

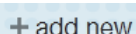
16R1 Enterprise Invoice Emailing

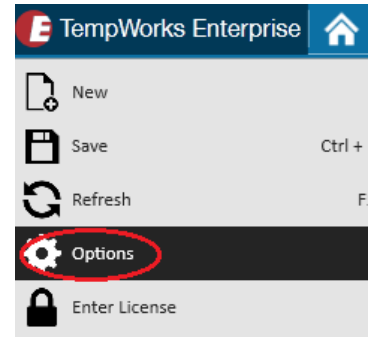
Enterprise has integrated functionality that allows users to send mass *Emails* with PDF copies of the **Invoice** attached. To be able to send invoices via email you must have a SMTP Email address setup in Enterprise.

To setup an SMTP Email Account:

Click on  located in the upper left of your screen.

From the dropdown, select **Options**, as circled on the right in red.

Click on  located in the upper right.



Enter an *Account Name*, *Description*, and *Email Address* in the respective fields, similar to what is seen here.

| | |
|-----------------------|-------------------------------------|
| Account Name | Invoice Emler |
| Account Description | invoices |
| Email Address | imapdummyaccount@gmail.com |
| Default | <input type="radio"/> |
| Shared System Account | <input checked="" type="checkbox"/> |

**Note: It is recommended to select the Shared System Account option to ensure that this process can still be completed if someone is unavailable or out of the office.*

Select an *Account Type* of SMTP

Server Name: this can be received from your email provider

User Name: user name for your email, which is typically your email address

Password: password to login to your email


Port: this can be received from your email provider

SSL: this can be received from your email provider

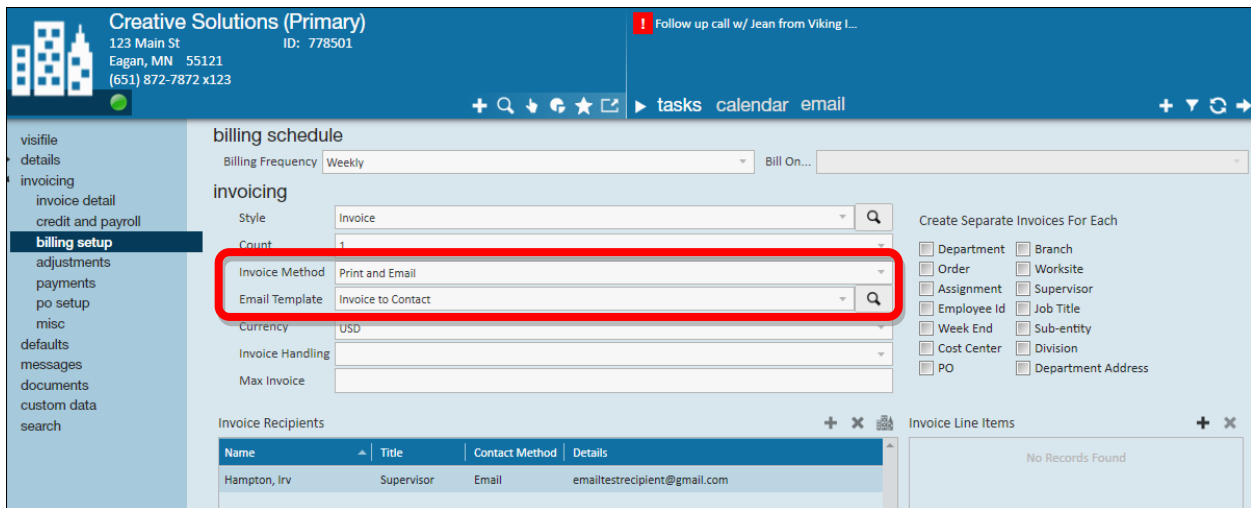
Account Type SMTP Outlook IMAP

Outgoing Mail Server

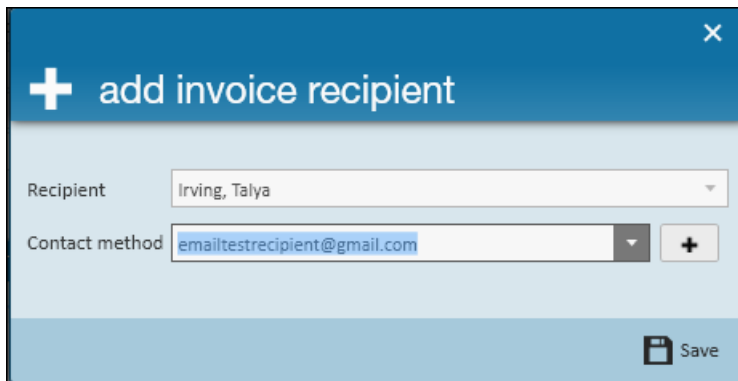
| | |
|-------------|-------------------------------------|
| Server Name | smtp.gmail.com |
| User Name | imapdummyaccount |
| Password | ●●●●●● |
| Port | 587 |
| Use SSL | <input checked="" type="checkbox"/> |

Once all information has been entered, click  located in the bottom right of your screen.

Once this is completed, invoice *Emails* can be sent to multiple recipients and **Customers** in one quick and easy process. On the **Customer Billing Setup** form select an *Invoice Method* of "Email" or "Print and Email". Then choose the *Email Template*, and the **Contacts** that should be recipients for the **Emailed Invoices**.



To add an *Email* recipient in the Invoice Recipients area click on the **+** button to open the form.

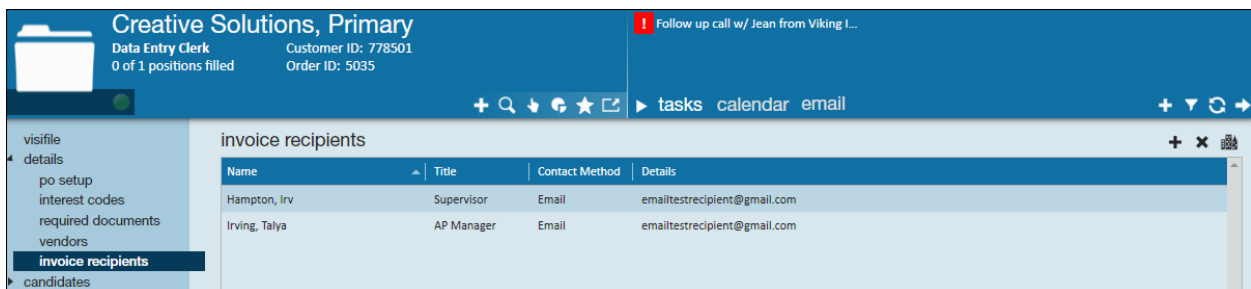


Select the **Contact** recipient from the drop down menu.

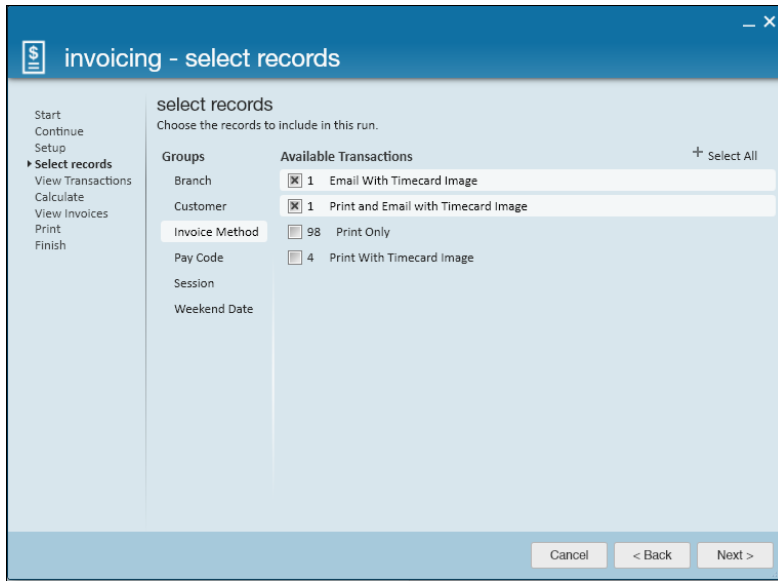
Note – Only **Contacts that are associated with this **Customer** will be listed in the drop down menu.*

Select an *Email* address from the *Contact Method* drop down menu. If there isn't an *Email* address available click on the **+** button to add. Once the form is completed click the *Save* button to update the system and close the form.

The Invoice *Email* recipients can be viewed and/or changed at the **Order** level by expanding on **Details** and then selecting the *Invoice Recipients* form as shown below:

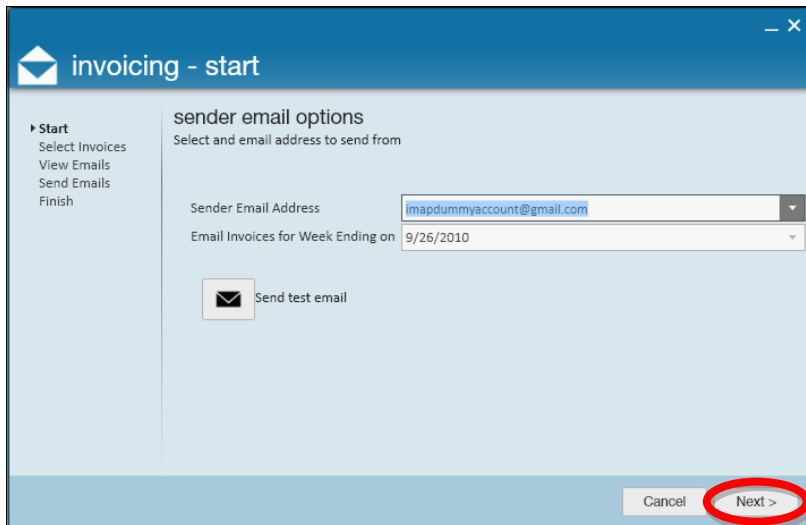
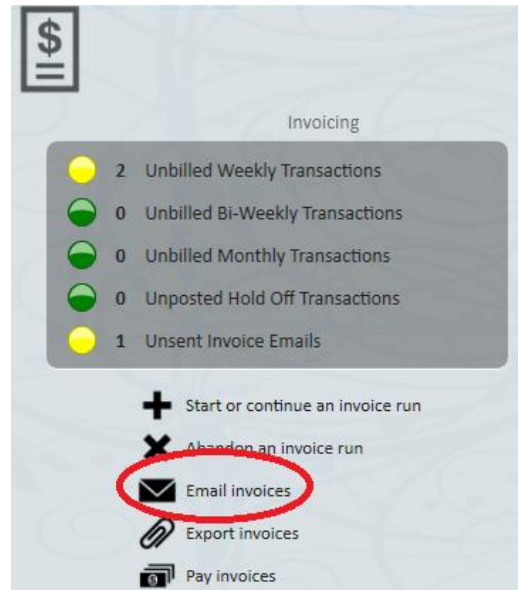


Once the **Customer** record is set up and the recipients are selected the **Invoice Emails** can be created.



Continue with the usual **Invoice** process. When selecting the *Transactions* to include in the run, viewing them by *Invoice Method* will allow the user to view and/or select *Transactions* that will be sent via **Email**. It is not necessary to group invoicing by **Invoice Method**. Invoices can be run in any order and grouped in any way.

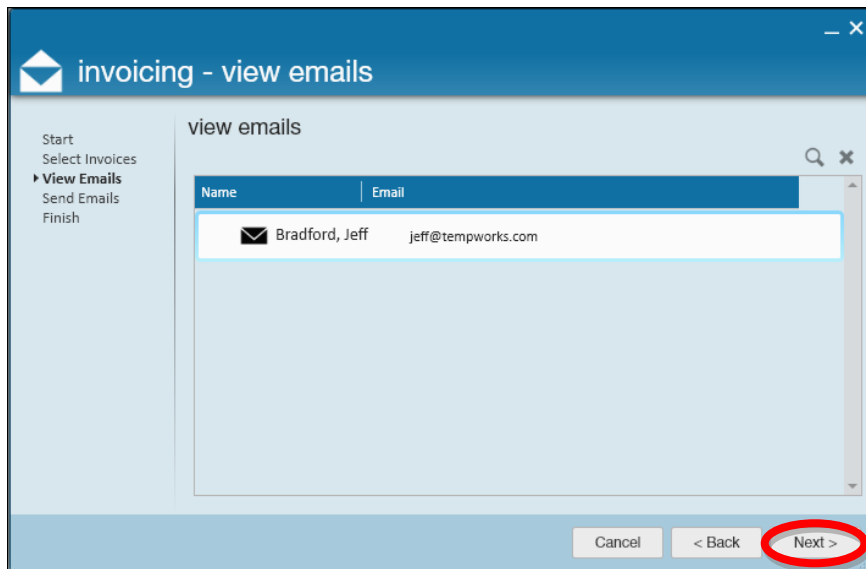
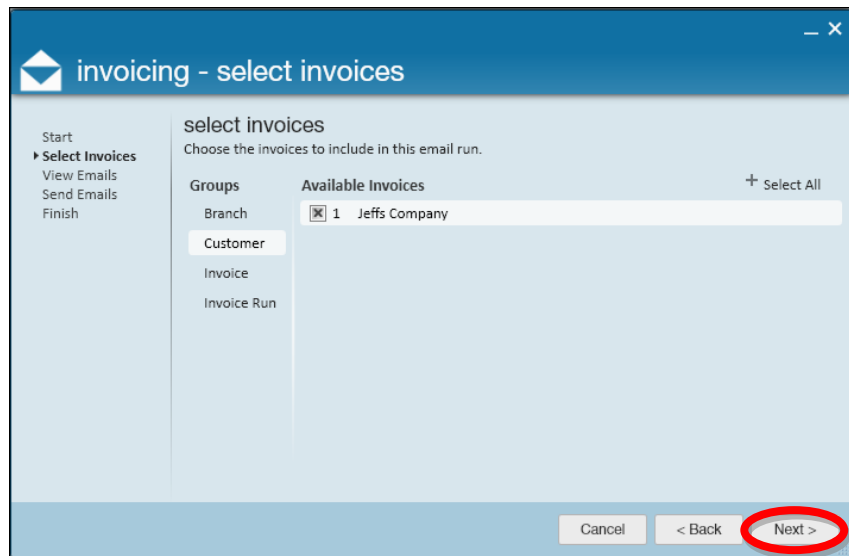
Once the **Invoices** have been *Posted*, the *Invoicing Wizard* can be closed by clicking *Finish*. After the *Invoicing Wizard* is closed select the *Invoicing* option and choose *Email Invoices*.



When *Email Invoices* is selected the *Invoice Email Wizard* opens to the *Invoicing - Start* form. Select the *Sender Email Address* from the drop down menu and the date in the *Email Invoices for Week Ending On* field, then click *Next*.

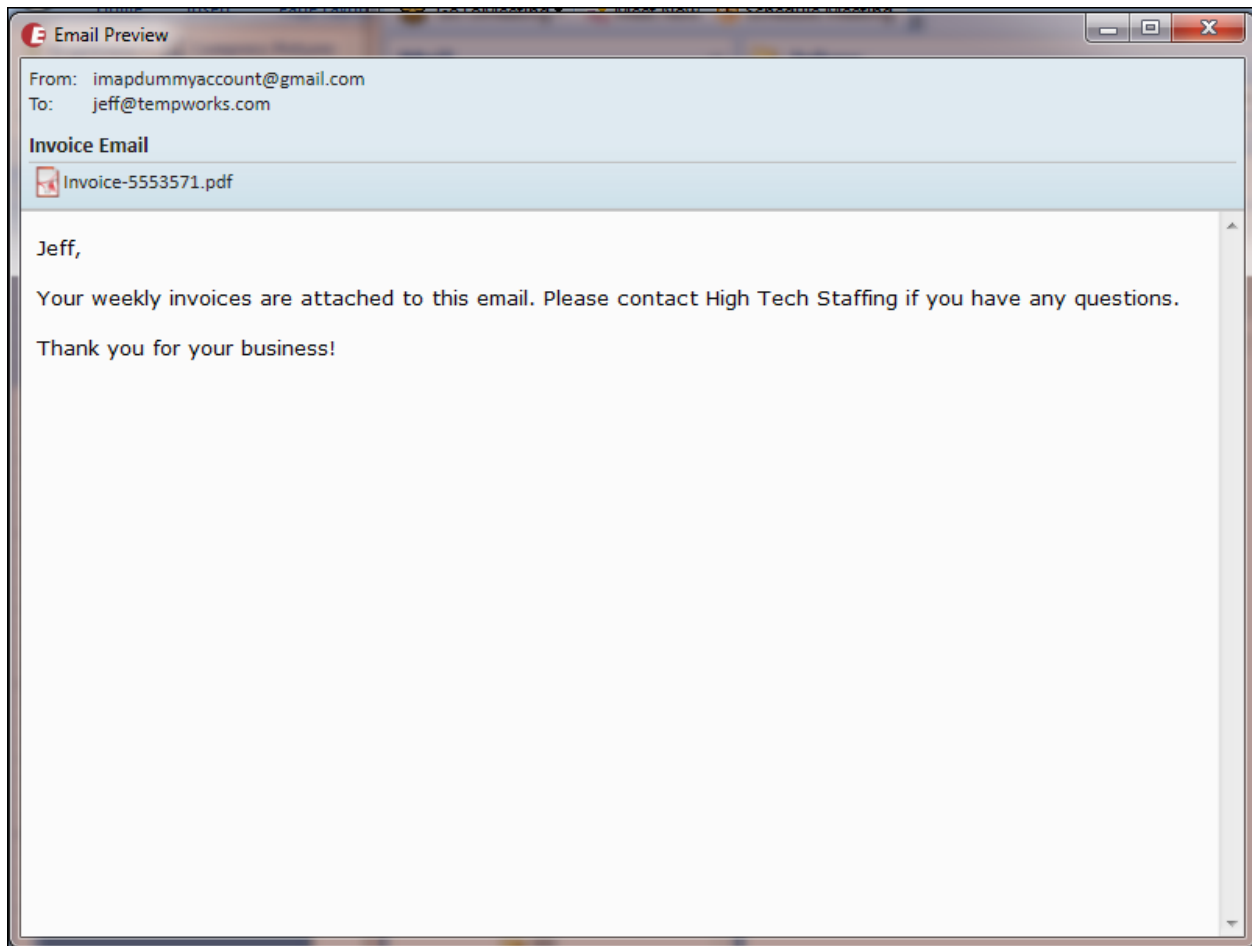
*Note – If the drop down menu is blank the "SMTP" *Email* address needs to be set up in the *E* menu *Options* form.

In the *Invoicing – Select Invoices* form choose the **Invoices** that will be included in the **Invoice Email** run. Once the **Invoice(s)** have been selected, click *Next*.




In the *Invoicing – View Emails* form the *Email* addresses of the **Invoice Email** recipients will be displayed. To remove a recipient, highlight the line and click on the button. Once all of the recipient info looks correct, click *Next*.

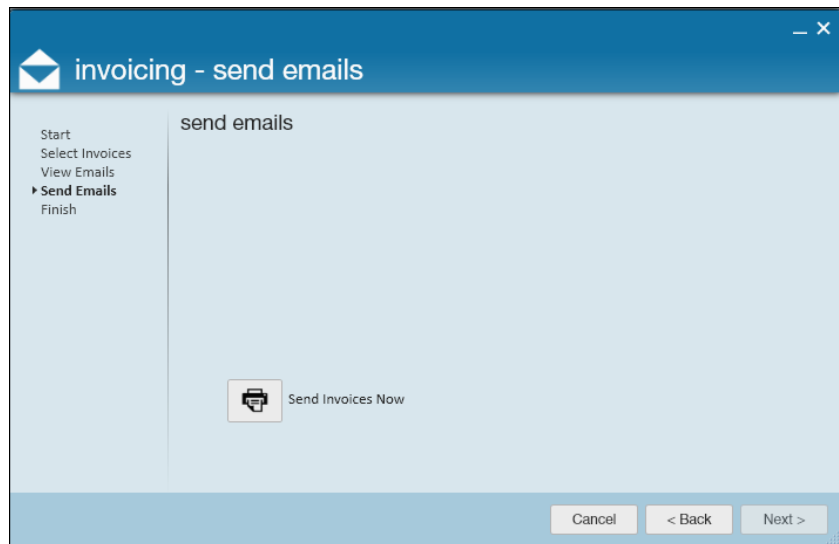
In the *Invoicing – View Emails* form the user can see a preview of the *Email* (as shown below) by selecting the line and clicking on the button. To view the PDF Invoice attachments, double-click on the document file name.

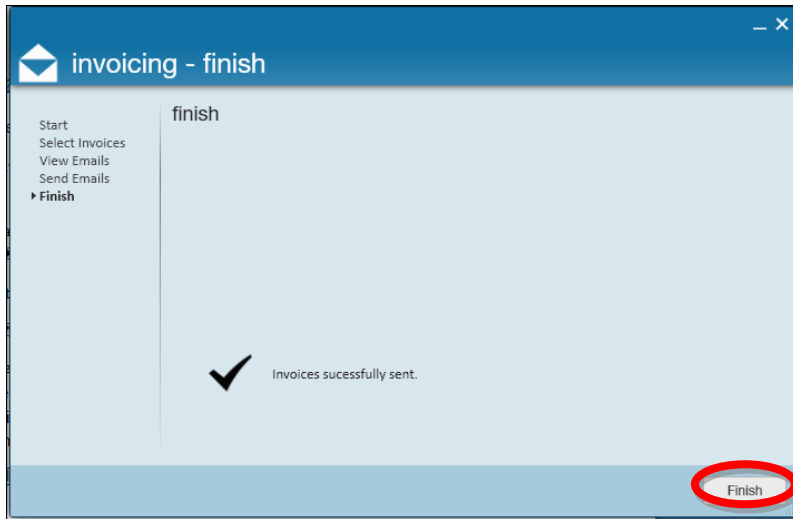


*Note – The text of the *Email* is determined by the **Invoice Email Template** selected on the **Customer Billing Setup** form.

In the *Invoicing – Send Emails* form click on the  button to send the **Invoice Emails** to the recipients.


The screen will then update to show the progress of sending the *Emails*.

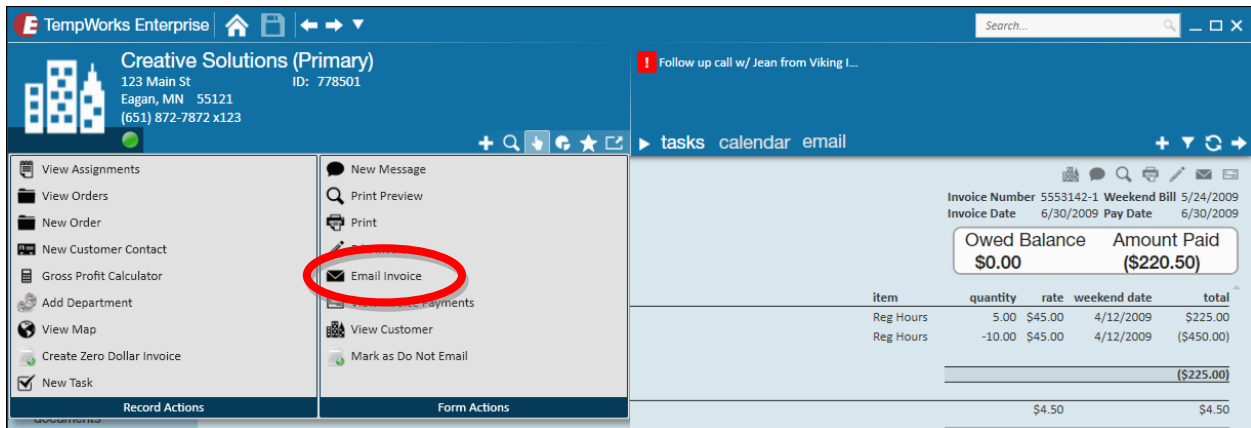
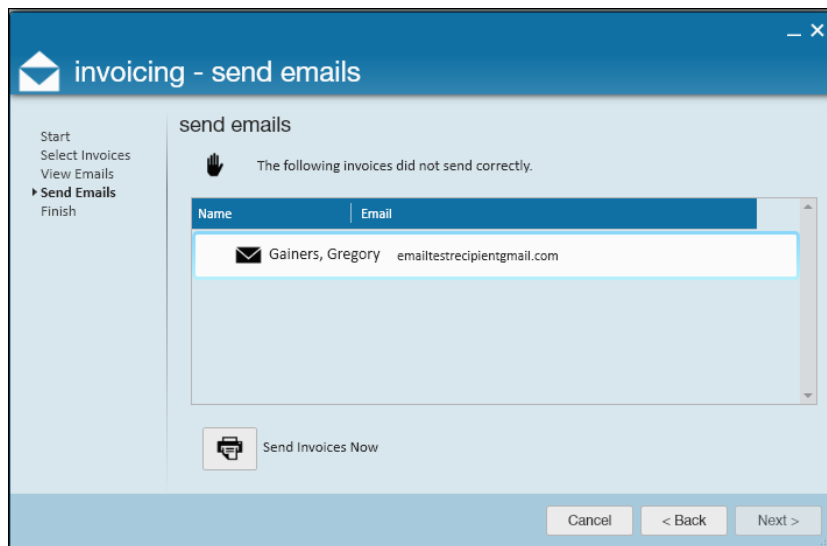





The *Invoicing – Finish* form will appear once the *Emails* have been sent successfully. Click on the *Finish* button to close out of the *Invoice Email Wizard*.

If there are issues with sending the *Emails* the *Invoicing – Send Emails* form will come back up with an error notification on it. Address any issues (improperly formatted addresses, sender accounts not set up correctly, etc.)

Then click the  button to send.



To resend an *Email Invoice* or to send an *Invoice* via *Email* that was originally printed, open the **Customer Invoicing** form and double-click on the **Invoice** to view the *Invoice Details*. Or from the **Pay/Bill** area select the **Invoice Register** and open the *Invoice Details* from there. Then click on the  drop down and select *Email Invoice*. This will open an outgoing *Email* with a PDF copy of the **Invoice** attached. Choose the recipients and click *Send*.

[Still Have Questions?](#)

For more information about mass invoice emailing contact our customer support group at 651-452-0366 or by sending an email to support@tempworks.com.

To schedule training on mass-emailing invoices, submit suggestions on how to improve this document, or to request documentation on other Enterprise functionality please contact our Training Department at trainers@tempworks.com.