

Mass Communication

“mass comms”

LivestockOffice

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MASS COMMUNICATIONS

OVERVIEW

Communicating is essential for successful efficient business. Whether with your staff, customers or suppliers, improvements in communication will help your business.

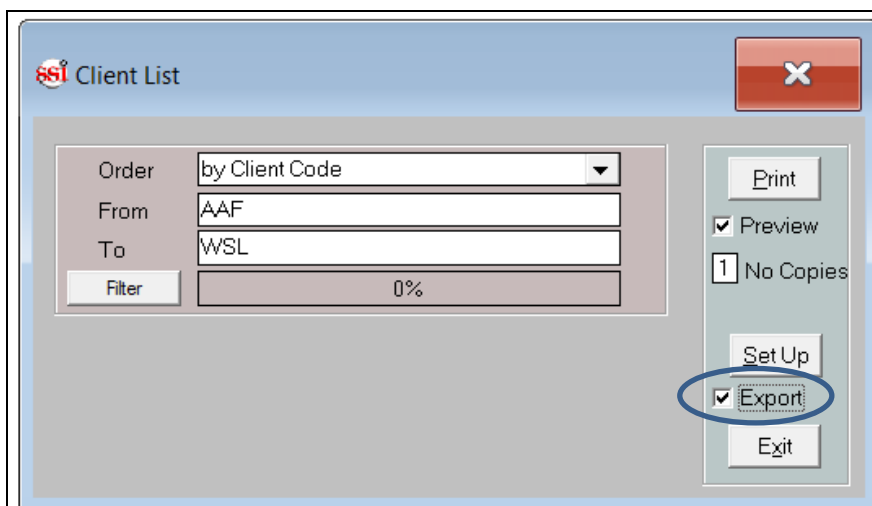
There are some modules in LivestockOffice that help with communication, they are the **Fax Module**, **PDF Module** and **Email Module** options. These Modules make it easier and more immediate to send information by fax and email. The PDF module allows you to create 'electronic' copies of reports.

ADOBE PDF MODULE

The PDF module allows for easy creation of PDF files from any print/export option. This requires a simple one off installation on your server. It is very simple to use. PDF files are a common format that essentially are an electronic print out of a document. They are a smaller file size making it ideal for emailing.

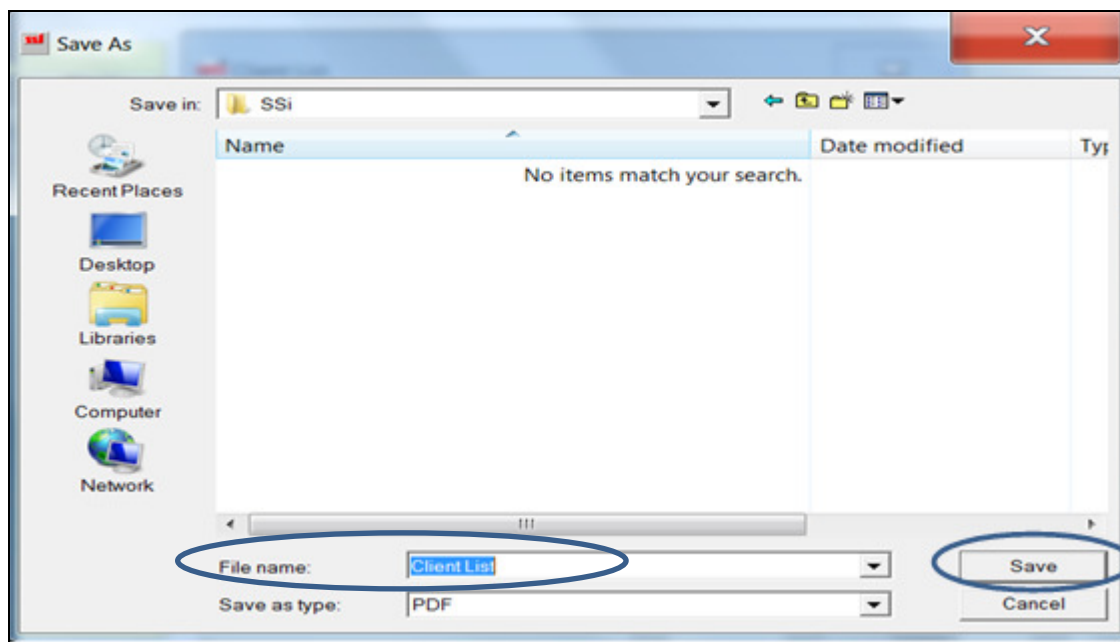
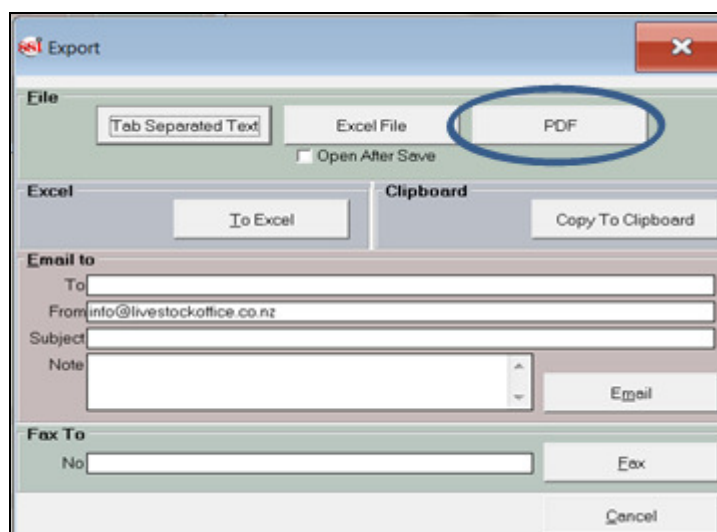
To create a PDF of a report

- tick **export** on the report screen
- click **print**.



An export options screen appears.

- Click **PDF** in the top right corner.
- You will be asked to select a location and a name for your file.



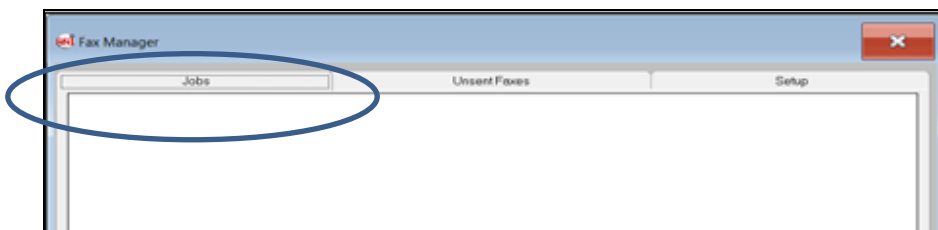
Select the location and the name for the PDF file.
Click **SAVE**.

FAX MODULE

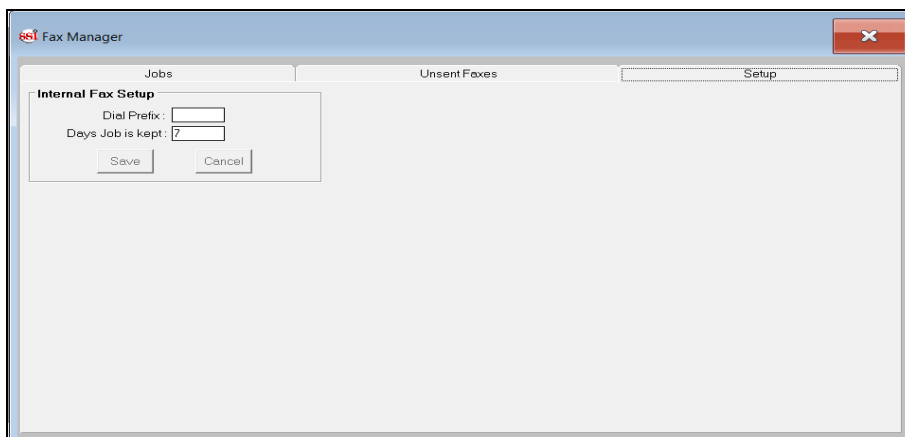
The Fax Module allows Statements or Invoices and Reports to be faxed. It handles bulk faxing easily and tracks each fax sent. It will also cut back on paperwork.

The Fax Module uses 'Windows Fax Services' that needs to be installed on your server with a physical modem attached.

This needs to be setup by your IT person and tested that it is working correctly. You can then check the log from the **Main Menu > File > Fax Manager**.



A Fax could appear on **JOBS** list as sent while in fact it has only been transferred to Windows Fax Services. You will need to use the software with Windows Fax Services to confirm if the Fax has been sent.

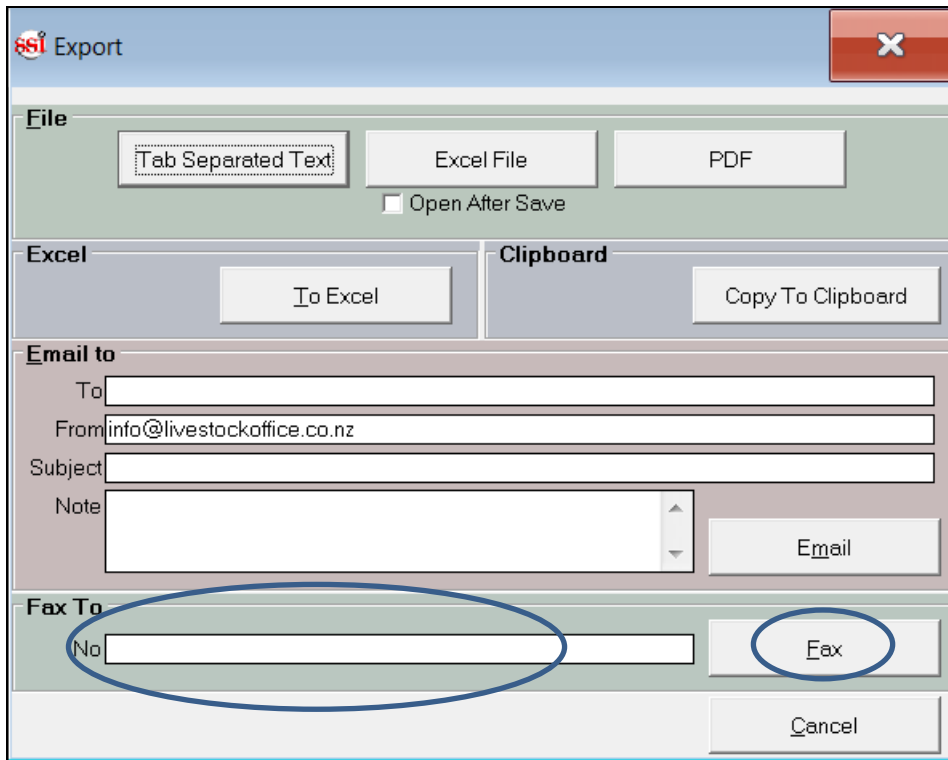


Field	Description
Jobs Unsent Faxes Setup	Lists all the jobs that have been transferred to fax Lists the jobs that have not been sent and shows any errors with transmission Allows you to set up the dial prefix - if you need to dial internally to access the Fax line. The days a Job is kept will be how long the jobs will show in the sent and unsent lists.

Note: From these lists you can also click on a job to delete or preview.

Fax a report by ticking **export** on the report screen and clicking **print**.

- The export screen appears, as below
- Enter the Fax number and click **Fax**.



esi Export

File

Tab Separated Text Excel File PDF

Open After Save

Excel **Clipboard**

To Excel Copy To Clipboard

Email to

To

From info@livestockoffice.co.nz

Subject

Note

Email

Fax To

No Fax

Cancel

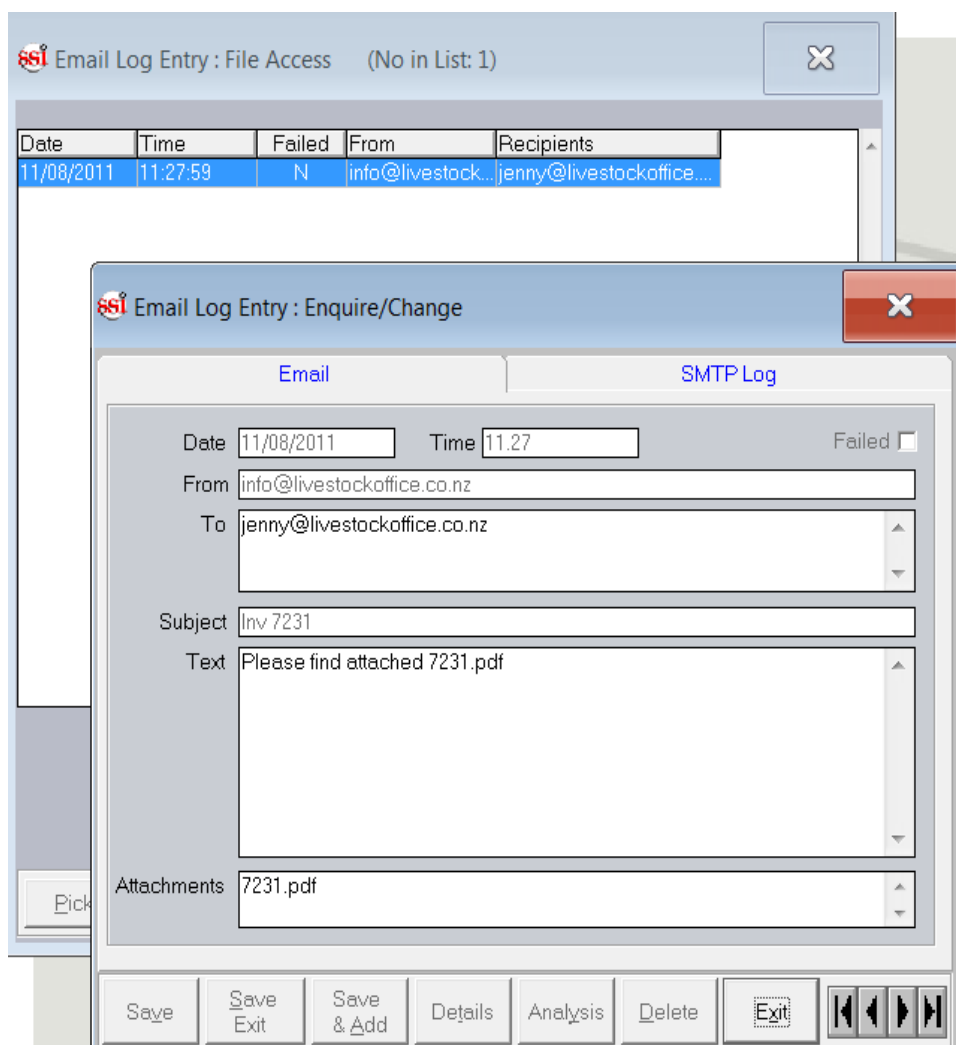
EMAIL MODULE

The system must be registered with Fax (Mass Comms) and PDF modules for email to be available.

This adds two new options on the **File Menu**

- Email Setting
- Email Log.

The Email Log shows a list of all emails sent from the system in the last week and whether or not they were sent successfully.

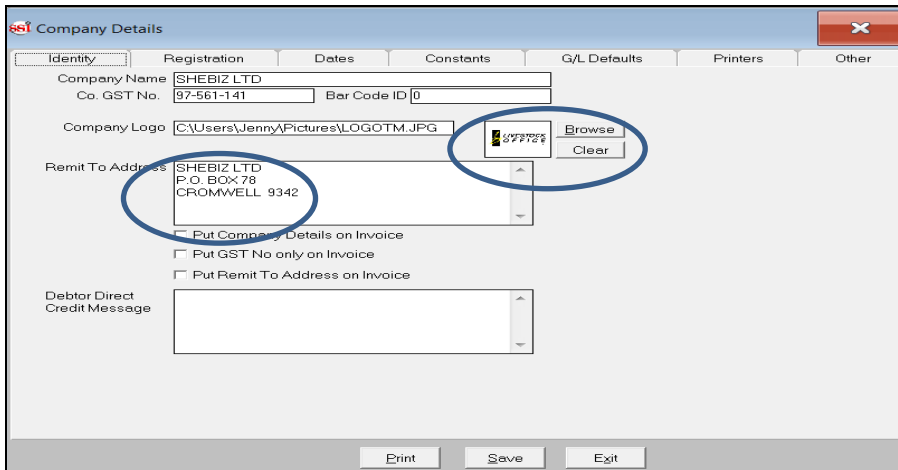


Click Display

- This shows you who the email was sent to and who it was from on what date, at what time
- It will show you the subject, text and if there were any attachments.
- The SMTP log shows a log of the message being sent, to track any problems.

Company Details - Identification

If you use 'pre-printed' Invoice paper, then you have to complete some address details which you want printed on any emails sent.



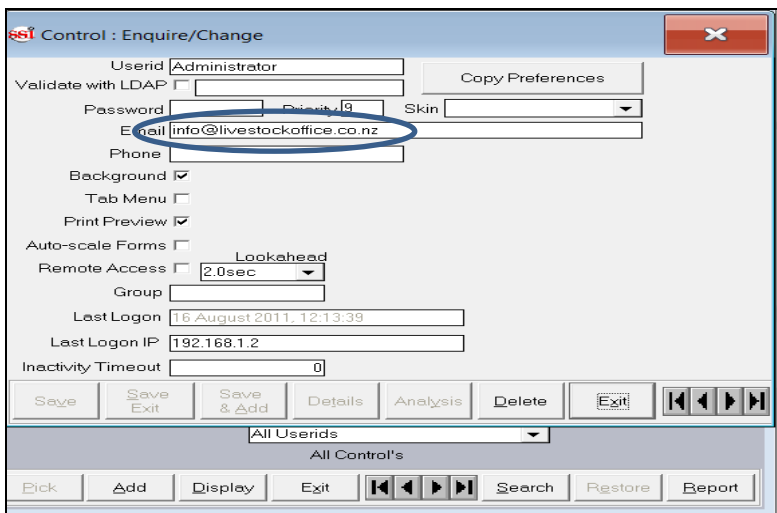
Go to **File > Company Details > Identification**

- Fill in the Remit To Address
- Browse and insert your Logo from its file location - it will be a .jpg file.
DO NOT tick any tick boxes.

If you use plain paper, **you have to** tick the appropriate tick boxes for company information to print on the emails.

- Save.

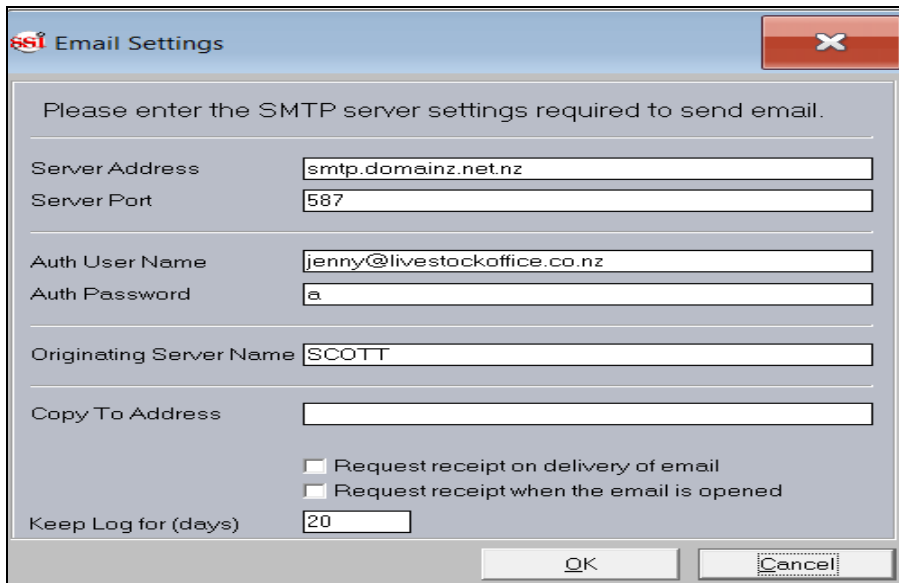
Company Details > User File



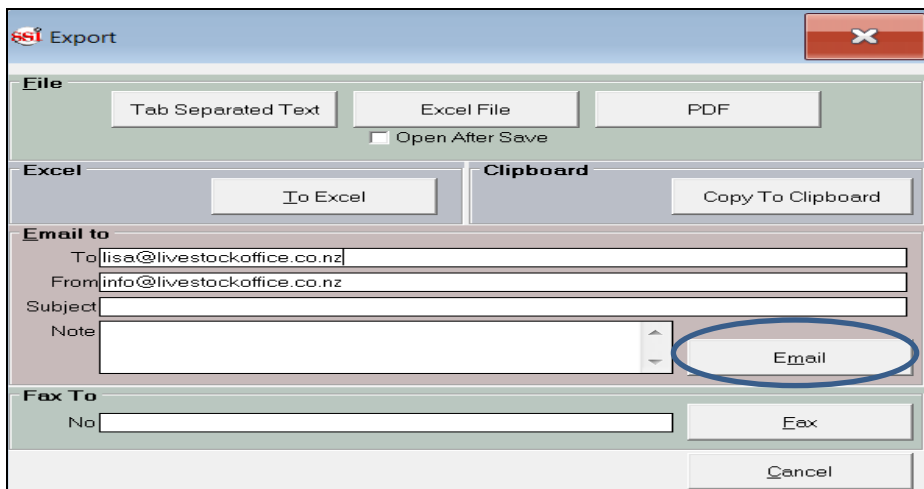
- Go to the **User File** and select your Userid. Make sure your email address is entered.
- This will ensure that your address will appear as the FROM address on any emails sent.

Email Settings

The email settings is where you configure how the program will talk to the Company's email server. The email settings need to be set up by your IT person.



The email module works by giving you another export option. If you tick **export** on reports and then click **print**, you will get the following export options:



The email option allows you

- to enter a **To:** email address,
- enter a subject header
- Add a note or the body of the text.
- Once completed, click **email**, this sends the information to your email program (setup in the settings) and will have a report attached as a *.PDF.

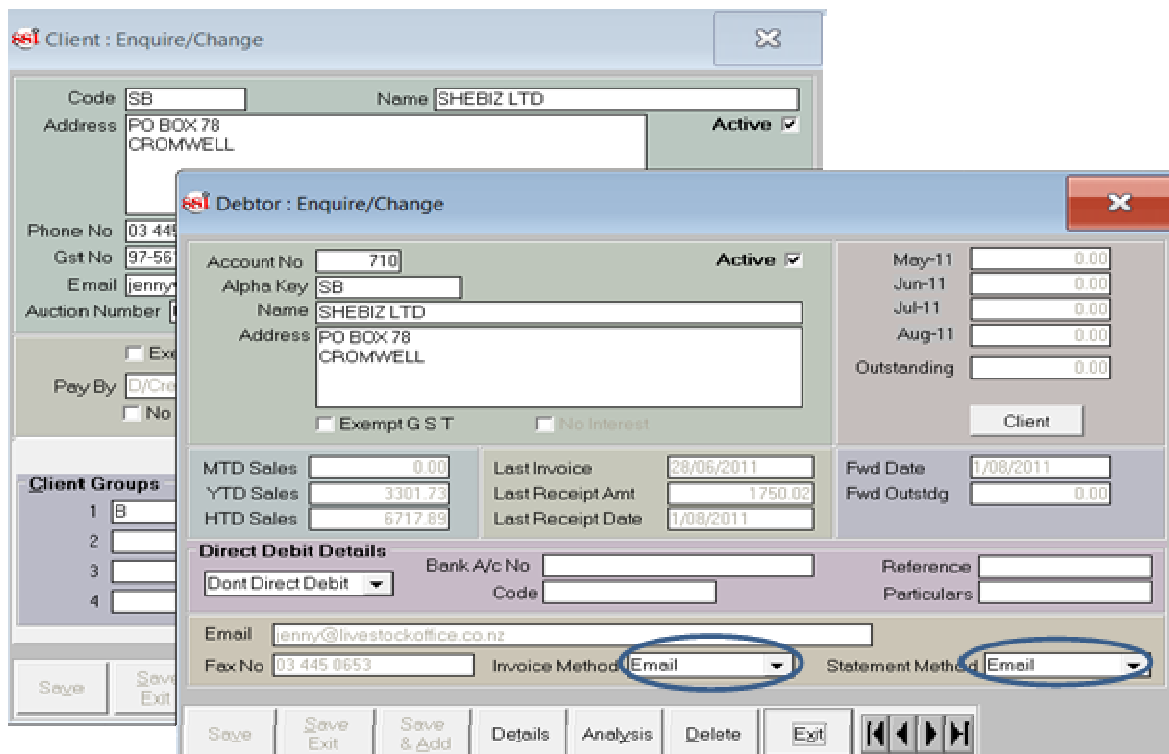
EMAILING INVOICES AND STATEMENTS

You also send Invoices and Statements as emails.

Customers / Clients can be set up to receive invoices and statements via email. These are sent as PDF attachments

From the LivestockOffice Main Menu:

- select **People > Clients** > highlight the Client
- enter the client email address
- and then select **Debtor** and **Creditor**, and change the invoice and statement methods to email



The screenshot shows two overlapping windows in the LivestockOffice software. The background window is 'Client: Enquire/Change' for 'SHEBIZ LTD' with address 'PO BOX 78 CROMWELL'. The foreground window is 'Debtor: Enquire/Change' for the same client. In the 'Debtor' window, the 'Invoice Method' and 'Statement Method' dropdown menus are both set to 'Email' and are circled in blue. Other fields include 'Account No' 710, 'Alpha Key' SB, 'Active' checked, and various sales and invoice statistics.

The Invoices and Statements will only be emailed when a **print** option is activated via **Sale Options** within a sale, or through the **Reports Menu** using the chosen Sale Invoice type.

Note: Preview must not be ticked

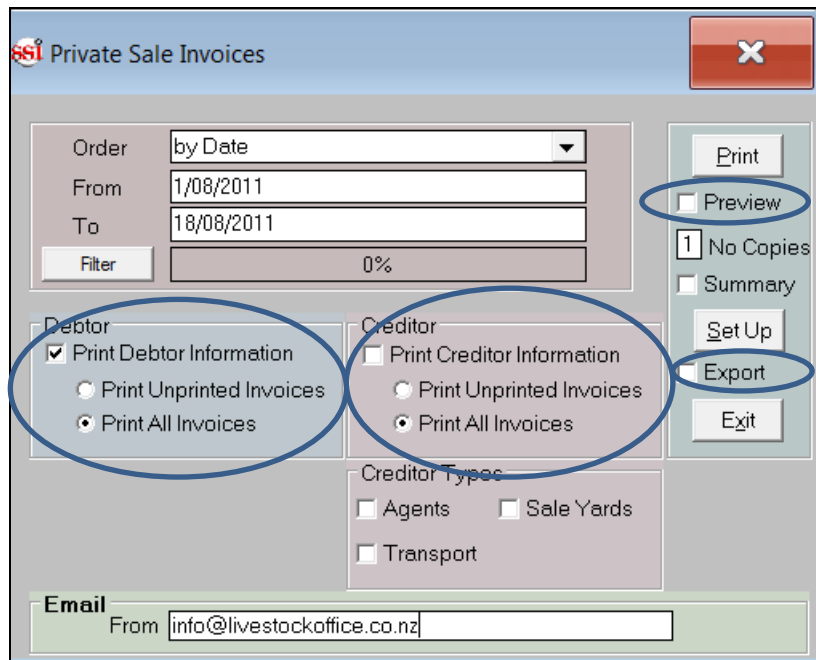
Note: This will only work if the Customer / Client and user all have valid email addresses

From the LivestockOffice Main Menu

- select **Reports > Private Invoices** (or other Sale type)

The window below will appear.

- Select the Order **By Date** or **By Sale No** and
- enter the **From** and **To** selections

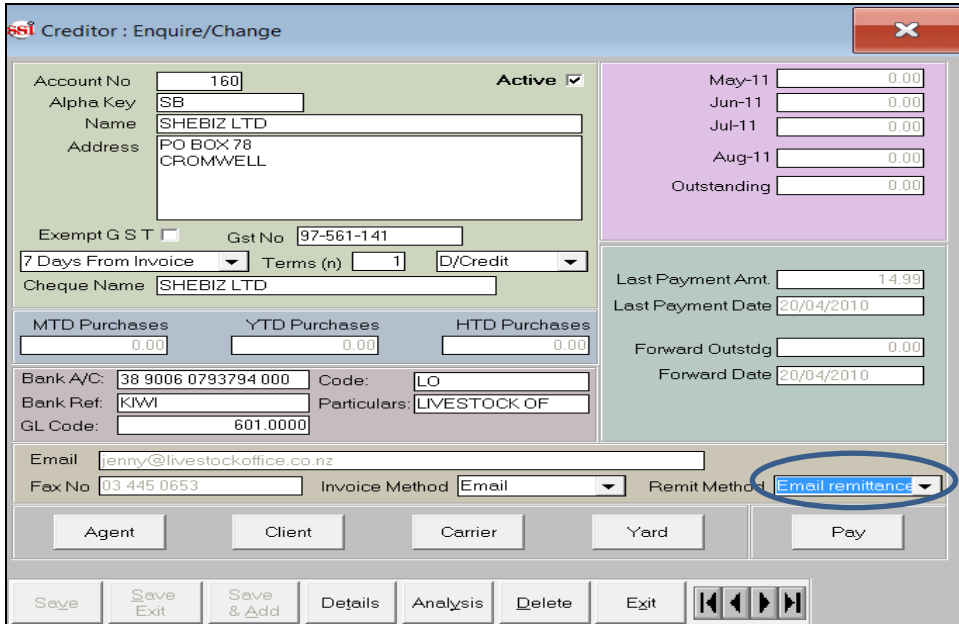


- Make sure to place a tick in the **Print Debtor information** and / or **Print Creditor information**
- Tick either **Print Unprinted Invoices** or **Print All Invoices**.
Note: If you have previewed individual Invoices first then you must select 'Print All Invoices' as this option.
- Make sure you remove the tick from the **Preview** box
- and make sure there is **NO** tick in **Export**.
- Click **Print**.

All the Clients with email chosen in their setup as the method for sending Invoices, will automatically be sent an email with the Invoice as a PDF attachment.

To check, go to: **File > Email Log** and view the details of emails sent during the past few days. The email log will also show any email failures, to follow up on.

Similar to Client invoices and statements, remittance method on a supplier can be changed to email also.



ss1 Creditor : Enquire/Change

Account No: 160 Active

Alpha Key: SB

Name: SHEBIZ LTD

Address: PO BOX 78 CROMWELL

Exempt G S T Gst No: 97-561-141

7 Days From Invoice Terms (n): 1 D/Credit

Cheque Name: SHEBIZ LTD

MTD Purchases: 0.00 YTD Purchases: 0.00 HTD Purchases: 0.00

Bank A/C: 38 9006 0793794 000 Code: LO

Bank Ref: KIWI Particulars: LIVESTOCK OF

GL Code: 601.0000

Email: jenny@livestockoffice.co.nz

Fax No: 03 445 0653 Invoice Method: Email Remit Method: **Email remittance**

May-11: 0.00 Jun-11: 0.00 Jul-11: 0.00 Aug-11: 0.00 Outstanding: 0.00

Last Payment Amt: 14.99 Last Payment Date: 20/04/2010

Forward Outstdg: 0.00 Forward Date: 20/04/2010

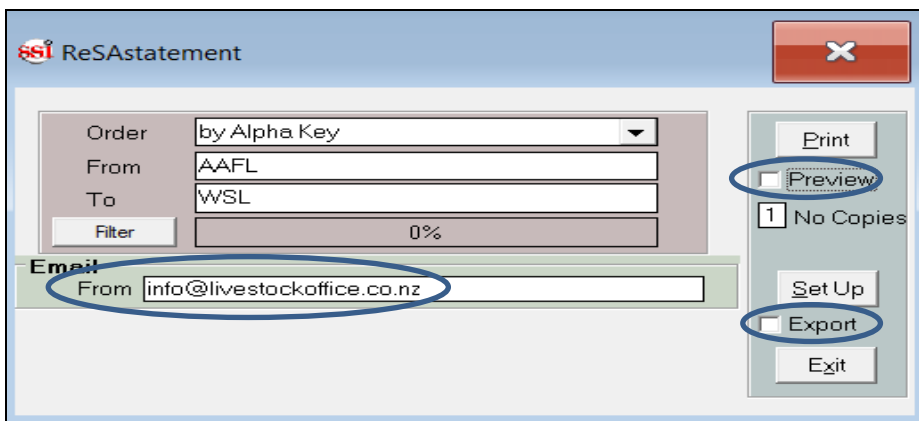
Agent Client Carrier Yard Pay

Save Save Exit Save & Add Details Analysis Delete Exit

It needs a valid email address on the user and supplier and preview **NOT** ticked.

Emailing Statements

All Debtors who have a valid email address and 'email' is selected for the sending of their Invoices and/or Statements will receive their paperwork via email.



ss1 ReSastatement

Order: by Alpha Key

From: AAFL

To: WSL

Filter: 0%

Email From: **info@livestockoffice.co.nz**

Print

Preview

1 No Copies

Set Up

Export

Exit

From LivestockOffice Main Menu

- Select **Debtors > Statements**
- Make sure a valid email address is entered in the **Email From** field.
- Take the tick out of both **Preview** and **Export**.
- Click **Print**.
- Check the Email Log under the **File Menu**.