



Discussion Document 10 Email Setup for Invoice Printing

Discussion Topics

Setting up the Email Control record to facilitate the ability to email out Invoices to Customers.

Email Control File

A screenshot of a Windows-style dialog box titled "Email Control file". The dialog is divided into three main sections: "E-Mail Options", "General", and "CRM".
- **E-Mail Options:** Contains four text input fields: "Email CTL" (with "EMAIL_CTL" entered), "Program Location" (with "d:\data\csoft7" entered), "Host" (with "smtp.ihug.co.nz" entered), and "From" (with "csoft@csoft.co.nz" entered). Below these fields is a checked checkbox labeled "Send Copy to Self".
- **General:** Contains a group of radio buttons for selecting an email system: "Postie", "Microsoft" (selected), "VBScript", "Csoft AutoMail", "Csoft AutoMail V3.0", "OI V7.2", "Selected Location", and "Use Local drive" (selected).
- **CRM:** Contains a group of radio buttons for selecting an email system: "Postie", "Microsoft" (selected), "VBScript", "Csoft AutoMail", "Csoft AutoMail V3.0", "OI V7.2", "Selected Location", and "Use Local drive" (selected).

Email Ctl - This indicates the control file that is being set up. Leave as is.
Program Location - This is the location of CSoft within your computer.
Host - The email address of the host
From - The email address of the sender.

Selection Options

a) Send Copy to Self – This sends a copy of the Invoice to sender. (address of the "From" field)

b) General & CRM

Next, you will need to select the type of email system you use. By default, use Microsoft. For systems that have the CRM module installed as well, please use the same options as that of the General options.



CSB Management

Update Customer Setup

The next step is to setup the contacts and allocate these contacts in the customer entry screen.

The screenshot shows two tables. The first table, 'Contact Names', has columns: Contacts, Contact Gp, Phone, EMAIL, DOB, and Comments. It contains two rows: John Doe with email johnD@tra.co.nz and Jane Doe with email janeD@webmail.com. The second table, 'Related Customers', has columns: Cust No, Cust Name, and Credit Limit. It has four rows numbered 1 to 4, all of which are currently empty.

- 1) Go to Customer Setup Screen and enter in the required customer number.
- 2) Scroll down to the Contact Details Page (2nd Page).
- 3) Enter in contact details. (see image above as an example).
- 4) Next, go to the last page.
- 5) Check the 'Email Invoice' Box.
- 6) Select the format of the statements to be emailed out. (this is normally PDF)

The screenshot shows the 'Customer entry screen' with several tabs: Main, More, Bank, Credit, Web, and Email. The 'Email' tab is selected. There are two 'Format' sections. The first section has 'Email Invoice' checked and 'PDF' selected as the format. The second section has 'Statement' checked and 'PDF' selected as the format. Both sections have an 'Emails' field with a list box containing two empty rows.

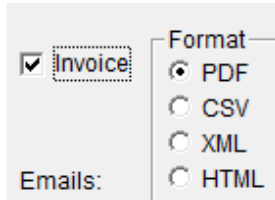
- 7) Next, use the options to select the contacts that should receive the e-mailed statements.

The screenshot shows a dialog box with a 'Key' field and a list box containing two items: '1 John Doe' and '2 Jane Doe'. The first item is selected. Below the list box are four buttons: OK, Cancel, Search..., and Print.

CSB Management



7) After you have selected the recipients of the Invoices they will be added to the email list table. You can select more than one recipient to receive the statements via email. See Screen shot below.



Format

Invoice

PDF

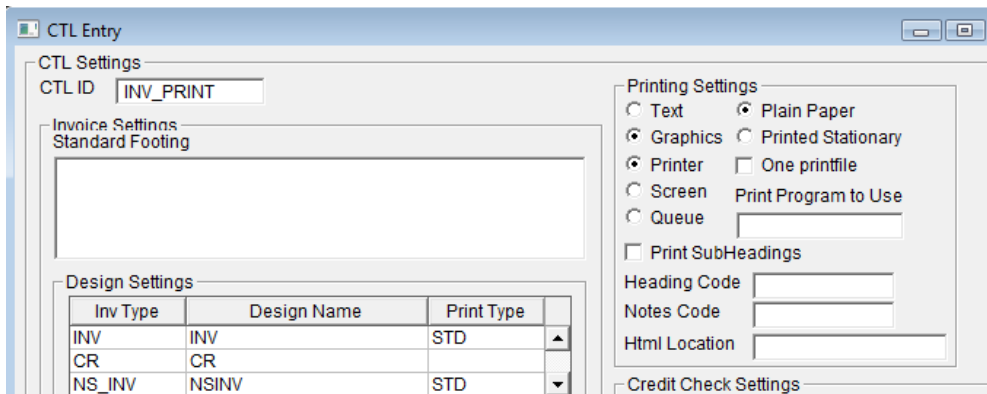
CSV

XML

HTML

Emails:

Printing of Invoices



CTL Entry

CTL Settings
CTL ID

Invoice Settings
Standard Footing

Design Settings

Inv Type	Design Name	Print Type
INV	INV	STD
CR	CR	
NS_INV	NSINV	STD

Printing Settings

Text Plain Paper

Graphics Printed Stationary

Printer One printfile

Screen Print Program to Use

Queue

Print SubHeadings

Heading Code

Notes Code

Html Location

Credit Check Settings

In the above entry screen in Housekeeping called Invoice selection, the emailing of Invoices depend on the setting of Printer or Screen as the default option.

If your default is set for Invoices to print to screen then you will have to print the invoices from Print Invoices in debtors reports, unselect ignore email settings and print it to printer to email them out.

If the Printer option is selected, then the invoices will be emailed immediately upon printing from the Invoice entry screen, or from the print invoices screen as above.