Do you need to email documents from a 3rd party system but want to use an email address from Sage 200? Alternatively you may want to email a Sage document using an email address from a 3rd party database.

Recently we had a customer looking to email Invoices out of a 3rd party system, but they wanted to use a specific email address set up in Sage 200.

We got around this using Spindle Professional.

In our example we will use word as the 3rd party system we are sending the Invoices from, and obtain the Email addresses from Sage 200.

Firstly, to easily identify the correct email address to use in the Sage 200 I created a view within the Sage 200 Database.

SELECT dbo.SLCustomerAccount.SLCustomerAccountID, dbo.SLCustomerAccount.CustomerAccountNumber, dbo.SLCustomerAccount.CustomerAccountName,dbo.SLCustomerContact.ContactName,dbo.SLCustomerContactValue.ContactValue,dbo.SLCustomerContactValue.SYSContactTypeID,dbo.SLCustomerContactValue.IsPreferredValue,dbo.SLCustomerContactRole.IsPreferredContactForRole, dbo.SYSTraderContactRole.Role

FROM dbo.SLCustomerAccount INNER JOIN dbo.SLCustomerContact ON dbo.SLCustomerAccount.SLCustomerAccountID = dbo.SLCustomerContact.SLCustomerAccountID INNER JOIN dbo.SLCustomerContactValue ON dbo.SLCustomerContact.SLCustomerContactID = dbo.SLCustomerContactValue.SLCustomerContactID INNER JOIN dbo.SLCustomerContactRole ON dbo.SLCustomerContact.SLCustomerContactID = dbo.SLCustomerContactRole.SLCustomerContactID INNER JOIN dbo.SYSTraderContactRole ON dbo.SLCustomerContactRole.SYSTraderContactRoleID = dbo.SYSTraderContactRole.SYSTraderContactRoleID

WHERE (dbo.SLCustomerContactValue.SYSContactTypeID = 2) AND (dbo.SLCustomerContactValue.IsPreferredValue = 1) *AND* (dbo.SYSTraderContactRole.Role = 'Account') AND (dbo.SLCustomerContactRole.IsPreferredContactForRole = 1)

This lists the Preferred Email address, for the Preferred Contact associated to the 'Account' Role against each customer.

Next, within Spindle Tools we need to set up a Data Source in order to connect to the separate database where we are getting the data (email address) from (in our example this is actually Sage 200).

In Spindle Tools go to External Data

Within the Data Sources List, Right Click and Select New Data Source
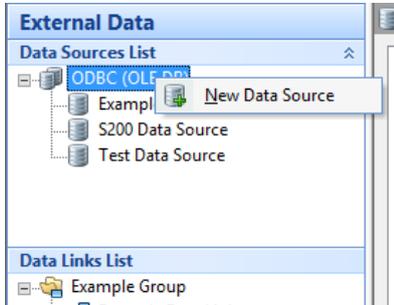
Enter a Name then select Edit

Select the Database provider, click Next.

Enter the Connection Details (these will be specific to the type of Database provider selected).

Click OK

In the Data Links section Right Click and select New Data Link (NB. You can group your different links).

Enter a Data Link Name

Select the Data Source you created above

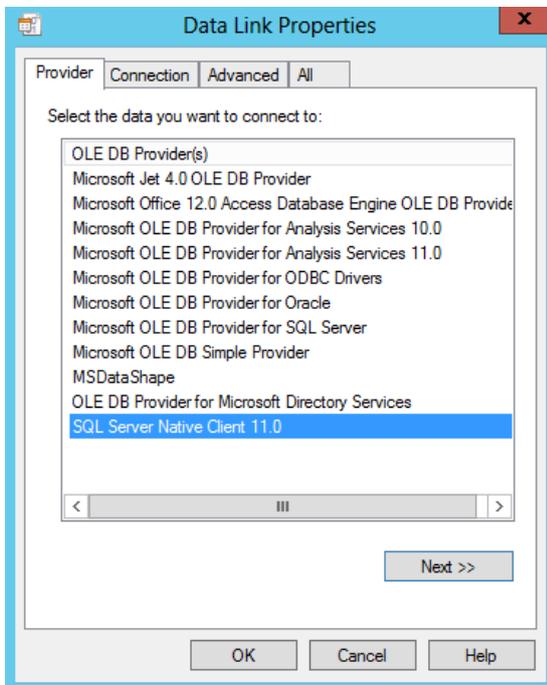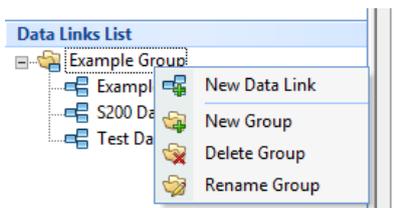Select the table (or in our case View) which contains the data required.

We then need to specify some data within the table that links to available data on the document we will send. We must specify at least the Primary Key information, but specifying a Secondary and Tertiary Key allows for a more defined filter (If primary keys were to contact duplicates).

We match a Field to a Spindle Command on our document. In our example below we are saying the CustomerAccountNumber will match the data assigned to ##VAR1 on our document (See Document set up).
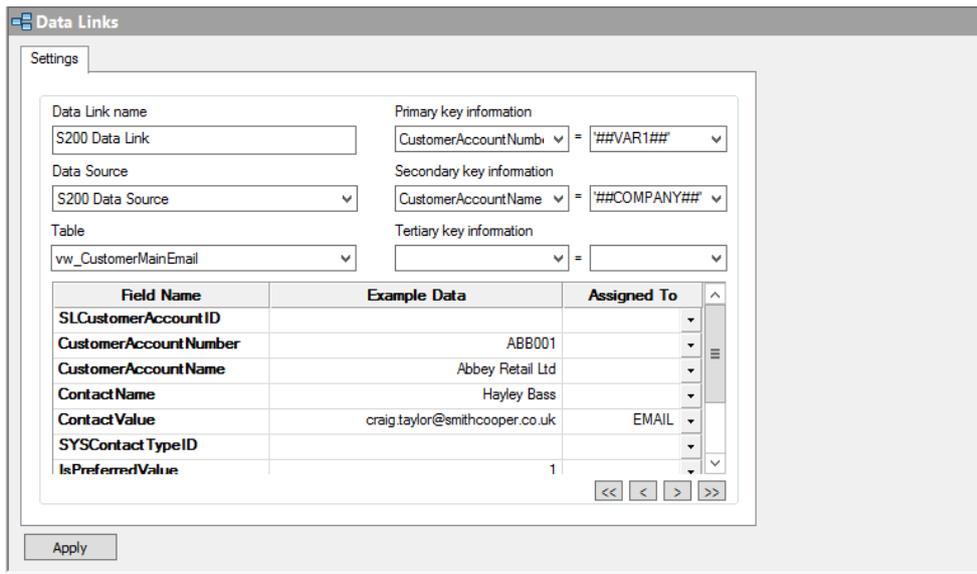
For the last part of the Data Links settings we need to specify the field(s) which we want to be captured from the 3rd Party. In our case we want the ContactValue to populate the ##EMAIL command.

Finally we need set up the Automation to use the Data source created.

In Document Automation
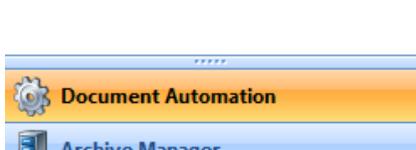
Open the Document Type and select the Operation which will have the data source assigned.

Select External Data and Click Add

Select the Data Link and Click OK.

NB. You could select multiple Data links if you were getting different data from different systems/databases.
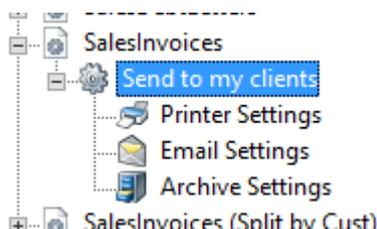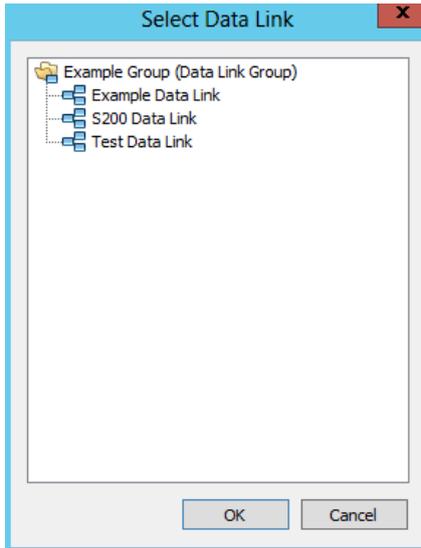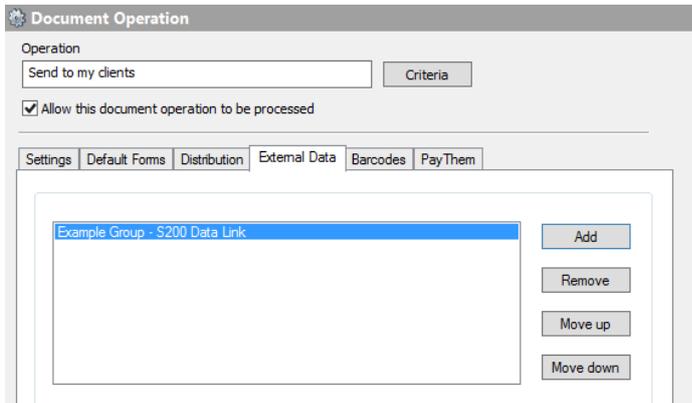
Finally we can set up the Document template we are looking to send, and ensure the required Commands are applied.

##CFG SalesInvoices ##
##VAR1ABB001##
##COMPANY Abbey Retail Ltd ##
##EMAIL##
##VAR2 00001000 ##
##VAR3 Hayley Bass ##

Home Style Kitchens

TEST INVOICE

Abbey Retail Ltd

Reference No.	00001000
Inv/Tax Date	10/03/2017
Customer No.	
Account No.	ABB001

Item Code	Description	Qty	Unit Price	VAT	Net
001-ACS/BLE	Blender	1	100.00	20.00	100.00
001-ACS/ESP	Espresso Machine	1	50.00	10.00	50.00

In our example we have applied the key ones:

##CFG – Standard spindle command to pick up the correct Document Automation

##VAR1 – Linked to the field containing our Primary Key information to match against our 3rd Party data (CustomerAccountNunber)

##COMPANY – Linked to the field containing our Secondary Key information (CustomerAccountName)

##EMAIL – Set as the command which will be populated from our Spindle Data Link.

NB. There is no data applied as in our example this is not available from Word, which is why we want to obtain it from the Sage 200 database via the Data Link.

Print the Document through Spindle Pro Auto as normal and the Email settings will apply.