Transaction Tracking per Customer

This how-to explains how to set up the Magaya Transaction Tracking feature for all your customers and how to customize it for specific customers.

What is Transaction Tracking?

The Transaction Tracking feature in Magaya software lets you send your customers an email message with a link that gives them up-to-the-minute status of their shipments, inventory, invoices, and more. Just like tracking a package that your ordered online and are waiting for its delivery, the Magaya Transaction Tracking feature is an easy way for customers to be updated about the transactions that you want them to see.

The feature gives you three options:

- Automatic: You can configure your Magaya software to send an email to a customer automatically whenever a transaction is generated.
- Manual: Set up your software to send an email message only when you want it sent.
- Customized: You can also customize which transactions each customer receives or turn off receipt of tracking email messages for specific customers

How to Set it Up

Activate Transaction Tracking for your Magaya system:

The Transaction Tracking feature is off by default, so you will need to contact Magaya to turn it on.

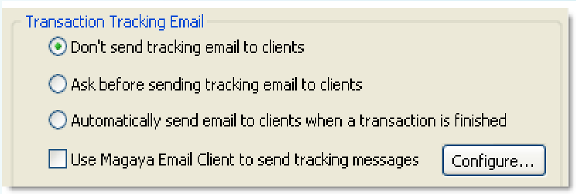
After it is activated, configure it to your needs:

1) Go to Maintenance > Configuration > Transaction Tracking

2) Click in the box next to "Allow by Transaction Tracking" at the top of the screen to add a check to the box. All the options are grayed out until you check this box and enable all the other checkboxes in this screen.

3) Check the boxes to choose which transactions you want to activate.

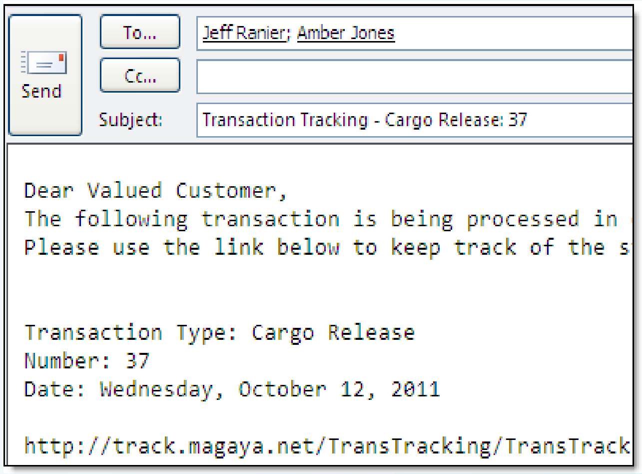
There are many other options in this screen such as selecting the language, the text of the email message, and more.



- **Automate**: You can configure the system to automate the process. Click the option "Automatically send email to clients when a transaction is finished." This means that each time a checkmarked transaction is created, the system will automatically send out a Transaction Tracking email message to the customer in that transaction.

  If you also check the option to use the Magaya Email Client to send tracking messages, the system will send the email messages in the background. In contrast using Outlook for email will show a notification as each message is sent.

- **Manual**: If you click the option "Ask before sending tracking email to clients", the system will create the email and display it on the screen. For example, you create a Cargo Release for a customer and click OK in the dialog box. An email message will pop up when you finish creating the release. The link and details will automatically be in the message. Review it, edit it if you want to and send the email message or cancel it. With this option, you choose how and when to send links. If the Customer profile has more than one contact name and email address, the system will include all the contacts in the email:



- **Customize**: To customize the process per customer, see the next section.

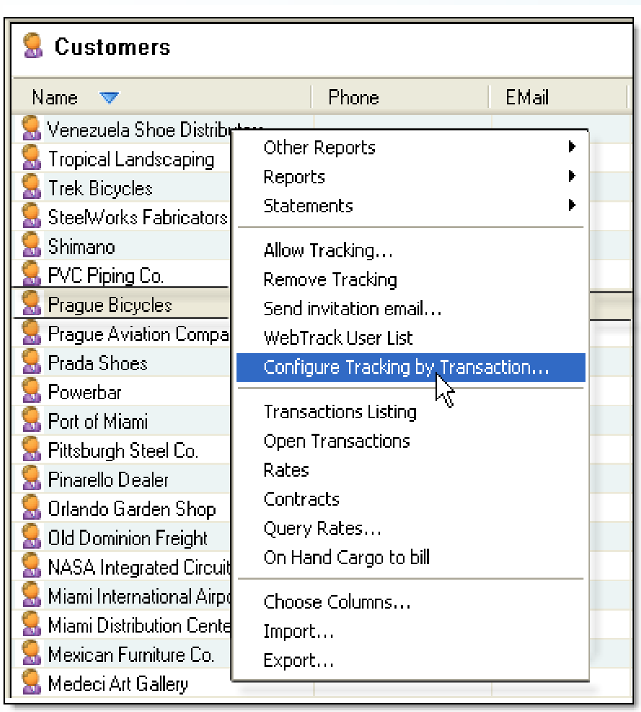
For details on the other options in the Configuration screen, see the chapter "Transaction Tracking" in the *Magaya Software Communications Manual* available on Magaya.com's Training page.

Click here to go to Page 2

Customize Transaction Tracking Per Customer

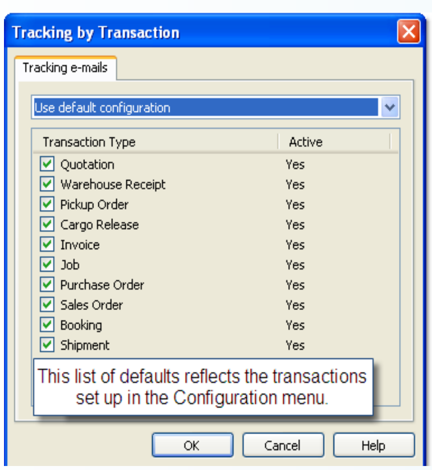
To customize how you send Transaction Tracking email messages to specific customers, vendors, or freight forwarders, set the tracking options by following these steps in this example:

1) Right-click on the customer name in the Maintenance > Customers list. Select "Configure Tracking by Transaction" from the pop-up menu:



This menu can also be accessed by selecting the customer name and clicking the Actions button.

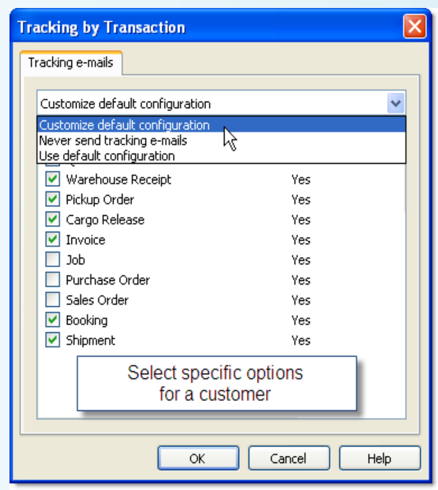
2) The dialog box that opens displays the default configuration. This example shows all the transactions are set as defaults for the customer:



This default list is the same as the list of transactions that you set up in the Maintenance > Configuration menu discussed at the beginning of this how-to tip.

When you are viewing the default list, you cannot click on any of the checkboxes to make changes. To activate the list and make changes, click on the dropdown menu to make one of the selections listed below:

- Customize default configuration: This enables you to select the specific transactions that you want to send to this customer. Uncheck any transactions you do not want sent. This will override the selections made in the Maintenance > Configuration settings for Transaction Tracking just for this customer.



- Never send tracking emails: This will turn off all the transactions for this customer, and the system will not send any Transaction Tracking emails to this customer. When you select this option, all the checkboxes will uncheck; you do not have to uncheck them one by one.

- Use default configuration: If some time later you want this customer to have the same settings that you set in the Maintenance > Configuration menu for everyone, select this default option from this dialog box.

3) Click OK to save the configuration.

Conclusion

Transaction Tracking works with any Magaya software. Contact Magaya Corporation to activate this feature and begin customizing how you send tracking links to your customers.