

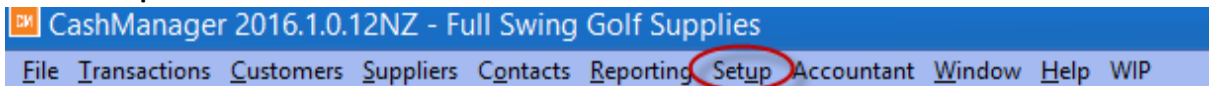
## Setting up emails in CashManager

There are 3 methods you can setup to email from CashManager.

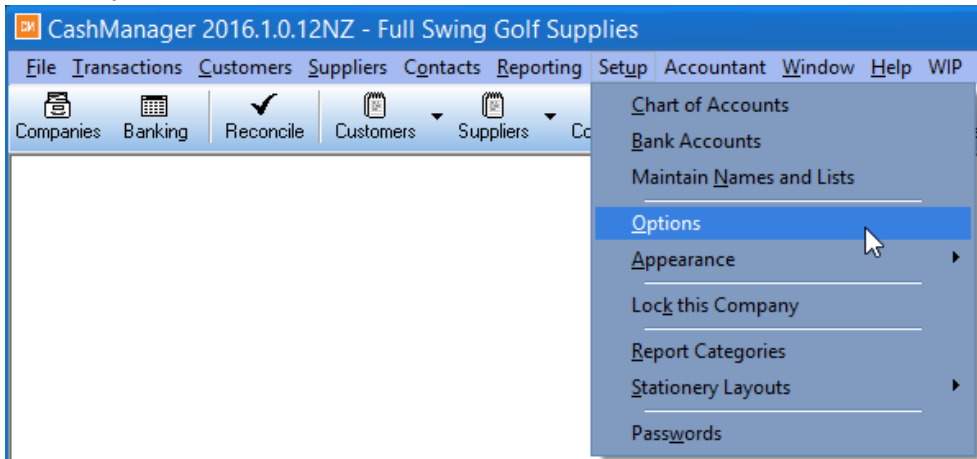
1. Via Desktop Client- Using Outlook, Windows live mail etc..
2. Via Web Client- Using Gmail, Hotmail, Yahoo, etc..
3. Via CashManager Server- Using the settings built in the CashManager programme

**To set up your emails using the Email/Desktop Client (e.g. - Outlook, Windows Live Mail, etc.)**

1. Go to '**Setup**' menu in the menu bar



2. Select '**Options**'



- This will take you to 'System Setup' screen, then Select the 'Email' tab at the bottom. Select the 'Preferred email method' from the drop down box 'Send emails via MAPI client(e.g. Outlook)

**System Setup**

**Sub-Accounts in Reporting**  
Sub-accounts enhance CashManager's monthly and budget reporting.  
 Activate sub-accounts in monthly reporting  
Character to use as sub-account separator: Slash

**Recurring Transactions**  
You can set up recurring transactions to automatically process regular deposits and payments, like loans and leases.  
 Activate recurring transactions feature  
 Check schedule at startup

**Quantities Tracking**  
Enabling this feature allows you to record quantities against selected transactions.  
 Activate tracking of quantities

**Deposit Slip**  
The deposit slip feature allows you to print deposit slips for your bankings.  
 Activate deposit slip printing

**Easysearch on Details**  
In addition to Easysearch on Payee/Payer Names, you can activate Easysearch on the transaction details line as well.  
 Activate Easysearch on Details

**Contact Management**  
This helps you keep track of your Contacts. You can attach notes and follow-up reminders to your Contacts, and also export selected Contacts for mail merging. Contact Management links in with your Customer and Supplier files if you have the Invoicing option activated.  
 Activate Contact Management feature  
 Show due tasks when loading CashManager

Features | GST Setup | Headings | Cheque Printing | Customers | Products | Suppliers | **Email** | Preferences | Other

Accept Help Cancel

**System Setup**

These options are used if you want to be able to send your data files to your accountant or Accomplish Support via email.  
They are also used if you have activated CashManager Invoicing and are sending emails to Customers or Suppliers.

**Your Email Account Details**  
Preferred email method: Send emails via CashManager Server  
(Selecting MAPI will use your Outlook. Selecting SMTP will use your SMTP Server)  
Send emails via MAPI client (eg Outlook)  
Send emails via SMTP Server  
Send emails via CashManager Server

Default Reply-to email address: [Empty field]  
Always use this reply-to email address:

**Full Swing Golf Supplies - Reply to email details**  
Reply-to email address for this company: [Empty field]

**Your Accountant's Details**  
Name: [Empty field]  
Email address: [Empty field]

Features | GST Setup | Headings | Cheque Printing | Customers | Products | Suppliers | **Email** | Preferences | Other

Accept Help Cancel

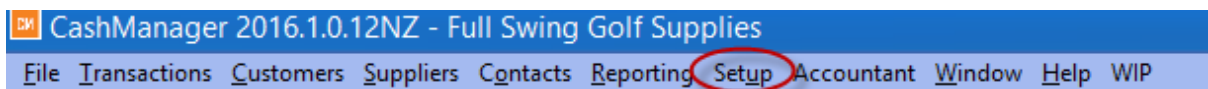
4. Enter the email address you use in the Email/Desktop Client in the **'Default reply-to email address'** area

**NOTE- THIS IS FOR THE COMPLETE CASHMANAGER SOFTWARE, IF YOU HAVE MORE THAN ONE ENTITY IN CASHMANAGER AND PREFER TO HAVE DIFFERENT REPLY-TO EMAIL ADDRESSES THEN ENTER IT IN THE NEXT BOX DOWN (circled in blue above)**

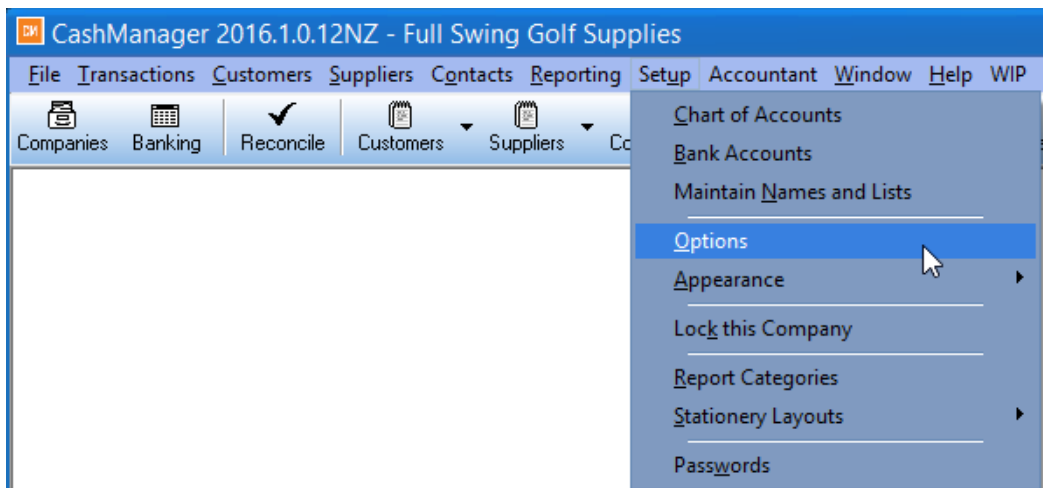
5. Should you wish to be able to email data or reports out of CashManager to your accountant Then please enter details in **'Your Accountant's Details'**
6. Then select **Accept**. You are all set to email from CashManager now.

***To set up your emails using the Email/Web Client (e.g. – Gmail, Hotmail, etc.)***

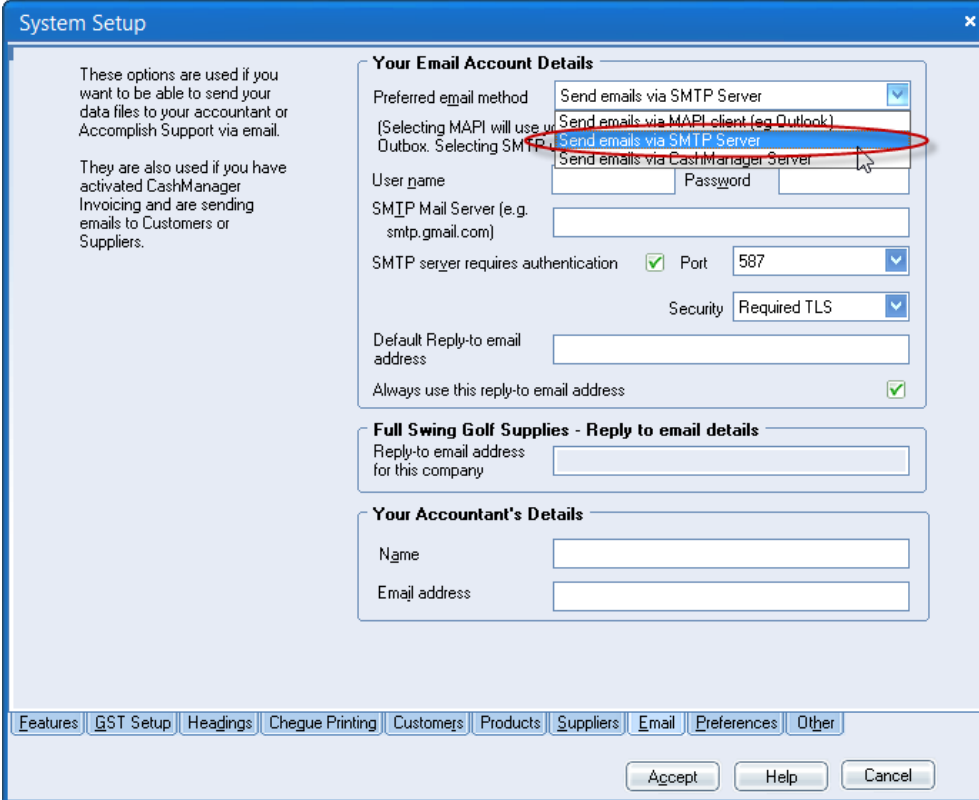
1. Go to **'Setup'** menu in the menu bar



2. Select **'Options'**



- This will take you to 'System Setup' screen, then Select the 'Email' tab at the bottom. Select 'Send emails via SMTP Server' from the drop down box for Preferred email method.



System Setup

These options are used if you want to be able to send your data files to your accountant or Accomplish Support via email.

They are also used if you have activated CashManager Invoicing and are sending emails to Customers or Suppliers.

**Your Email Account Details**

Preferred email method: Send emails via SMTP Server (selected)

(Selecting MAPI will use Outlook. Selecting SMTP will use the Internet Service Provider.)

User name: \_\_\_\_\_ Password: \_\_\_\_\_

SMTP Mail Server (e.g. smtp.gmail.com): \_\_\_\_\_

SMTP server requires authentication:  Port: 587 Security: Required TLS

Default Reply-to email address: \_\_\_\_\_

Always use this reply-to email address:

**Full Swing Golf Supplies - Reply to email details**

Reply-to email address for this company: \_\_\_\_\_

**Your Accountant's Details**

Name: \_\_\_\_\_

Email address: \_\_\_\_\_

Features GST Setup Headings Cheque Printing Customers Products Suppliers **Email** Preferences Other

Accept Help Cancel

- Enter the details in the red circle as below that you may have received from the Internet service provider (e.g.: Vodafone, Spark, ect) You can easily find these by contacting your Internet Service Provider help desk. And if you still need assistance you can [Contact CashManager Support Team](#).

System Setup

These options are used if you want to be able to send your data files to your accountant or Accomplish Support via email.

They are also used if you have activated CashManager Invoicing and are sending emails to Customers or Suppliers.

**Your Email Account Details**

Preferred email method: Send emails via SMTP Server

(Selecting MAPI will use your default email software, and place emails in your Outbox. Selecting SMTP utilises CashManager's built-in email tool.)

User name:  Password:

SMTP Mail Server (e.g. smtp.gmail.com):

SMTP server requires authentication:  Port: 587

Security: Required TLS

Default Reply-to email address:

Always use this reply-to email address:

**Full Swing Golf Supplies - Reply to email details**

Reply-to email address for this company:

**Your Accountant's Details**

Name:

Email address:

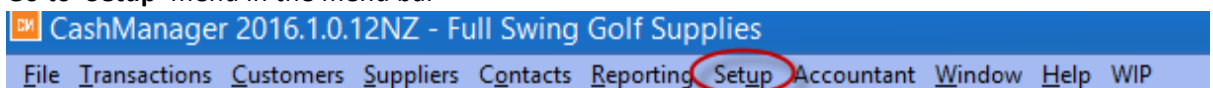
Features | GST Setup | Headings | Cheque Printing | Customers | Products | Suppliers | Email | Preferences | Other

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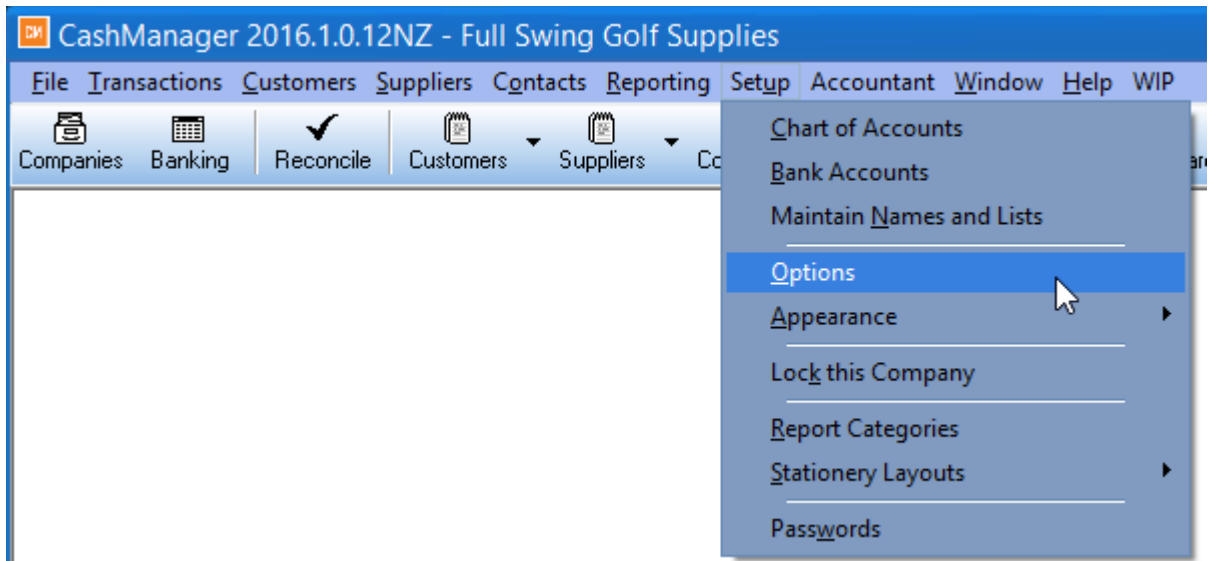
5. Enter the email address you use in the **'Default reply-to email address'** area
6. Should you wish to be able to email data or reports out of CashManager to your accountant Then please enter details in **'Your Accountant's Details'**
7. Then select **Accept**. You are all set to email from CashManager now.

### ***To set up your emails using CashManager Server-Built In with the programme***

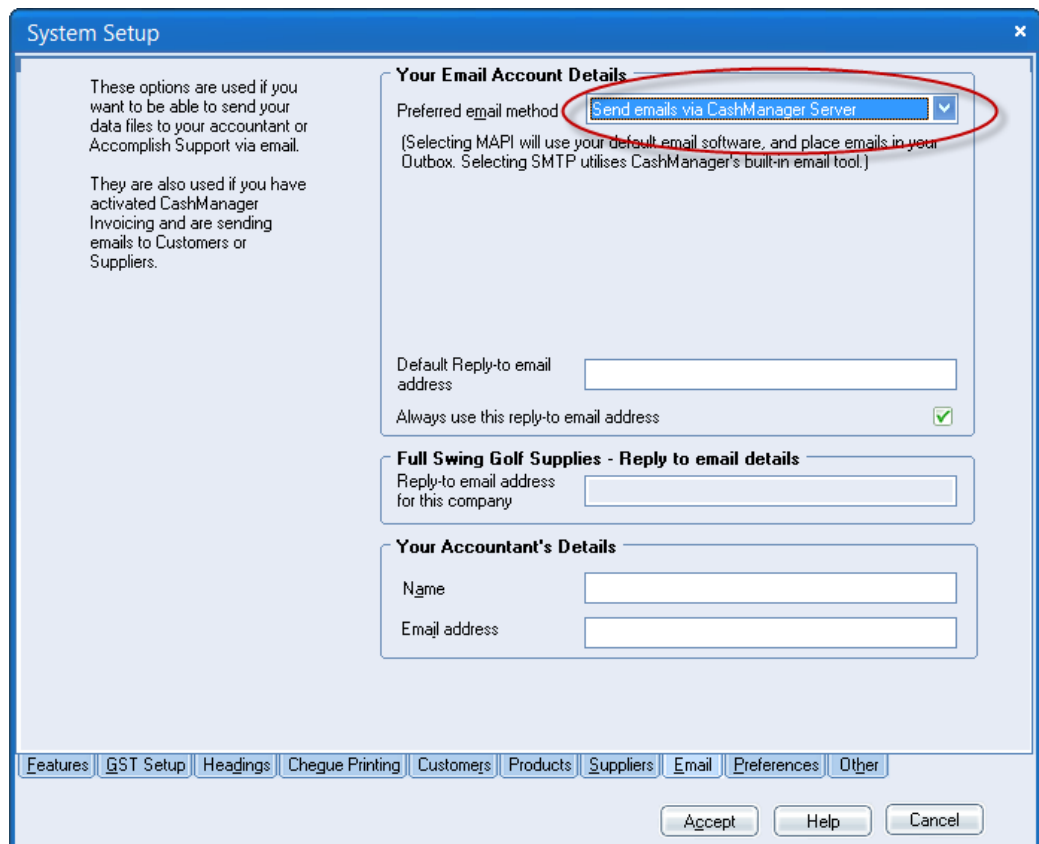
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4. Enter the email address you use in the **'Default reply-to email address' area**
5. Should you wish to be able to email data or reports out of CashManager to your accountant  
Then please enter details in **'Your Accountant's Details'**
6. Then select **Accept**. You are all set to email from CashManager now.