# **Online invoice & mailer**

With this module you can send e-mails directly from PC CADDIE. These can be invoices, invitations to the AGM, information and much more.

Get a licence for the PC CADDIE module. You can request a quote at <a href="mailto:support@pccaddie.com">support@pccaddie.com</a>. As soon as the module is licensed for you, you will find the menu item E-mail in PC CADDIE directly under <a href="mailto:People/E

## Mail and SMTP settings

For the basic settings for sending mails, please go to **Settings**, **Programme settings** to the Mail and SMTP settings

Please note: an unlimited mail server is required to use the mailer. Limited products, e.g. from Office365, are not suitable and can cause costs when troubleshooting. We recommend domain email hosting from PC CADDIE. We would be happy to send you a quote.

## **Basic settings**

You can access directly via **System/Contacts and Mail and SMTP settings** to the basic settings.

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und	X	Grafiken / Druckvorlagen		hι	Ilun	igen					
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	菡	Kasse	Þ		Dater	n von ande	eren Progra	mmen im	portieren		
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Deutschen G	ð	Service-Manager									
	E	Prüffunktion, Info-Fenster									
	9	Datenbanken neu indizieren									
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mit Stichtag	G	Mit Intranet <u>v</u> erbinden									
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llen die PDF n ch für Siel	V	Schnelle Datensicherung									

Mail-Setup				_	×
Standard	1			<u>S</u> peichern	
			5 0	Blacklist	
			6	Vorlagen	
+ Neu	Bearbeiten F7	Löschen			
🔶 Standard	C Manueller	Limit-Reset			
Test an:	test@pccaddie.com		1		
Versand durch:	Direkt zum SMTP-Serv	er 💌	1		
Mails schreiben über:	Standard Mailprogram	ım 💌	Ð	<u>E</u> nde	
	SMTP-Server		×	1	
	Bereichnung Filter (z.B. Domain) Absender Name Absender E-Mail Antworten an E-Mail SMTP Server und Port SMTP Benutzer	Golfdub Sonnenuchein e.V.	✓ £K X §bbruch		
	SMTP Passwort SMTP Auth.	LOGIN			
1. Enter your SMTP server c	Schemet Sendeclimit	SSL 💌			

- 2. Test function
- 3. Directly to the STMP server (for test purposes only). Then please switch to dispatch by service.
- 4. Default mail programme remains set

E	E-Mail-Blacklist	□ X		
	E-Mail	Kommenter		✓ 9×
				× Merch
3lacklist 🗌	+ Neu	n / Bearbeiten	17 Löschen 15	

6. You can access the mail templates here

## Spell check

To activate the automatic spell check, go to **System, Language.** Here, tick the box next to "Spell check: Check as you type"

ወ Sprache			? – ×
Konfigurieren Sie die Spra	ache:	Rechtschreibprüfung:	<u>✓ о</u> к
Dialoge:	Deutsch 💌	Prüfung während der Eingabe	→ Ende
Ausdruck:	Deutsch 💌	Standard Wörterbuch:	
Ersatz-Sprache:	Englisch 👻	Deutsch	
Falls ein Element sprache nicht ver	: in der Haupt- fügbar ist.		
In Services:	Deutsch 💌	<ul> <li>Wörterbücher neu laden (aktualisieren)</li> </ul>	
Sprachelemente bear	rbeiten		

## Templates

Any number of templates can be created in the configuration. The templates can be customised individually.

Mailvorlagen		Х
		_
	DEFAULT	
	EINLADUNG	
	EVENT	
	Email	
	EventBest	
	Geburtstag	
	HOTELANREISE	
	INVOICE	
	NachStartzeit	
	PDF	
	Rechnungen	
	SUMPF	
	VorStartzeit	
+ Neu	Bearbeiten F7 Vmbenennen 🗍 Löschen	

### (1) New

Name der neuen Vorlage:     Image: Contraction of the set of	Neue Vorlage ersteller	ו	
DEFAULT   EINLADUNG   EVENT   Email   EventBest   Geburtstag	Name der neuen Vorlage:		✓ <u>O</u> K ★ <u>A</u> bbruch
	DEFAUL EINLADU EVENT Email EventBe Geburtsi Gruppe: (Keine)	T UNG State of the second seco	

- (1) Name of the new template. A template with the same name must not exist
- (2) Template to be copied for new creation
- (3) Group to which the template belongs. A new group can be created by adding ???\_ in front of the name

#### (2) Edit

Opens the window for editing the selected template.

#### (3) Rename

Renames the selected template.

#### (4) Delete

Deletes the selected template. A deleted template cannot be restored!

## Edit template

#### General



ATTENTION: The command <MAIL.> always takes the mail address from the 1st address! IMPORTANT: Use the command <MAILTO.> command, then the mail addresses in the "PAYMENT" tab will be used if set accordingly!

- (1) Recipient: Can also be a field, as in the example.
- (2) Copy recipient:
- (3) Blind copy:
- (4) Sender:
- (5) Reply to: Email address that should receive replies to the mail.
- (6) Subject: As clear and meaningful as possible.
- (7) Enter footer
- (8) HTML: Edit HTML in the editor (preview: open mail as HTML in browser window)
- (9) Attachment
- (10) Options: Settings for sending
- (11) Preview
- (12) Fields: Show list of person fields

- (13) Text block function is still in progress
- (14) Highlight font or heading  $\rightarrow$  Insert
- (TX) Text of the mail

The commands in angle brackets <USERNAME.>, <USERMAIL.>, <USERTELE.> are user-defined and refer to the data stored in the password management. You can also enter the name, e-mail and telephone number of the contact person in the club directly here and send the e-mails in a standardised way.

#### Footer

Mailvorlage ko	onfigurieren - DEFA	ULT					$\times$
Empfänger:	<mailto.></mailto.>					<b>√</b> <u>О</u> к	F12
Kopie-Empfänger:							
Blind-Kopie:	<usermail.></usermail.>					✓ Sichern	F11
Von:						🗂 HTML	F9
Antwort an:							
Betreff:						<>> Felder	F2
						Iextblock	
Text	Fusszeilen	HTML	Anhang	Optionen	Vorschau		
Golfclub Sonnensch Musterstrasse 8 12345 Teststätten Deutschland Fon +41 41 9876543	ein	n erganzt:					
Deutschland Fon +49 2642 98765 Fax +49 2642 98765 Österreich Fon +43 1 9876543 Fax +43 1 9876542	43 142						
Mail test@testmail.d Web www.testadres	le se.de						
						X Abbruch	

#### HTML

We will be happy to create an HTML template for your mails. Please contact support for this.

Example:

@ Mailvorlage	konfigurieren - INVOICE						X
					_	_	
Emptanger:	<imailto.></imailto.>					✓ <u>о</u> к	F12
Kopie-Empfänger:						Sichern	F11
Blind-Kopie:							
Von:						🗂 HTML	F9
Antwort an:							
						<>> Felder	F2
Betreff:	Rechnung <rg_nr.></rg_nr.>						
Tert		A = h = = =	Ortioner	Verselen		Textblock	
					<u> </u>		
		PC CADDIE					
		Tuon II			- 11		
<*T\/							
S 111	-E. > NI. < KG_NK. >			_			
<anre< td=""><td>DEBRIEF&gt;</td><td></td><td></td><td></td><td></td><td></td><td></td></anre<>	DEBRIEF>						
Anbei e	erhalten Sie die aktuelle Rechnung für	das Jahr 2018!					
Bitte be	eachten Sie das PDE-Dokument im An	hang					
Ditto be		nung.					
Rechnu	ungsnummer <rg_nr> und der Brutto</rg_nr>	obetrag: <brutto></brutto>					
Mit freu	ındlichen Grüssen						
<user< td=""><td>RNAME&gt;</td><td></td><td></td><td></td><td></td><td></td><td></td></user<>	RNAME>						

However, you are also welcome to try this yourself according to the following instructions:

#### Template (to copy)

```
<!DOCTYPE html PUBLIC "-//W3C//DTD XHTML 1.0 Transitional//EN"
"https://www.w3.org/TR/xhtml1/DTD/xhtml1-transitional.dtd">
<html xmlns="https://www.w3.org/1999/xhtml">
<head>
    <meta http-equiv="Content-Type" content="text/html; charset=UTF-8" />
   <meta name="viewport" content="initial-scale=1.0"/>
   <meta name="format-detection" content="telephone=no"/>
   <title>Rechnung</title>
   <style type="text/css">
        .ReadMsgBody { width: 100%; background-color: #ffffff;}
        .ExternalClass {width: 100%; background-color: #ffffff;}
        .ExternalClass, .ExternalClass p, .ExternalClass span,
.ExternalClass font, .ExternalClass td, .ExternalClass div {line-
height:100%;}
        html{width: 100%; }
        body {-webkit-text-size-adjust:none; -ms-text-size-adjust:none; }
        body {margin:0; padding:0;}
        table {border-spacing:0;}
        img{display:block !important;}
        table td {border-collapse:collapse;}
```

```
.yshortcuts a {border-bottom: none !important;}
      img{height:auto !important;}
      .footer a, .footer a:visited, .footer {color: #25316a !important;
text-decoration: none !important;}
   </style>
</head>
<body style="font-size:12px;background-color:#eaeaea;">
<table width="100%" border="0" cellspacing="0" cellpadding="0"
style="background-color:#eaeaea;">
   <!-- Start Header -->
   <table width="700" align="center" border="0" cellspacing="0"
cellpadding="0">
             <!-- ### BITTE ANPASSEN ### -->
                   <a href="https://www.pccaddie.net"><img
style="display: block"
src="https://www.pccaddie.net/share/clubs/0410922/upload/2021-05-12 08h16 56
.png" width="150" alt="Logo" border="0"/></a>
                   <!-- ### BITTE ANPASSEN ### -->
                <td style="background-color: #ffffff; border-bottom: 3px solid
#f07d00;" height="5" >
   <!-- Ende Header -->
   <!-- Start Email -->
   <table width="700" align="center" border="0" cellspacing="0"
cellpadding="0" bgcolor="#ffffff" style="background-color:#ffffff;">
             <td style="background-color: #eaeaea;" height="20"
>
```

```
<table width="700" border="0" cellspacing="0"
cellpadding="0">
                    <td colspan="3" style="background-color:
#f07d00; font-size: 16px; padding: 6px 15px; font-family: Arial,Tahoma,
Helvetica, sans-serif; color:#ffffff; text-align:left;">
                          <*TYPE.*> Nr. <*RG NR.*>
                       <td colspan="3" style="padding: 0 15px;
background-color: #ffffff; font-size: 13px; font-family: Arial,Tahoma,
Helvetica, sans-serif; color:#333333; font-weight:normal; text-align:left;">
                          <br>
                          <*MAINTEXT.*>
                          <br><br>>
                       <td colspan="3" height="10" style="border-bottom: 3px
solid #f07d00">
           <!-- Ende Email -->
  <!-- Start Teiler -->
  <!-- Ende Teiler -->
  <!-- Start PCCO-info -->
  <table width="700" align="center" border="0" cellspacing="0"
cellpadding="0" bgcolor="#ffffff" style="background-color: #ffffff;">
           <table width="700" align="left" border="0"
```

cellspacing="0" cellpadding="0" bgcolor="#ffffff" style="backgroundcolor:#ffffff:"> <table width="700" border="0" cellspacing="0" cellpadding="0"> <td colspan="3" style="background-color: #f07d00; font-size: 15px; padding: 6px 15px; fontfamily: Arial,Tahoma, Helvetica, sans-serif; color:#ffffff;textalign:center;"> Impressum <td colspan="3" height="10" > <!-- ### BITTE ANPASSEN ### --> <td class="footer" valign="top" colspan="3" width="350" style="color: #25316a; padding: 0 15px; backgroundcolor: #ffffff; font-size: 12px; line-height: 16px; font-family: Arial,Tahoma, Helvetica, sans-serif; text-align:center;"> height: 22px;">PC CADDIE AG,<br> Bachtelweg 3 | 6048 Horw height: 22px;">Tel.: +41 41 511 06 00 | Mail: info@pccaddie.com | <a style="text-decoration: none; color: #25316a" href="https://www.pccaddie.de/">www.pccaddie.de</a> height: 22px;">Verwaltungsrat: Benedikt Schmedding (Präsident)<br> Marc Spangenberger<br> UID CHE-105.347.983 HR/MWST | USt-IdNr. DE 813580086 <!-- ### BITTE ANPASSEN ### - -> 

#### **Customise logo**

In the HTML, the position for the logo and the imprint is marked with <!- ### BITTE ANPASSEN ### -> before and after the text.

The customer's logo is usually saved in the Club Manager in the file manager at the bottom left:

×

Keep the mouse on the image name until the word url appears and then click. The following window opens with the address:

×

Copy this and replace the text highlighted in red with the new address:

×

ATTENTION: Please make sure that the address ends with png! svg e.g. distorts the logo for the recipient!

#### **Change imprint**

Scroll down in the HTML to the next <!- ### BITTE ANPASSEN ### -> Again, overwrite the text marked in red with the customer's details

×

In the HTML file <br> is used for a line break. Please insert this command if the imprint requires additional lines.

#### How to determine the colour code

With this colour code selector https://www.site24x7.com/de/tools/farbcode-wahler.html the customer's colour code can be defined very easily. Simply printscreen the customer's logo and insert the image in the colour code selector in the field provided. Then click on the desired colour and the colour code will appear on the right or at the bottom:

×

#### Adjust colour code

The colour code must be adjusted four times; for both bars and both lines. To do this, please search for the code #0061ae and replace it with the customer's colour code:

here just below the logo:



and further down a little above the imprint:

×

#### Adjust the font colour of the imprint

The font colour for the text in the legal notice can be changed at the top of the HTML. This is blue in the template:

×

For the black font colour, the colour code marked in red can be replaced with #333333

#### Appendix

Mailvorlage ko	nfigurieren - INVOICE		X
Empfänger:			
Kopie-Empfänger:		✓ <u>0</u> K	FIZ
Blind-Kopie:		Sichern	F11
Von:	invoice@pccaddie.com	P HTML	F9
Antwort an:			
		C Felder	F2
Betreff:	Rechnung <rg_nr.></rg_nr.>		
-		<> <u>T</u> extblock	
Text	usszeilen HTML Anhang Optionen Vorschau		
Anhang 1:	<+ILE01>		
Benennen 2	Rechnung <rg_nr.> (<nachname, vorname.="">)</nachname,></rg_nr.>		
Anhang 2:			
Benennen:	Speichern		
Anhang 7:			
Repoppon:			
benefinen.	V spechern		
Anhang 4:			
Benennen:	Speichern		
Anhang 5:			
Benennen:			
Anhang 6:			
Benennen:	Speichern		
		X Abbruch	

- (1) Attachment: File path of the attachment. For automatically generated attachments <FILE01.> (e.g. invoice dispatch)
- (2) Name: Name of the attachment when it is sent. Can also contain fields.invoice <RG\_NR.> (<NACHNAME, VORNAME.>)
- (3) Save: Save attachment or delete immediately after sending?

#### Options

Mailvorlage ko	onfigurieren - I	NVOICE						
Empfänger:	<imaii to.=""></imaii>					_	1 OK	512
Kopie-Empfänger:						- 1		FIZ
Blind-Kopie:						_	Sichern	F11
Von:	invoice@pccaddie.	com					🗂 HTML	F9
Antwort an:								
Betreff:	Rechnung <rg_nr< td=""><td>&gt;</td><td></td><td></td><th></th><td>_</td><td>&lt;&gt;&gt; Felder</td><td>F2</td></rg_nr<>	>				_	<>> Felder	F2
					_	_	<> Textblock	
Text	Fusszeilen	HTML	Anhang	Optionen	Vorschau			
	<b>1</b>					-		
Waster-Vonage		ster HTML Club				Ŧ		
Ausdruck als PDI	F anhängen	2						
Reim Bildschirm	druck E-Mail-Versand	Istarten						
Jenn bildschinnin			-					
Vor dem Versand	d im Editor anzeigen	und bearbeiten	4					
Sendeverzögerung	7	Minuten	•					
Sendeverzögerding	-		<b>9</b>					
							X Abbruch	

- (1) Master template. The HTML can be accessed from the default here.
- (2) Should be set if something is to be attached.
- (3) Start e-mail dispatch on screen printing. Only remove if, for example, an invoice is to be printed & emailed.
- (4) Display and edit the finished email in the editor before sending. May interfere with mass mailing, for example.
- (5) Send delay: Send mail on a specific date

## **Predefined templates**

#### Default (empty template)

Only this template is stored by default. It is used automatically when a new email is created from the mail window using the **new email** button in the mail window. Configure this template as required with the greeting formula and the sender.

Please do not delete this template!

#### Invoice (invoices/online invoice dispatch)

You can find basic knowledge about invoices here: Create invoices

#### Test mail and invoice layout

If you select **Basic settings** tick the box next to **Test mail setting: Test on** and have entered an email address which is to receive the test mail with an invoice PDF, you now switch to a personal account (possibly yourself?) in a contribution area, e.g. CLUB.

Umsatzko	onto - CLUB			X
Quicke	rt, Rosemarie (quro)			
Đ	Information	Datum Zeit S Netto	Brutto OK	
boel	Caddiebox Elektro	07.02.14 13:37 1 150,00	150,00	🖶 Beitr Wah E2
				Beitr <u>Typ(F7)</u>
				<u>O</u> ndern
				🗙 <u>S</u> torno FS
				🌮 Zuordnen
				😒 <u>B</u> ezahlen
				Drucken F8
		07.02.14 13:37 T 0,00	0,00	
		0,00	0,00	
		0,00 150,00	150,00	Ende

Prepare an article for invoice printing (you can cancel the invoice after the test as usual and delete the article). and delete the article). Then continue on the right with **Print**.

We then look at the text for invoice with *Edit* what is still missing in the invoice layout:

Format-Editor	E
Name: Rechnung mit MAIL 💌 🚀 Neues Format definieren	Eelder F2
21/48(0) Linie Tab	Befehle           A         Schrift         F6
<adresse_mit_datum></adresse_mit_datum>	
<pre><sendmail:invoice> 2</sendmail:invoice></pre>	; ormat speicheF11
• ~U~FRechnung <rg_nr>~f~u</rg_nr>	Format jösche F5
<anrede_herr_frau></anrede_herr_frau>	🙆 <u>D</u> atei F9
hiermit stellen wir Ihnen die fällig gewordenen Beiträge in Rechnung. Im Einzelnen handelt es sich um folgende Beträge:	📚 Test F8
<kontoauszug datum=""></kontoauszug>	
Ihr Kundenkonto weist insgesamt folgenden Saldo auf: ~F <saldo>~f EUF <wenn_einzugsermächtigt> <umbruch:8></umbruch:8></wenn_einzugsermächtigt></saldo>	
Ihre Beiträge werden von diesem Konto abgebucht: <bankverbindung></bankverbindung>	
	Ende

- 1. This command is really important. A so-called PGE file of the invoice is stored here, with which the stationery is also printed. If you still print your invoices on stationery pre-printed by the printing company, you should have PC CADDIE create a PGE file for you. You can also create the file create the file yourself
- 2. Without this command, it is not possible to create the invoice by e-mail:!: It does not matter where the command is located in the invoice layout, the main thing is that it is included!

The command <BANKVERBINDUNG> prints the IBAN unrecognisable with xxxxxx when sending the invoice by e-mail, in order to prevent future cybercrime.

If everything fits, please save the layout with a suitable name, e.g. Invoice by e-mail

Test it now! Print the invoice



Konto drucken	23
Quickert, Rosemarie	Drucken F8
Kontenblatt Voraus-Beleg (ohne Vermerk im Konto) Normaler Beleg (Rechnung bzw. Gutschrift) Duplikat drucken Zusammenfassungs-Beleg	Ende Ende
Buchungsdatum: von: bis: 31.12.14 ☐ Belegpositionen einzeln wählen (F3) ✓ Familien zusammenfassen <u>Beleg-N</u> ummer	
Textvorlagen:         Rechnung:       Rechnung mit MAIL       Bearbeiten         Gutschrift:       Gutschrift mit Mwst.       Bearbeiten         Zusammenfassung:       Kontenblatt mit mwst test       Bearbeiten	

If the test worked, you now have the following under **Personal e-mail** in your outbox list, and the test email is also in the inbox of the email address that you specified in the **Test to** you entered under Test to.

Don't forget to cancel the invoice in your test person's account!

#### Single invoice dispatch

If you tick the box next to **Test on** have removed the tick, you can simply send invoices individually by e-mail directly from the customer accounts with the appropriate invoice layout. If no email address is stored for a customer in the personal data, PC CADDIE will open a query and ask you for the email address when printing the invoice.

If you then decide to print out the invoice and send it by post, please switch to an invoice layout without the command <SENDMAIL:INVOICE>

#### Send invoice in series

- 1. Firstly, start sending invoices by e-mail! This gives you all the automatic options and the process is simple!
- 2. Then the invoices are printed for dispatch by post.

You start serial invoice printing as usual via *Turnover/Invoices*. Make sure that the invoice layout *Invoice by mail* is set, with the command <SENDMAIL:INVOICE>.

You do not need a special person filter. When invoices are sent by e-mail, invoices are only created automatically (with invoice number) for those persons for whom an e-mail address is stored.

All other amounts prepared in the accounts are then also available for printing on paper. You do not need a special person filter here either, you should only change the invoice layout to a layout without the command <SENDMAIL:INVOICE>.

Before sending, you will be asked whether you want to send all mails at once or confirm them individually:

Mail senden X
Sollen die Schreiben als Mail gesendet werden? Aktuell: Bucher, Kurt
🗸 Ja, ginzeln fragen
🗸 la für alle
X Nein, diese nicht
X Nein für alle
X Abbruch

With no for all and Cancel you can cancel the dispatch again at this point.

#### Mail outgoing list

5	Mail-Ausga	ngs-Liste	e (3)			? —		$\times$
	Datum	Zeit	Von	An	Betreff	User		_
1	🛨 19.10.22	12:27				test		
2	19.10.22	12:02				test	O	4
3	17.10.22	14:41			Ihre Startzeit <	test		
	Suche:			Gesendet anzeigen: von	12.10.22 bis 19.10.22 C Akt	ualisieren	F5	
	+ Neue E-	Mail	F9	Bearbeiten	F7 🛄 Löschen			
	Mailvor	agen		<u> </u>	Ende			

- 1. E-mail in preparation
- 2. E-mail deleted
- 3. E-mail sent
- 4. Attachment

#### Configuration in the person mask

In the person mask under the tab **Bank/Payment** tab, you define the e-mail address to which the invoice is to be sent.

🧕 Member, Pau	l
- Name	mepa Nr. 041.0904.100011 Nr. wählen
Titel	B <u>r</u> iefanrede
Vorname	Paul
Nachname	Member
🖤 Event	🚡 Kasse 💿 Timetable 💮 Intranet
<u>M</u> erkmale <u>A</u> dre	esse <u>2</u> .Adresse Zahlung Inf <u>o</u> s <mark>Memo</mark>
Kontoinhaber	
Bank	LUZERNER KANTONALBANK
BLZ / BIC	LUKBCH2260A SEPA / Details
Kto-Nr. / IBAN	CH31 0077 8888 5555 3333 9
Abbuchung:	Club GmbH KG
	Spinde Proshop Restaurant
Zahlweise	J - Jährliche Zahlung
Versand	als PDF an diese E-Mail-Adresse:
E-Mail	info@paulonline.ch
Kreditkarte	
Inhaber	
Nummer	
Gültig bis	

If you use the module **Sending invoices by e-mail** and use it, you can use the **dispatch** tick the box **as PDF to this e-mail address:** and in the line **e-mail** line, enter the e-mail address to which the invoice should then be sent by e-mail. This e-mail address can be added to the e-mail addresses in the tabs **Address** and **2. address** and is used exclusively for sending invoices by e-mail.

The first time you activate the e-mail by invoice, the general enquiry is displayed.

Or can be called up at any time under: Settings - Programme settings - General settings - Sales tab



This wizard helps you to copy the e-mail addresses correctly into the Payment tab.

The e-mail addresses are selected as follows:

1st e-mail filled - 2nd e-mail empty > 1st e-mail goes to invoice by e-mail

1st e-mail filled but with ! in front - 2nd e-mail empty  $\rightarrow$  dispatch by post - invoice by e-mail remains empty

1st email empty - 2nd email filled  $\rightarrow$  2nd email goes to invoice by mail

1st e-mail empty - 2nd e-mail filled but with ! before  $\rightarrow$  dispatch by post - invoice by e-mail remains empty

Exclamation mark (!) remains and continues to apply **only** for the newsletter dispatch (Supermailer)

## **Examples**

# Mail merge by email - with or without attachment

The email module can also be used to send serial letters or invitations by email.

These mails can be sent with any attachments. However, a Word document cannot be linked with a personalised salutation.

If the attachment requires mail merge fields, this is possible if the document is created in advance using the graphics editor.

Create the corresponding mail template and name it:

✓ 15.01.22 09:03 <tg@pccaddie.com></tg@pccaddie.com>	AHRINFO	Neue Verlage erstellen	
15.01.22 08:58 <tg@pccaddie.com></tg@pccaddie.com>	Angebot Technik	Inde vonage eistellen	
✓ 15.01.22 08:57 <tg@pccaddie.com></tg@pccaddie.com>	BIRTHDAY	Name der neuen Vorlage:	OK
	DEFAULT	Einladung GV	
	INVOICE	Destauration	× Abbruch
	Mahnung	basierend aut:	
	Mit HTML Rechnung	AHRINFO	î
	NEUMITGLIED	Angebot Technik	
	RG mit Footer	BIRTHDAY	
	TEETIME	DEFAULT	
	test	INVOICE	
		Min HTML Deckeyog	
		WICHTWE Rechnung	~
		Gruppe:	
		(Keine)	
	ta de la esta		
	+ Neu Bearbeiten F7 V Umbe	enennen	
Suche:	Gesendet anzeigen: von 08.01.22 bis 15.01.	22 CAktualisieren F5	
/	Alle Errors und Gelös	schten anzeigen	

Attachments are best linked in the text. To do this, the document must be saved in the Club Manager in the file manager:





# Clubmanager:

## Start

## Willkommen im P

Sie können Einstellungen fü und vieles mehr. Zu Ihrer Information finder

Kontaktieren Sie uns imme



Logo ändern

Info	
Nummer:	
Name:	
Kontakt:	

Click in the large window, select the document and save it. Then park the mouse on the title of the document until this URL display appears:

*.pdf
Payment Flyer.pdf

Click with the left mouse button and confirm this window with OK. This saves the link in the clipboard.

URL	×
https://www.pccaddie.net/share/clubs/0410922/upload/i .pdf	
Car	icel OK

Now open the mail template and link the document with a word as follows:

Mailvorlage konfigurieren - Einladung GV					
Empfänger:	<mailto.></mailto.>				
Kopie-Empfänger:					
Blind-Kopie:					
Von:	support@pccaddie.com				
Antwort an:	support@pccaddie.com				
Betreff:	Einladung GV für				
Text	Fusszeilen	HTML	Anhang	Optioner	
<anredebrief.> Mit freundlich<del>en Gr</del>üss Traktandenlist<mark>e::h</mark>ttps</anredebrief.>	sen ://www.pccaddie.net/share/cl	ubs/0410922/upload/F	:.pdf		

The link is created using two colons, which are placed directly next to the word without spacing. Then paste the copied link without spacing via Ctrl/Control + V or with the right mouse button. It does not matter whether the link is inserted directly in the text or as an attachment at the bottom.

In our example, we do not need an attachment created by PC CADDIE (this is only the case for invoices and reminders). It is therefore important that the following tick is removed:

@ Mailvorlage konfigurieren - Einladung GV								X
Empfänger: Kopie-Empfänger:	<mailto.></mailto.>						✓ <u>O</u> K I Sichern	F12 F11
Blind-Kopie: Von: Antwort an:	support@pccaddie.c	:om					💾 HTML	F9
Betreff:	Einladung GV für						<> Felder	F2
Text Master-Vorlage	Fusszeilen (Keine Fanhängen adruck E-Mail-Versand d im Editor anzeigen u	ts ) starten und bearbeiten Minuten	Anhang	Optionen	Vorschau	¥	<> <u>T</u> extblock	c
							× <u>A</u> bbruch	

We only need the addresses for sending from the personal data. To do this, we create a template under Contacts / Mail merge without text but with the note that the mail (this is what the SENDMAIL command is for) will be sent to the selected persons with the corresponding template (we name this with the designation after the colon).

Format-Edito	r						- ×
Name:	Einladung GV	Ŧ	💥 <u>N</u> eues Forma	at definieren		<> <u>F</u> elder	F2
				1/0 (0) Linie	Tab	<u>B</u> efehle	
<pre>;1 </pre>	);20;30	••••;••••40••••	• • • • 50 • • •   • • •		80	A Schrift	FG
SENDIALL'E	iniadung GV>					🛋 Grafik	F7
						Format sp	eich F11
						Format <u>l</u> ös	sche F5
						् <u>D</u> atei	F9
						🖶 Test	F8
					~		
<					>	L → Ende	

Then select the desired person filter and print the mail merge to the screen.

# **Multiple SMTP accounts**

You can also use several SMTP accounts in PC CADDIE, depending on the template.

Under the menu item **System - Contacts - Mail and SMTP settings** you will find the setting options. Via the button **New** button to create a second SMTP account:

Mail-Setup	– 🗆 ×		
★ Standard			✓ <u>S</u> peichern
Zweiter SMTP Acc	ount		Selacklist
+ Neu 🧪	Bearbeiten F7	🗓 Löschen	
★ Standard	C Manu	Jeller Limit-Reset	
Test an:			
Versand durch:	Direkt zum SM	TP-Server 💌	
Mails schreiben über:	Standard Mail	programm 💌	<u></u> <u> </u>

Make the settings for the two SMTP accounts accordingly:

SMTP-Server		×
Bezeichnung	Standard	<b>√</b> <u>о</u> к
Filter (z.B. Domain)	info@golfclub-sonnenschein.de	Abbruch
Absender Name	Golfclub Sonnenschein	
10111 - 1000 - 11		
Sicherheit	SSL 💌	
Sende-Limit	Kein Sende-Limit 💌 0	

SMTP-Server		×
Bezeichnung	Zweiter SMTP Account	<u>√ о</u> к
Filter (z.B. Domain)	info@gc.sonnenschein.de	X Abbruch
Absender Name	Golfclub Sonnenschein	
SMTP Auth.	Keine 💌	
Sicharbait	Kaina	
Sichemeit	Keine	
Sende-Limit	Kein Sende-Limit 💌 0	

These two *filters (domain)* are set accordingly in the mail template:

Mailvorlagen	@ Mailvorlag	e konfiguriere	n - INVOICE				
	Empfänger:	<mailto.></mailto.>					✓ <u>о</u> к F12
INVOICE INVOICEGC	Kopie Empfäng						Sicher: 511
	Blind-Kopie	<usermail.></usermail.>					<b>Dichen Ph</b>
	Von:	info@golfclub-soi	nnenschein.de				🗂 HTML F9
	Antwort an:	info@golfclub-sor	nnenschein.de				
							<> Felder F2
	Betreff:	Rechnung					
	Text	Fusszeilen	HTMI	Anhang	Optionen	Vorschau	<> lextblock
					optionen		
	SAINREDEBRIEF.					^ Fett	
	hiermit erhalter	n Sie die Rechnung.				Kursiv	
	Freundliche Gri	üße				Üherrehrift 1	
	Ihr Team vom G	SC				Überschrift 2	
						Überschrift 3	
						Überschrift 4	
						Überschrift 5	
1.0						Aufzählung mit	
- Neu Bearbeiter 2 V U						Aufzählung mit	

Mailvorlagen	Mailvorlag	e konfigurieren	- INVOICE_IN	VOICEGC			
	sopfänger: Kopie sopfäng Blind-Kopies Von: Antwort an:	<mailto> <usermail.> info@gc-sonnensc info@gc-sonnensc</usermail.></mailto>	hein.de hein.de				✓ QK FI2 Sicherr F11 <sup>(1)</sup> HTML F9
	Betreff:	Rechnung					<> Felder F2 <> Textblock
	Text	Fusszeilen	HTML	Anhang	Optionen	Vorschau	
+ Neu 🎤 Bearbeiten 2	<anredebrief hiermit erhalte Freundliche Gn Ihr Team vom (</anredebrief 	> n Sie die Rechnung. üße 3C				Fett Kursiv Unterstrichen Überschrift 1 Überschrift 2 Überschrift 3 Überschrift 4 Überschrift 5 Aufzählung mit Aufzählung mit	

## Payment reminders or reminders by e-mail

With a special parameter, it is possible to attach the original invoice to a payment reminder or overdue notice. In order for the invoice to be attached to the payment reminder, the following command is required in the layout.

For the payment reminder without specifying the reminder level: <RECHNUNGEN:NOLEVEL>

vermutlich haben Sie übersehen, daß folgende Clubbeiträge noch offen sind

Rechnungs-Nr.	Datum	Betrag/CHF
202400001	31.01.24	894.00

For reminders with indication of the dunning level: <RECHNUNGEN>

vermutlich haben Sie übersehen, daß folgende Clubbeiträge noch offen sind

Rechnungs-Nr.	Datum	Betrag/CHF	Mahnstufe
202400001	31.01.24	894.00	1

The commands are integrated into the text:

Format-Editor		- ×
Name:	Zahlungserinnerung MAIL	Selder F2
····:  ····10 ·	19/60 (0) Linie <u>I</u> ab	Befehle     Schrift F6
<logo1:0, 5,<br=""><adresse_mit_ <sendmail:mah< td=""><td>Musterclub.pge&gt; DATUM&gt; nung&gt;</td><td>Grafik F7</td></sendmail:mah<></adresse_mit_ </logo1:0,>	Musterclub.pge> DATUM> nung>	Grafik F7
~Fl. Zahlungs	erinnerung~f	Format speichern F11
<anrede_herr_< td=""><td>FRAU&gt;</td><td>🔯 Datei F9</td></anrede_herr_<>	FRAU>	🔯 Datei F9
vermutlich ha	ben Sie übersehen, daß folgende Clubbeiträge noch offen sind	🔒 Test F8
Bitte überwei	sen Sie diesen Betrag baldmöglichst auf unser Konto.	
Mit freundlic	hen Grüßen	
4	v •	✓ <u>E</u> nde

The names of the attachments in the mail template can be stored in this way:

@ Mail senden	- 🗆 X
	→ Senden F12
	Sichern F11
Vori:	
	Links F6
Betreff: Zahlungserinnerung	→ CRM F8
Text Fusszeilen Anhang (2) Status Vorschau	Felder F2
Anhang 1: C:\SSS\PCCADDIE\MAIL\2022\20221021094503000142\ATT\1. Zahlungserinnerung ).PDF	
Benennen: 1. Zahlungserinnerung .PDF	<> <u>T</u> extblock
Anhang 2: C:\SSS\PCCADDIE\MAIL\2022\20221021094503000142\ATT\Rechnung 202200002.PDF 2	
Benennen: Rechnung 202200002.PDF	
Anbang 7:	
Renennen:	
seiteinen.	
Anhang 4:	
Benennen:	
Anhang 5:	
Benennen:	
	-
Anhang 6:	
Benennen:	
	X Abbruch

- Payment reminder or reminder
   Original invoice

Our support team will be happy to help you activate this function.