CabVista: Emailing Invoices to Account Customers

When you produce an invoice for an Account Customer, you can send it to them by either of two methods:
-- **Printed** copy (to be posted or faxed)
-- **Emailed** copy (described in this document)

> **1)** Emailing Invoices to Customers:

Summary: After creating a set of invoices in Invoice Manager, you can now email those invoices to your account customers.

Detail: Previously, you could create a printed invoice for each of your Account Customers in Invoice Manager.   Now you can choose to instead create an HTML invoice (ie: one that a customer can open in his web-browser) and <u>attach</u> it to an <u>email</u> to the customer.

For each customer, you can say which method (printed or email) he would prefer.

- Part 1: Selecting which customers will receive an email:

Go to "Basic Data → Account Customers", and for each customer whom you wish to email (rather than print), set "Send via" to "Email attachment".   Your full set of choices is:

Send via	Means that Invoice Manager will ...
Printed Invoice (for posting)	Print an invoice on paper, ready for **posting to customer**
Email attachment (for Emailing)	Create an HTML (web-page) invoice, ready to be **attached to an email to the customer**
Both	Copies of **both** the above will be created, so you can send the invoice to your customer in either way (or both)

So for each customer whom you wish to email, set "Send via" to "Email attachment".

(Note: you must also have entered an email address for each of these customers !)

- Part 2: Create invoices in Invoice Manager:

Create your invoices in Invoice Manager in the usual way, starting at Step 1 by clicking on "Print" to preview then print your invoices.

However, there are two differences:

1) **Step 1: Print**: will now <u>only</u> show the invoices for customers you set as "Printed Invoice" (or "Both").

2) **Step 2: Email**: you will see there is an <u>extra option</u> after "Print" called "Email".

   After you have "Print"ed your invoices, click on "Email" and you are shown a list of the customers you said wanted an "Email attachment".

Highlight the first customer and click on "View or Check Invoice". You are shown the invoice that is about to be emailed to that customer. Close the invoice after checking.

Now click on "Email invoice" and an email is opened to this customer, with their invoice attached. If you are happy with the email, you can now send it.

Now move on to the 2nd customer in the list, etc.

Notes:

1) If you chose "Send Via = Both" then that customer's invoice will appear in both steps 1 and 2.

2) You can only email a customer if you have entered his email address at "Basic Data → Account Customers".

Reviewing the History of emailed invoices:

If you need to look back at an 'old' invoice that you previously emailed to a customer, then there are two possible ways:

1) Simply look back in the 'Sent Items' of your email client, to find the email you sent to the customer – the invoice will be attached for you to open and view.

2) Go to "Invoicing → Invoice History", choose the month you wish to view, then click on "Emailed Invoices". You are then shown a folder for each day in this month where you created an emailed invoice. Double-click on the day you want to see the invoices for. Double-click on an invoice to open it.

> **2)** Sending Emails (to Drivers and Customers) when you have *MS Outlook*:

Emailing a list of jobs to a Driver, or emailing an invoice to a customer, may need special action if you are using *MS Outlook* as your default email client.

You may need to link specifically to *Outlook*, which you can do as follows:
Go to "Basic Data → Parameters & Options → General Options" and change "**My Email Client...**" to "**MS Outlook**".

If you now try to send an email, you should find that CabVista tries to connect directly to your copy of Outlook. **Note**: To be successful, you may need to have **Outlook running/open** at the time you send the email.

To run a quick test of this feature, go to "Dispatch F8", click on "Email Driver" and try emailing a driver a list of his jobs for today.

> **3)** You can include header and/or footer images/**pictures** in your emailed invoices:

If you are sending invoices via the email feature, then you can choose to include an **image** or **picture** as the **header** or **footer** (or both) of your invoice. This effectively allows you to include your own stationery within the invoice, or to display your company logo.

- To set-up this feature the first time, follow these steps:

    1) In Windows:

    i) create a folder called "InvoiceImages" on your "Local-C-drive" and copy the 2 jpegs you wish to use (the 'header' and the 'footer') into the "CabVista" folder (ie: copy them to "My Computer → Local C-Drive → InvoiceImages").

    ii) re-name the header as **Header1.jpg**, and re-name the footer as **Footer1.jpg**.

    2) In CabVista:

    i) go to "Basic Data → Parameters & Options → General Options", then:

    ii) tick "Show Pictures in emailed invoices ?".

- You will also need to do the following with any Account Customer who wishes to subscribe to this feature (**once only**, before you send them their first emailed invoice):

    i) ask your account customer if they wish to receive electronic invoices with pictures

    ii) if they do, then ask them to create a folder "InvoiceImages" on their "Local-C-drive" … then email them copies of your 2 jpegs, and ask them to store them in that folder "InvoiceImages".

    You only have to do this once – the first time you use this feature.

    You can then go to Invoice Manager and create your email invoices in the usual way.