

Livestock Office – Email

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Mass Communications

The mass communications module includes printing to PDF, Faxing and Emailing from within Livestock Office.

- Debtors and Creditors can be set to receive their invoices and statements by email and these are sent automatically when invoice or statement batches are printed.
- Multiple email addresses can be entered so that a copy is automatically sent to say the Accountant or Manager as well as the client.
- Individual Invoices and Statements can be emailed even if the Debtor/Creditor is not setup for automatic emailing.
- All reports, including invoices, system reports, and custom reports etc can be saved to a PDF file or emailed.
- An email signature can be set up for each user of the system. This will be included at the bottom of emails sent from Livestock Office.
- Emailed Invoices and Statements use the logo and company details defined in the company details in their header even if your normal printed invoices do not have these details shown.
- Terms and Conditions of sales can be sent with emailed invoices either as a separate document or as an image appended to the last page of the invoice.
- A log is kept of all emails sent from within Livestock Office so you can quickly check that the correct emails have been sent and to assist with any troubleshooting.

Email Setup

Livestock Office main menu > File > Email Settings

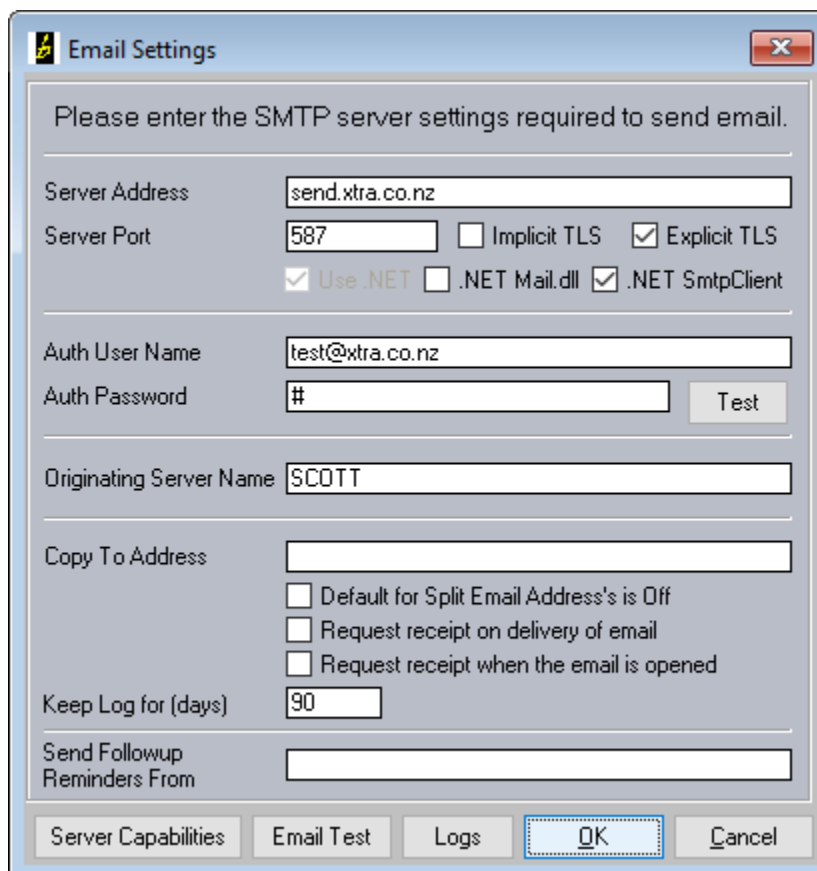
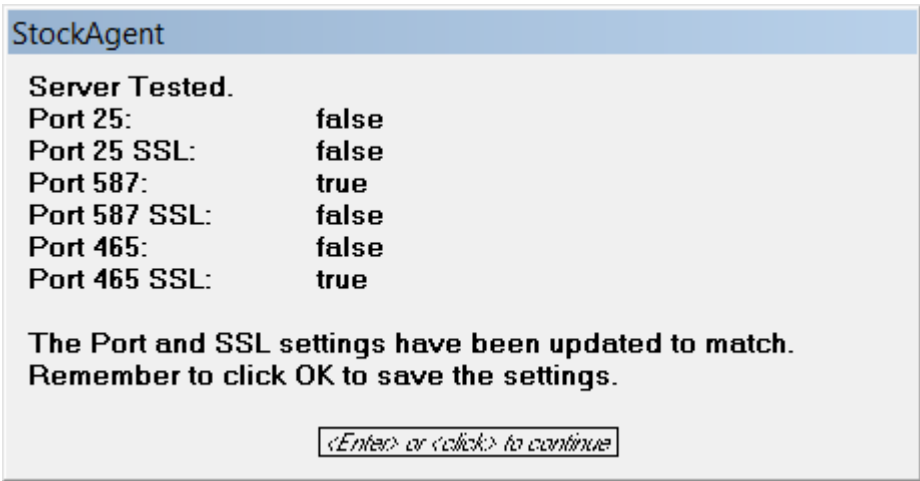


Figure 1: Email Settings

Field	Description
Server Address	Enter the smtp address for your email provider.
Server Port	Enter the port number. Your email provider will be able to give this to you.
Implicit TLS	Where the SMTP client immediately connects using a secure channel.
Explicit TLS	Where the SMTP client immediately connects on an unsecure channel first then secures the connection by issuing STARTTLS command. This mode is sometimes called TLS.
Use .NET	Uses the .NET sockets to send the email.
.NET Mail.dll	Uses the Mail.dll component to send the email.
.NET SmtplibClient	Uses the built-in SmtplibClient to send the email.
Auth User Name	The username for the account.
Auth Password	The password for the account. Click the Test button to test the authentication.
Originating Server Name	This name is used by mail servers to track the origin of mail. The name of your server or domain name is appropriate.

Continued...

Field	Description
Copy To Address	Enter a valid email address to send copies of all emails to.
Default for Split...	Not used in Livestock Office.
Request receipt...	Tick the appropriate options to request receipts when the email is delivered or opened.
Keep Log for (days)	Enter the number of days to keep the email log. The minimum value is 7 days. Documents (invoices, statements, payslips etc) are emailed in PDF format. Consideration should be given to disk space capacity if choosing to keep the email log for a long period.
Send Followup...	Not used in Livestock Office
Server Capabilities	<p>Click to test the Server entered. The Ports and SSL settings available for the server will be tested, the results displayed and the settings updated if required.</p> 
Email Test	Click to send a test email using the current settings.
Logs	Opens the Email Log.
OK	Save settings and Exit.
Cancel	Exit the window without saving any changes.

Email Log

Livestock Office main menu > File > Email Log

The first screen lists all the emails initiated from within Livestock Office.
Emails that have failed to send are displayed in **Red**.

Click on any line to view the details of a specific email.

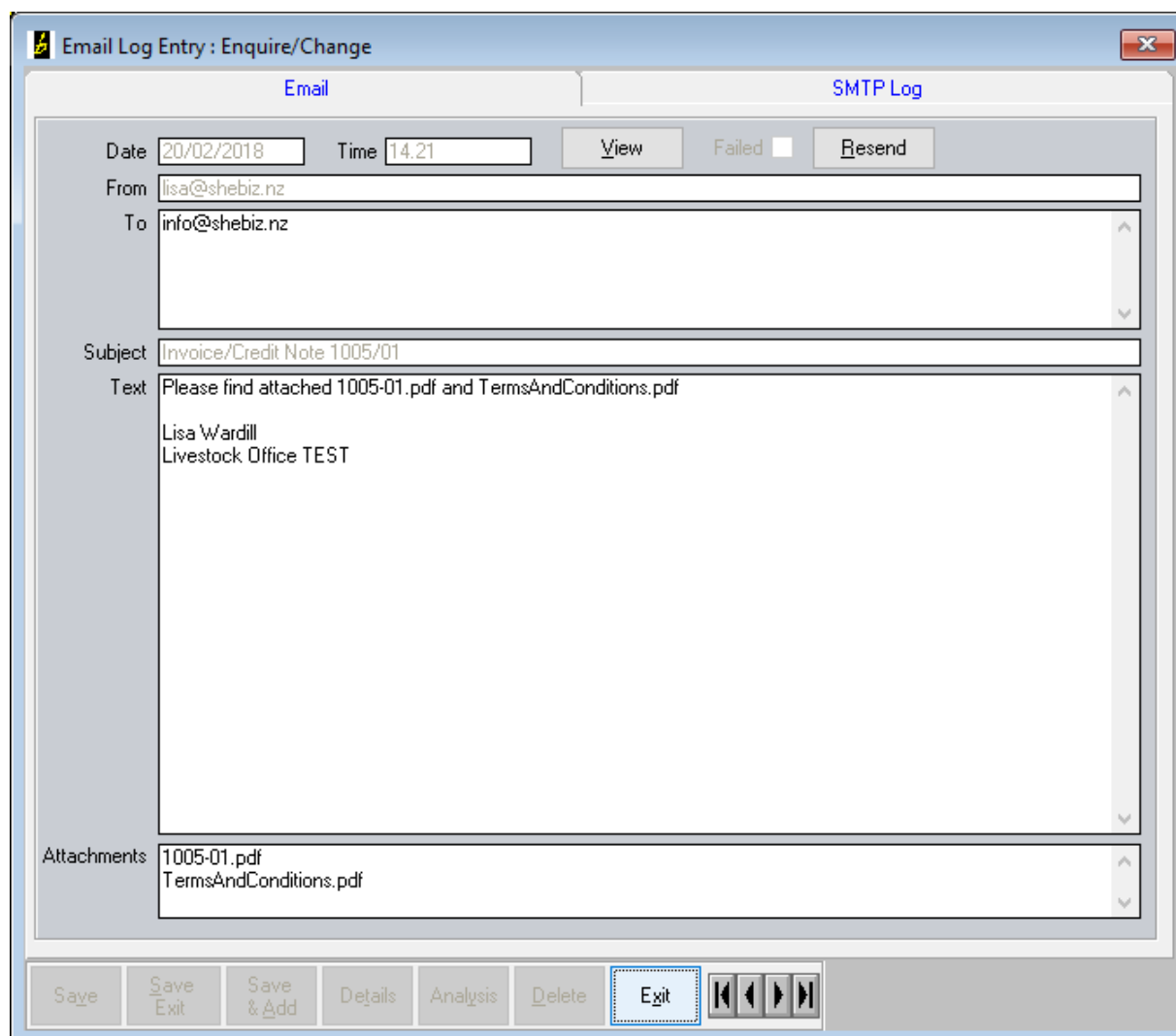
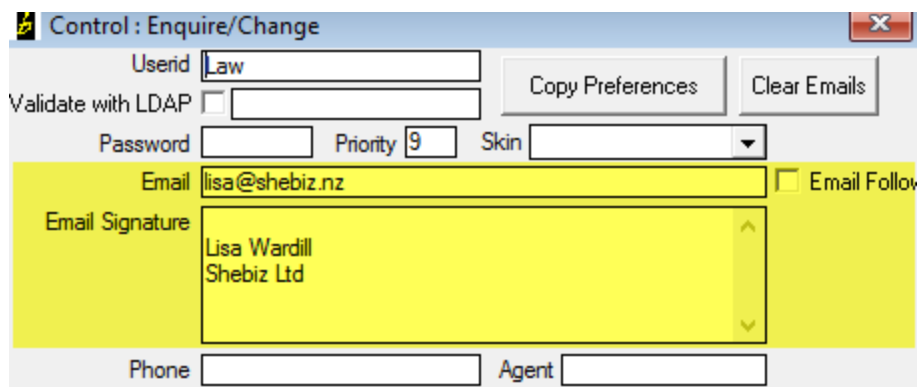


Figure 2: Email Log

- Shows the details of sent messages.
- Click the **View** button to view the actual message in your default email program.
- Click the **Resend** button to resend the email.
- Click on the SMTP Log to see a full log of the transmission. This can be useful for troubleshooting if the email has Failed.

User Setup

Livestock Office main menu > File > User File



The screenshot shows a window titled "Control : Enquire/Change". It contains several input fields and buttons. The "Userid" field is set to "Law". There are buttons for "Copy Preferences" and "Clear Emails". A "Validate with LDAP" checkbox is present. The "Password" field is empty, and the "Priority" is set to "9". The "Skin" field has a dropdown arrow. The "Email" field is set to "lisa@shebiz.nz". The "Email Signature" field contains the text "Lisa Wardill" and "Shebiz Ltd". The "Email Follow" checkbox is checked. The "Phone" and "Agent" fields are empty.

Figure 3: Email settings on User file

- Enter a valid email address for each user of the system. This will be the default From address used for emails sent by this user.
- Enter a signature. If entered, this will print at the bottom of the email.
Note: This example has a blank line first (hold Shift key and press Enter). This is to separate the signature from the rest of the email text.
If the Email Signature field is left blank, the Company Name will print at the bottom of the email body.
- Tick **Email Follow** to have a copy of each email sent from this user to the user's email address.

Company Setup

Livestock Office main menu > File > Company Details > Email tab

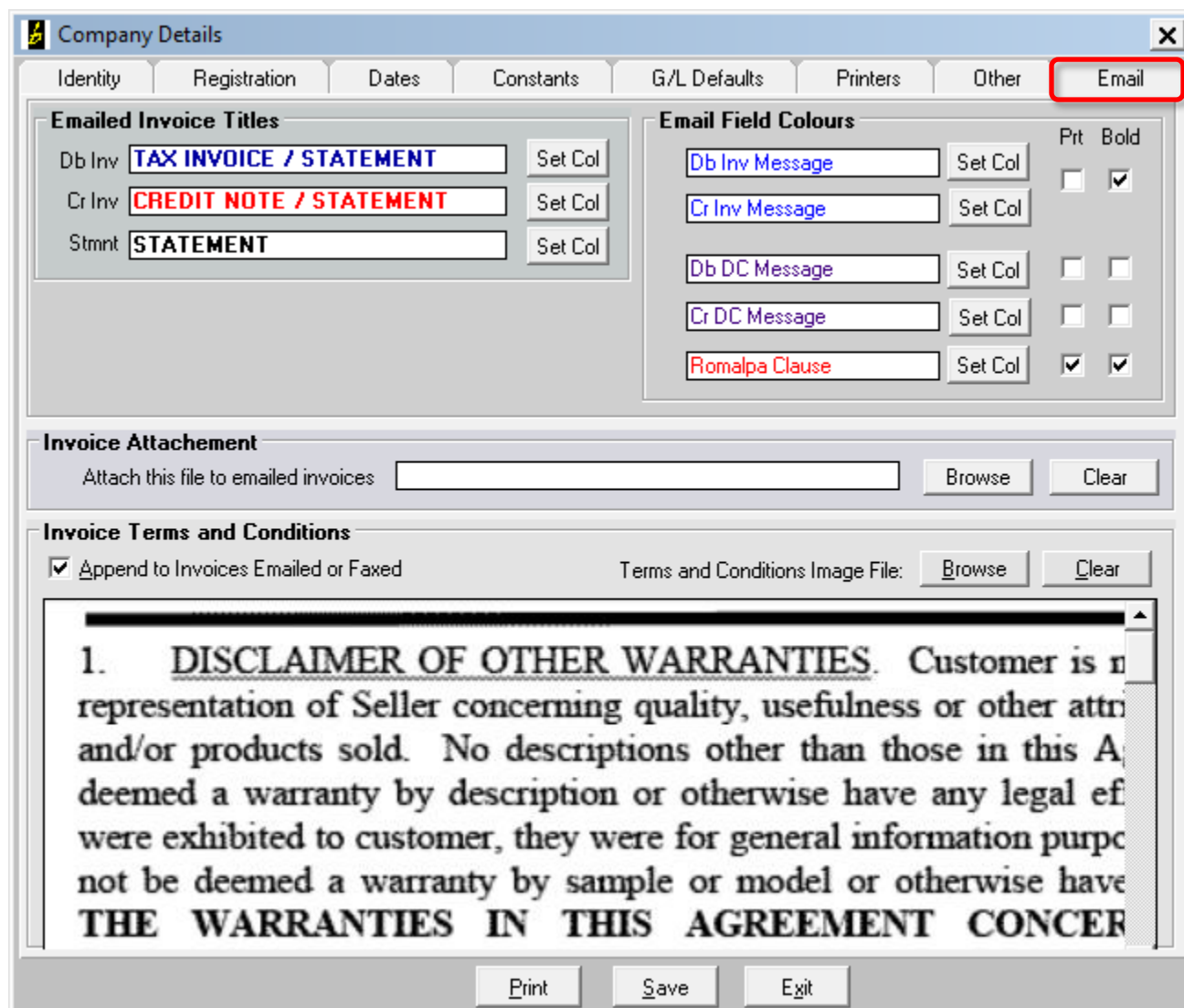


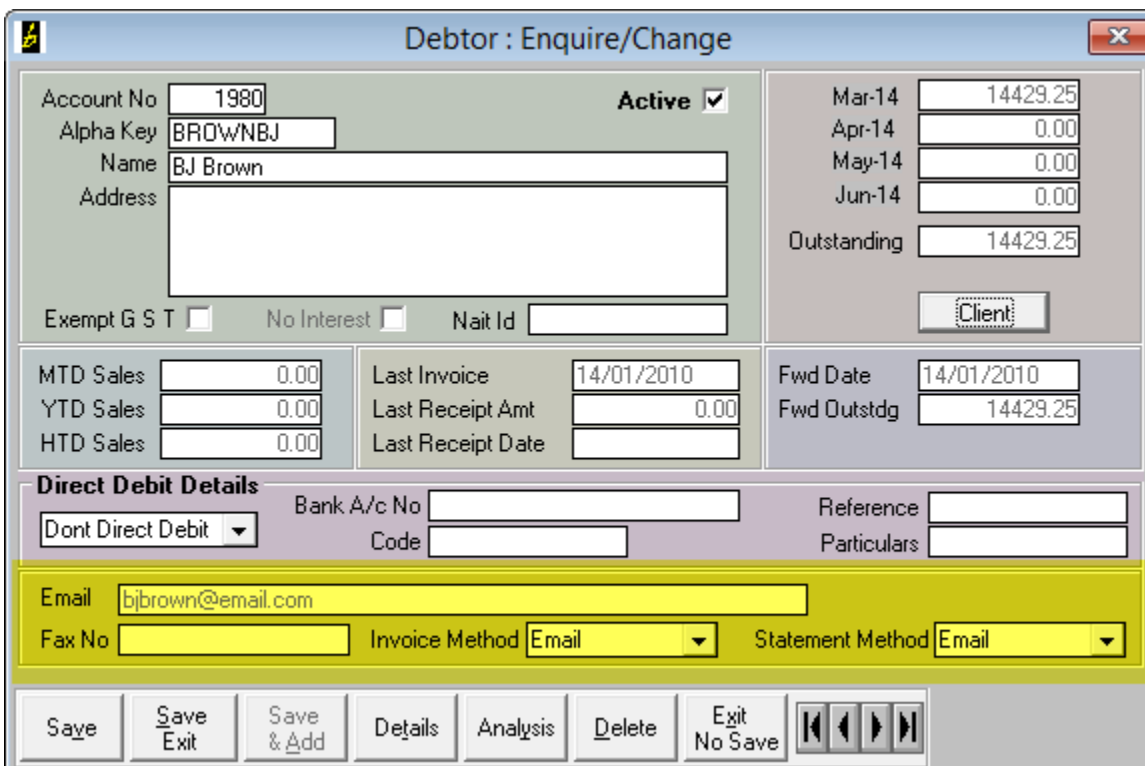
Figure 4: Email settings on User file

- Set your preferred Titles for emailed invoices and statements.
- Set the desired colours for the Titles and various messages. The default is Black.
- Tick **Prt** to apply the colour to printed invoices as well as emailed invoices.
Tick **Bold** to have the message print in bold text on both printed and emailed invoices
- The **Invoice Attachment** section allows you to load in a file that will be attached as a separate attachment to all emailed invoices. This is useful to the Terms and Conditions.
The **Invoice Terms and Conditions** section allows you to import an image file that will be appended to all emailed invoices. This is not a separate attachment, but rather an additional page add to the invoice PDF that is emailed.

Email Invoices and Statements

Debtors and Creditors can be set up to receive their invoices and statements via email.

The email address is defined on the Client screen, then set the invoice and statement methods on the Debtor and Creditor screens.



The screenshot shows the 'Debtor : Enquire/Change' window. The 'Account No' is 1980, 'Alpha Key' is BROW/BJ, 'Name' is BJ Brown, and 'Address' is empty. The 'Active' checkbox is checked. On the right, a summary table shows monthly balances: Mar-14 (14429.25), Apr-14 (0.00), May-14 (0.00), Jun-14 (0.00), and 'Outstanding' (14429.25). Below this is a 'Client' button. The 'Exempt G S T' and 'No Interest' checkboxes are unchecked, and 'Nait Id' is empty. A section for sales and receipts shows MTD, YTD, and HTD Sales (all 0.00), and Last Invoice (14/01/2010), Last Receipt Amt (0.00), and Last Receipt Date (empty). Another section shows Fwd Date (14/01/2010) and Fwd Outstdg (14429.25). The 'Direct Debit Details' section has a 'Dont Direct Debit' dropdown, 'Bank A/c No' and 'Code' fields, and 'Reference' and 'Particulars' fields. The 'Email' field contains 'bjbrown@email.com'. The 'Invoice Method' and 'Statement Method' are both set to 'Email'. At the bottom are buttons for 'Save', 'Save Exit', 'Save & Add', 'Details', 'Analysis', 'Delete', 'Exit No Save', and navigation arrows.

Figure 5: Email settings on Debtor screen

Auto-Email Function

- Invoices printed via **Reports > Batch Print Invoices**
- Statements printed via **Debtors > Debtor Statements**
- Multiple email addresses can be entered in the **Email** field, separated with a comma. Copies of the invoices/statements will be sent to all the valid email addresses entered.
- Debtors set to Email will be automatically emailed when **Print** is clicked if the **Preview** and **Export** are NOT ticked. Debtors not set to Email will print normally.

Note: This will only work if **Preview** and **Export** are NOT ticked.

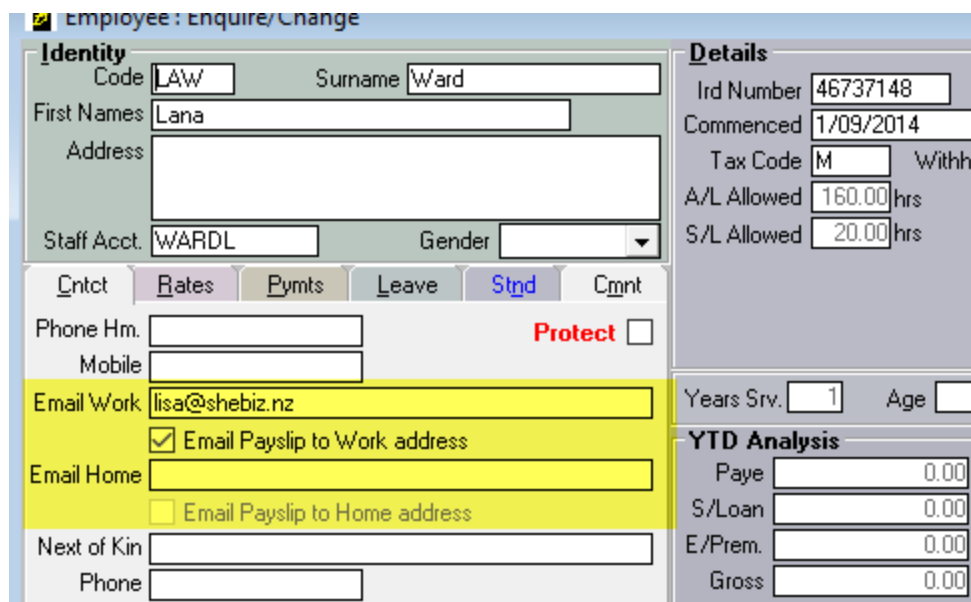
Manual Email Function

Open the **Print Options** from an Invoice screen, check the Email To and From addresses, add a message if desired and click on **Email**.

For full details see **Email via Print Options** later in this document.

Email Payslips

Livestock Office main menu > Employees > Contact tab



Employee: Enquire/Change

Identity

Code: LAW Surname: Ward

First Names: Lana

Address:

Staff Acct: WARDL Gender:

Details

Ird Number: 46737148

Commenced: 1/09/2014

Tax Code: M Withh:

A/L Allowed: 160.00 hrs

S/L Allowed: 20.00 hrs

Years Srv.: 1 Age:

YTD Analysis

Paye: 0.00

S/Loan: 0.00

E/Prem: 0.00

Gross: 0.00

Email Settings

Email Work: lisa@shebiz.nz

☒ Email Payslip to Work address

Email Home:

☐ Email Payslip to Home address

Next of Kin:

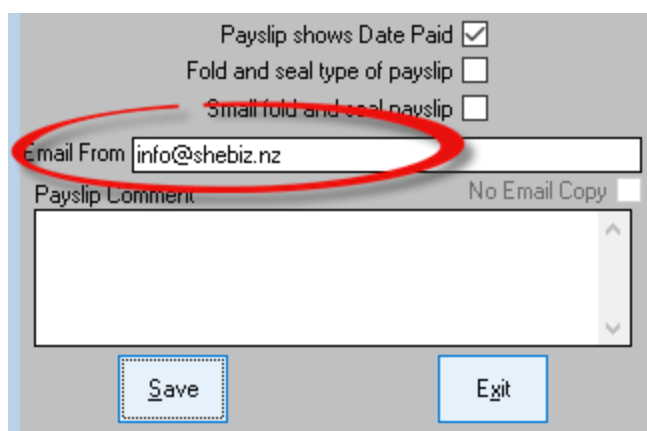
Phone:

Protect ☐

Figure 6: Email settings on Employee

- If there is a valid email address entered, tick the appropriate checkbox to set this employee to have their payslips emailed to either the Work or Home address.

Livestock Office main menu > Payroll > Payslip Setup



Payslip shows Date Paid ☒

Fold and seal type of payslip ☐

Small fold and seal payslip ☐

Email From: info@shebiz.nz

Payslip Comment:

No Email Copy ☐

Save Exit

Figure 7: Email settings on Employee

- Enter a valid email address in the **Email From** field. This should be the email employees can reply to if they have any queries.

Livestock Office main menu > Payroll > Pay Wages

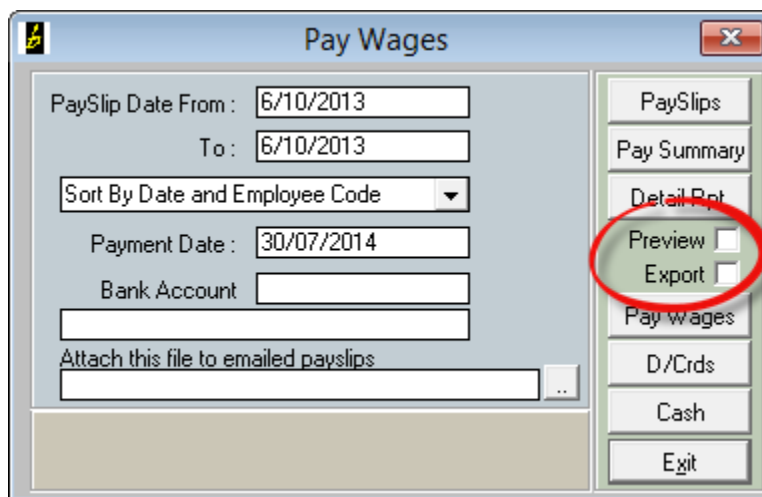


Figure 8: Email Payslips

- Ensure Preview is NOT ticked, then click **PaySlips**.
- Payslips for employees set to Email will be automatically emailed to their selected email address. The remaining payslips will print on the printer.

Email via Print Options

Individual Invoices and Payslips can be emailed via the Print Options screen.
Click on the **Print Options** button on the Debtor Invoice, Creditor Invoice or Payslip screen.

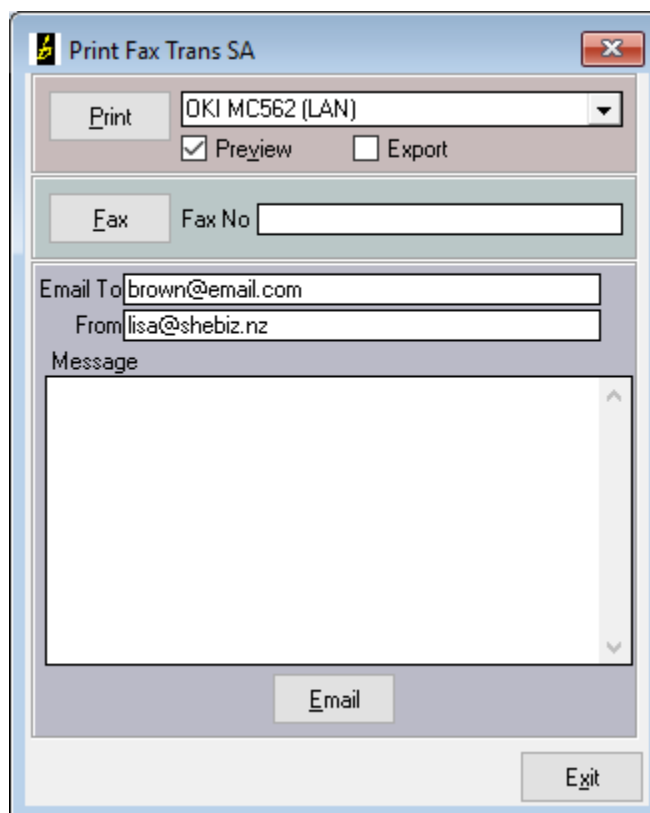


Figure 9: Print Options

Field	Description
Email To	Enter the email address to send the invoice or payslip to. Defaults to the email address entered for the Debtor, Creditor or Employee, but can be overwritten. Separate multiple email addresses with a comma.
From	Enter the email address to send from. Defaults to the email address for the current user logged in, but can be overwritten.
Message	Optional. Free text field to enter any message you wish to appear in the body of the email.
Email	Click to send the email.

Email via Export

Payslips and Reports can also be emailed.

Most reports have an **Export** option.

This is displayed as a checkbox, sometimes near to the Preview checkbox, or just under the Set Up button.

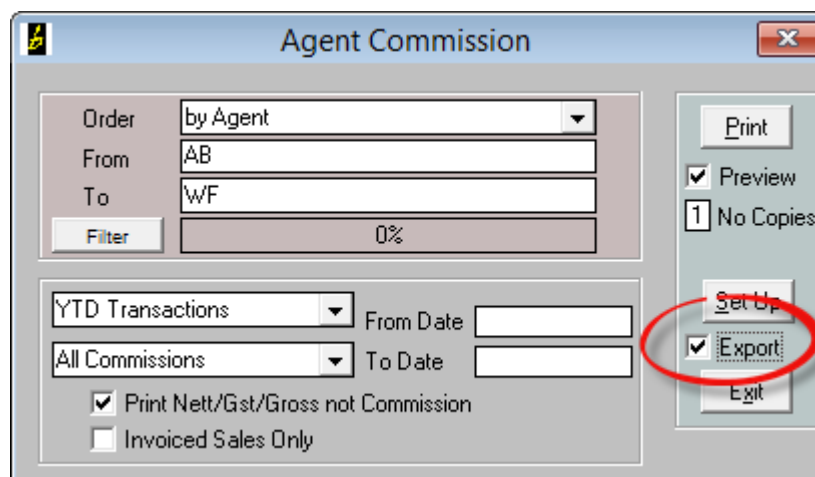
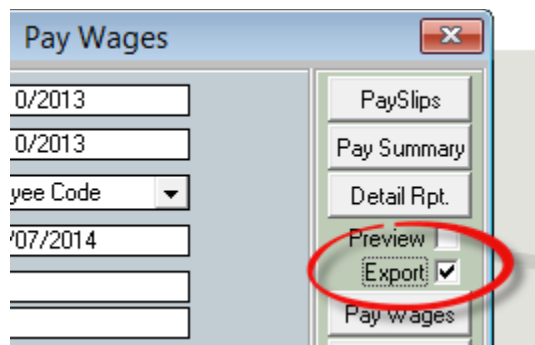


Figure 10: Export Checkbox examples

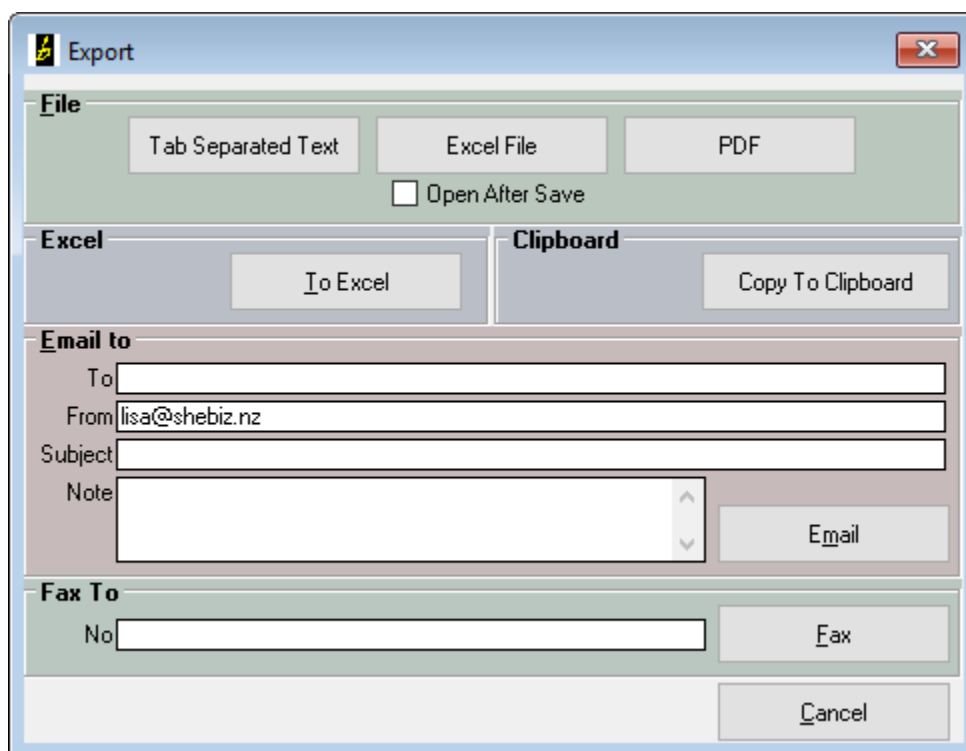
Tick the **Export** checkbox, then click the appropriate report button or click **Print**.

This will open the **Export** window.

This provides a variety of export options, but this document will only detail the email options.

Note:

- When exporting a batch of reports, such as PaySlips, Batch Invoices or Statements, all of the individual documents will be grouped together into a single PDF document and emailed to a single email address.



The screenshot shows an 'Export' dialog box with the following sections:

- File**: Contains three buttons: 'Tab Separated Text', 'Excel File', and 'PDF'. Below these is a checkbox labeled 'Open After Save' which is currently unchecked.
- Excel**: Contains a button labeled 'To Excel'.
- Clipboard**: Contains a button labeled 'Copy To Clipboard'.
- Email to**: Contains four text input fields: 'To', 'From' (pre-filled with 'lisa@shebiz.nz'), 'Subject', and 'Note'. To the right of the 'Note' field is an 'Email' button.
- Fax To**: Contains a text input field labeled 'No' and a 'Fax' button.
- At the bottom right is a 'Cancel' button.

Figure 11: Export window

Field	Description
To	Enter the email address to send the report to.
From	Enter the email address to send from. Separate multiple email addresses with a comma. Defaults to the email address for the current user logged in, but can be overwritten.
Subject	Optional. Enter a subject for the email.
Message	Optional. Free text field to enter any message you wish to appear in the body of the email.
Email	Click to send the email.

Email via Debtor/Creditor Options

One off emails with or without an attachment can be sent via the Debtor or Creditor Options.

Livestock Office main menu > Debtors > Debtors > Options button > Send Email

Livestock Office main menu > Creditors > Creditors > Options button > Send Email

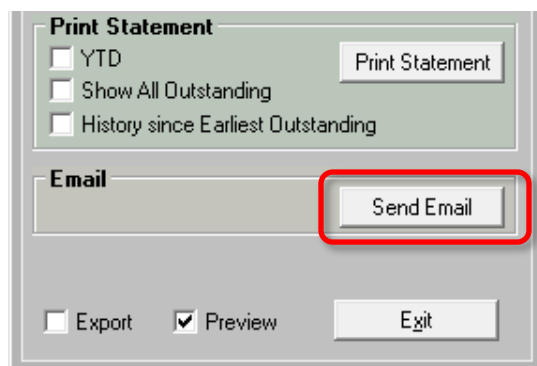


Figure 12: Options

Click **Send Email**

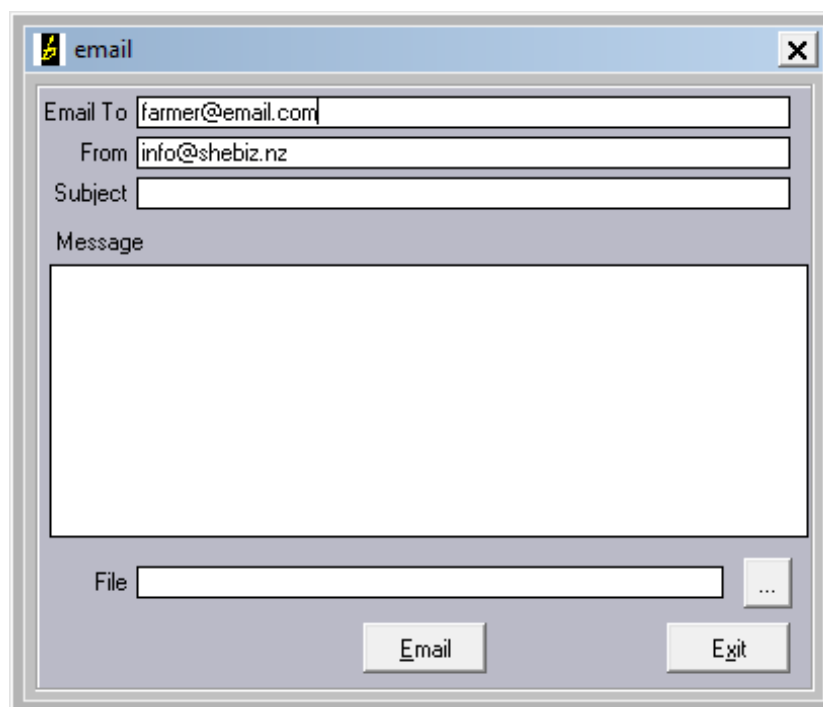


Figure 13: email screen

- The Email To address will default through from the Debtor/Creditor if present.
- The From address will default to the email address of the current user logged in.
- Enter a subject and message. Add an attachment if you desire.
- N.B. The users email signature does not append to emails sent this way.