



## Reminder via e-mail

You have to use the following settings to send the reminder via e-mail directly:

1. Remind => Reminder => Options

The screenshot shows the 'Options reminder management' dialog box with the following settings:

- Options** (tab selected)
- no. of reminders: 4
- printout version: standard
- print description: ☐
- increase of rem.levels after days:
  - first-time: 3
  - reminder level: (empty)
  - reminder level: (empty)
  - reminder level: (empty)
  - reminder level: (empty)
- reminder levels:
  - increase: ☒
  - decrease: ☐
  - equal: ☐
- remind in:
  - customers: ☒
  - positions: ☐
- Sort:
  - account no.: (empty)
  - none: (empty)
  - none: (empty)
  - none: (empty)
- options:
  - interval in days: 14
  - tolerance amount in: EUR: 1
  - interest on arrears from level: 2, 360 D
  - contacts: (empty)
  - Address at line: 2
  - height of footer: 7
  - rounding: 0,01
  - take bal.into consideration: ☒
  - Format reminder date: TT.MM.JJJJ
  - Vorgangsnummer: ☒ leer
  - mailversion: Microsoft Outlook** (highlighted)
  - faxversion: standard printout
  - register rem.notes in: MS Word 8
  - make reminder levels due: ☐ from level: (empty)
  - print reminder level 0: ☐
  - print neg.interests on a.: ☐

Mailversion

You have to choose the application, which you want to use for sending the e-mails, here. (Microsoft Outlook + Tobit at the moment)



Path attachments

The program creates one PDF-file for each reminder and this file will be used as an attachment in the e-mail. You have to enter the path, where the program should save these PDF-files, here.



## 2. Remind => Reminder => Headings

**Subject** Here you can enter the subject, which should be used for sending the reminder.

**Text** Here you can enter the text for the e-mail.



3. Basic data => Accounts data => Debtors

**Debtors data**

Address | Supplements | **Reminder management** | Credit assurance | BD-Soft / SAP | Banks | Contacts | Extras | Invoice

account no. 29999 name  
customer no. address A  
phone

reminder informations

reminder ☒ reminder charges ☐ interval   
account statement ☐ interest on arrears ☐ last reminder 00.00.0000  
rem.blocked ☐ language code 1

interest invoice curr.acc. interest invoice OI  
interest invoice ☐ interest invoice ☐  
interest on arrears tab  interest on arrears tab  Respiro

reminder type  
print ☐  
fax ☐  
eMail ☒ test@test.com

netdays   
discount days1  ,00 %  
discount days2  ,00 %

Reminder type

You have to choose „eMail“ as reminder type and you have to enter the e-mail adress for each debtor.



4. Remind => Reminder => Print out

**Print reminders**

restrictions

☐ print ☐ fax ☒ eMail

Vorgang

account no.  —

representative  —

trade  —

customer group  —

cou.  —

selection field  —

reminder level client  —

survey

reminder level

remind in

total items

no. of printouts

no. of fax

**no. of e-mail**

If you have done the settings above, all these customers will get the reminder via e-mail.