Livestock Office – Email

22/10/2021

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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 to 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.

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Email Setup

Livestock Office main menu > File > System > Email Settings

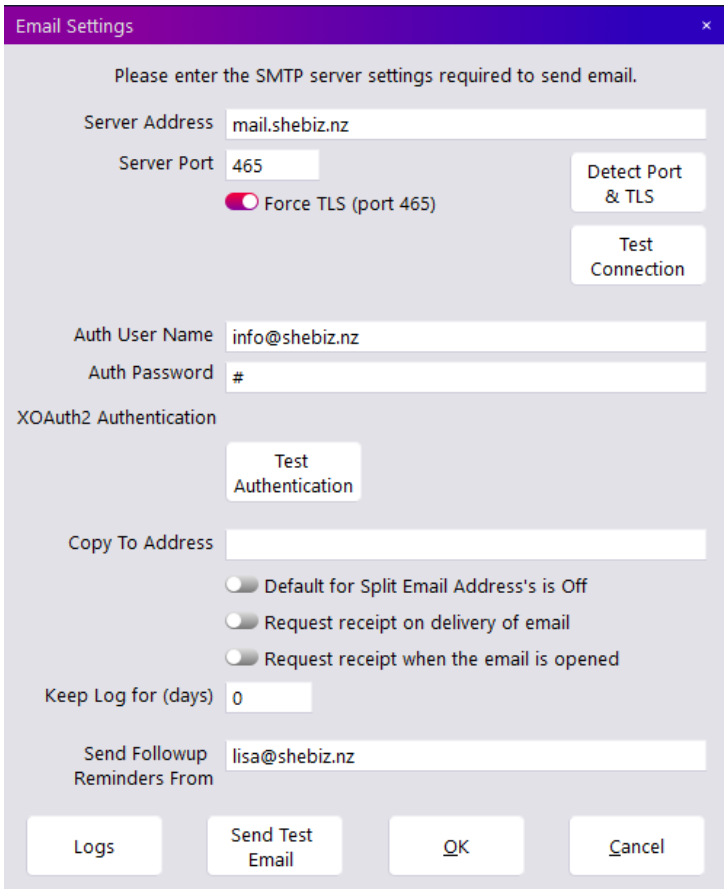

Figure 1: Email Settings

Field	Description
Server Address	Enter the sending smtp address for your email provider.
Server Port	Enter the port number. Your email provider will be able to give this to you.
Force TLS	Set to get the SMTP to use TLS from the beginning.
Detect Port and TLS	Use to automatically detect the Port and TLS settings based on the server address.
Test Connection	Use to test the server address and port work.
Auth User Name	The username for the account.
Auth Password	The password for the account. Click the **Test** button to test the authentication.

Continued…

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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…	Set 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…	This is the email address from which follow-up reminders will be sent. If not entered, no follow-up reminders will be sent.
Logs	Opens the Email Log.
Send Email Test	Click to send a test email using the current settings.
OK	Save settings and Exit.
Cancel	Exit the window without saving any changes.

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Email Log

Livestock Office main menu > File > Company > 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.

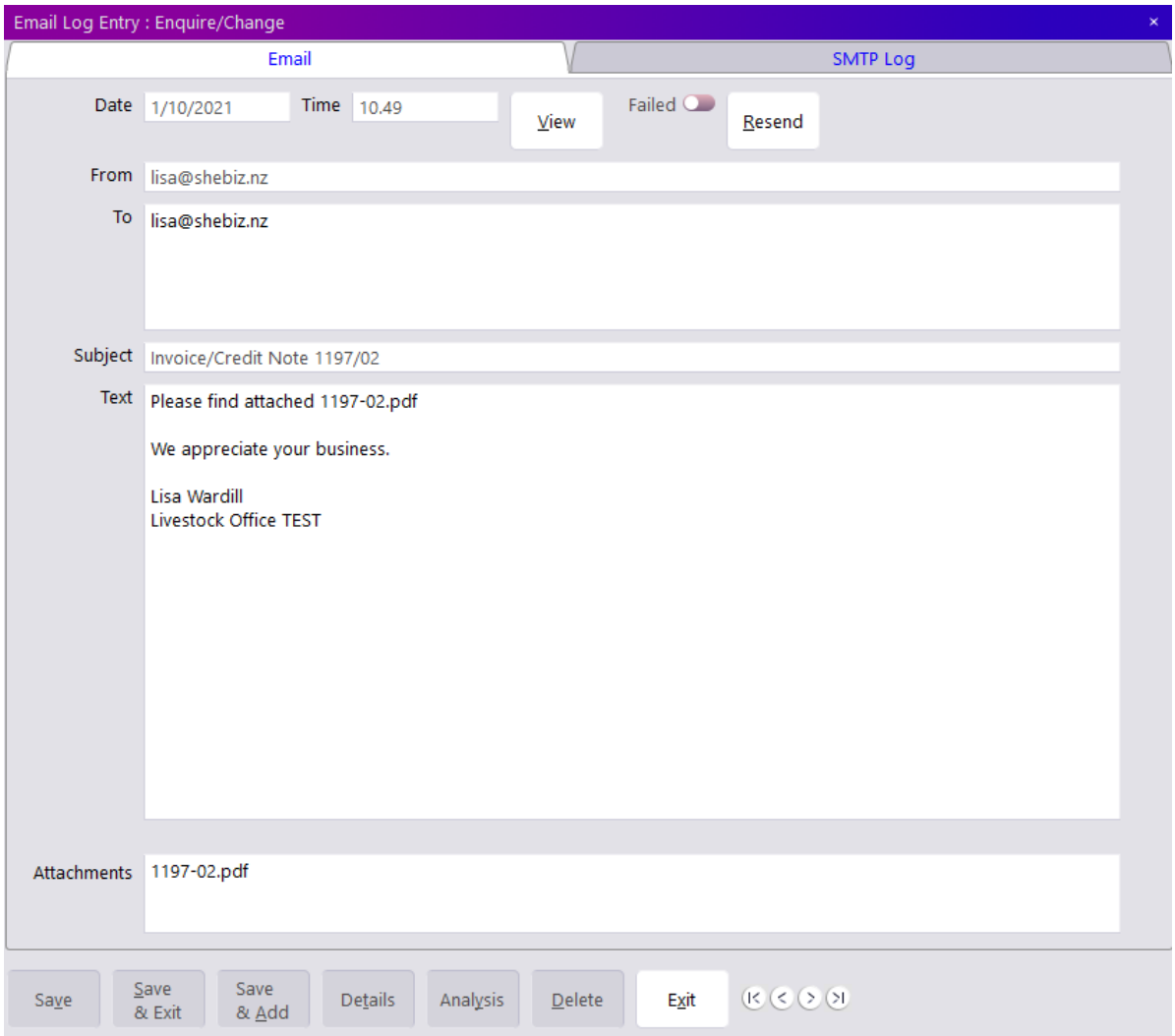

Figure 2: Email Log

- 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.

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User Setup

Livestock Office main menu > File > User > User File

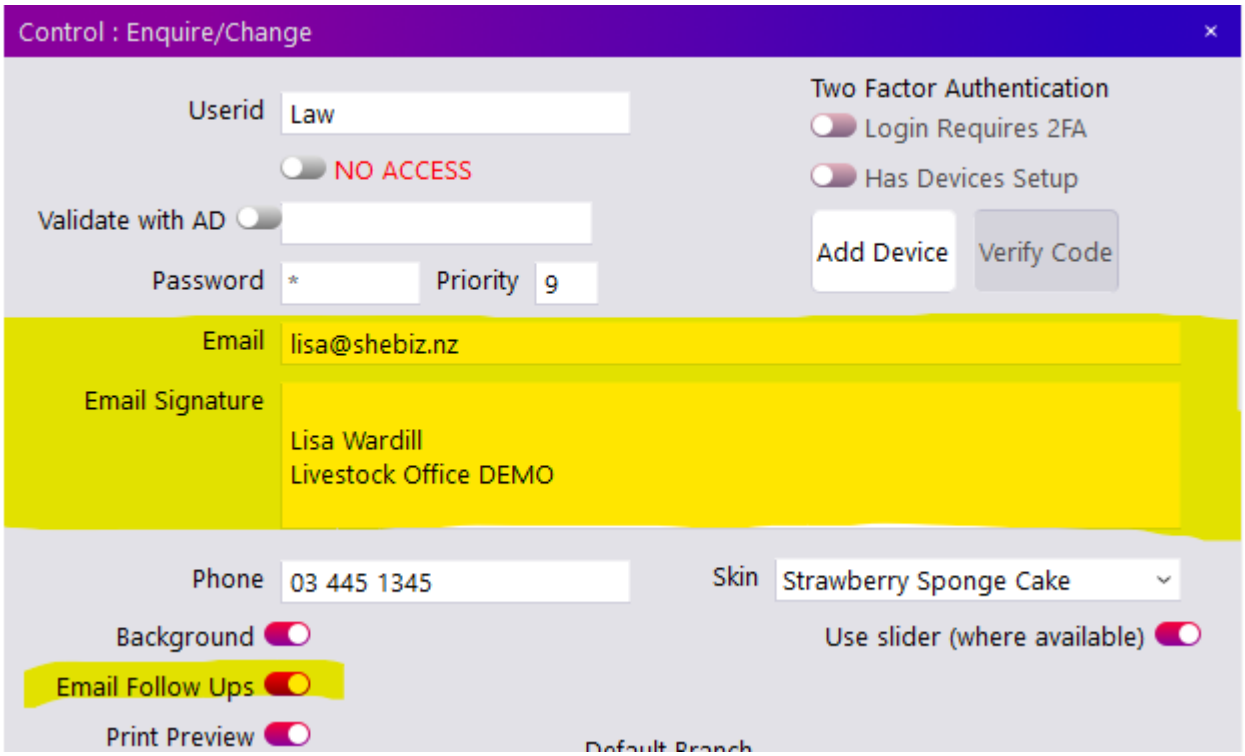

Figure 3: Email settings on User file

- 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.

- Set **Email Follow Ups** to enable emailing of follow-ups when they are created.have a copy of each email sent from this user to the user's email address.

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Company Setup

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

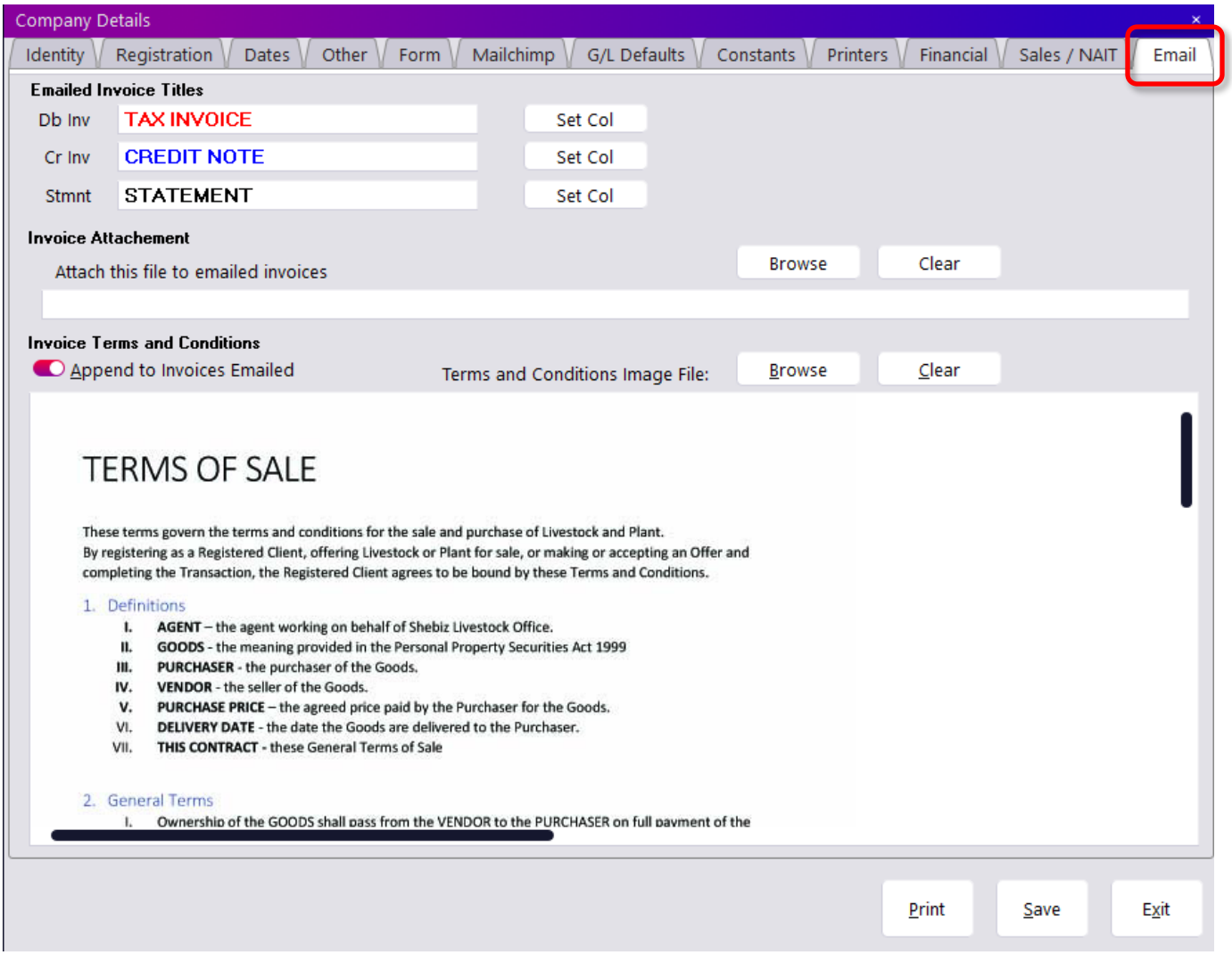

Figure 4: Email settings on User file

- Set your preferred Titles for emailed invoices and statements.
- Set the desired colours for the Titles and various messages. The default is Black.
- 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.

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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.

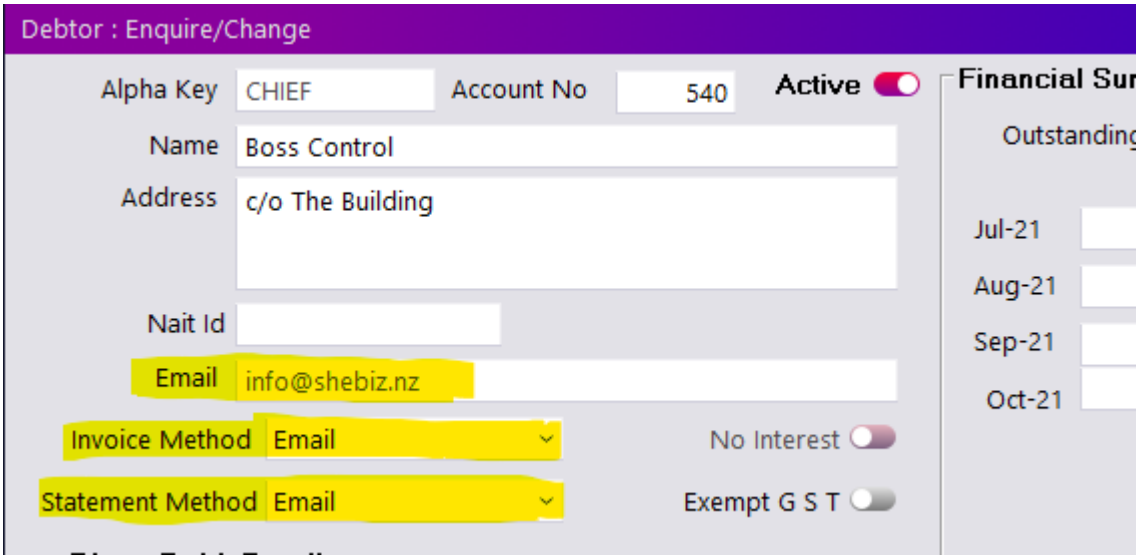

Figure 5: Email settings on Debtor screen

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 set. Debtors not set to Email will print normally.

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

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.

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Email Payslips

Livestock Office main menu > Payroll > Employees > Contact tab

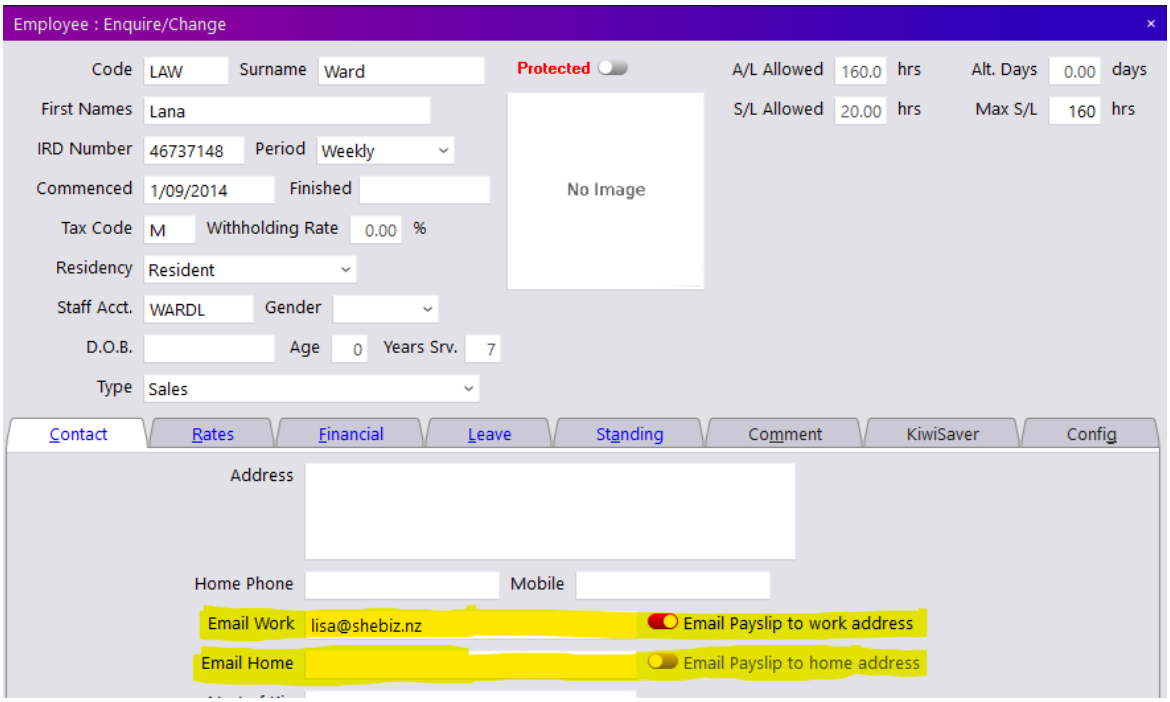

Figure 6: Email settings on Employee

- If there is a valid email address entered, set the appropriate slider so this employee has their payslips emailed to either the Work or Home address.
-
- NOTE: the Set is on automatically when an email address is entered.

Livestock Office main menu > Payroll > Payslip Setup

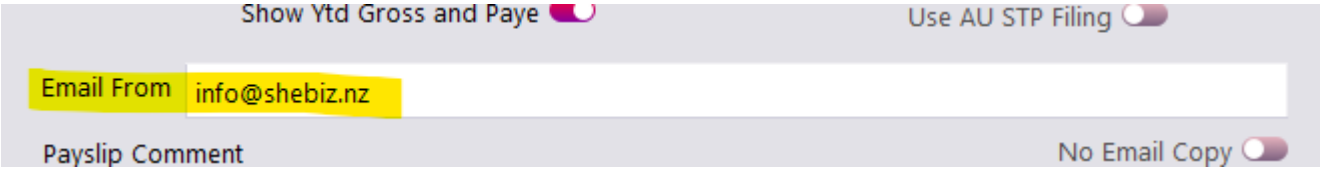

Figure 7: Email settings on Employee

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

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Livestock Office main menu > Payroll > Pay Wages

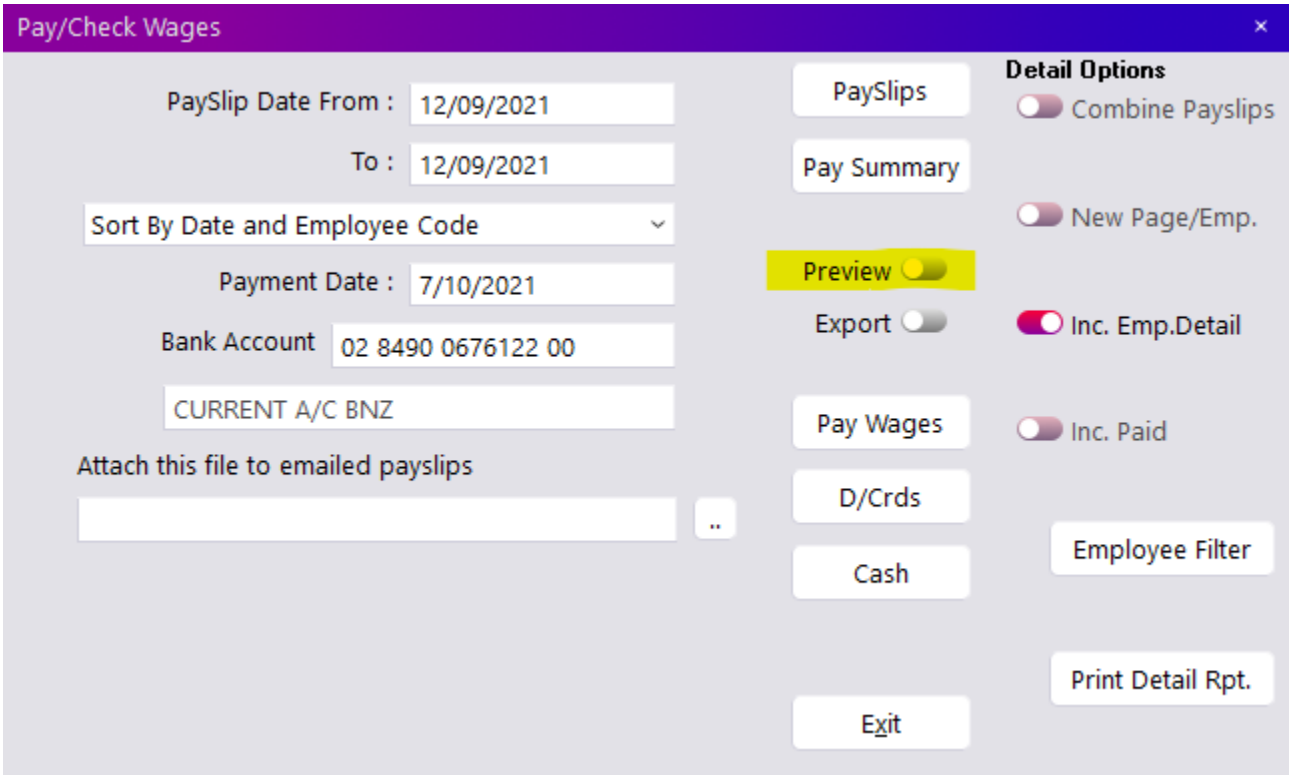

Figure 8: Email Payslips

- Ensure Preview is NOT set, 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.

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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.

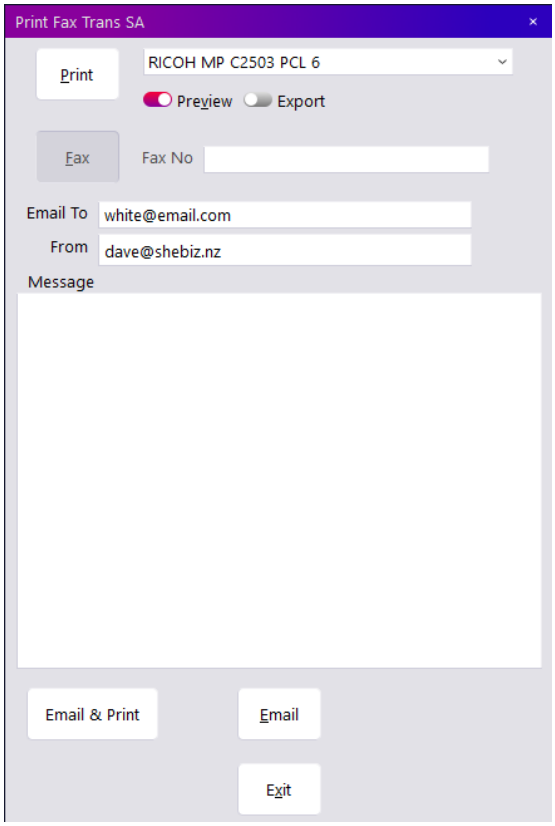

Figure 9: Print Options

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 & Print	Click to send the email and print on the printer.
Email	Click to send the email

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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.

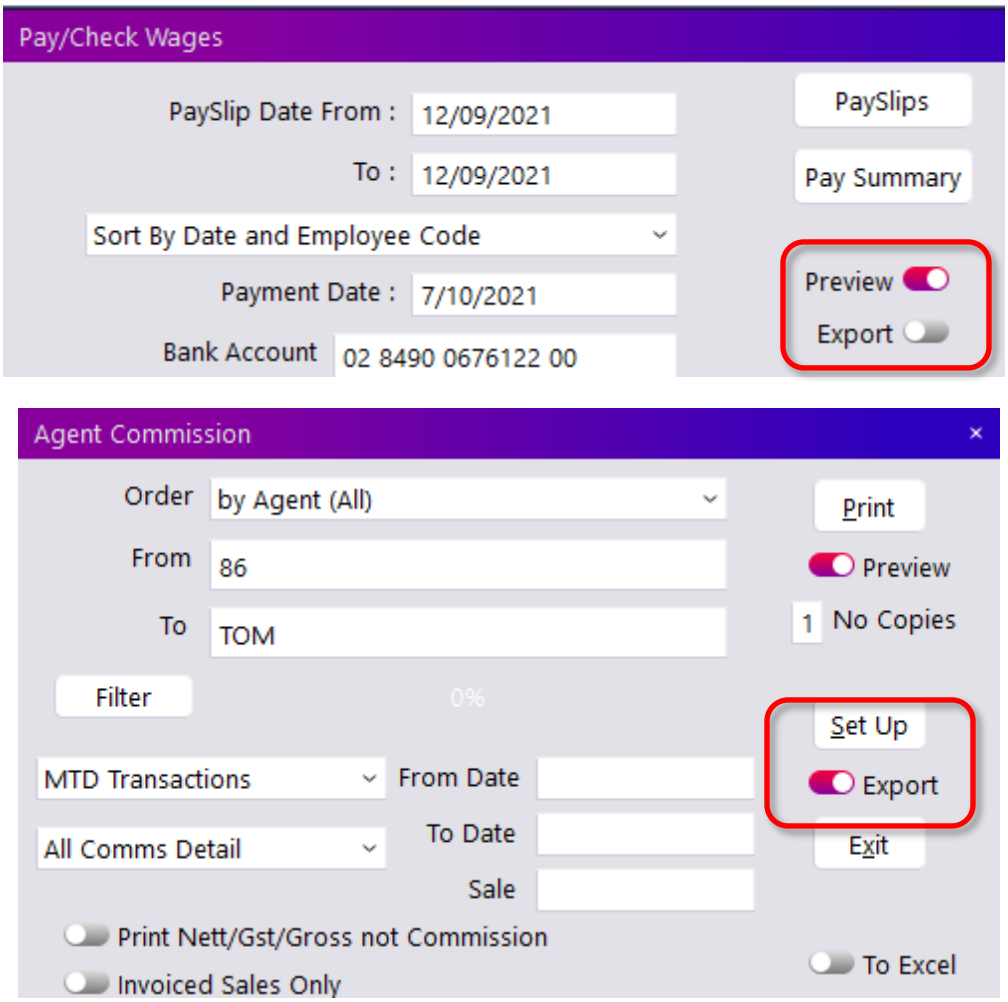

Figure 10: Export Checkbox examples

Set 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.*

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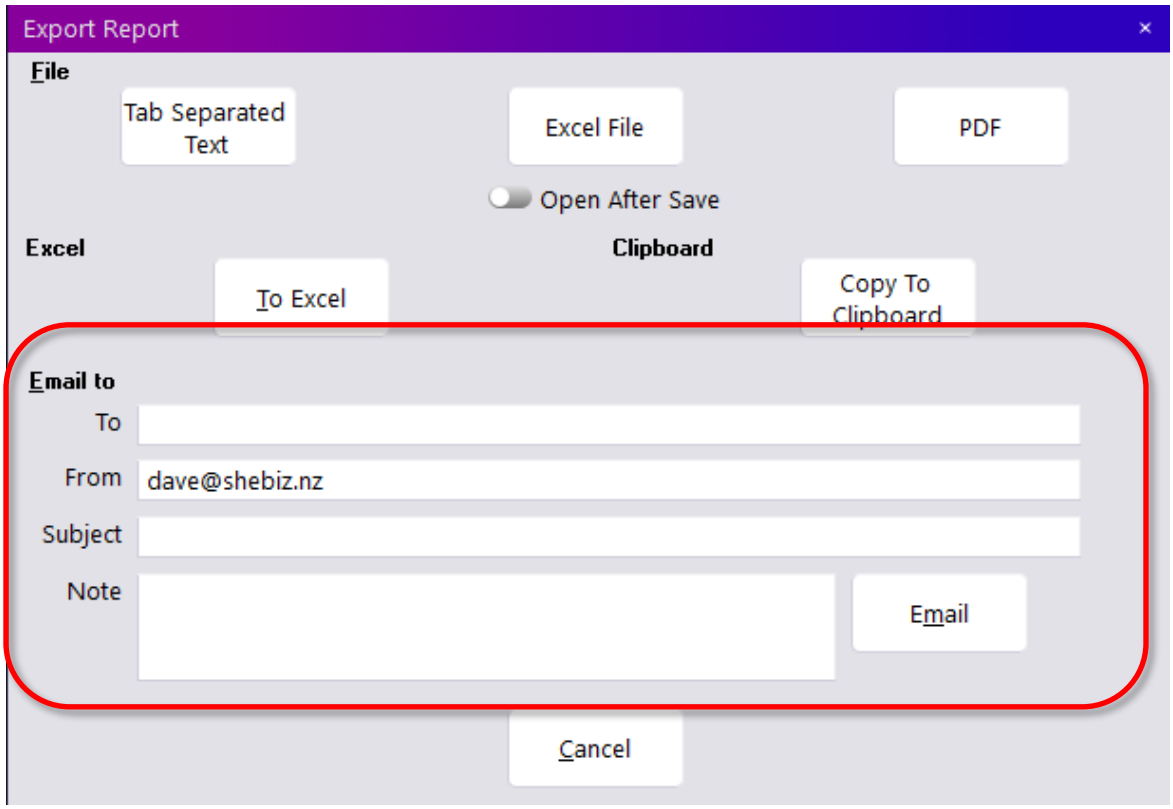

Figure 11: Export window

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.
Note	Optional. Free text field to enter any message you wish to appear in the body of the email.
Email	Click to send the email.

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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

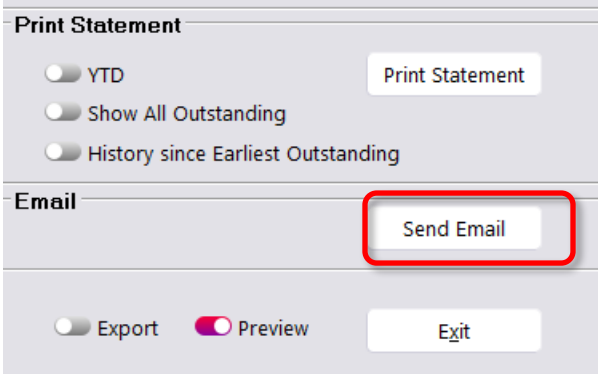

Figure 12: Options

Click **Send Email**

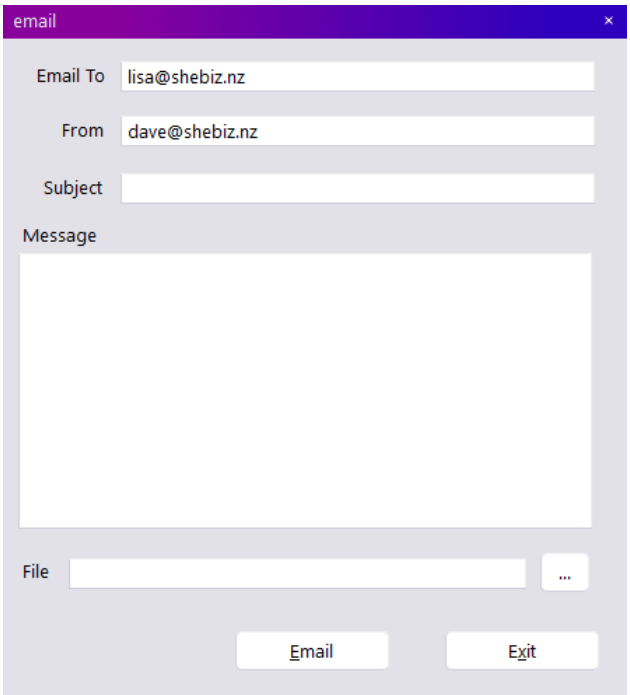

Figure 13: email screen

- 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.