

DB2 Email Notification Guide



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Purpose

This document describes the setup and operation of the DB2 Email Notification product. You only need to complete these instructions if you have installed the DB2 product.

Before You Begin

Make sure you have completed the common setup instructions and the DB2 server installation. You must complete these steps before you can setup and use DB2 Email Notification.

Authorization required:

You will need account and authorization codes to complete the DB2 Email Notification setup. Contact Jack Duncan at 800-722-3615 extension 1 before you continue.

Install SMTP Server:

You must install and setup the SMTP Server before you can send emails with DB2 Email Notification. See the SMTP Server Setup instructions for how to install and configure this service.

Must be on current DB2 release:

You must be on the current DB2 release before following these instructions. The DB2 Email Notification is a recent addition to DB2 and must be downloaded using the Server Program Update.

Installation Sequence Critical:

The installation sequence is critical to successful operation. Before you set any options or perform any other setup functions, you must perform the DB2 Open Order Database Update and the DB2 Sales History Update. Running these two functions first will mark all existing orders as checked for email notification.

If you do not run the Open Order Database Update and the Sales History Database Update prior to establishing email notifications for a customer, then ALL orders will be emailed that match the criteria. This could be hundreds if not thousands of emails!

DB2 Email Notification Features

The current DB2 Email Notification process contains three separate functions you can take advantage of by setting the program options.

eServ login notification:

DB2 Email Notification can provide you with email notifications when users login, or fail to successfully login, to your eServ Website. There are two types of eServ login notifications. The first type is a successful login notification and can be set at the individual user level or at the company level. The second type is login failure notification and can only be set at the company level.

The successful login notification can send you an email when any, or a particular user, logs into eServ. This login notification can be sent to one or multiple email addresses.

The login failure notification can send you an email when a user has a problem logging to eServ. This login error notification cannot be set at the user level.

Automatic email notifications:

Automatic email notifications can be set to send either or both an order receipt confirmation and a shipment confirmation. These confirmations are scheduled to occur by the DB2 Scheduler and happen automatically once setup.

Email on receipt function

The email on receipt function looks only at your open order file and checks for any customers setup to receive an email on receipt. It is important to remember that this function only looks in the open order file. You need to schedule the DB2 Open Order Update to run during the day followed by the DB2 Email Notification in order to catch open orders before they are moved to your journal files. This functions purpose is to provide an email notification of the receipt of order and never contains ship quantities.

Email on Shipment function

The email on shipment function looks only at your sales journal file and checks for any customers setup to receive an email on shipment. It is also important to remember that this function only looks at your sales history file. You need to schedule the DB2 Sales History Update to run once a day followed by the DB2 Email Notification to catch new-billed tickets and email shipment confirmations. The primary purpose of this function is to provide shipment notification which includes ship quantities.

eServ user interface:

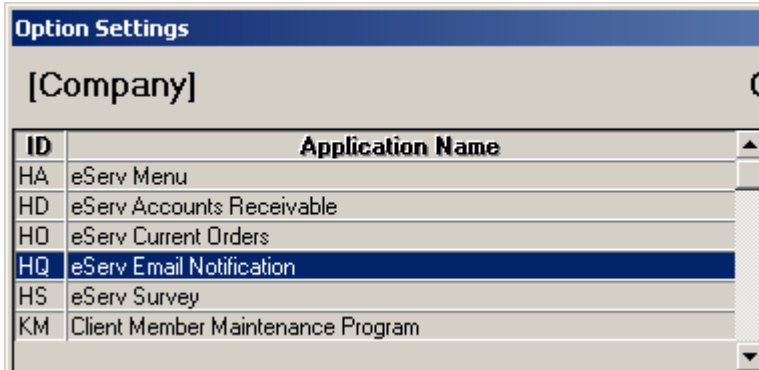
Included with the DB2 Email Notification is a user interface for your eServ Website. When enabled, the user can schedule his or her own email notification. The user can select the types of email to send, and set criteria including only non-contract items, orders over a certain amount, and multiple email addresses.

Setting Program Options

Before you use the DB2 Email Notification, you must make program option settings using the DB2 User Member Maintenance Program. Open your DB2 User Member Maintenance program and select the Company Default Settings.

HQ – eServ Email Notification Application:

When you open the Company Default Settings, Make sure to select the eServ Email Notification Application as shown in the screen below. If you do not have this entry in your application selection, then you must perform the Server Program Update to download the latest changes.

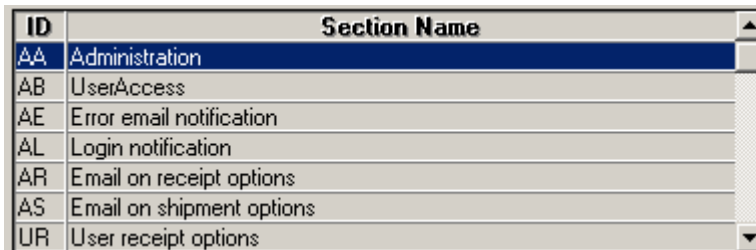


The screenshot shows a dialog box titled "Option Settings" with a sub-header "[Company]". Below the header is a table with two columns: "ID" and "Application Name". The table contains the following entries:

ID	Application Name
HA	eServ Menu
HD	eServ Accounts Receivable
HO	eServ Current Orders
HQ	eServ Email Notification
HS	eServ Survey
KM	Client Member Maintenance Program

AA-Administration Settings:

In the Section Box, make sure to select the Administration Section:



The screenshot shows a table with two columns: "ID" and "Section Name". The table contains the following entries:

ID	Section Name
AA	Administration
AB	UserAccess
AE	Error email notification
AL	Login notification
AR	Email on receipt options
AS	Email on shipment options
UR	User receipt options

See the separate listing of the Administration options, their descriptions, and the default value.

Before you can use the DB2 Email notification, you must set the CanAccess option to True, enter a valid From email address, and provide the complete image URL to your Website containing any images you want to transmit through the email notifications.

AB-User Access Settings:

The user access section controls the properties of the user access to your eServ Website.

See the separate list of the user access options, their descriptions, and the default value.

AE-Error Email Notification Settings:

This section controls the sending of eServ login error notifications.

See the separate list of the error email notifications options, their descriptions, and the default value.

You must set the ErrSend option to true and specify an email address in the ErrTo, ErrCC, or ErrBCC options to start receiving error email notifications.

You must make the error email notification settings at the company level. Due to the nature of a login failure, the user is not known when a login failure occurs. Setting the login failure options at the user level will have no affect.

AL-Login Notification Settings:

This section controls the sending of eServ login notifications.

See the separate list of the login notification options, their descriptions, and the default value.

You must set the LogSend option to true and specify an email address in the LogTo, LogCC, or LogBCC options to start receiving error email notifications.

Login notification settings, unlike error login notification, can be set at the user level. If you set these options at the company level, you will receive an email every time anyone logs into eServ.

AR-Email on Receipt Options:

The email on receipt options are administrative settings you make that control how the email on receipt is processed.

See the separate list of the email on receipt options, their descriptions, and the default value.

The default values for this section should work for most situations.

AS-Email on Shipment Options:

The email on shipment options are administrative settings you make that control how the email on shipment is processed. Below is a list of the email on shipment options, their descriptions, and the default value.

The default values for this section should work for most situations.

UR-User Receipt Options:

The user receipt options control if the user will receive an email on receipt of order. You can set this group of options using Member Maintenance, and the user can set these options using the eServ interface if so enabled. Below is a list of the user email on receipt options, their descriptions, and the default value.

Before an email on receipt of order can be sent, the RecSend must be set to True and the RecTo, RecCC, or RecBCC address must be set. Also, a subject is required before an email will be sent.

Unlike other options, you must set these options at the user level. Setting these options at the company level will not cause all orders to be emailed.

US-Send on Shipment Options:

The user shipment options control if the user will receive an email on shipment of order. You can set this group of options using Member Maintenance, and the user can set these options using the eServ interface if so enabled. Below is a list of the user email on shipment options, their descriptions, and the default value.

Before an email on shipment of order can be sent, the ShpSend must be set to True and the ShpTo, ShpCC, or ShpBCC address must be set. Also, a subject is required before an email will be sent.

Unlike other options, you must set these options at the user level. Setting these options at the company level will not cause all orders to be emailed.

Supporting Applications

In addition to the new DB2 Email Notification application, there are also two other and existing applications that work in conjunction with DB2 Email Notifications.

DB2 Open Order Database Update:

Now included in the DB2 Open Order Database Update is a pass through the open orders looking for orders that you have selected to be emailed. You need not do anything special to perform this action, it happens automatically with either a full or partial update. If the Open Order Database Update encounters an order to be emailed, it places it in the DB2 Email Notification queue for processing. Otherwise, the order is marked as considered for emailing and will not be considered again.

DB2 Sales History Database Update:

Like the DB2 Open Order Database Update, the DB2 Sales History Update has also been modified to look for completed orders you have selected to email. You need not do anything special to perform this action, it happens automatically with either a full or partial update. If the Sales History Database Update encounters an order to be emailed, it places it in the DB2 Email Notification queue for processing. Otherwise, the ticket is marked as considered for emailing and will not be considered again.

Initial Open Order and Sales History Updates:

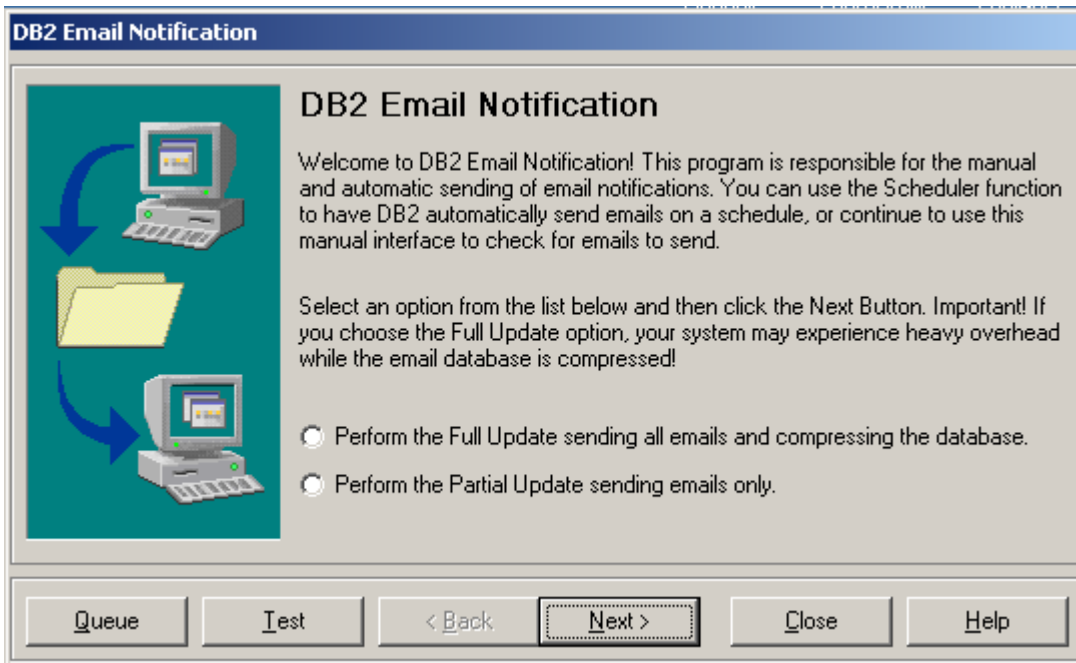
It is important to remember that you must run the DB2 Open Order Update and the DB2 Sales History Update before selecting customers to receive email notifications. If you do not perform these initial updates first, any and all orders for the customer you select to receive emails will be queued the first time you run Open Order or Sales History update.

DB2 Email Notification

The DB2 Email Notification program runs only on your DB2 Server. It is responsible for reading the emails queued by Open Order Update and Sales History Update and then turning these queued requests into emails and then sending the email. It is suggested that you use the manual interface until you become accustomed to the processing flow.

Before an email will be queued, two things must happen. You need to set the customer options using the DB2 User Member Maintenance program and then either the DB2 Open Order Update or DB2 Sales History Update must be run to queue any new orders meeting the criteria you establish in User Member Maintenance.

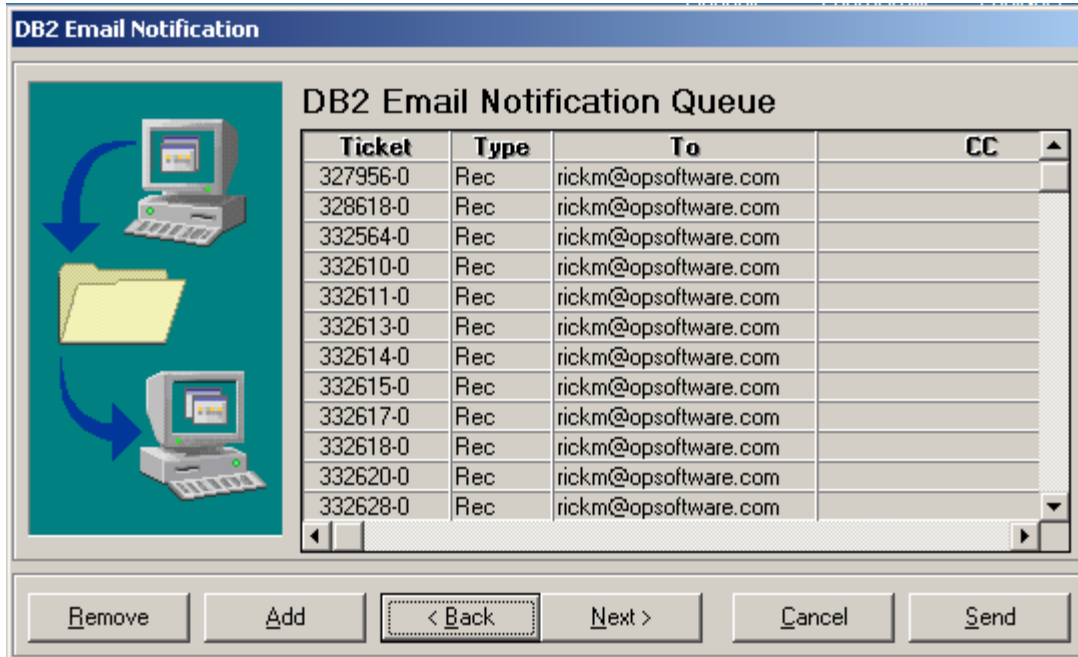
Open your DB2 Server Menu and choose Email Notification. The following screen will appear:



There are several buttons on this screen and two options. Each button, and any sub levels, are described in the following sections.

Queue Button:

Clicking the Queue Button displays the current email queue. These are emails waiting to be sent. They will not be sent until you either manually start the send, or the DB2 Email Notification runs automatically on a schedule. Below is a sample of the Queue Screen:



There are several buttons on this screen as follows:

Remove Button

Clicking this button will remove the selected emails from the list. You can select more than one email by holding down the 'Ctrl' key while clicking the emails to remove.

Add Button

Used to allow you to manually add an email to the send queue.

Back Button

Clicking this button will return to the Main Screen.

Next Button

Opens the selected queue item so you can make changes or preview the email before sending.

Cancel Button

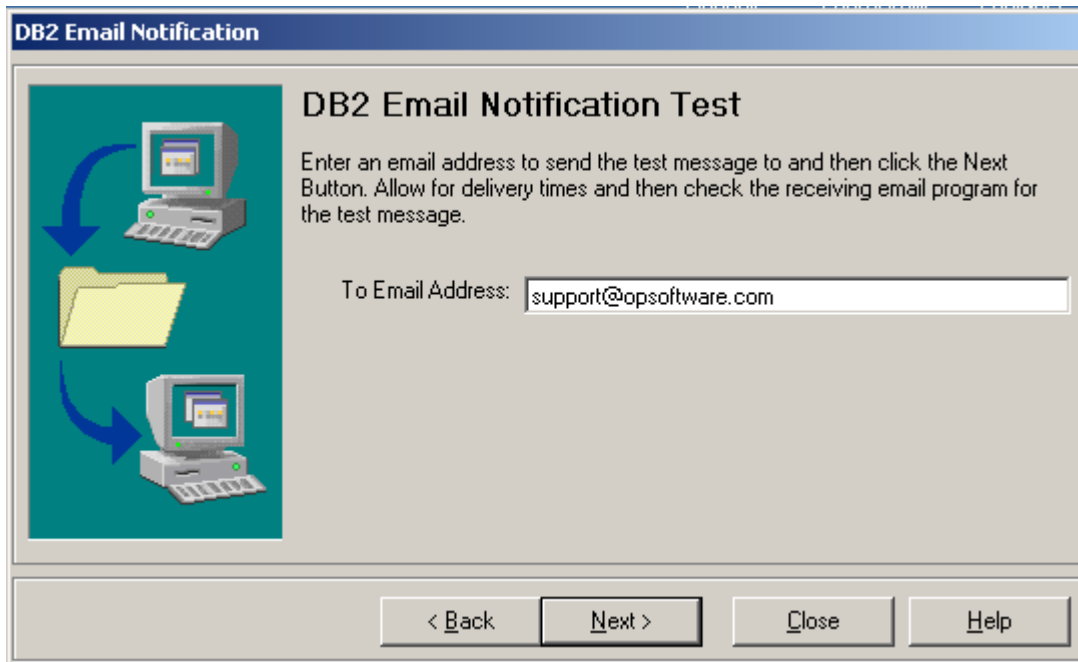
Performs same function as Back Button.

Send Button

Clicking this button will send the selected emails immediately. You can select more than one email by holding down the 'Ctrl' key while clicking the emails to send.

Test Button

Clicking the Test Button from the main screen shows the Test Screen where you can test the installation of your SMTP Server.



Enter an email address to send to and then click the Next Button. DB2 Email Notification will send a test email to the address you enter using your SMTP Server. Check your email to verify the email was received.

Next Button:

From the main screen, choose one of the update options and then click the Next Button to send all queued emails.

Close Button:

Click the Close Button to exit the DB2 Email Notification program.

Editing and Previewing Email Queue Items

If you select an email from the Queue Screen and then click the Next Button, the queue details screen is shown:

DB2 Email Notification Queue

DB2 Email Notification Queue Details

Type: **Receipt Confirmation** Format: **HTML Attachment**

Ticket #: **327956** Dash: **-0**

From: **administrator@propsolution** Reply To: **administrator@propsolution**

To: **rickm@opsoftware.com**

CC: BCC:

Subject: **Order Receipt Confirmation**

WhoCalled Attention SignedBy SalesRep

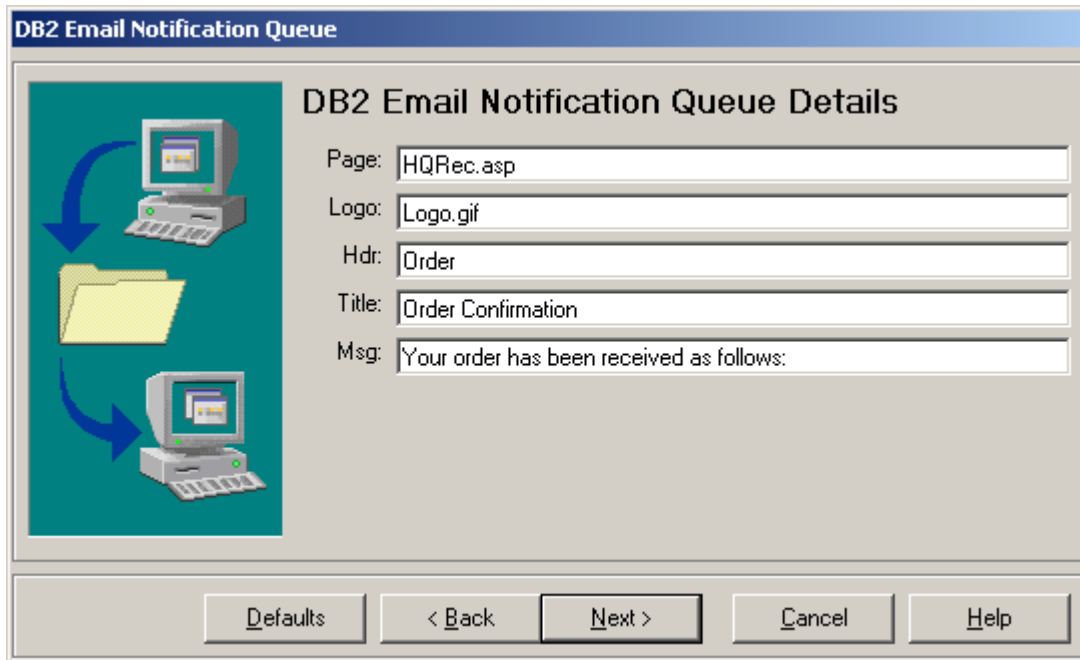
OrderTaker AAAA Special Item Specials ZZZZ Special

Template **Defaults** **< Back** **Next >** **Cancel** **Preview**

This screen contains several control buttons that follow:

Queue Details Template Button:

Clicking the Template Button shows the template information that will be used to process the email.



The screenshot shows a dialog box titled "DB2 Email Notification Queue" with a sub-header "DB2 Email Notification Queue Details". On the left, there is a graphic showing a folder icon and two computer icons with arrows indicating a process flow. On the right, there are five text input fields:

- Page: HQRec.asp
- Logo: Logo.gif
- Hdr: Order
- Title: Order Confirmation
- Msg: Your order has been received as follows:

At the bottom of the dialog box, there are five buttons: Defaults, < Back, Next >, Cancel, and Help.

Clicking the Defaults Button will apply the standard defaults from Member Maintenance.

Queue Details Defaults Button:

Clicking the Defaults Button from the Queue Details Screen will replace any manual changes you have made with the default settings from Member Maintenance.

Queue Details Back Button:

Clicking the Back Button from the Queue Details Screen will return to the Queue listing screen.

Queue Details Cancel Button:

Clicking the Cancel Button from the Queue Details Screen will return to the Queue listing screen.

Queue Details Preview Button:

Clicking the Preview Button from the Queue Details Screen will open Internet Explorer and show the currently selected item, as it would appear in the email.