Emailing from Counter Intelligence Office 2009

A feature has recently been added to the Counter Intelligence Office software that allows purchase orders and supplier returns to be emailed directly to your suppliers and invoices/credit notes and statements to be emailed directly to your customers from within Counter Intelligece Office.

Settings

SMTP Server: this is whoever your Internet Service Provider is i.e. smtp.vodafone.co.nz

SMTP Port: 25 (this shouldn't need to be changed)

User Name: user name for which email account will be sending the emails through.

Password: the password for the user name used above.

SMTP SSL: can be left unchecked

From Address: the email address that you want the emails to display

To Address: this is pulled from the Customer Account

Subject: the subject that will appear on the email

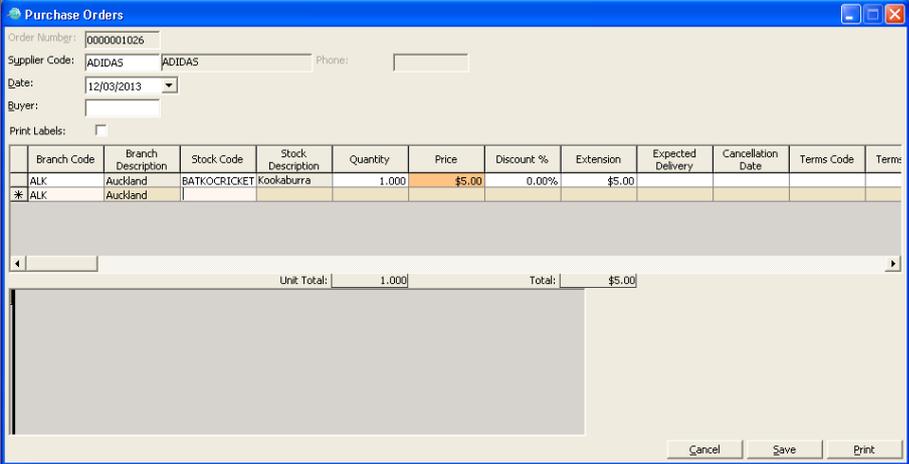Message: this is the message that will display on each email that is sent through.

Hide this dialogue for future emails (can be restored in System Settings):

this prevents the Email Details window from appearing the next time you send an email.

Emailing Purchase Orders

Right Click on the Purchase Icon in Counter Intelligence Office to select *Create or Modify an Order*.

Fill in the Purchase Order with the required information or recall an existing purchase order that you know is already is in the system.

Click on *Print*; when the first *Select Printer* window appears select *Print to email* and click *OK.*

When the second window appears it is asking what action to take when there is no email address against the Supplier; select a printer or one of the other options that is available to you.

Once you have clicked on the second print option the email window will appear for you to click *send*, or if you have disable this settings window the purchase order will be emailed or printed if there is no valid email address.

Emailing Supplier Returns

Right Click on the Supplier Icon in Counter Intelligence Office to select *Returns to Suppliers.*

Fill in the Returns to Supplier with the required information or recall an existing supplier return that you know is already is in the system.

Click on *Print*; when the first *Select Printer* window appears select *Print to email* and click *OK.*

When the second window appears it is asking what action to take when there is no email address against the Supplier; select a printer or one of the other options that is available to you.
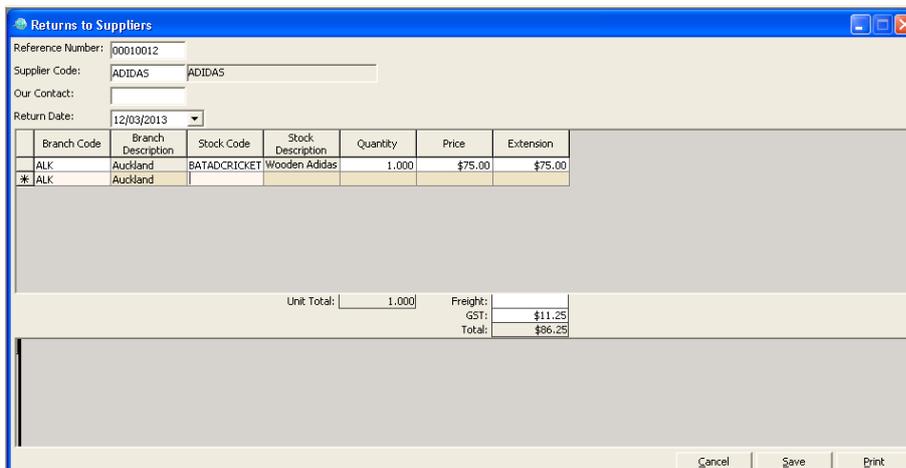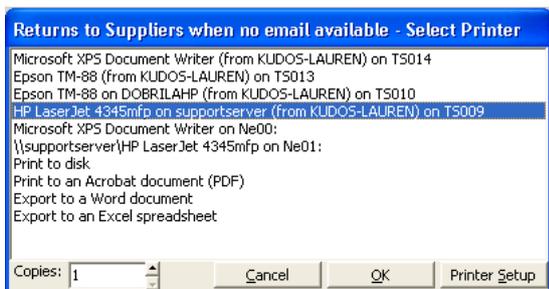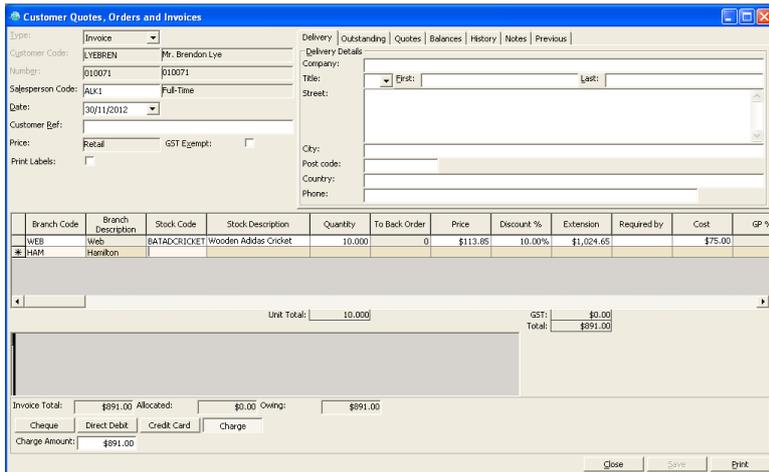

Once you have clicked on the second print option the email window will appear for you to click *send*, or if you have disable this settings window the supplier return will be emailed or printed if there is no valid email address.

Emailing Invoices / Credit Notes

Right Click on the Sell Icon in Counter Intelligence Office to select *Create or Modify a Quote, Order or Invoice*.

Fill in the Quote, Order or Invoice with the required information or recall an existing Quote, Order, or Invoice that you know is already is in the system.

Click on *Print*; when the first *Select Printer* window appears select *Print to email* and click *OK.*
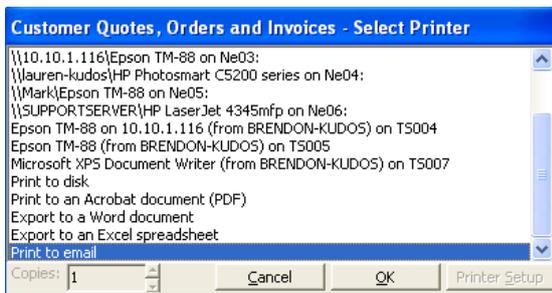
When the second window appears it is asking what action to take when there is no email address against the Customer Account; select a printer or one of the other options that is available to you.
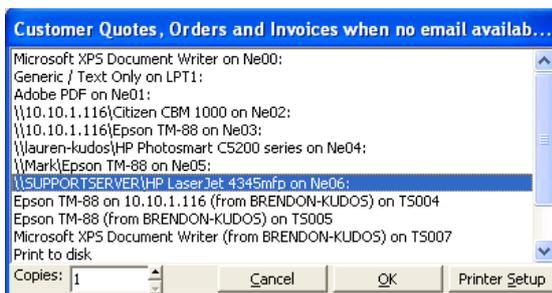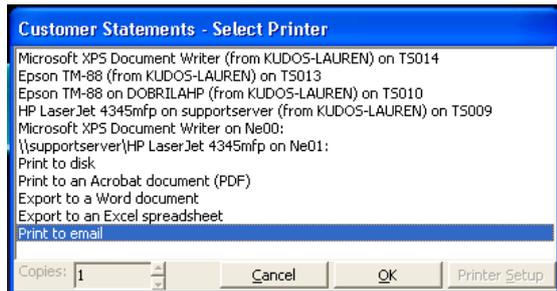

Once you have clicked on the second print option the email window will appear for you to click *send*, or if you have disable this settings window the invoice/credit note will be emailed or printed if there is no valid email address.

Emailing Statements

Right Click on the Customer Icon in Counter Intelligence Office to select *Print Statements*.

When the first *Select Printer* window appears select *Print to email* and click *OK.*

When the second window appears it is asking what action to take when there is no email address against the Customer Account; select a printer or one of the other options that is available to you.
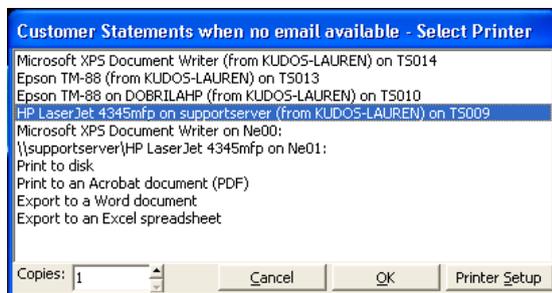
Fill in the Print Customer Statements with the required information and click *Print*.

Once you have clicked on the print option the email window will appear for you to click *send*, or if you have disable this settings window the statements will be emailed or printed if there is no valid email address.

Updating the Email Settings

If you need to change the settings again, you will need to go into Setup and System Settings and put a checkmark against the option: Show email dialogue. This will make the prompt from above appear the next time you try to print another email