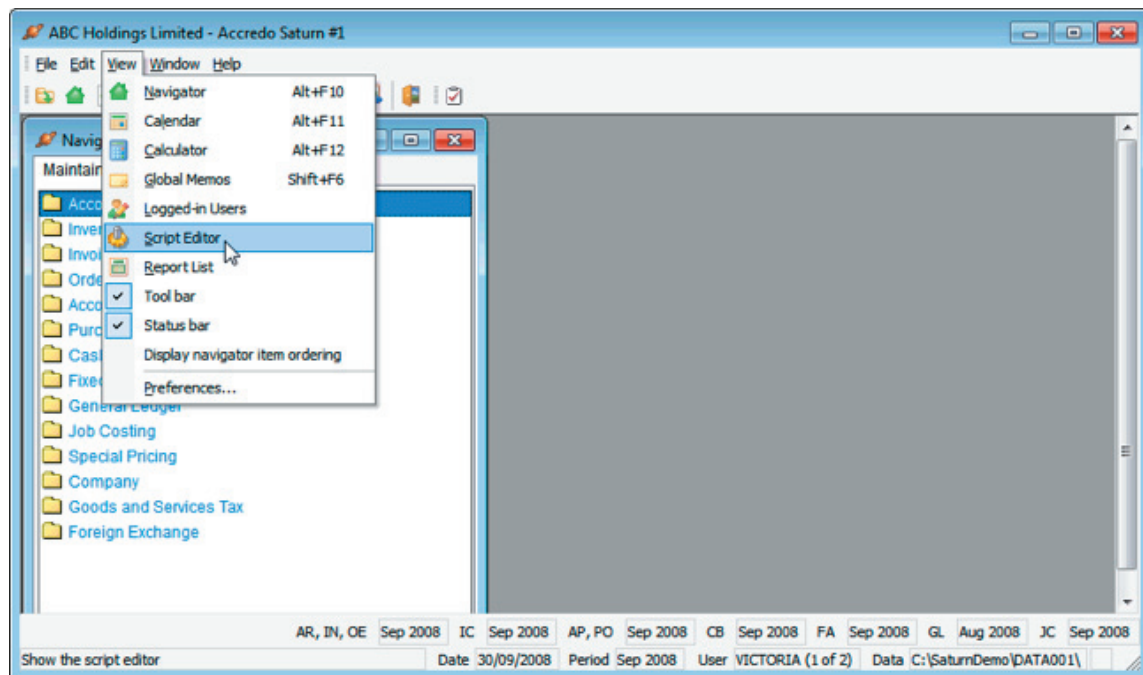


Script Code

Either download and save this script [ARStatementEmail_WithNewsletter.pfs](#) to your Accredo\Scripts folder, then go to the next step **Add the Script Function to the Navigator** further down).

Or copy the code below then open the Accredo Script Editor

Main Menu > View > Script Editor →



And paste the code in.

Then click SAVE and save to Accredo\Scripts directory giving the script a meaningful name.

We called it ARStatementEmail_WithNewsletter.pfs

Copy the script code below:

```
const Newsletter = "C:\Newsletters\Xmas09.pdf"
const EmailStatements = True ' set this to false to only email newsletters
```

```
Dim CustomerFrom as String, CustomerTo as String
Dim scForm1 as Object
scForm1 = CreateObject("Accredo.ScriptedForm")
scForm1.Caption = "Email Statements Form"
Control = scForm1.InputCode("CustomerFrom","ARCUST","Customer From")
Sibling = scForm1.InputCode("CustomerTo","ARCUST","Customer To")
Sibling.DittoSibling = Control
```

```
Do
  If scForm1.Execute Then
    scForm1.BringToFront
    CustomerFrom = scForm1.GetValue("CustomerFrom")
    CustomerTo = scForm1.GetValue("CustomerTo")
    If CustomerFrom = "" Then
      scForm1.ShowErrorHint("'Customer From' must be specified.")
    ElseIf CustomerTo = "" Then
      scForm1.ShowErrorHint("'Customer To' must be specified.")
    Else
      Exit Do
    End If
  End If
```

→

```

Else
  Abort("User pressed cancel.")
End If
Loop
scForm1 = Nothing

Dim Dir as Object
Dir = CreateObject("Accredo.Directory")

Dim Txt as Object
Txt = CreateObject("Accredo.TextFile")

Dim ARCust as Object
ARCust = OpenTable("ARCUST")
ARCust.IndexName = "ActiveCustomer"
ARCust.SetRangeStart(False, CustomerFrom) ' range on selected active customers
ARCust.SetRangeEnd(False, CustomerTo)

ARCust.First
Do Until ARCust.EOF
  If (ARCust.EmailAddress <> "" OR ARCust.StatementEmail <> "") Then
    StatementFileName = Dir.DataDirectory & "Statement.pdf"

    If ARCust.BalanceTotal <> 0 AND EmailStatements Then
      Dim ARStatement as Object
      ARStatement = CreateObject("Accredo.ARStatementReport")
      ARStatement.Destination = "Disk file"
      ARStatement.Format = "Adobe Acrobat PDF"
      ARStatement.FileName = StatementFileName
      ARStatement.CustomerFrom = ARCust.CustomerCode
      ARStatement.CustomerTo = ARCust.CustomerCode
      ARStatement.ExcludeEmailCustomers = False
      ARStatement.IncludeNilBalanceAccounts = True
      ARStatement.Run
      ARStatement = Nothing
    End If

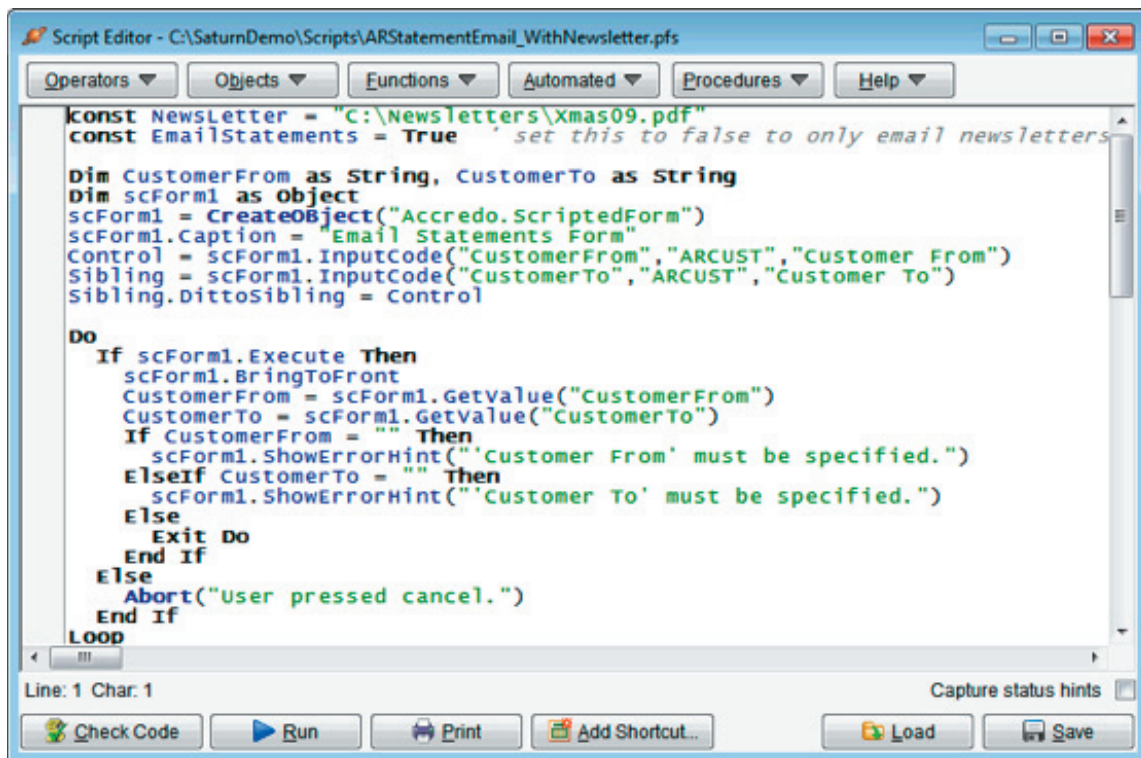
    Dim Mailer as Object
    Mailer = CreateObject("Accredo.SMTPMailer") ' attach to mailer and send
    Mailer.Subject= "Statement from " & Company.CompanyName
    Mailer.To = IIF(ARCust.EmailAddress <> "", ARCust.EmailAddress, ARCust.StatementEmail)
    Mailer.Attachments = NewsLetter

    If Txt.FileExists(StatementFileName) Then ' if statement file exists
      Mailer.Attachments = Mailer.Attachments & ";" & StatementFileName
    End If

    Mailer.Send
    If Txt.FileExists(StatementFileName) Then DeleteFile(StatementFileName)
      ' delete the statement file
    End If
    ARCust.Next
  End If
Loop

Msgbox("Statements & NewLetters emailed")
→

```



```
Script Editor - C:\SaturnDemo\Scripts\ARStatementEmail_WithNewsletter.pfs
Operators ▾ Objects ▾ Functions ▾ Automated ▾ Procedures ▾ Help ▾

Const Newsletter = "C:\Newsletters\Xmas09.pdf"
Const EmailStatements = True ' set this to false to only email newsletters

Dim CustomerFrom as String, CustomerTo as String
Dim scForm1 as Object
scForm1 = CreateObject("Accredo.ScriptedForm")
scForm1.Caption = "Email Statements Form"
Control = scForm1.InputCode("CustomerFrom", "ARCUST", "Customer From")
Sibling = scForm1.InputCode("CustomerTo", "ARCUST", "Customer To")
Sibling.Dittosibling = Control

Do
  If scForm1.Execute Then
    scForm1.BringToFront
    CustomerFrom = scForm1.GetValue("CustomerFrom")
    CustomerTo = scForm1.GetValue("CustomerTo")
    If CustomerFrom = "" Then
      scForm1.ShowErrorHint("'Customer From' must be specified.")
    ElseIf CustomerTo = "" Then
      scForm1.ShowErrorHint("'Customer To' must be specified.")
    Else
      Exit Do
    End If
  Else
    Abort("User pressed cancel.")
  End If
Loop
```

Line: 1 Char: 1 Capture status hints

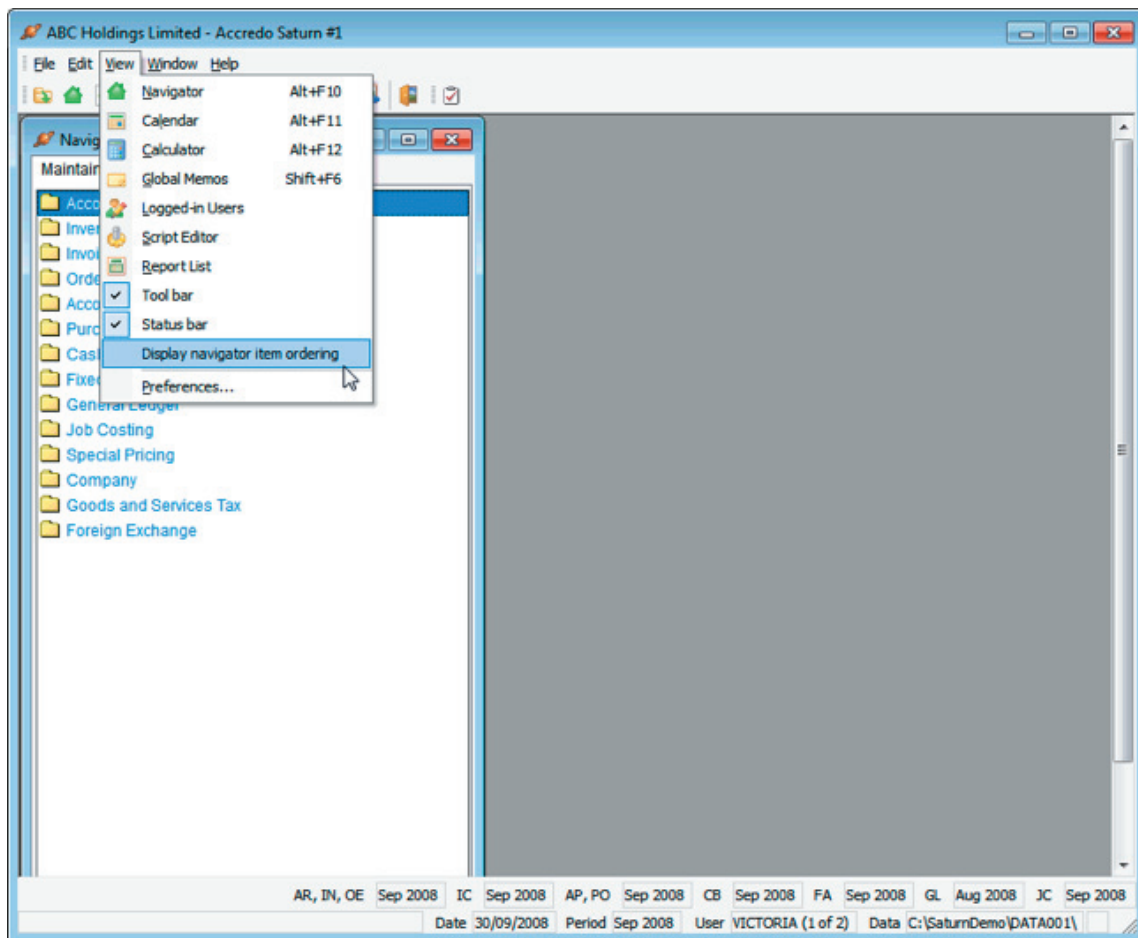
Check Code Run Print Add Shortcut... Load Save

Add the Script Function to the Navigator

First decide where you'd like this function to appear in the Navigator. In this example we are going to put it underneath Navigator > Reports > Accounts Receivable > Email Statements. But first we need to turn on Navigator Item Ordering to find the correct order.

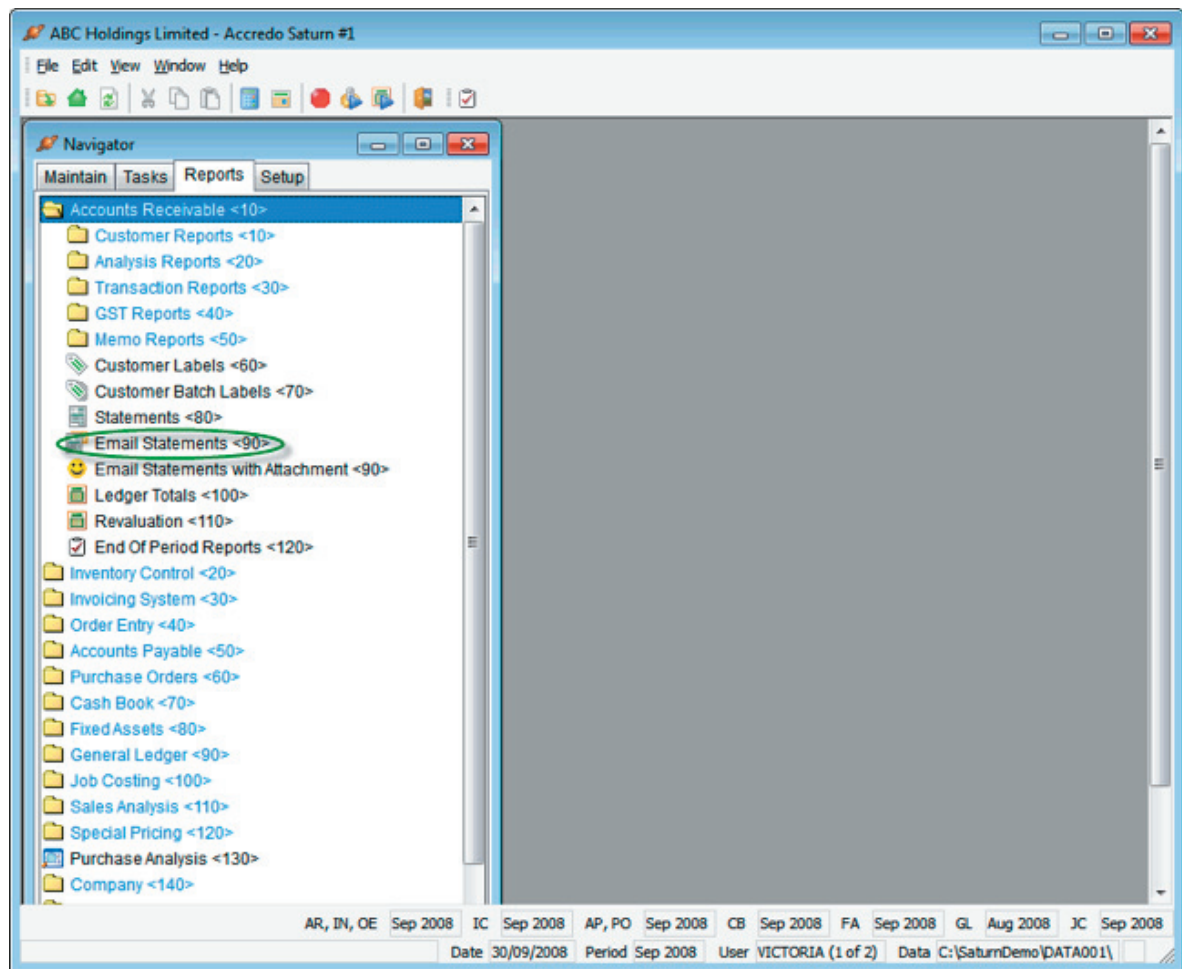
Turn off Navigator Item Ordering

Main Menu > View > Display Navigator Item Ordering →



Then go to: Navigator > Reports > Accounts Receivable

You will see that Email Statements has a Navigator Item order of 90. →



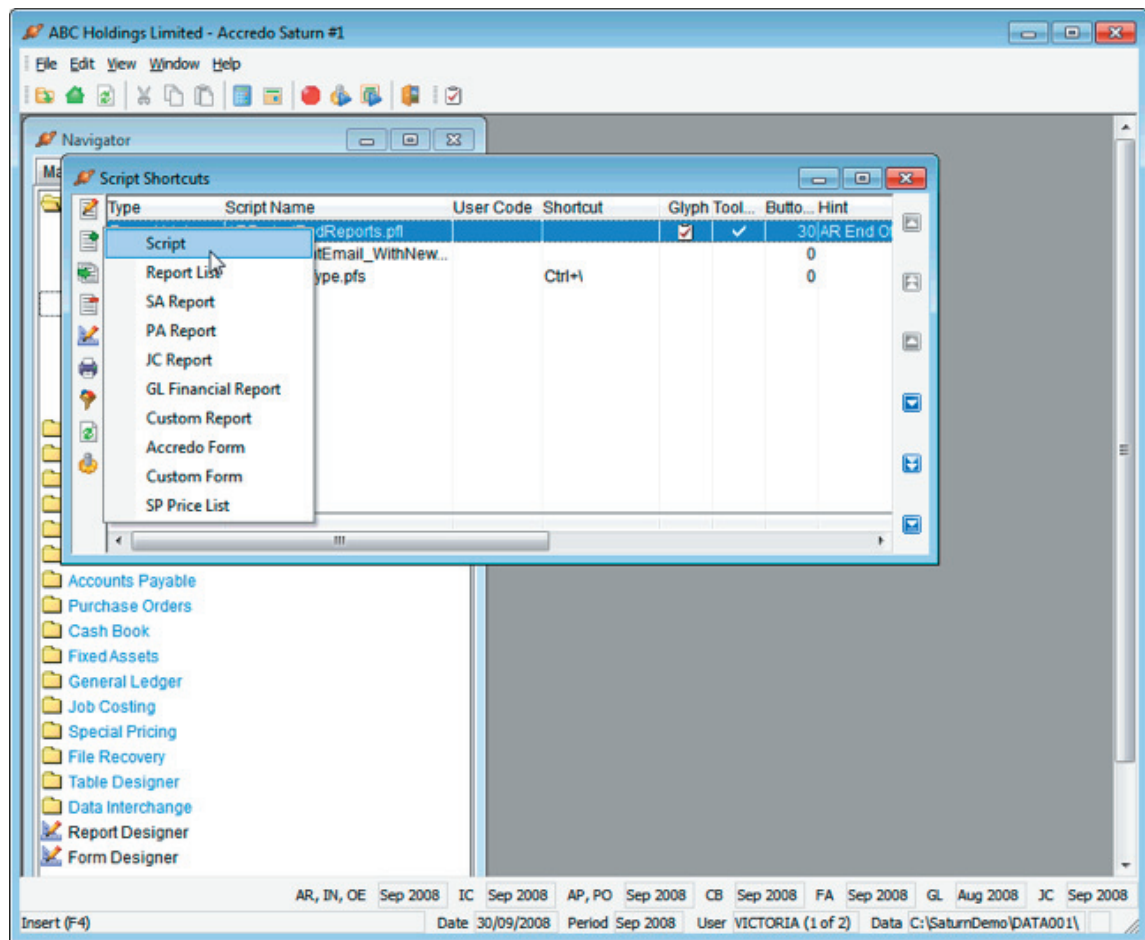
Turn off Navigator Item Ordering

Main Menu > View > Display Navigator Item Ordering

Add the Script function to the Navigator

Navigator > Setup > Company > Scripts > Script Shortcuts

Click F4 and select 'Script' →



Script Name – press F2, select the Script and press Open and the Script will appear in the field.

Available in Navigator – Tick the checkbox

Tab Name – select 'Reports'

Action Name – enter in: Accounts Receivable\Email Statements with Attachment

Navigator Order – enter in: 90 (so 'Email Statements with Attachment' will sit under 'Email Statements' in the Navigator). ■