



Emailing Monthly Statements

TMP Version: 4.38

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Introduction

Overview

This document describes the Emailing Statements feature added to The Marina Program for version 4.38.

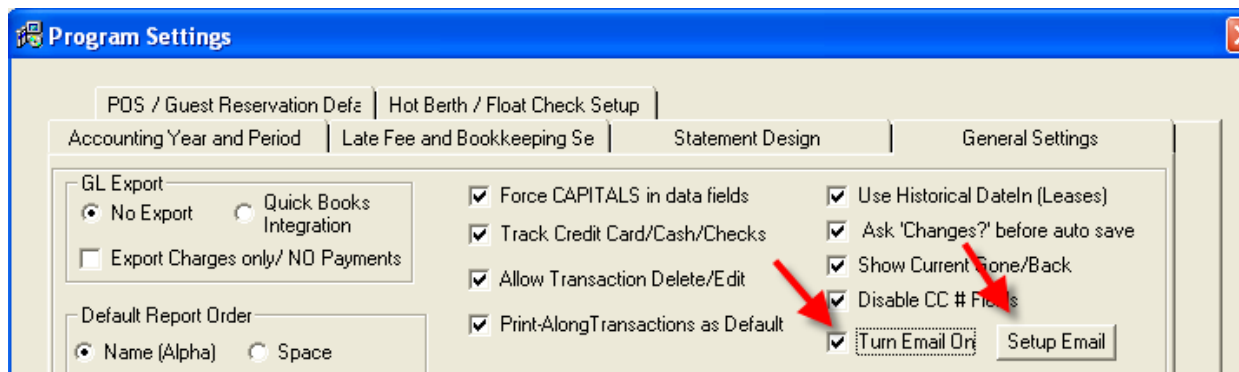
Intended Audience

Experienced Users of The Marina Program, with access to IT or network technical personnel that may be needed to determine the Email settings required.

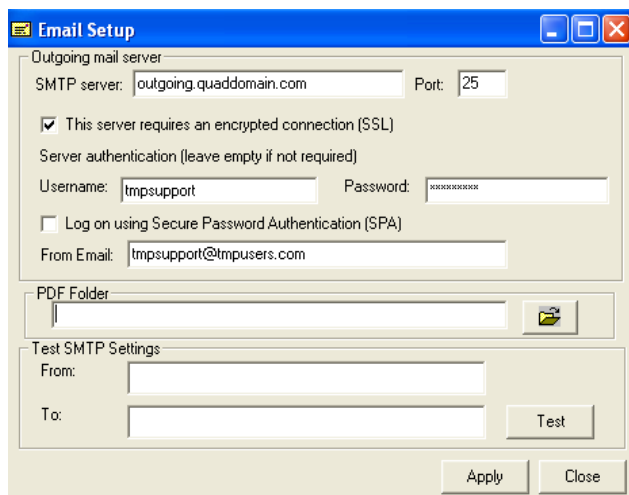
Setup

The Marina Program sends email using SMTP your email parameters Server name, User name and Password will have to setup prior to using the feature. To do so start The Marina Program and choose Lists – Program Settings. If you have security turned on you will need to enter a master level User ID/Password or Password. If security is turned off enter the password **superboss**.

On the tab entitled **General Settings**, a **Turn Email On** checkbox has been added, checking the checkbox (by clicking it) will enable the button entitled **Setup Email**. NOTE: Be sure and click the Apply button on this window to save the checked value for the "Turn Email On" checkbox.



Click the **Setup Email** button to display the Email Setup dialog window,



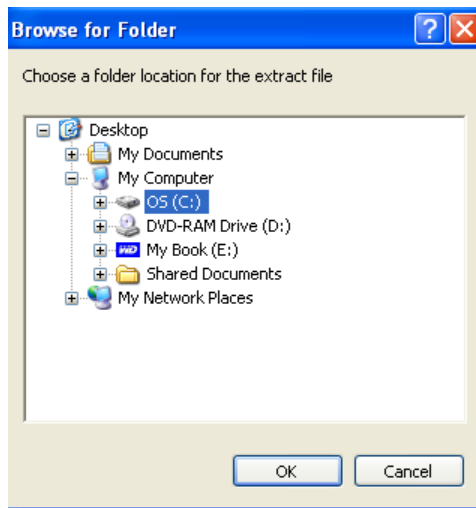
Outgoing Mail Server

Enter the information required by your SMTP server, and click the **Apply** button to save. You may need to contact your IT department or network consultant to determine what these values should be for your install. Watch Captain TMP Support would **not** know this information for you. If you need IT support to determine these settings for you Watch Captain does provide these services for an additional fee. Please contact TMPsupport@WatchCaptain.com if you are interested in obtaining IT services from Watch Captain.

PDF Folder

When statements are created for the customers receiving their statements via email the statement will be created as a PDF document and attached to an email that is sent to the customer's email address on file. These statements will be stored in the folder specified here.

To select an existing folder click the  button,

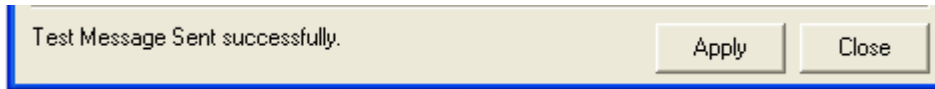


Note At the current time it will be a manual process to delete the statements in this folder should you desire to do so.

Test SMTP Settings

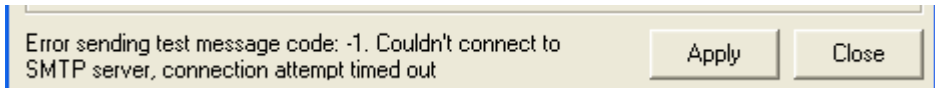
The Test button will attempt to send an email using the From and To email addresses specified using the SMTP Outgoing Mail Server settings entered.

If the Outgoing SMTP settings are correct clicking the Test button will display the following status message,



The To: email address specified should also receive a test email.

If the Outgoing SMTP settings are incorrect you will receive a status message indicating failure. Please check with your IT or network consultant for proper settings.



Customer Setup

To setup each customer to receive an email statement instead of a printed statement you need to perform the following tasks.

Using the Tenants window, Select/Find each customer to receive an emailed statement, click on the ***Info/Wait*** tab,

Tenants

1 Name Order

LESSOR

First Name: Josh Last Name: Alexander

Extra: Josie Alexander Tenant

Address: 8955 La Nita Way

City/St/Zip: San Diego CA 12222

H: 619-555-1515 W: 619-555-1616 O:

Date In /Lease In: 9/12/2007 Date Out /Lease Out: / /

Historical Date In: 11/18/2004

Boat/Space: Info/Wait \$\$\$ Account Sub Acc/Memo

LICENSE Social Sec # Code

LOCK BOX Dr Lic # NOT Taxable

KEY/CARD Cr. Card Ex

PERMITS Email: Josh@MyDomain.com

Email Statement

Insurance Information

Insurance Carrier and Phone

Wait List Information

3/12/2007 01 NORTH BAY Reply Remark

34 * Alexander XCEL88 A13 MASTER 11/18/04

Enter the customer's email address and click the checkbox entitled **Email Statement** so it displays with a checkmark as shown above.

To prevent this customer from also receiving a printed statement select the \$\$\$ Account tab and set the accounting code to a number 90 or greater (for more information on Accounting Codes see the TMP Manual Section 2 page 11).

Tenants

1 Name Order

LESSOR

First Name: Josh Last Name: Alexander

Extra: Josie Alexander Tenant

Address: 8955 La Nita Way

City/St/Zip: San Diego CA 12222

H: 619-555-1515 W: 619-555-1616 O:

Date In /Lease In: 9/12/2007 Date Out /Lease Out: _/_/___

Historical Date In: 11/18/2004

Boat/Space | Info/Wait | \$\$\$ Account | Sub Acc/Memo

Recurring Charges

A13
Net Base Rate = 40.50

Charge	Timing	Mon	Amount	Tax	I
SLIP RENT	Monthly		50.00	1	

Last Pd: 11/26/08 \$395.50 Live a board: 0

Meters: Standard

Prev: 0.0 Last Read: 0.0

Balances

Y Late Fee

Alert

95 code

Remark: Remark

Deposits

Security: 250.00

Key: 0.00

34 * Alexander XCELR8 A13 MASTER 11/18/04

Emailing Statements

From the Marina Program menu choose Journals/Reports-Statements/Invoices/Notices – Statement



An additional button has been added to the Statement Print dialog window,

Statements

STATEMENT TYPE

Statement ALL Records ONLY Tenants ONLY Non-Tenants





SORT ORDER

Name Order ...

Enter Sort Order Range


Print ALL Print RANGE to

Minimum Balance to Print (Use neg for Credits only)



Options Message    

Non Tenants w 0 bal/No \$\$\$ always skipped

Skip Tenants w/ Zero Balance
 Skip Tenants w/ No Activity/No \$\$\$/Zero Bal




Click the Email button to email a statement to all customers that have an email address and are flagged by checking the **Email Statement** checkbox on the Tenants window.

KEY/LARD	<input type="button" value="View/Edit"/>	Cr. Card	<input type="text"/>	Ex
PERMITS		Email	<input type="text" value="Josh@MyDomain.com"/>	
		<input checked="" type="checkbox"/> Email Statement		



When clicking the Email Statements button each statement is emailed as a PDF attachment to the email address listed in the Customer's record. When the statement email process is complete the following dialog will be displayed,

The Marina Program [X]

 Statements existing your in PDF folder g:\marinas\demomm\pdfs have been emailed to the email addresses on file.

The PDFs of the statements created and emailed are stored in the PDF Path specified on the Email Setup dialog described in the **Setup** section of this document.

Each PDF document is saved with a file name in the following format

 200812-0002600.pdf	12/21/2008 5:32...	Adobe Acrobat ...	3 KB
 200812-0003400.pdf	12/21/2008 5:31...	Adobe Acrobat ...	4 KB

Where 200812 represent the year and month the statement is created, followed by the customer record number padded with zeros.

This way each period's statements will not overwrite the prior statements and you can save as a record of what was emailed in case there is any questions later.

Emails Received

The emails received by your customers will look as follows,



Note that the *From* email address will be taken from your email setup (**setup** section of this document), the Subject will contain your marina name and the period that the statement is for.

Opening the email will show the email with the statement attached as a PDF document,

