Sending Emails from Foodlogik
with PDF document attached.

You can email Invoices, Statements Purchase orders and other documents directly to a customer or supplier from within Foodlogik. The document to be emailed is first converted to PDF and then your own email program is used to send it. A history of all emails sent is kept in your Sent Folder. You can also use the automatic batch processes to send these documents.

Installation instructions. (Don't Panic! It's very easy)

This software will be installed on your computer, not the server, so **you must have administrator rights**.

1. Download and install gs862w32.exe. (Ghostwriter)
   Open a web browser and enter this link in the address (Or just click on it and a browser should automatically open)

   https://www.foodlogik.co.uk/downloads/?media=111

2. Just double click the installation file, then click the "Setup" button.
   It's important that it's installed with Administrator rights. You may need to get your Administrator to install this for you.
   Then just click the "Install" button.

3. Download and install setupSOMEmail.exe. You must have Administrator rights.

   https://www.foodlogik.co.uk/downloads/?media=105

   This will create a local working folder on your computer called C:\SOM\PDFExport

4. Install CutePDF Writer
   Download from http://www.cutepdf.com/Products/CutePDF/writer.asp (Or just click on it and a browser should automatically open)
   Double click the installation file and follow the on-screen instructions.

5. You have a choice as to how you send the emails.

   BLAT - You don't need an installed email client with this but there is a bit more to setting it up.
   MAPI - This uses your MAPI email client, such as Thunderbird or Outlook Express. (The easiest option)
   OUTLOOK - MS Outlook (version 2007 or later). (Also very easy)
   EXCHANGE - MS Outlook with Exchange Server.

   MAILSEND – this is if you use web email system such as Gmail

   To set the method, go to the Foodlogik menu and select "System | Settings | Email Settings".
   The setting is unique for each user, so every user that wants to send emails must perform this step.
   Select the required Mail Client from the drop down list

   MAPI and Outlook don't need any further settings.
   The EXCHANGE setting will need your Outlook Profile name which you can find in the Accounts section in Outlook.
   The BLAT or MAILSEND setting will need a few more settings. As with Outlook, they can be found in your current email program's Account settings.
   If you normally get your emails using Secure Authentication, then you must enter your username and password.

   See the next page for an example of setting it to BLAT.

Email Settings

User: piet

Mail Client: BLAT

Settings are only required for Exchange Server and BLAT.

Exchange Server
Outlook Profile:

BLAT Settings
SMTP Server: smtp.b:connect.com
Account ID: piet@mtel.co.uk
Email From: accounts@mtel.co.uk
CC:
BCC:
Auth Login: myuser
Auth Password: *********

Only use if your email needs an authenticated login.

Enter Email addresses.

Ensure that any Customers or Suppliers email addresses are entered on the relevant customer or supplier screen.

Tick the Email D/Note, Inv or Stmnt box if you want to send it by email instead of printing it during a batch run.

The supplier screen will have the option to email Purchase Orders.

Page 4 of Customer screen. Tick the boxes for sending automatic emails. If the customer is a sub-account then tick the "Send email to H/O" box.

When you send an email, you would normally type a Subject and Body text. SOM will automatically generate these depending on what type of document you are sending.

The Subject

The subject line of the email will be the document type plus the customer/supplier code and the Invoice/Dnote number. e.g. "Weekly Invoice 0002 WI30234", where 0002 is the customer code and WI30234 is the Invoice number. The PDF file name attached to the email will be similar, Weekly_Invoice_0002_WI30234.pdf.

Personalise the Body message

The body text for the email depends on the document type. If you want to change the body text to something more to your liking, then the Text files you need to modify are in C:\SOM\PDFExport. (You can find it using "My Computer" which is on the desktop, then double click the file to edit it in NotePad or WordPad)

Delivery Notes	emaildelnote.txt
Purchase orders	emailpurchord.txt
Invoices (Daily, weekly & Extras)	emailinvoice.txt
Credit Notes	emailcreditnote.txt
Statements	emailstatement.txt

(Your computer might be set to not display the .txt extension)

Sending the Email

To send the document by email, press the Print button as usual, but select the "Email Report" option instead of your usual printer.

However, if you select a real printer then any report that has been ticked to receive emails will be sent by email. Any reports that have not been ticked will be printed.
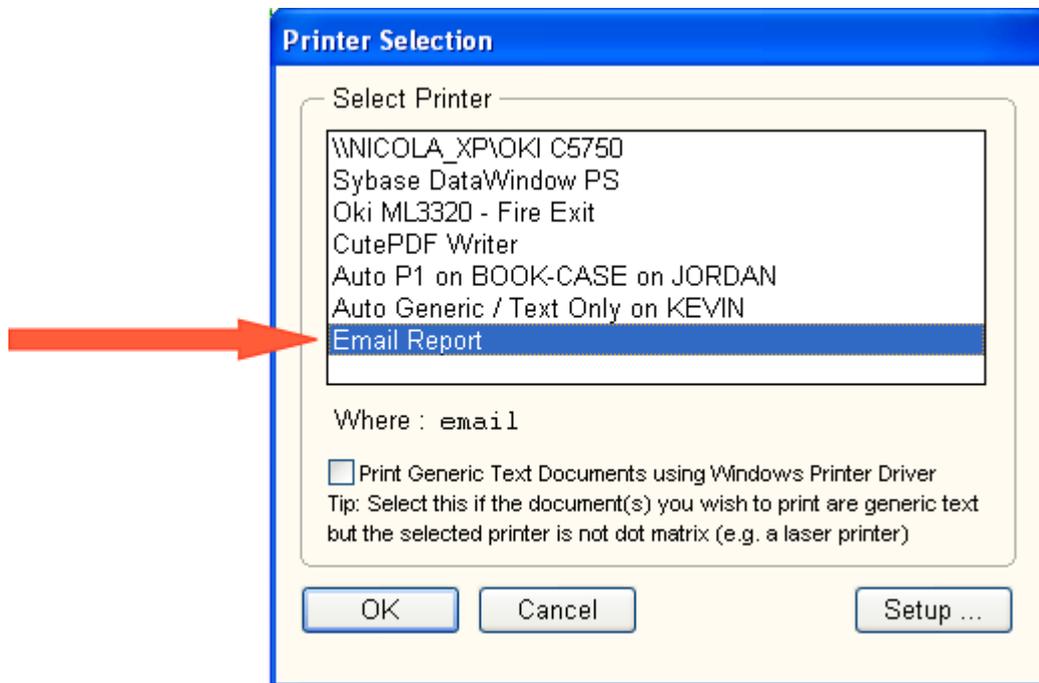
The document will be converted to PDF and the PDF to your email outbox (e.g. Outlook, Gmail etc) which will the send it to the customer or supplier using your email preferences as defined in your email program.

If any problems are encountered during the process, you will receive an appropriate error message. The most usual would be a missing email address or incorrect gmail password.

Sometimes a second PDF attachment needs to be sent with each email, such as terms and conditions. If this is the case you need to change the settings on the remote.ini configuration file.

1. The pdf file you need must be saved in the c:\SOM\PDFExport\ folder
2. Add this line to the [Application] section of the remote.ini file:

> PDFDnote2ndAttach=filename.pdf

where "filename" is the name of file you wish to attach

We appreciate that this is slightly technical, so please feel free to contact us for helping in setting that up.

If you require any other documents to be sent by email, then please contact Merit Technology to arrange the additions.

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