

How to Email Invoices from CashManager

Emailing Customer Invoices/ Emailing Supplier Invoices (Recipient Created Tax Invoice)

Sending one invoice

- Select the invoice you would like to email.
- Click on the **'Print'** button on the Invoicing Screen bottom right hand side corner.
- This will open 'Print Selected Invoices' screen

Print Selected Invoices	×
You have selected 1 invoice for printing.	
Invoice-message	
Select the desired Invoice layout from this list:	
Credit Note with Logo Invoice with Remittance Tear-Off and Logo Credit Note with Logo Standard Invoice - Products Standard Invoice - Professional/Trade Standard Credit Note - Products	
Standard Credit Note - Professional/Trade	
Preview Print Bulk Email Setup Help Cancel	

- If you would like to add a message on to the invoice, you can type it in the **'Invoice message'** (1 on the above image)
- Select your preferred 'Layout' from the list of layouts (2 on the above image)
- Finally click on 'Preview' button to view the invoice you are emailing
- Select 'Email' then make your selection as PDF or as a spreadsheet(PDF is most common format)



Send Email	×
Re <u>p</u> ly-to address	
<u>R</u> ecipient	Customer Code SPORTM Search
<u>E</u> mail address	To
	Attachments
Attach	
	(To remove an attached file, highlight it and press the Delete key)
	Remember these details in future
	✓Include email message text
S <u>u</u> bject	
<u>M</u> essage	
	V
[
	Send Cancel

• This will take to the 'Send Email' screen

• Selected Customer or Suppliers details will appear on the Email Address area. You attach any additional files by clicking on the 'Attach' button, add a Subject and a Message to your email and select 'Send' (will be highlighted when email address is added)

Sending Bulk Emails

- Select the invoices you would like to email.
- Click on the 'Print' button on the Customer Invoicing Screen bottom right hand side corner.
- This will open 'Print Selected Invoices' screen



Print Selected Invoices	×
You have selected 4 invoices for printing.	
Select the desired Invoice layout from this list: Invoice with Remittance Tear-Off and Logo Credit Note with Logo Invoice with Remittance Tear-Off and Logo Credit Note with Logo Standard Invoice - Products Standard Invoice - Professional/Trade Standard Credit Note - Products Standard Credit Note - Professional/Trade	
Design Preview Print Bulk Email 3 Setup Help Cancel	

- If you would like to add a message on to the invoice, you can type it in the **'Invoice message'** (1 on the above image)
- Select your preferred 'Layout' from the list of layouts (2 on the above image)
- Then select the 'Bulk Email' and Email invoices screen will open

Email Invoices				×		
Name	Email	Attachment	Result			
Regit Sdoow	support@cashm.co	Regit Sdoow Invoice 100002.pdf				
Southern Golf Club	support@cashm.co	Southern Golf Club Invoice 100005.pdf		=		
Southern Golf Club	support@cashm.co	Southern Golf Club Invoice 100003.pdf				
				×		
Location of PDF files is C:\Cas	hwin2016.1.0.12\Tutorial\Pdfs\					
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Send <u>A</u> ll <u>S</u> end <u>Print</u> Close						
1						

- In this screen you can revise if all lines have a valid email address or not.
- You can attach any other documents you may need to send to all listed.



- Once you have entered any messages and selected all the options you need then select 'Send All'
- You will see in the **'Result '**Column in red if the email sent or failed