

Tips and Tricks

How to e-mail Pastel documents and statements

One of the most frequent queries of our Cover customers is how to send invoices and statements via e-mail. They also want to know whether the software allows you to send more than one document at a time and how to set the process up in Pastel. Our call centre receives at least 15 calls a day about this, so we decided to focus this Tips and Tricks article exclusively on the topic.

E-mailing your Pastel documents and statements is by far the most efficient way to run your business. An immediate benefit is that your invoices can be sent out that much faster, speeding up payment. It's more secure and there's proof of delivery if you activate the read-receipt functionality on your e-mail system. It also saves paper, postal costs and a whole lot of hassle. So familiarize yourself with all the tips below to take full advantage of this feature!

Getting started and understanding your options

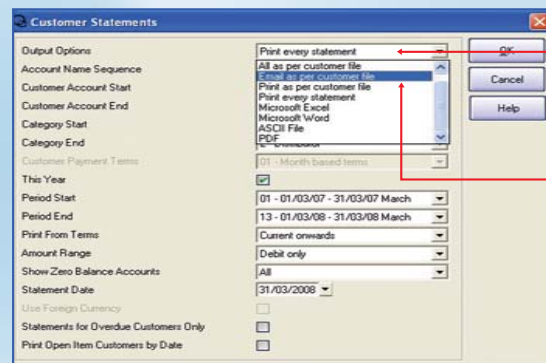
From the menu bar, select **View**, click on **Customers**, **Print Document**, then select a document e.g. **Tax Invoice** and select your filters (or View /Supplier/Print Document). You can now select the **Print To** drop down menu option. The various choices available when you select **Print To** determine where your selected Pastel Accounting document or report will be sent, one of these being **E-mail**. Depending on the kind of document or report you have selected, the full range of output options are:

- **E-mail:** this option e-mails the report as an HTML or PDF attachment. If you use this option, you need to provide the recipient's e-mail address.
- **Screen:** this displays the report on the screen. From there, you can of course print to the printer.
- **Printer:** this prints the report to the printer. The system lets you change the default printer and the default font before you print.
- **Microsoft Excel:** this opens the report in Excel, from where you can format, edit and save the report. You cannot use this option if you do not have a Microsoft Excel compatible program installed on your computer.
- **Microsoft Word:** this opens the report in Word, from where you can format, edit and save the report. You cannot use this option if you do not have a Microsoft Word compatible program installed on the computer.
- **HTML File:** this outputs the report in HTML format. You can then upload the report onto the Internet and/or Intranet pages. You can also view the report in your Internet browser. If you use this option, you need to choose a folder and enter a file name for the file.
- **ASCII:** you can export the report into a plain text file for spreadsheet or word processor import. If you use this option, you need to choose a folder and enter a file name for the file.
- **PDF:** this creates a PDF file from the report. You need Adobe Acrobat Reader to view the file.

To set e-mail options and e-mail a report

In order to e-mail reports or documents, your computer must have Microsoft Outlook installed

1. Customer Statements and Supplier Remittances



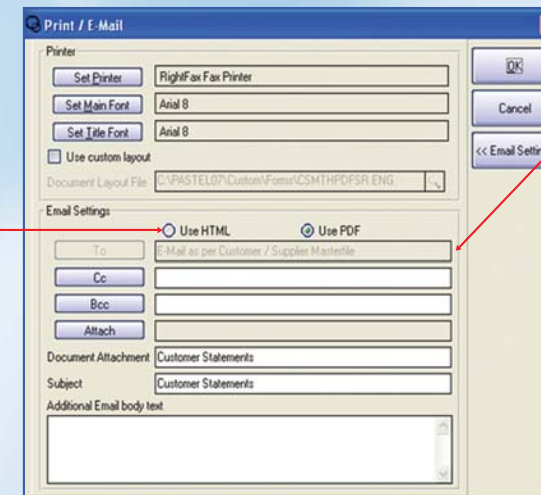
If you select to **E-mail** as the output option, you are able to combine a number of functions in the Print /E-mail window.

For **Customer Statements** or **Supplier Remittances**, when selecting the option **E-mail as per customer file** it will not allow you to enter any further recipients in the **To** option. You are, however, able to add additional recipients in the **Cc** and the **Bcc** fields.

Choose the format in which the system should send the report. Two options are available, HTML and PDF. HTML format requires HTML compatible software such as Internet Explorer or Microsoft Word. The PDF format requires Adobe Acrobat Reader software which is free and the most widely used.

NOTE

The person to whom you are sending the document must have the reader software installed on their computer. You can download this from www.adobe.com



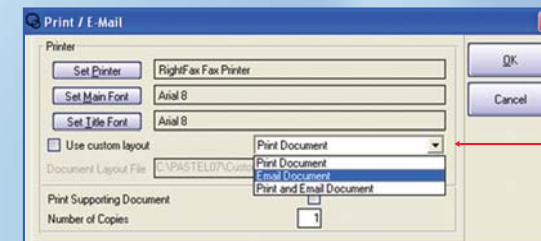
For **Customer / Supplier Statements** or **Remittances**, you will have to select the option **E-mail as per Customer / Supplier Masterfile**, the **To** field will **not** be available for you to add recipient addresses.

By clicking on the **Cc** or **Bcc** option, you will be able to select the person/s to whom you wish to send from the Customer or Suppliers. You can add the addresses yourself in the **Cc** and **Bcc** fields. If you are sending to multiple recipients then separate the e-mail addresses with a semicolon (;).

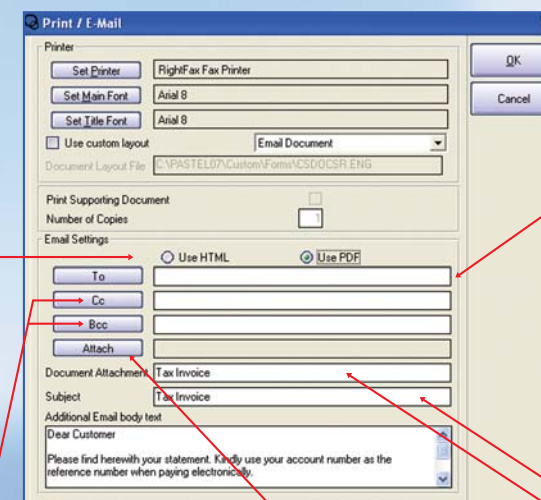
NOTE

The e-mail address for each Supplier or Customer must be added to the relevant account. If no e-mail address is present then the account will not be selected.

2. Invoices and other Documents



If you select to **E-mail Document** as the output option, you are able to combine a number of functions in the Print/E-mail window.



Choose the format in which the system should send the report. Two options are available, **HTML** and **PDF**. HTML format requires HTML compatible software such as Internet Explorer or Microsoft Word. The PDF format requires Adobe Acrobat Reader software which is free and the most widely used.

NOTE

The person to whom you are sending the document must have the reader software installed on their computer. You can download this from www.adobe.com

In the **To** field you **are** able to enter the addresses yourself. If you are sending to multiple recipients then separate the e-mail addresses with a semicolon (;).

By clicking on the **To** option, you will be able to select the person/s to whom you wish to send from the Customer or Suppliers.

NOTE

The e-mail address for each Supplier or Customer must be added to the relevant account. If no e-mail address is present then the account will not be selected.

You are able to select the Contacts option to build the list. Using Outlook you may be requested to confirm whether Pastel can access the contact list.

You are able to do the same in the **Cc** and **Bcc** fields as has been described for the **To** field.

Select **Attach** to add additional files that you wish to send. You can send multiple attachments.

In the **Document Attachment** field you can edit the name of the attached file. The **Subject** field can be changed. It defaults to the report/document name.