



Reminder via e-mail

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

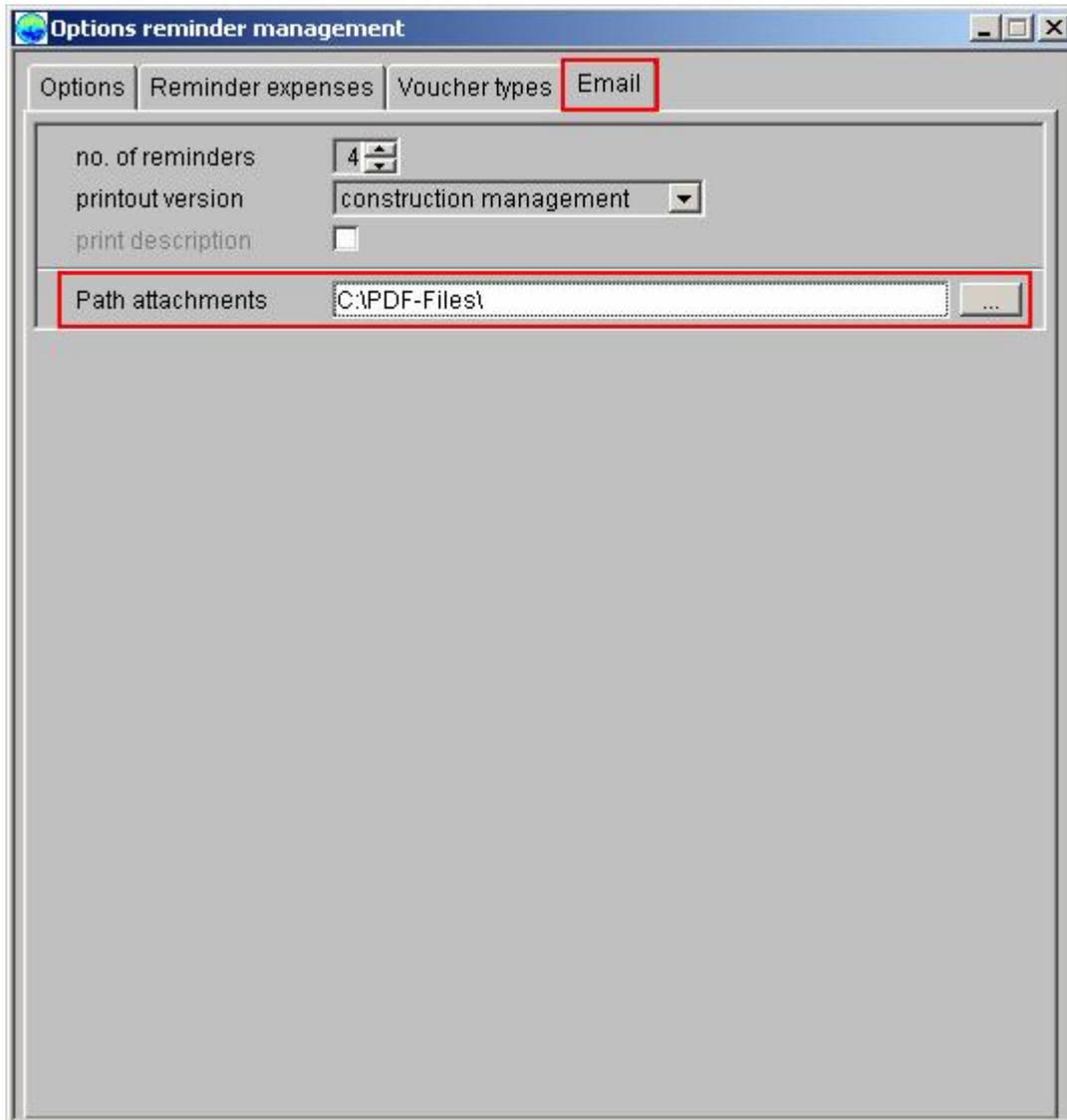
1. Remind => Reminder => Options

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

- 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 with a red box)
 - 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

language: Deutsch

heading

voucher no.	<input type="text"/>	invoice amount	<input type="text"/>	Amount of interest on arrears	<input type="text"/>
voucher type	<input type="text"/>	outstanding invoice total	<input type="text"/>	Amount of interest on arrears days	<input type="text"/>
voucher date	<input type="text"/>	fcc	<input type="text"/>	reminder level	<input type="text"/>
due date	<input type="text"/>	fc amount outstanding	<input type="text"/>		

totals

total remind. amounts	<input type="text"/>
Collection expenses	<input type="text"/>
total interr.on arrears	<input type="text"/>
total amount	<input type="text"/>

rem.fields

payments considered till	<input type="text"/>
balance acc. to accounting	<input type="text"/>

amounts in:

page: account no:

email

subject:

text:

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

The screenshot shows the 'Debtors data' window with the following visible fields and settings:

- Account no.: 29999
- Customer no.: [empty]
- Name: [empty]
- Address: A
- Phone: [empty]
- Reminder management tab is active.
- Reminder type: eMail (selected)
- Email address: test@test.com
- Interest invoice: [checkbox unchecked]
- Interest on arrears tab: [empty]
- Respiro: [dropdown menu]
- Language code: 1
- Last reminder: 00.00.0000

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

restrictions		
<input type="radio"/> print	<input type="radio"/> fax	<input checked="" type="radio"/> eMail
Vorgang	[dropdown]	
account no.	[input]	[input]
representative	[input]	[input]
trade	[input]	[input]
customer group	[input]	[input]
cou.	[input]	[input]
selection field	[input]	[input]
reminder level client	[input]	[input]

survey	
reminder level	increase
remind in	customers
total items	35
no. of printouts	33
no. of fax	
no. of e-mail	2

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