

Livestock Office – Email

22/10/2021

Contents

Mass Communications	2
Email Setup	3
Email Log	5
User Setup	6
Company Setup	7
Email Invoices and Statements	8
Auto-Email Function	8
Manual Email Function	8
Email Payslips	9
Email via Print Options	11
Email via Export	12
Email via Debtor/Creditor Options	14

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 > System > Email Settings

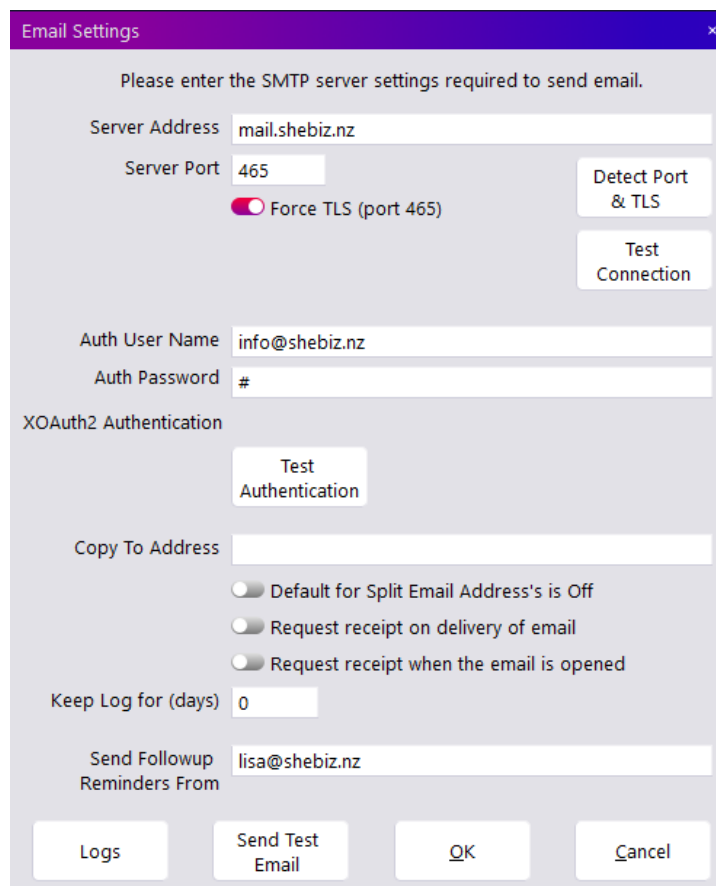


Figure 1: Email Settings

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...

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.

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.

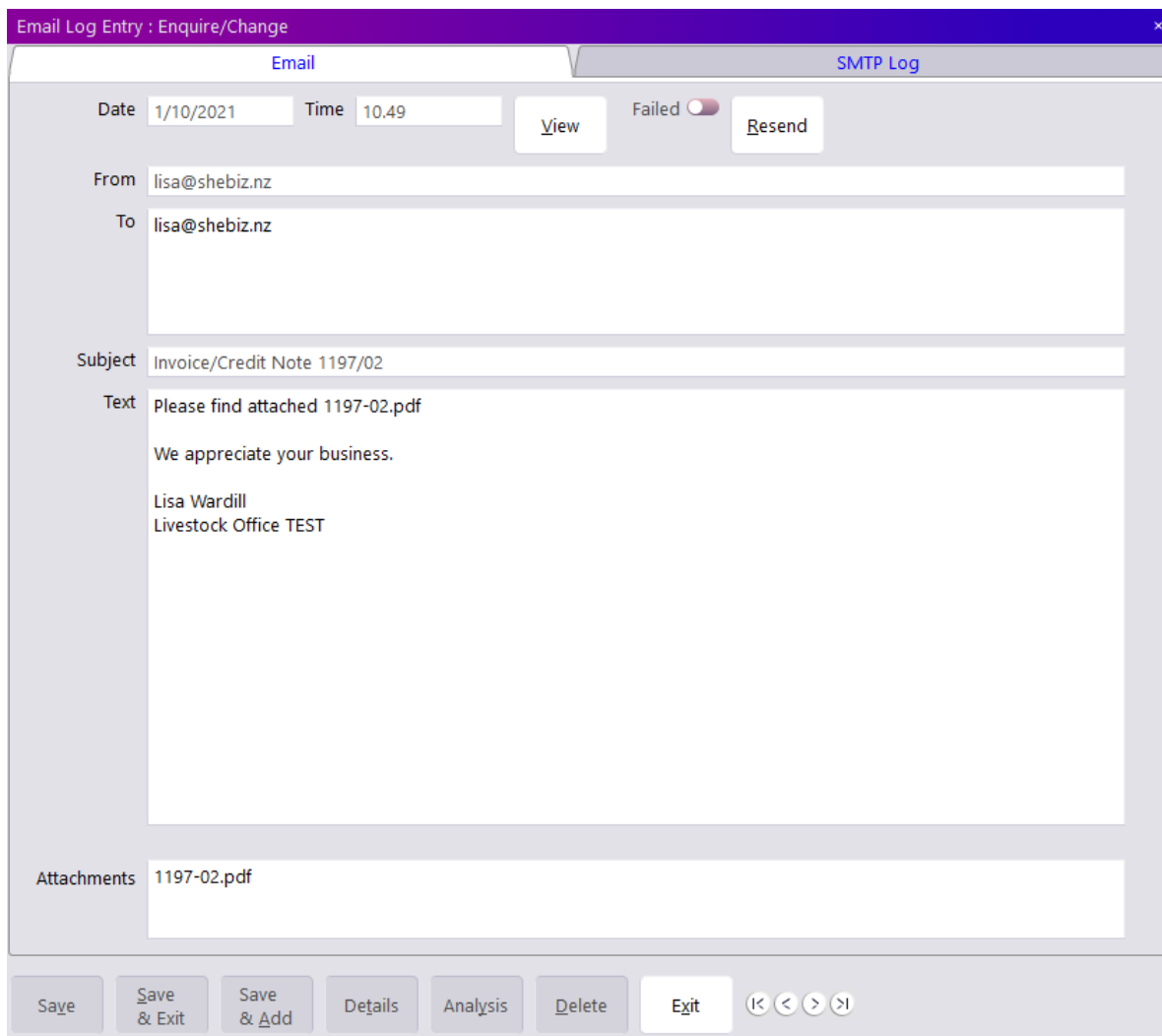


Figure 2: Email Log

- 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.

User Setup

Livestock Office main menu > File > User > User File

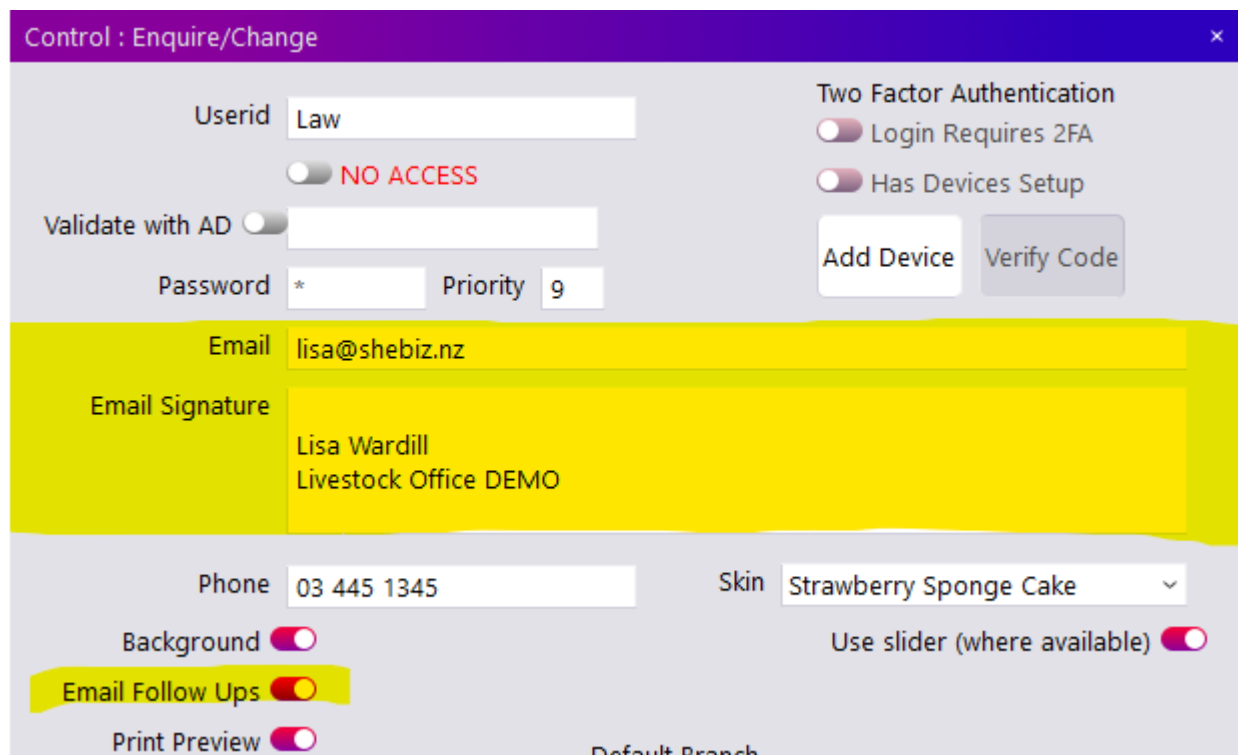
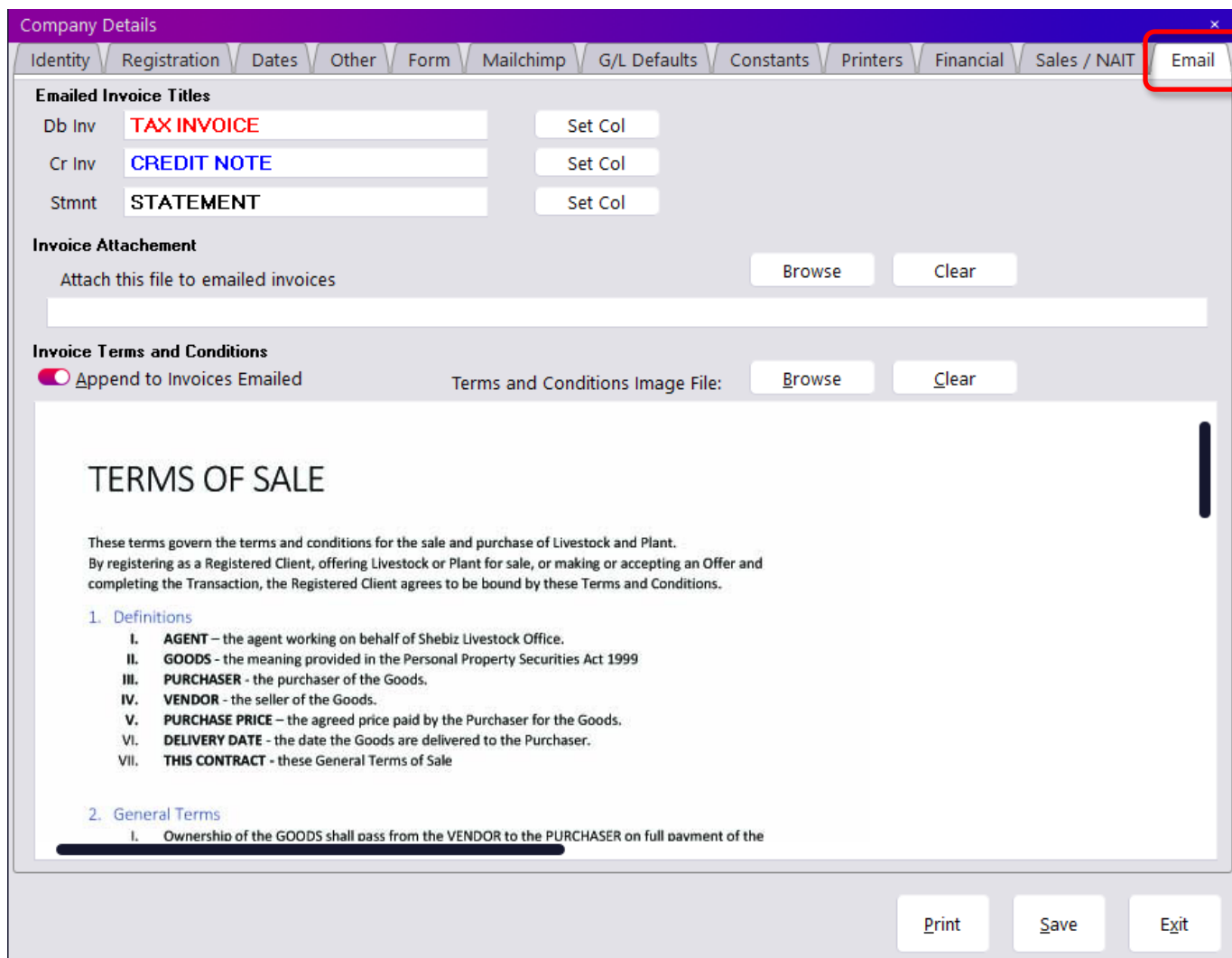


Figure 3: Email settings on User file

- 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.

Company Setup

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



Company Details

Identity | Registration | Dates | Other | Form | Mailchimp | G/L Defaults | Constants | Printers | Financial | Sales / NAIT | **Email**

Emailed Invoice Titles

Db Inv: TAX INVOICE [Set Col]

Cr Inv: CREDIT NOTE [Set Col]

Stmnt: STATEMENT [Set Col]

Invoice Attachment

Attach this file to emailed invoices [Browse] [Clear]

Invoice Terms and Conditions

Append to Invoices Emailed [Terms and Conditions Image File: [Browse] [Clear]]

TERMS OF SALE

These terms govern the terms and conditions for the sale and purchase of Livestock and Plant. By registering as a Registered Client, offering Livestock or Plant for sale, or making or accepting an Offer and completing the Transaction, the Registered Client agrees to be bound by these Terms and Conditions.

1. Definitions

I. **AGENT** – the agent working on behalf of Shebiz Livestock Office.

II. **GOODS** - the meaning provided in the Personal Property Securities Act 1999

III. **PURCHASER** - the purchaser of the Goods.

IV. **VENDOR** - the seller of the Goods.

V. **PURCHASE PRICE** – the agreed price paid by the Purchaser for the Goods.

VI. **DELIVERY DATE** - the date the Goods are delivered to the Purchaser.

VII. **THIS CONTRACT** - these General Terms of Sale

2. General Terms

I. Ownership of the GOODS shall pass from the VENDOR to the PURCHASER on full payment of the

[Print] [Save] [Exit]

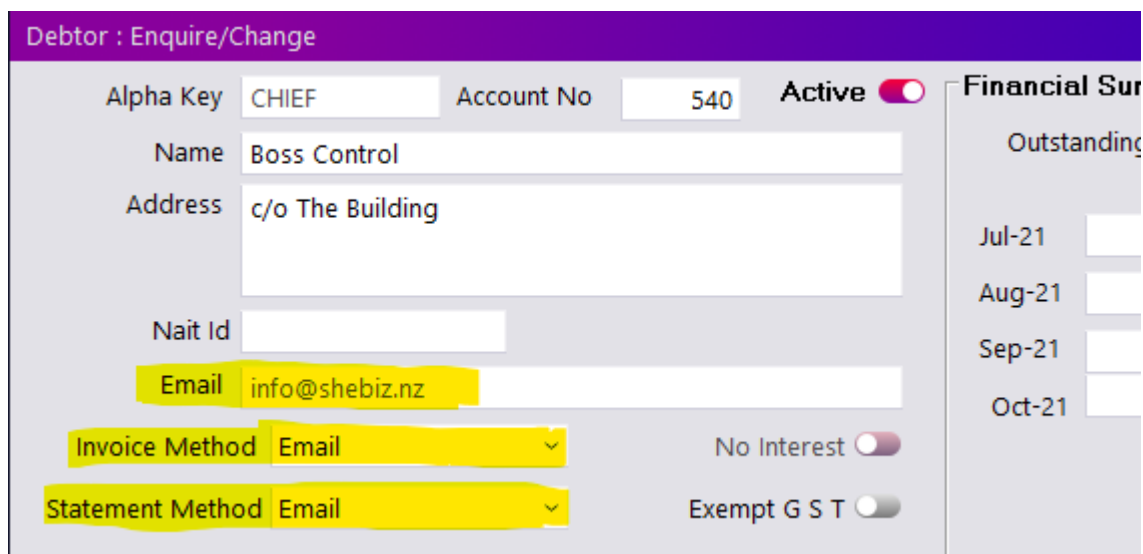
Figure 4: Email settings on User file

- 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.

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.



Debtor : Enquire/Change

Alpha Key CHIEF Account No 540 Active

Name Boss Control

Address c/o The Building

Nait Id

Email info@shebiz.nz

Invoice Method Email No Interest

Statement Method Email Exempt G S T

Financial Sur

Outstanding

Jul-21

Aug-21

Sep-21

Oct-21

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.

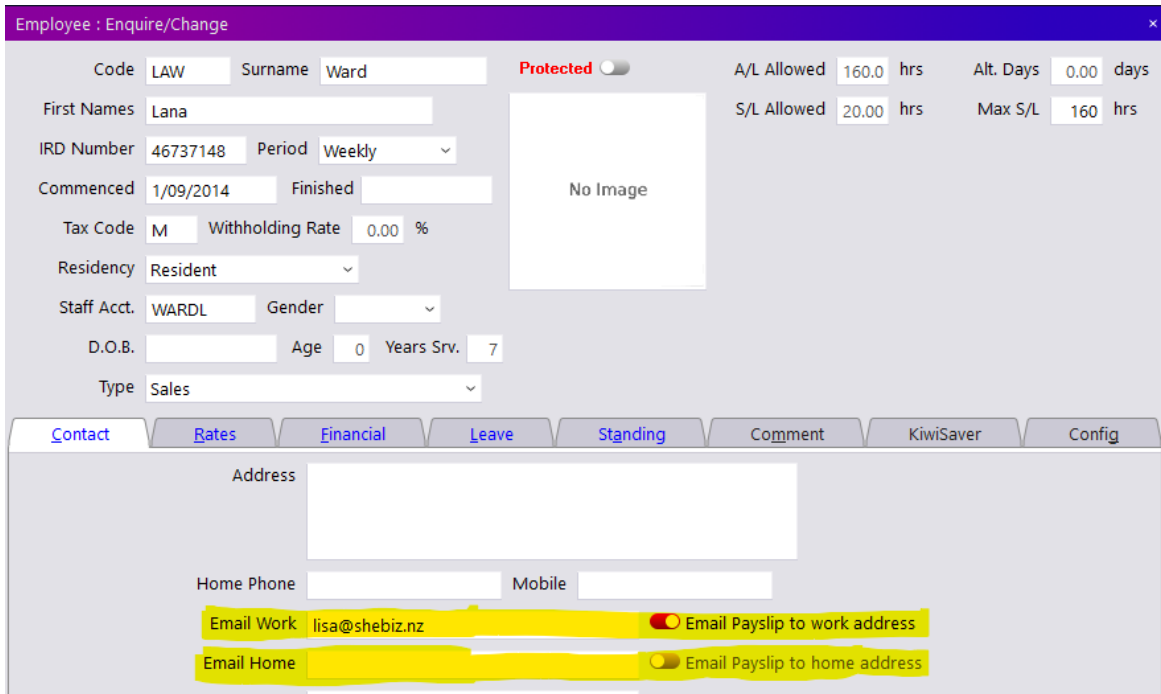
Manual Email Function

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.

Email Payslips

Livestock Office main menu > Payroll > Employees > Contact tab



Employee : Enquire/Change

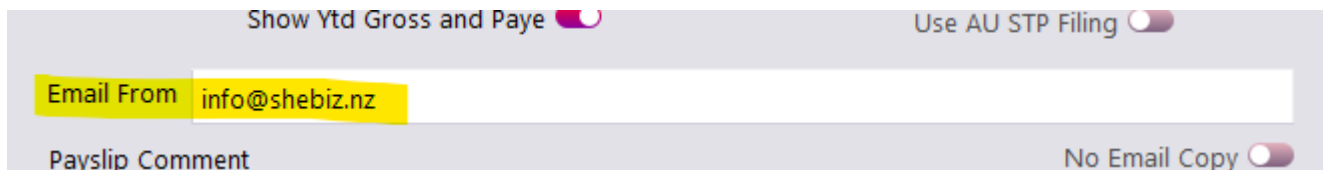
Code LAW Surname Ward **Protected** A/L Allowed 160.0 hrs Alt. Days 0.00 days
 First Names Lana S/L Allowed 20.00 hrs Max S/L 160 hrs
 IRD Number 46737148 Period Weekly
 Commenced 1/09/2014 Finished
 Tax Code M Withholding Rate 0.00 %
 Residency Resident
 Staff Acct. WARDL Gender
 D.O.B. Age 0 Years Srv. 7
 Type Sales

Address
 Home Phone Mobile
 Email Work lisa@shebiz.nz Email Payslip to work address
 Email Home Email Payslip to home address

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



Show Ytd Gross and Paye Use AU STP Filing

Email From info@shebiz.nz

Payslip Comment No Email Copy

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

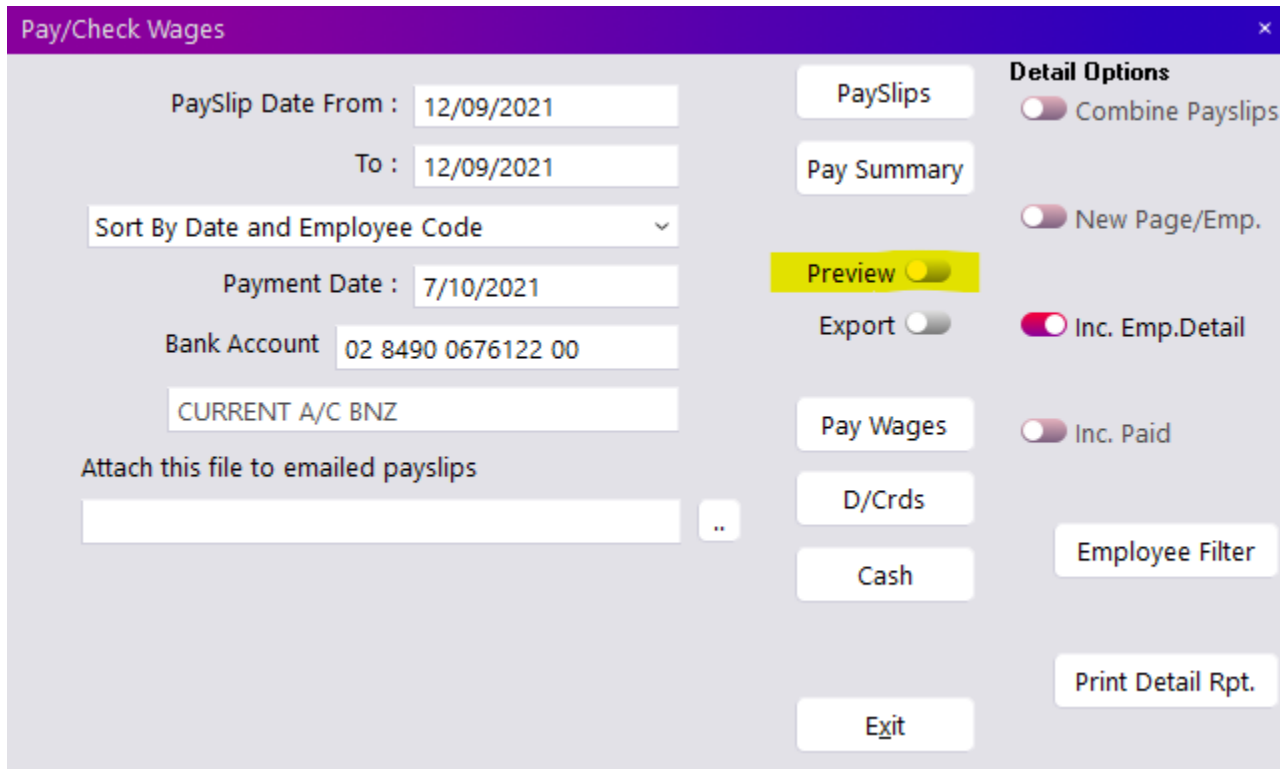


Figure 8: Email Payslips

- Ensure Preview is NOT 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.

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.

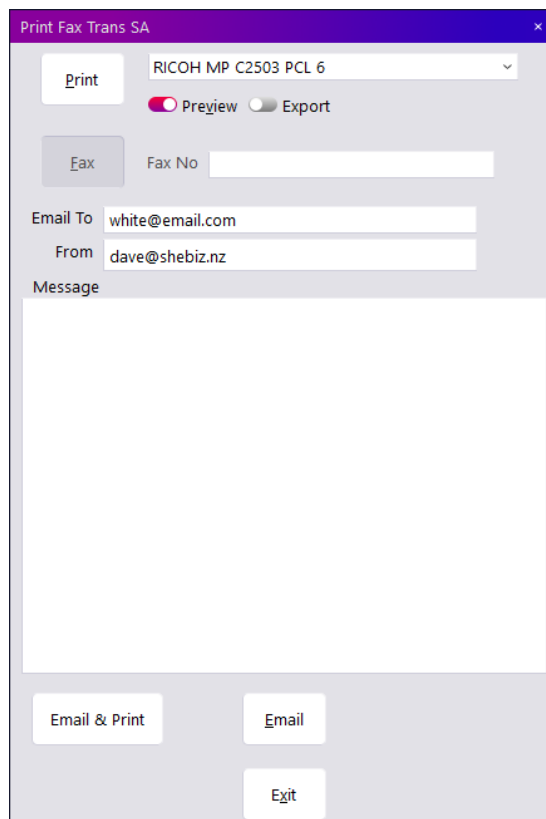


Figure 9: Print Options

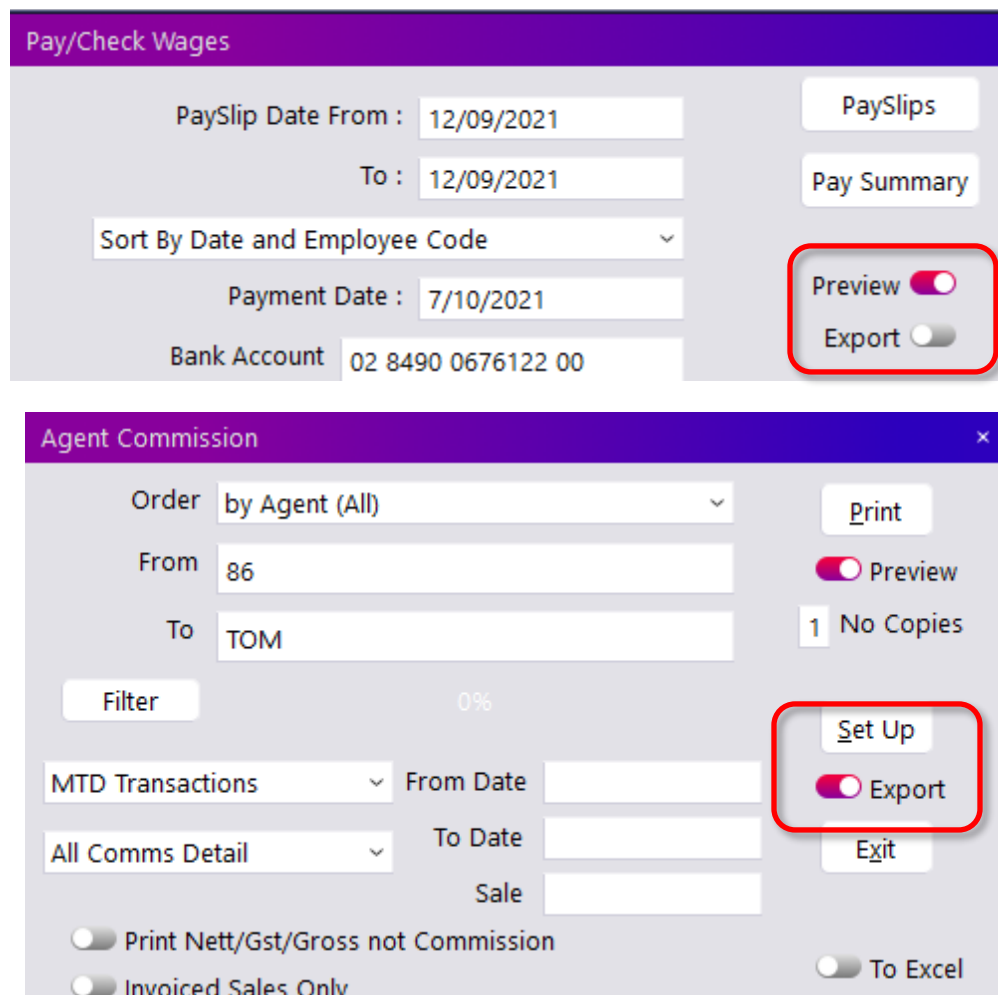
Field	Description
Email To	Enter the email address to send the invoice or payslip to. Defaults to the email address entered for the Debtor, Creditor or Employee, but can be overwritten. Separate multiple email addresses with a comma .
From	Enter the email address to send from. Defaults to the email address 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

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.



The figure shows two screenshots of software interfaces. The first screenshot is titled 'Pay/Check Wages' and features a purple header. It contains several input fields: 'PaySlip Date From' (12/09/2021), 'To' (12/09/2021), 'Sort By Date and Employee Code' (dropdown), 'Payment Date' (7/10/2021), and 'Bank Account' (02 8490 0676122 00). On the right side, there are buttons for 'PaySlips', 'Pay Summary', 'Preview' (checked), and 'Export' (unchecked). The 'Export' checkbox is highlighted with a red box. The second screenshot is titled 'Agent Commission' and also has a purple header. It includes fields for 'Order' (by Agent (All)), 'From' (86), and 'To' (TOM). Below these are 'Filter' (0%), 'MTD Transactions' (dropdown), 'From Date', 'To Date', and 'Sale' (dropdown). At the bottom, there are checkboxes for 'Print Nett/Gst/Gross not Commission' and 'Invoiced Sales Only'. On the right side, there are buttons for 'Print', 'Preview' (checked), '1 No Copies', 'Set Up', 'Export' (checked), and 'Exit'. The 'Export' checkbox is highlighted with a red box.

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.

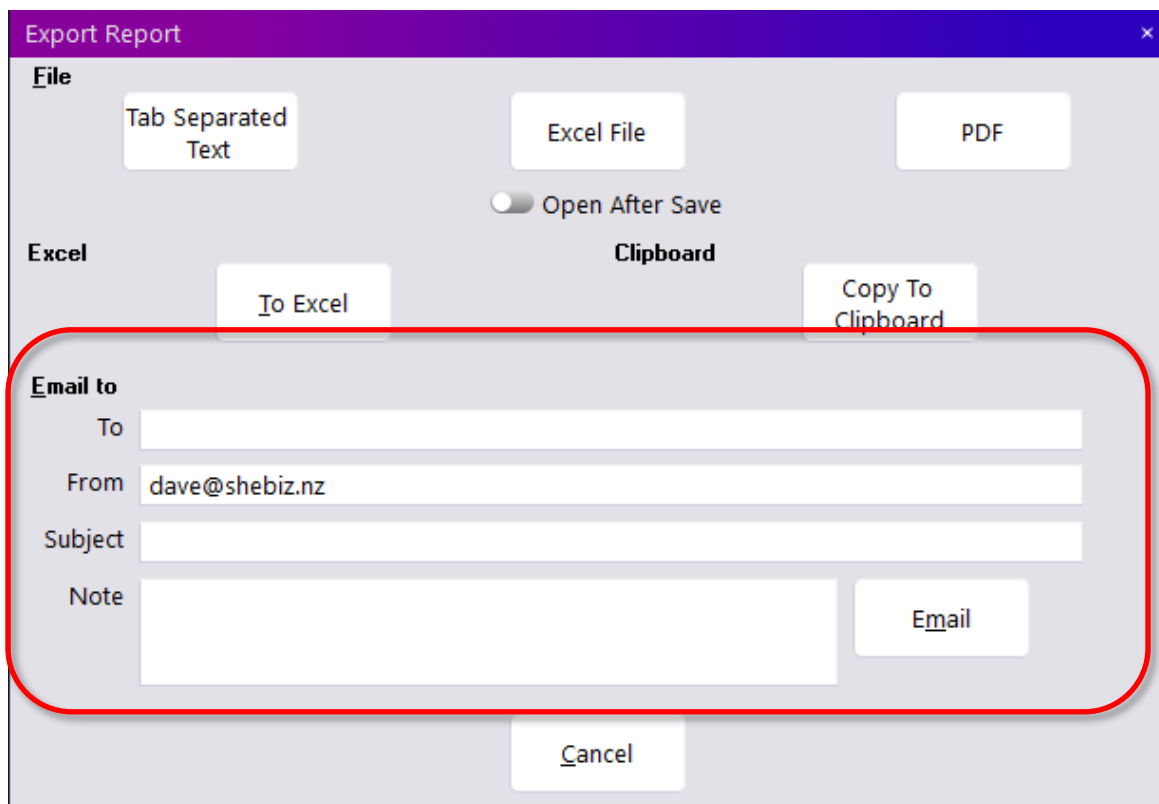


Figure 11: Export window

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.

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

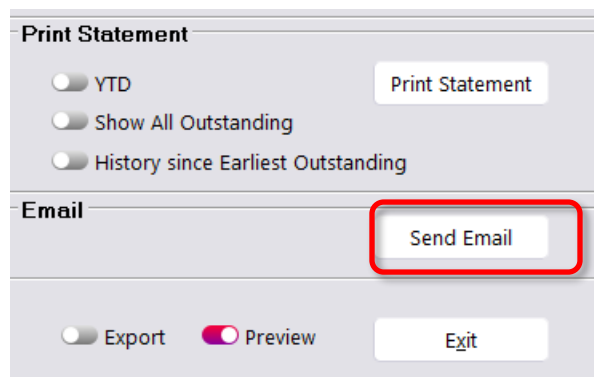


Figure 12: Options

Click Send Email

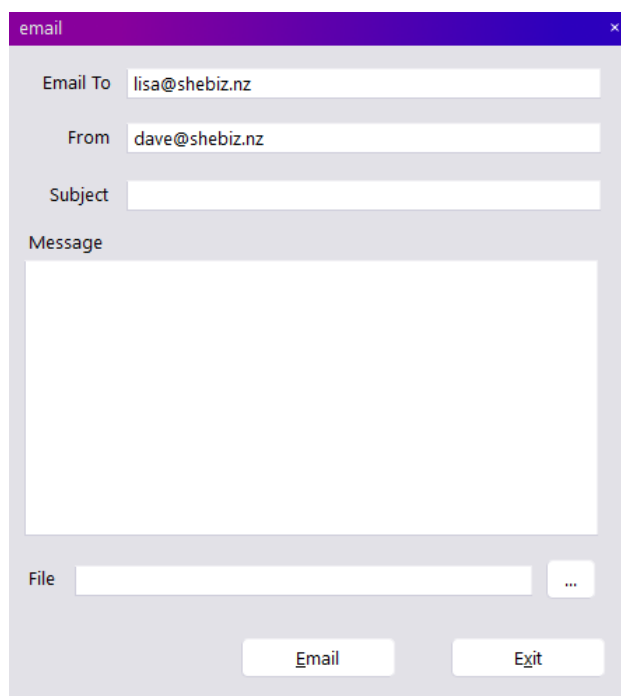


Figure 13: email screen

- 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.