Emailing and Faxing from Gold

In order to email documents directly from Gold to customers/suppliers the email system must be set up.

To fax documents direct a faxing system needs to be set up and licenced, for example, Hylafax.

Ibcos can arrange and set up email and fax systems.

It is also recommended that background forms are set up and in use to include company logo/stationery when emailing and faxing (refer to factsheet 28 for more information).

Gold Set Up

Personnel Security File

(System Management, Security)

For each user, the personnel security needs to be set to allow email or fax use.

Key Entry Fields (# = Indicates the default setting)

E-mail in Use	No	Normally set to 'No'.
	Yes	
	FAX	
E-mail Address		Enter the users email address.

Standard Comments

(Workshop Control, Standard Comments)

On the General tab, standard comments can be created for use when sending emails or faxes from Gold. Create any number of comments in the Electronic Mail and Fax Notes sections.

These can then be added to the emails and faxes being sent via the "Notes" button.

Customer Documents

(Sales Ledger, Account Maintenance)

Each customer account should be set up to indicate how to send documents.

On the "**Invoice**" tab set the send method for each document type.

Key Entry Fields

Send By	Post	Post document to customer
	FAX	Fax document to customer
	Email	Email document to customer
	Email & Post	Email document to customer and send a copy by post
	Electronic	
To	Select Code or leave blank	A Contact Code can be select from the standard contact list. If the customer does not currently have a contact of the selected type it is possible to create it.
The email address or fax number to be used will be displayed for verification depending on the sending method selected.		

To create a new contact, select the hyperlink "To" field. Either mouse click or "**Shift & F12**" in Windows; or "**Shift & Tab**" in Classic.

A list of current contacts is displayed. Use the "**Insert**" button to add a new contact.

Combined Invoice Emails
Where a customer receives multiple invoices these can be emailed on a single email with one attachment for each invoice or on a single email with one attachment combining all invoices.

This option is set on a per customer basis and only affects the Batch Invoice Run when set to "Print via Invoice Re-Print".
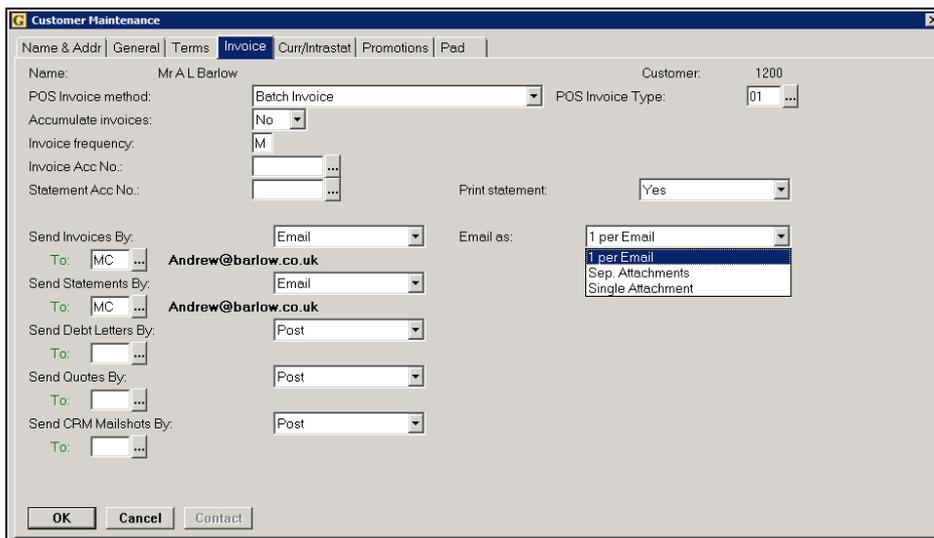
The original option to send one invoice per email is still available.

Both the Invoice Range Reprint program when run in Account or Alphabetical order for Batch Invoices Not Reprinted Before and the Statement program will apply this new option to combine emails.

Note: New settings for Statement Initialisation and Reset are required on the relevant printer model characteristics.
The customer needs to be set to "Batch Invoice" and the statement format needs to be a Laser Preprinted format.

Key Entry Fields

Email As	1 Per Email	Original method of one invoice attachment to each email.
	Sep. Attachments	Sends one email with multiple attachments for each individual invoice.
	Single Attachment	Sends one email with a single PDF attachment containing all invoices.

Statements with Invoices

Where the batch invoice print has been run to print via Batch Invoice Reprint it is now possible to print those invoices as part of the statement run provided they have not been reprinted before.

There is a new option on the statement print to include batch invoices awaiting reprint.
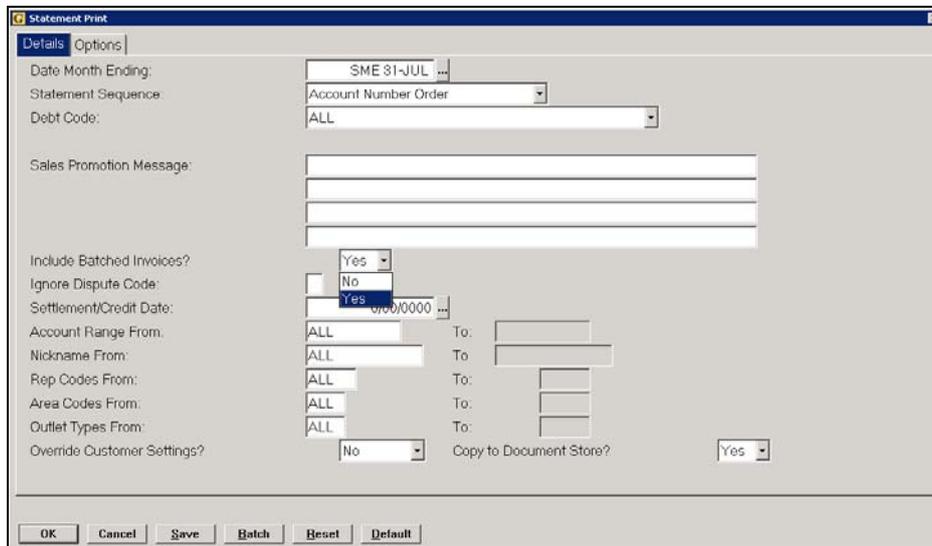
This will produce the statement and a print of each invoice using the combined Email invoices option as detailed above.

Supplier Documents

(Purchase Ledger, Account Maintenance)

Each supplier account should be set up to indicate how to send documents.

On the "**General**" tab set the send method for each document type.

Key Entry Fields

Send By	Post	Post document to supplier
	FAX	Fax document to supplier
	Email	Email document to supplier
	Email & Post	Email document to supplier and send a copy by post
	Electronic	Will be used in future for orders sent electronically through Communications
To	Select Code or leave blank	A Contact Code can be select from the standard contact list. If the supplier does not currently have a contact of the selected type a message is displayed and it is possible to create it.
The email address or fax number to be used will be displayed for verification depending on the sending method selected.		

To create a contact, select the hyperlink "To" field. Either mouse click or "**Shift & F12**" in Windows; or "**Shift & Tab**" in Classic.

A list of current contacts is displayed. Use the "**Insert**" button to add a new contact.

Emailing from Gold

Printer 92 is used to email documents from Gold to a customer or other contact.

For example, a copy invoice from the Sales Ledger, Customer Enquiry could be emailed to a customer.
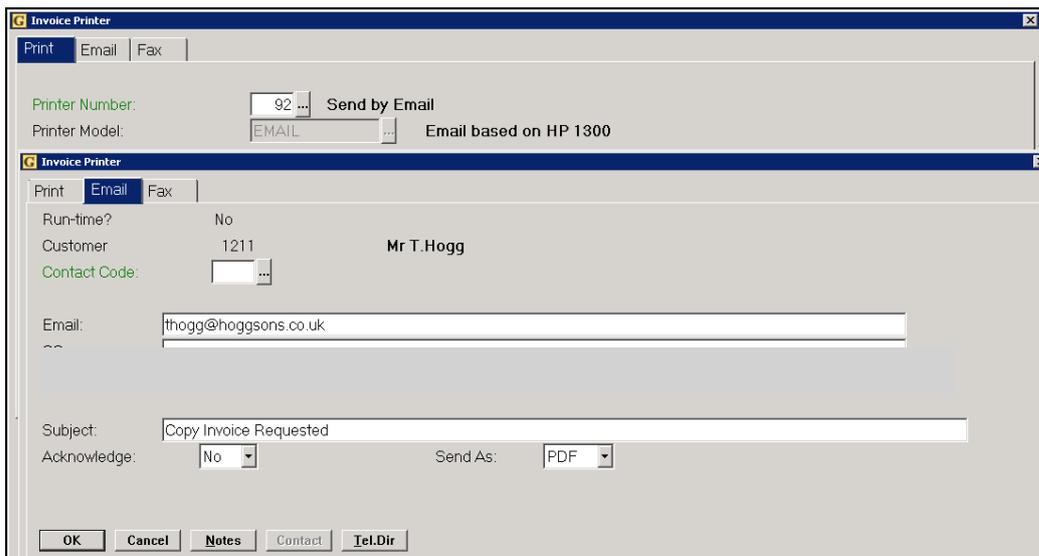
Key Entry Fields (# = Indicates the default setting)

Printer Number		Select Printer 92 for email.
Customer		Enter the customer number if required. (The TelDir option can be used to select a contact from the telephone directory.

E-mail Address		A manual email address can be entered if it is not held against the customer/contact.
E-mail Subject		Enter text to be added to the email subject line.
Send As	PDF TXT	Select the format for the attachment.

Use the "**Notes**" function to add manual notes to the email or to select a comment from the standard comment file.

Faxing from Gold

Printer 94 is used to fax individual documents from Gold to a customer or other contact.

For example, a copy invoice from the Sales Ledger, Customer Enquiry could be faxed to a customer.
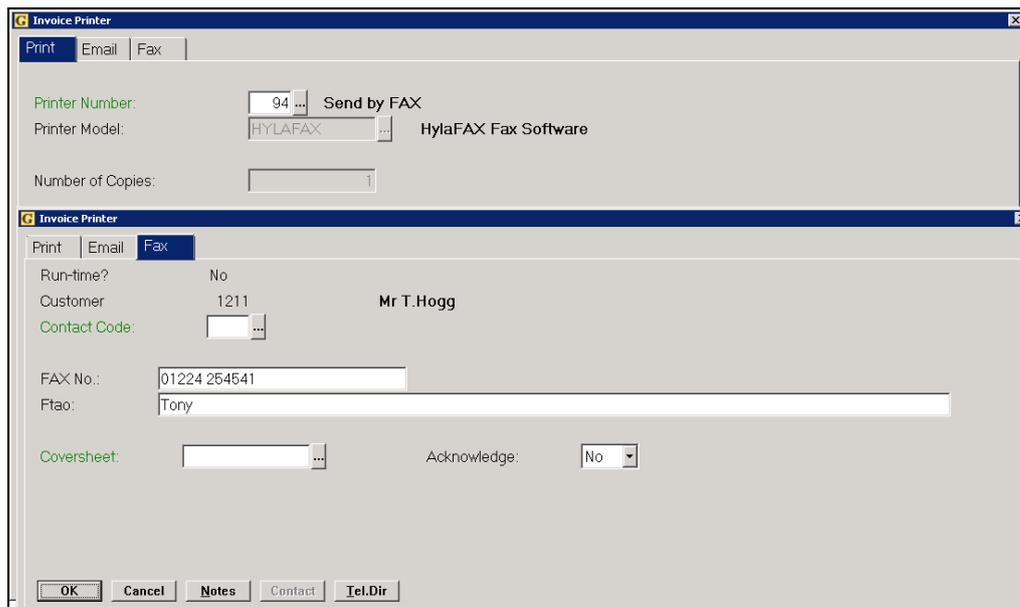
Key Entry Fields (# = Indicates the default setting)

Printer Number		Select Printer 94 for individual fax.
Nickname		Enter a nickname or select from the lookup. The nickname could be a customer, prospect or any contact in the telephone directory.
Fax Number		If held against the account, the fax number will be displayed automatically. If not, a manual number can be entered.
FTAO		Enter a "For The Attention Of" name.

Use the "Notes" function to add manual notes to the fax or to select a comment from the standard comment file.