

T 01202 714200 | F 01202 733552 | www.ibcos.co.uk Support 01202 730522 | goldsupport@ibcos.co.uk

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.

G Security File Maintenance					×
Details Security Doc	ument Store Window	s			
Password:	GO	Initials:	GO	Dept.:	1
First Name:	George				
Surname:	Osbourne		Nickr	iame:	OSBOURNE
E-mail in Use:	No 🝷				
E-mail Address:	georgeo@ibcos	.co.uk			
E-mail login:			Pwi	d: 🛛	*******
Send Copy emails to	originator?		No 💌		
Allowed to send SMS	messages?		Yes 🔹		
SMS Signature:					
G Osbourne					
F	Function Key	Description		Menu S	Selection
	F2	Prt.Enq		M2.1	
	F3	W\S.Enq		M1.1	
	F4	CUS.Enq		M4.1	
	F5	SUP.Enq		M5.1	
	F6	Nom.Enq		M6.1	
Default Menu:		Main Menu		-	•
OK Cancel	<u>Cpy Pwd</u> Chg <u>P</u> wd				

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.

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G Customer Maintenance				X
Name & Addr General Terms Invoice	Curr/Intrastat Promotions P	ad		
Name: Mr A L Barlow			Customer:	1200
POS Invoice method:	atch Invoice	POS	Invoice Type:	01
Accumulate invoices:				
Invoice frequency:				
Invoice Acc No.:	<u></u>			
Statement Acc No.:		Print statement:	Yes	-
Send Invoices By:	Email 🔹	Email as:	1 per Email	<u> </u>
To: MC Andrew@barlo	ow.co.uk		1 per Email Sen Attachments	
Send Statements By:	Email 🔹		Single Attachment	
To: MC Andrew@barlo	ow.co.uk			
Send Debt Letters By:	Post 🔹			
To:				
Send Quotes By:	Post 🔹			
То:				
Send CRM Mailshots By:	Post 🔹			
То:				
OK Cancel Contact				
To: MC Andrew@barld Send Debt Letters By. To: Send Quotes By: To: Send CRM Mailshots By: To:	Post Post Post			

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		
То	Select Code	A Contact Code can be select from the	
	or leave	standard contact list.	
	blank	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.

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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".

G Customer Maintenance				×
Name & Addr General Terms Invoid	Curr/Intrastat Promotions F	Pad		
Name: Mr A L Barlow	_		Customer:	1200
POS Invoice method:	Batch Invoice	PC	S Invoice Type:	01
Accumulate invoices:	No 💌			
Invoice frequency:	M			
Invoice Acc No.:				
Statement Acc No.:		Print statement:	Yes	•
Send Invoices By:	Email 🔹	Email as:	1 per Email	<u>•</u>
To: MC Andrew@bar	low.co.uk		1 per Email Sen Attachments	
Send Statements By:	Email 🔹		Single Attachment	
To: MC Andrew@bar	low.co.uk			
Send Debt Letters By:	Post 💌			
То:				
Send Quotes By:	Post 🗾			
То:				
Send CRM Mailshots By:	Post 💌			
То:				
OK Cancel Contact				

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.

G Statement Print	
Details Options	
Date Month Ending:	SME31-JUL
Statement Sequence	Account Number Order
Debt Code:	ALL
Sales Promotion Message:	
Include Batched Invoices?	Yes •
Settlement/Credit Date:	Yes (70)/0000
Account Range From.	ALL To:
Nickname From:	ALL To
Rep Codes From:	ALL To:
Area Codes From:	ALL To:
Outlet Types From:	ALL To:
Override Customer Settings?	No Copy to Document Store? Yes
OK Cancel Save Bat	ch Beset Default

This will produce the statement and a print of each invoice using the combined Email invoices option as detailed above.



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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.

Name & Address General Terms/Intrastats Bank/Electronic CIS Pad
Name: Main Franchise Supplier Supplier A/c.: 1133
Account Type: Open Item
Account Ref No.: VAT. Number:
Currency Code: GBP Nominal A/c:
Payment To A/c.: 1133 Default VAT Code:
Payment Method: Cheque Payment Priority. 1
Carriage Uplitt%: 0.00% Delivery Days:
Emergency Part Orders Pricing: No 💌
Send Orders By: Email
To: AC sales@mainfranchise.co.uk
Send Warranty By. FAX
To: 01203 304555
Send Remittances By: Post
To:
OK Cancel Contact

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	
То	Select Code	A Contact Code can be select from the	
	or leave	standard contact list.	
	blank	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.

G Invoice Printer				×
Print Email Fax				
				1
Printer Number:	02 5	and by Email		
Printer Madal:	EMAIL	Email based	op HD 1200	
Printer Model.	EMAIL		011 FP 1300	
G Invoice Printer				×
Print Email F	ax			
Run-time?	No			
Customer	1211	Mr T.Hogg		
Contact Code:				
	·			
Email:	thoga@hogasons.co.uk			
~~	[
Cubicat:	Conulousias Deguastad			
Subject.	Copy Invoice Requested	0.14		
Acknowledge:	NO 💌	Send As:	IPDF 🗾	
OK Canc	el <u>N</u> otes Contact	Tel.Dir		

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	Select the format for the attachment.
	ТХТ	

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.

G Invoice Printer	×
Print Email Fax	
Printer Number: 94 - Send by FAX Printer Model: HYLAFAX - HylaFAX Fax Software	
Number of Copies: 1	
G Invoice Printer	×
Print Email Fax	
Run-time? No	
Customer 1211 Mr T.Hogg	
Contact Code:	
FAX No.: 01224 254541 Ftao: Tony	
Coversheet: Acknowledge: No 💌	
OK Cancel Notes Contact Iel.Dir	



Kev	Entry	Fields	(# =	Indicates	the	default	settina)
ксy	LIIUY	i ieius	$(\pi -$	indicates	uie	uerauit	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.