

Sending Invoices by Email.

This is now possible but it does require some configuration changes.

Customer.

There are new fields to be added to the customer file. In version 2.60 the customer file will be updated automatically to add these fields.

The new fields are on the accounts page and are

Invoice Email – the address to send the emails to

Wish Invoice by Email – Indicates if wish to send the invoice by email and not print. If this is not ticked then it is possible to still print and email.

Invoicing

When the results of an invoice run- the overview page with the list of invoices has been extended so there is now a To print tab.

The screenshot shows the 'Create Invoices' application window. On the left, there is a date selector set to '21/04/2014' and a 'Show all?' checkbox. The main area is divided into 'Invoice Runs' (listing dates from Mar 13 to Mar 14) and 'Customers'. The 'Customers' section has tabs for 'Overview' and 'To Print'. The 'Overview' tab displays a table with the following data:

Customer	External	Name	Town	Invoice	Chain	Group	Sales	VAT	Total
<input type="checkbox"/> 010683	10683	Testing...	St Ives,...	100012	F		248....	49.72	298....

Below the table, summary statistics are shown:

Total before VAT:	248.60
Goods/Post:	(245.00/0.00)
Total VAT:	49.72
Total:	298.32

Buttons at the bottom include 'Create Interface File', 'Create Monthly File', 'View Jobs on Selected Invoice', 'Make PDF', 'View PDFs', 'Print Invoice', and 'Select Printer'. A 'Close' button is at the bottom left.

On the overview tab there is now an option to Make PDF for selected items. This allows you to make a PDF and attach the PDF manually to an email that you can create. This may be useful in some circumstances. The PDF is saved in a subfolder PDF below the invoices folder.

If the customer on the invoice run has an invoice email address set then there can be two other tabs that appear:

To Email – these are the customers that wish to receive invoices by email, these customers will NOT appear in To Print.

Can Email – these are customers with an invoice email set but have not indicated that they wish to receive invoices by email. These customers will still be in To Print. So to produce invoices, you will process the To Print and To Email columns.

If a customer appears in To Email, you can still get a print by selecting the customer from the Overview tab and clicking Print.

Sending Email.

On the Invoice configuration page there are settings. The Sender email address needs to be entered and if you wish to have a copy of the email sent, then enter this into the copy email address.

Setting up the Email client requires some understanding of how your email works and is configured.

On the configuration page there are three options.

Email Settings

Email via Web Service Email via Local Client

Sender Email Address

Copy Email Address

SMTP Server Port

SMTP User SMTP Password

TLS

No TLS Require TLS

Implicit TLS Explicit TLS

Email via web service.

If this is ticked then Annapurna will send the email via Hawkstone Design web service. However, some email clients will consider that an email sent from xxx@yyyy via info@hawkstonedesign.co.uk is suspicious and not deliver it.

Email via Local Client.

If this is ticked then Annapurna will place the email into your local email client and you then have to send it from there. This can be troublesome if there are many invoices to email.

If neither of the above are ticked then the email is sent via a SMTP server which has to be entered in the setting. You will also need from your email provider information on port number, user, password and security (TLS).

A log of emails status is retained in the log folder.