

# 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 [support@pccaddie.com](mailto:support@pccaddie.com) . As soon as the module is licensed for you, you will find the menu item E-mail in PC CADDIE directly under **People/Email**

## Mail and SMTP settings

For the basic settings for sending mails, please go to **Settings, Programme settings** to the [Mail and SMTP settings](#)

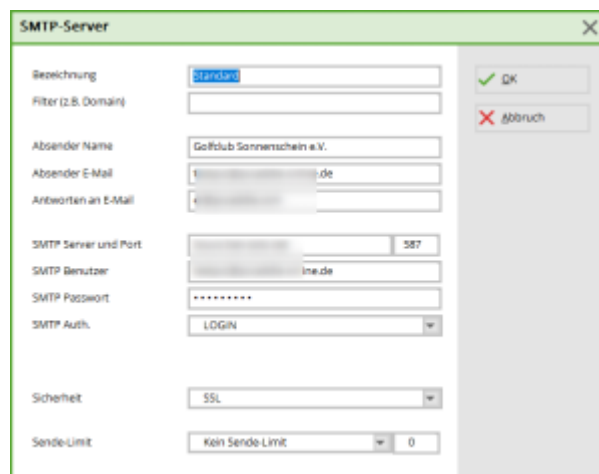
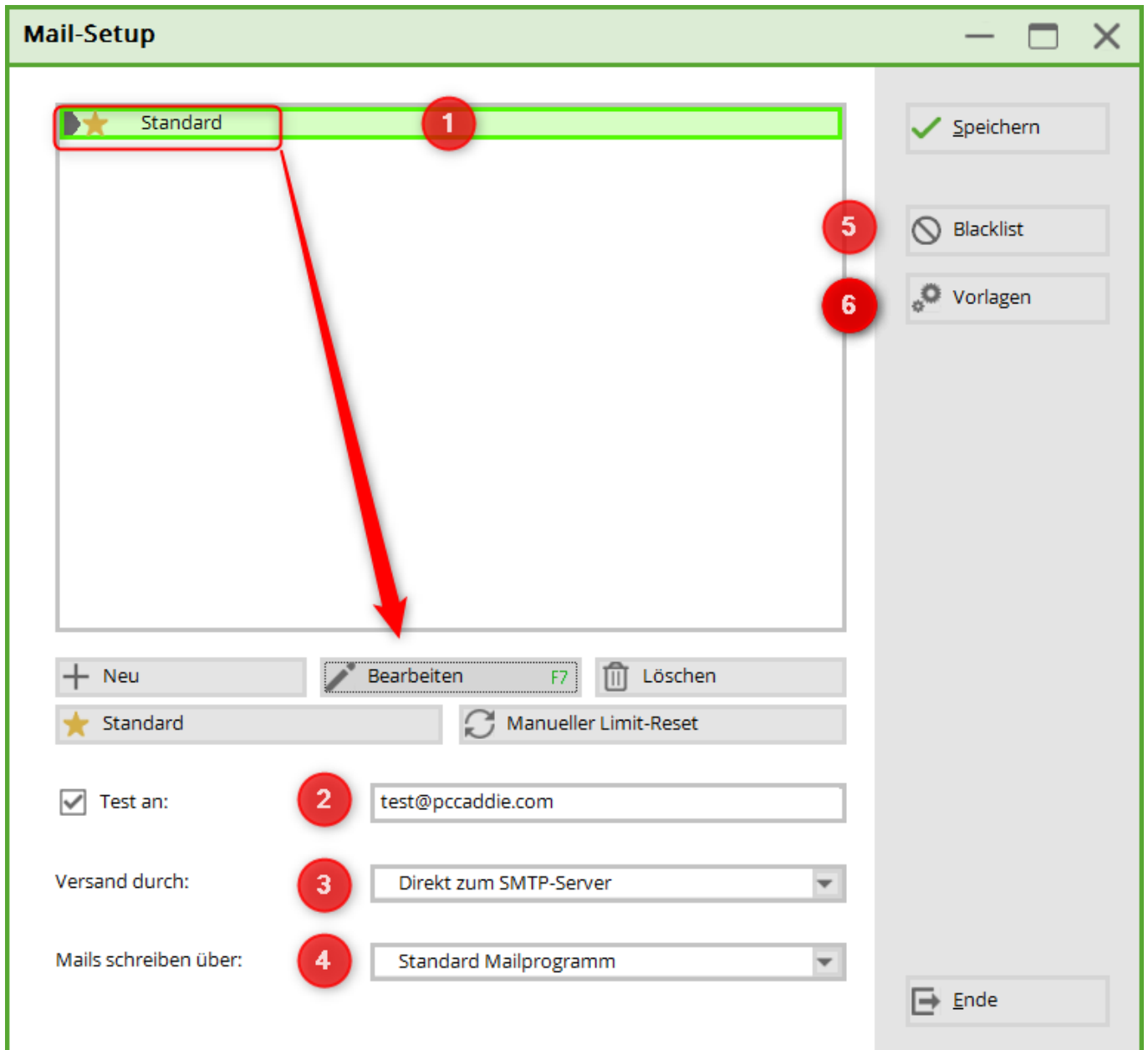
**Please note: an unlimited mail server is required to use the mailer. Limited products, e.g. from Office365, are not suitable and can cause costs when troubleshooting. We recommend domain email hosting from PC CADDIE. We would be happy to send you a quote.**

## Basic settings

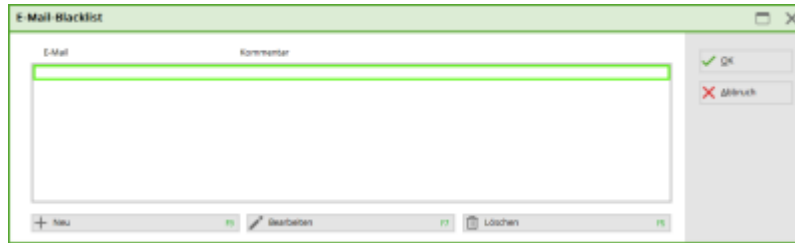
You can access directly via **System/Contacts and Mail and SMTP settings** to the basic settings.

The image shows a web application interface with a sidebar menu. The 'System' menu item is highlighted with a red box. A sub-menu is open for 'System', and the 'Mail- und SMTP-Einstellungen' item is highlighted with a red box. The sub-menu items are: Merkmale der Kontakte, Zusatzfelder der Kontakte, Mail- und SMTP-Einstellungen, Zusatz-Infos, Altersklassen-Anpassung, Datenschutz, Daten von anderen Programmen importieren, and Management-Report. At the bottom of the sub-menu is a green button labeled 'Alle Beiträge ansehen' with a right-pointing arrow.

- Nachricht an andere Computer senden
- Passwort-Verwaltung
- Drucker
- Grafiken / Druckvorlagen
- Explorer
- Kontakte**
  - Merkmale der Kontakte
  - Zusatzfelder der Kontakte
  - Mail- und SMTP-Einstellungen**
  - Zusatz-Infos
  - Altersklassen-Anpassung
- Datenschutz
- Daten von anderen Programmen importieren
- Management-Report
- Alle Beiträge ansehen →



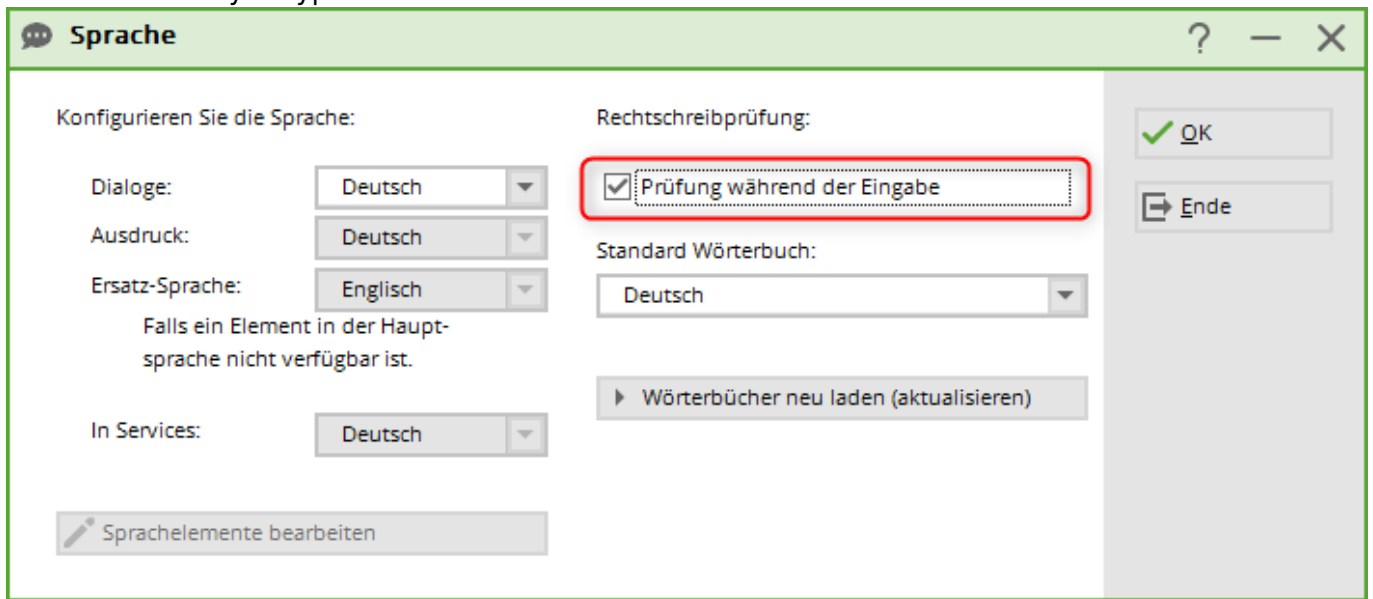
1. Enter your SMTP server data here.
2. Test function
3. Directly to the STMP server (for test purposes only). Then please switch to dispatch by service.
4. Default mail programme remains set



5. Blacklist
6. You can access the mail templates here

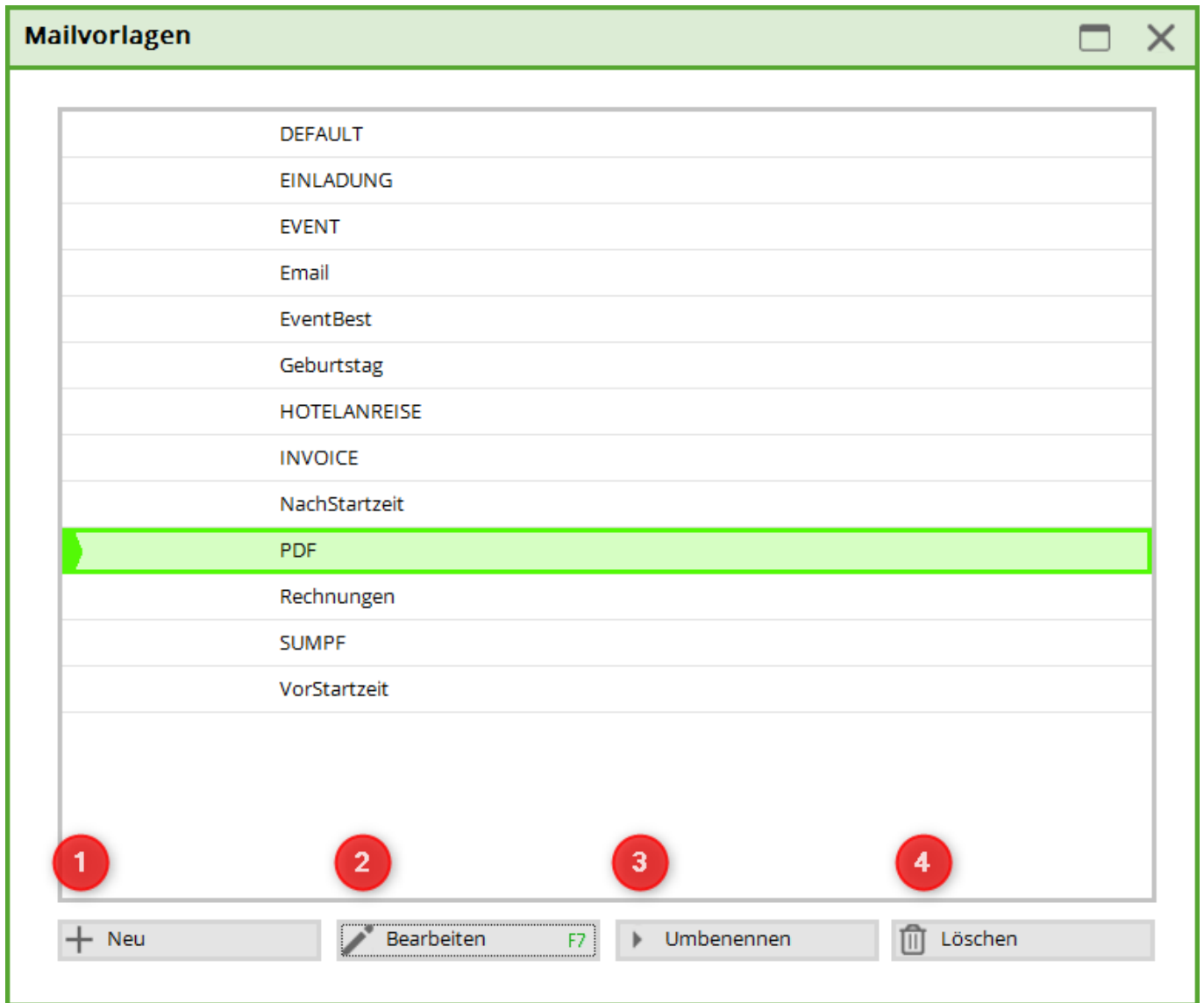
## Spell check

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



## Templates

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



## (1) New

**Neue Vorlage erstellen**
☐ ×

Name der neuen Vorlage:

1

Basierend auf:

2

DEFAULT
EINLADUNG
EVENT
Email
EventBest
Geburtstag

Gruppe:

3

(Keine)
---------

✓ OK

✗ Abbruch

- (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

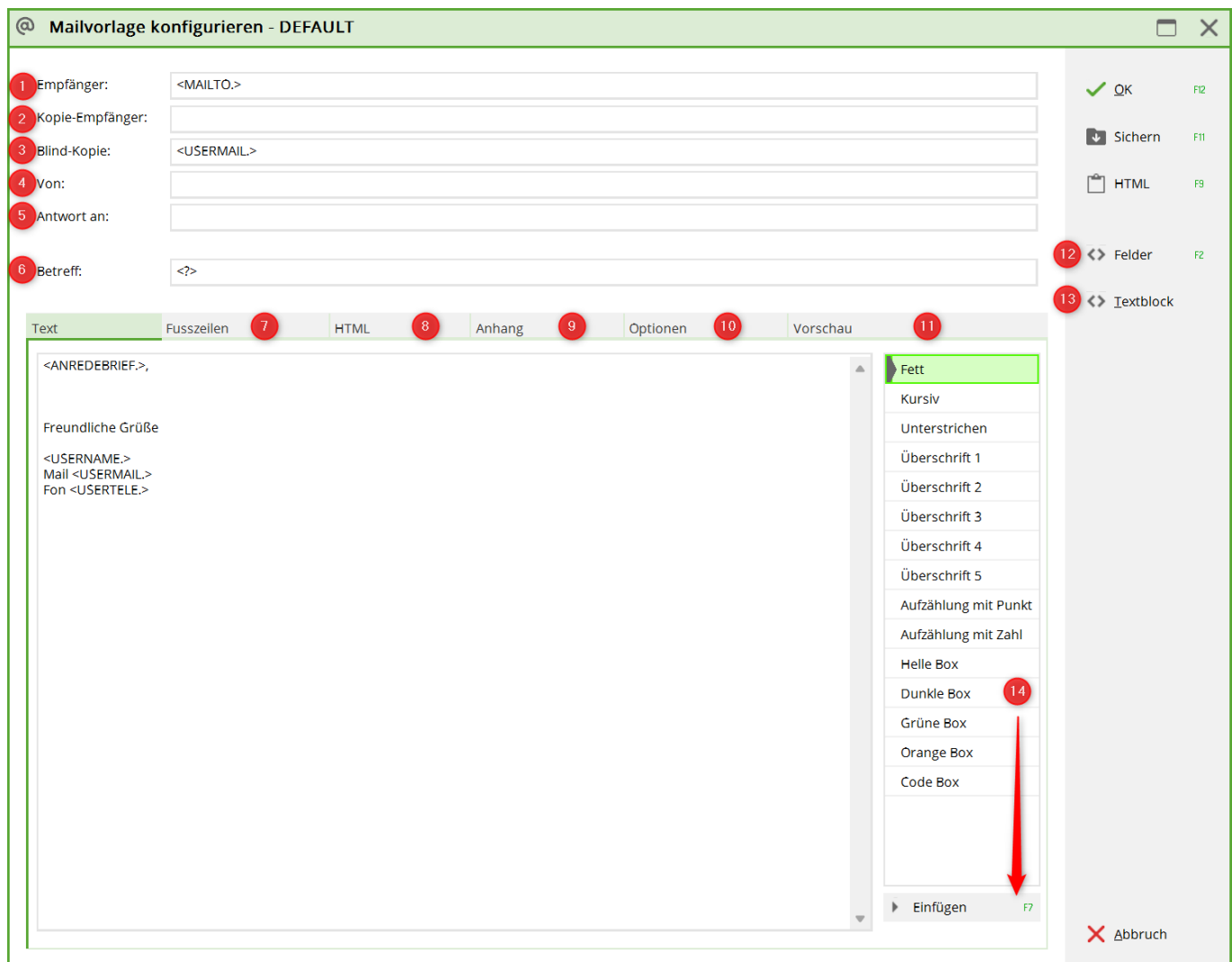
Renames the selected template.

## (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 → 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 konfigurieren - DEFAULT

Empfänger: <MAILTO.>  
 Kopie-Empfänger:  
 Blind-Kopie: <USERMAIL.>  
 Von:  
 Antwort an:  
 Betreff: <?>

Text Fusszellen HTML Anhang Optionen Vorschau

Die Mail wird im Textmodus um diese Fusszellen ergänzt:

```
<MAINTXT.>
--
Golfclub Sonnenschein
Musterstrasse 8
12345 Teststätten
Deutschland
Fon +41 41 9876543
Fax +41 41 9876542

Deutschland
Fon +49 2642 9876543
Fax +49 2642 9876542

Österreich
Fon +43 1 9876543
Fax +43 1 9876542

Mail test@testmail.de
Web www.testadresse.de|
```

OK F12  
 Sichern F11  
 HTML F9  
 Felder F2  
 Textblock

Abbruch

## HTML

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

Example:

**Mailvorlage konfigurieren - INVOICE**

Empfänger: <IMAILTO.>  
 Kopie-Empfänger:  
 Blind-Kopie:  
 Von:  
 Antwort an:  
 Betreff: Rechnung <RG\_NR.>

OK F12  
 Sichern F11  
 HTML F9  
 Felder F2  
 Textblock

Text Fusszeilen **HTML** Anhang Optionen Vorschau

**PC CADDIE**  
 1 Golf IT

<\*TYPE.\*> Nr. <\*RG\_NR.\*>

<ANREDEBRIEF>  
 Anbei erhalten Sie die aktuelle Rechnung für das Jahr 2018!  
 Bitte beachten Sie das PDF-Dokument im Anhang.  
 Rechnungsnummer <RG\_NR> und der Bruttobetrag: <BRUTTO>  
 Mit freundlichen Grüßen  
 <USERNAME>

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;}
  </style>

```

```

        .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 -->
    <tr>
        <td style="background-color: #ffffff;" height="5" ></td>
    </tr>

    <tr>
        <td valign="top" height="40px" style="background-color: #fff;">
            <table width="700" align="center" border="0" cellspacing="0"
cellpadding="0">
                <tr>
                    <td style="padding-left: 275px">
                        <!-- ### BITTE ANPASSEN ### -->
                        <a href="https://www.pccaddie.net"></a>
                        <!-- ### BITTE ANPASSEN ### -->
                    </td>
                </tr>
            </table>
        </td>
    </tr>

    <tr>
        <td style="background-color: #ffffff; border-bottom: 3px solid
#f07d00;" height="5" ></td>
    </tr>
    <!-- Ende Header -->

    <!-- Start Email -->
    <tr>
        <td>
            <table width="700" align="center" border="0" cellspacing="0"
cellpadding="0" bgcolor="#ffffff" style="background-color:#ffffff;">
                <tr>
                    <td style="background-color: #eaeaea;" height="20"
></td>

```

```

        </tr>
        <tr>
            <td valign="top">
                <table width="700" border="0" cellspacing="0"
cellpadding="0">
                    <tr>
                        <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>
                    </tr>
                    <tr>
                        <td colspan="3" height="10" ></td>
                    </tr>
                    <tr>
                        <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>
                    </tr>
                </table>
            </td>
        </tr>
        <tr>
            <td colspan="3" height="10" style="border-bottom: 3px
solid #f07d00"></td>
        </tr>
    </table>
</td>
</tr>
<!-- Ende Email -->

<!-- Start Teiler -->
<tr>
    <td style="background-color: #eaeaea;" height="20" ></td>
</tr>
<!-- Ende Teiler -->

<!-- Start PCC0-info -->
<tr>
    <td align="center" valign="top" >
        <table width="700" align="center" border="0" cellspacing="0"
cellpadding="0" bgcolor="#ffffff" style="background-color: #ffffff;">
            <tr>
                <td valign="top">
                    <table width="700" align="left" border="0"

```

```

cellspacing="0" cellpadding="0" bgcolor="#ffffff" style="background-
color:#ffffff;">

        <tr>
            <td valign="top">
                <table width="700" border="0"
cellspacing="0" cellpadding="0">
                    <tr>
                        <td colspan="3"
style="background-color: #f07d00; font-size: 15px; padding: 6px 15px; font-
family: Arial,Tahoma, Helvetica, sans-serif; color:#ffffff;text-
align:center;">
                            Impressum
                        </td>
                    </tr>
                    <tr>
                        <td colspan="3" height="10"
></td>
                    </tr>
                    <tr>
                        <!-- ### BITTE ANPASSEN ### -->
                        <td class="footer" valign="top"
colspan="3" width="350" style="color: #25316a; padding: 0 15px; background-
color: #ffffff; font-size: 12px; line-height: 16px; font-family:
Arial,Tahoma, Helvetica, sans-serif; text-align:center;">
                            <p style="margin: 0; line-
height: 22px;">PC CADDIE AG,<br>
                                Bachtelweg 3 | 6048 Horw</p>
                                <p style="margin: 0; line-
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></p>
                                <p style="margin: 0; line-
height: 22px;">Verwaltungsrat: Benedikt Schmedding (Präsident)<br>
                                    Marc Spangenberg<br>
                                    UID CHE-105.347.983 HR/MWST
                                    | USt-IdNr. DE 813580086</p>
                                <!-- ### BITTE ANPASSEN ###
-->
                            </td>
                        </tr>
                    </table>
                </td>
            </tr>
            <tr>
                <td height="20" ></td>
            </tr>
        </table>
    </td>
</tr>

```

```
        </table>
    </td>
</tr>
<!-- Ende PCC0-info -->

<!-- Start Teiler -->
<tr>
    <td style="background-color: #eaeaea;" height="20" ></td>
</tr>
<!-- Ende Teiler -->

</table>
</body>
</html>
```

## 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/farbcodes-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:

```
Text      Fusszeilen  HTML      Anhang    Optionen  Vorschau
Die Mail wird im HTML-Modus in diese HTML-Vorlage integriert:
<!-- ### BITTE ANPASSEN ### -->
<a href="http://www.pccaddie.net"></a>
<!-- ### BITTE ANPASSEN ### -->
</td>
</tr>
</table>
</td>
</tr>
<tr>
<td style="background-color: #ffffff; border-bottom: 3px solid #f07d00; height="5" ></td>
</tr>
<!-- Ende Header -->
<!-- Start Email -->
<tr>
<td>
<table width="700" align="center" border="0" cellspacing="0" cellpadding="0" bgcolor="#ffffff" style="background-color:#ffffff;">
<tr>
<td style="background-color: #eaeaea; height="20" ></td>
</tr>
<tr>
<td valign="top">
<table width="700" border="0" cellspacing="0" cellpadding="0">
<tr>
<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.*&
```

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 konfigurieren - INVOICE

Empfänger: <IMAILTO.>  
Kopie-Empfänger:  
Blind-Kopie:  
Von: invoice@pccaddie.com  
Antwort an:  
Betreff: Rechnung <RG\_NR.>

Text Fusszeilen HTML **Anhang** Optionen Vorschau

Anhang 1: 1 <FILE01.>  speichern  
Benennen: 2 Rechnung <RG\_NR.> (<NACHNAME, VORNAME.>) 3

Anhang 2:   speichern  
Benennen:

Anhang 3:   speichern  
Benennen:

Anhang 4:   speichern  
Benennen:

Anhang 5:   speichern  
Benennen:

Anhang 6:   speichern  
Benennen:

OK F12  
Sichern F11  
HTML F9  
Felder F2  
Textblock  
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 konfigurieren - INVOICE**

Empfänger: <IMAILTO.>  
 Kopie-Empfänger:  
 Blind-Kopie:  
 Von: invoice@pccaddie.com  
 Antwort an:  
 Betreff: Rechnung <RG\_NR.>

Text Fusszeilen HTML Anhang **Optionen** Vorschau

Master-Vorlage **1** Master HTML Club

Ausdruck als PDF anhängen **2**

Beim Bildschirmdruck E-Mail-Versand starten **3**

Vor dem Versand im Editor anzeigen und bearbeiten **4**

Sendeverzögerung  Minuten **5**

OK F12  
 Sichern F11  
 HTML F9  
 Felder F2  
 Textblock

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](#)

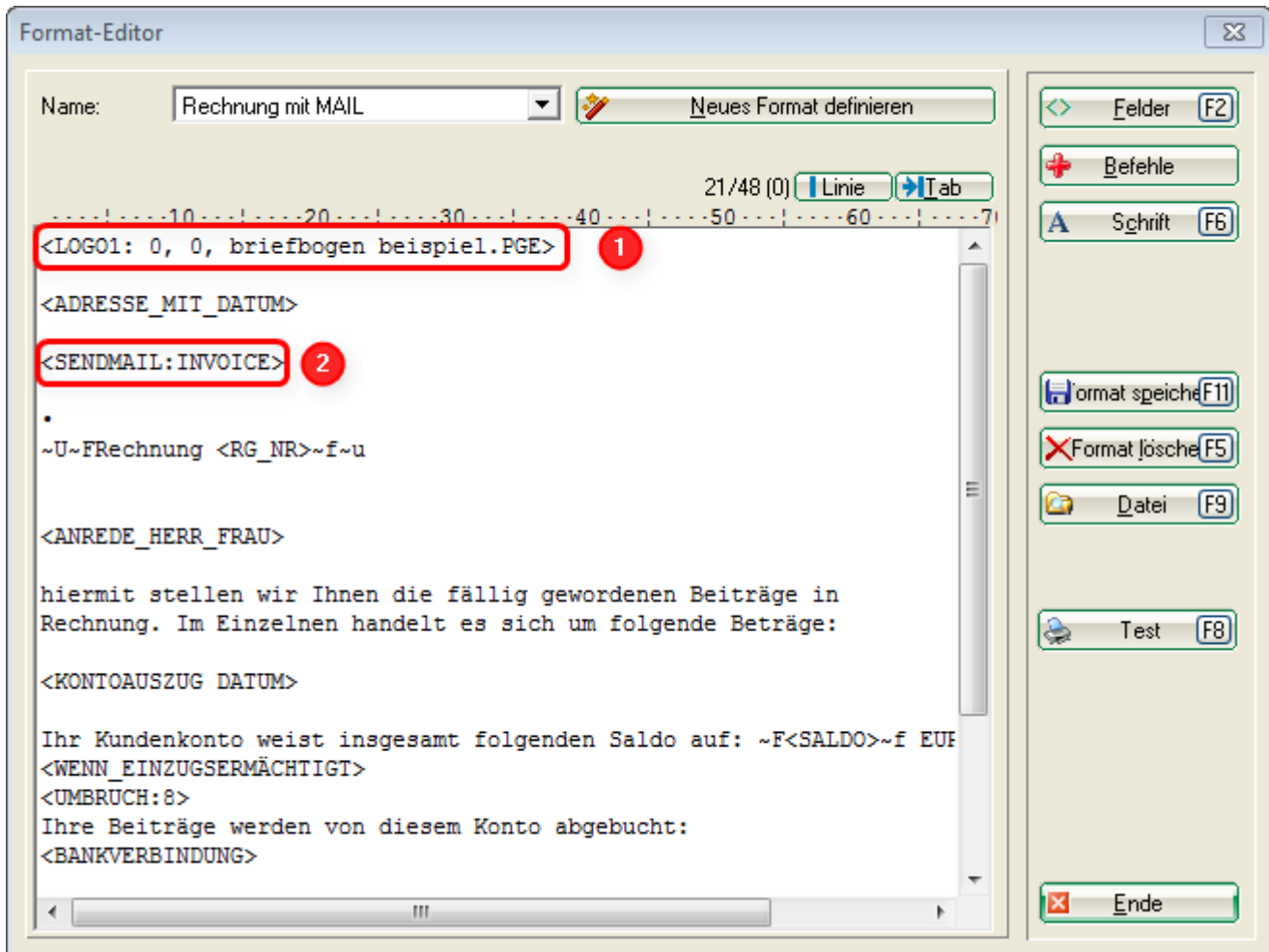
## Test mail and invoice layout

If you select **Basic settings** tick the box next to **Test mail setting: Test on** and have entered an e-mail 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.

The screenshot shows the 'Umsatzkonto - CLUB' window. At the top, it displays 'Quickert, Rosemarie (quro)'. Below this is a table with columns: Information, Datum, Zeit, S, Netto, Brutto, and OK. The first row is highlighted in yellow and contains the following data: 'boel', 'Caddiebox Elektro', '07.02.14', '13:37', 'I', '150,00', '150,00'. Below the table, there are several input fields and a summary table. The summary table shows: 0,00 (Netto), 0,00 (Brutto), 0,00 (Netto), 0,00 (Brutto), 150,00 (Netto), 150,00 (Brutto). On the right side, there is a vertical toolbar with buttons: 'Beitr. Wah (F2)', 'Beitr. Typ (F7)', 'Ändern', 'Storno (F5)', 'Zuordnen', 'Bezahlen', 'Drucken (F8)', and '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:

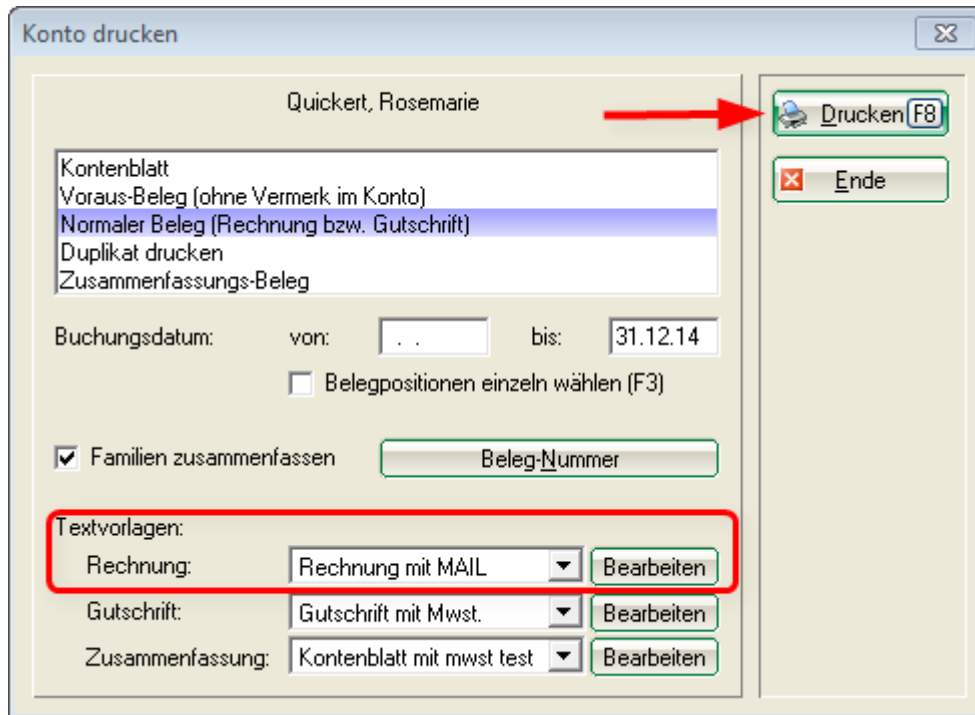


1. This command is really important. A so-called PGE file of the invoice is stored here, with which the stationery is also printed. If you still print your invoices on stationery pre-printed by the printing company, you should have PC CADDIE create a PGE file for you. You can also create the file [create 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 



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

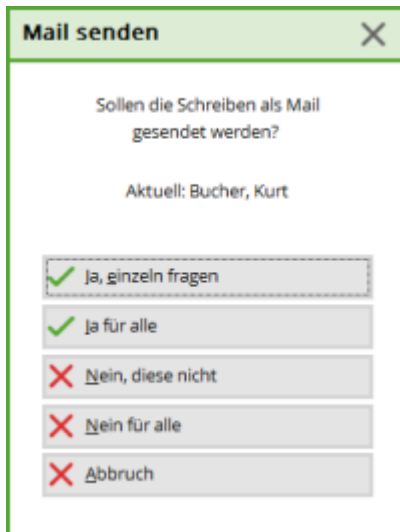
1. Firstly, start sending invoices by e-mail! This gives you all the automatic options and the process is simple!
2. Then the invoices are printed for dispatch by post.

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.

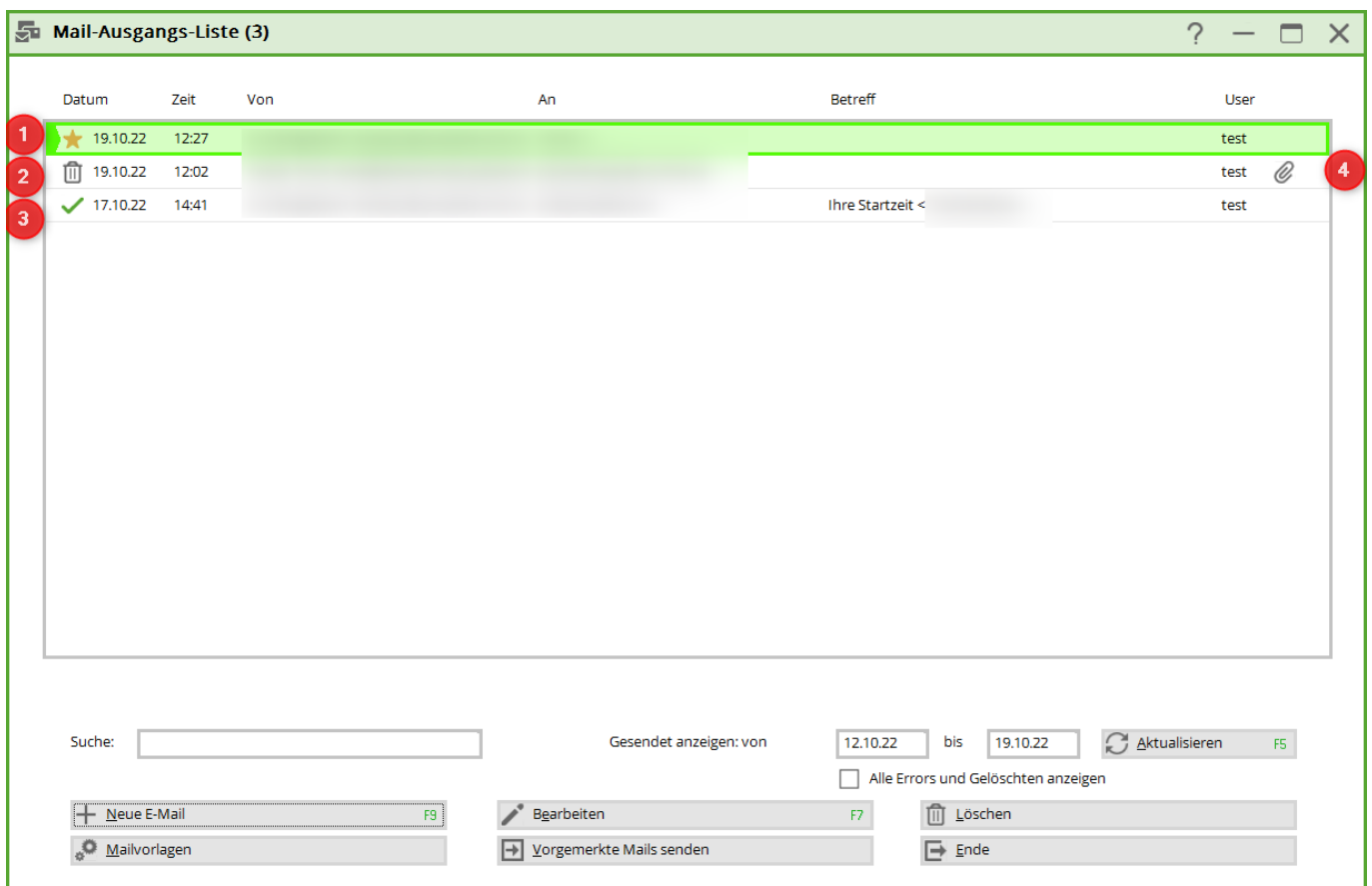
All other amounts prepared in the accounts are then also available for printing on paper. You do not need a special person filter here either, you should only change the invoice layout to a layout without the command <SENDMAIL:INVOICE>.

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



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

## Mail outgoing list



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, Paul**

Name

Suchkürzel  Nr.

Titel

Vorname

Nachname

**Merkmale** **Adresse** **Z.Adresse** **Zahlung** **Infos** **Memo**

Kontoinhaber

Bank

BLZ / BIC

Kto-Nr. / IBAN

Abbuchung:   Club  GmbH  KG  
 Spinde  Proshop  Restaurant

Zahlweise

Versand  als PDF an diese E-Mail-Adresse:  
E-Mail

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 → dispatch by post - invoice by e-mail remains empty

1st email empty - 2nd email filled → 2nd email goes to invoice by mail

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

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

## Examples

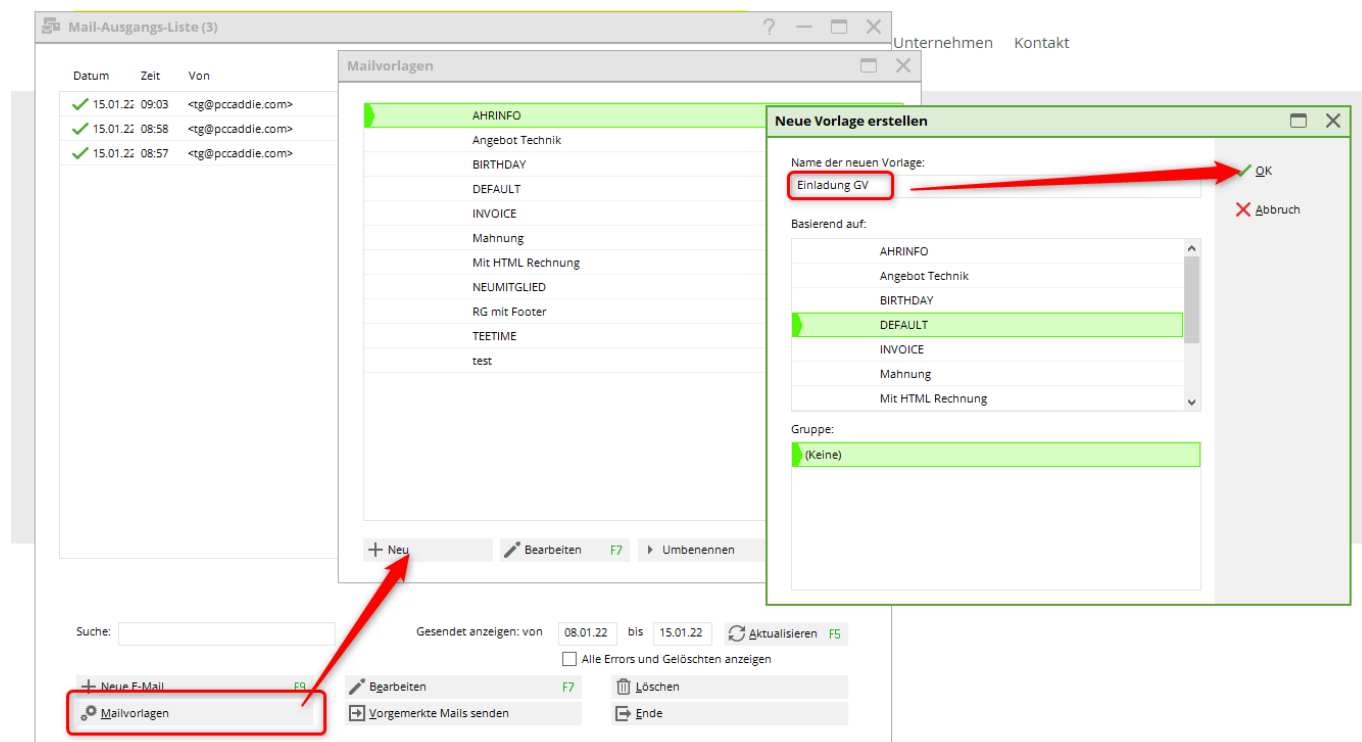
# Mail merge by email - with or without attachment

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:



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

## Clubmanager:

Veranstaltungen

Gutscheine

Platzbelegung

Scorekarten-Rechner

Teetimes

★ Marshal / Starter

A Texte Marshal / Starter

Web SMS

i News

App News

Mail-Kategorien

InfoScreen

\$ Sponsoren

Accounting

Datenschutz

**Dateimanager**

Self Waiter

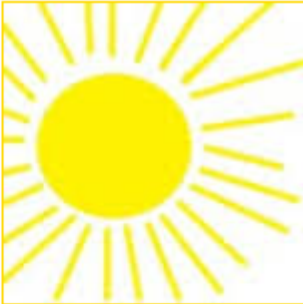
### Start

## Willkommen im P

Sie können Einstellungen für  
und vieles mehr.  
[Zu Ihrer Information finden](#)

Kontaktieren Sie uns immer

### Logo



[Logo ändern](#)

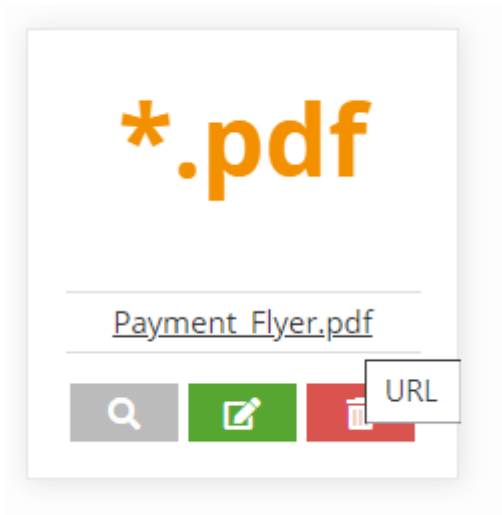
### Info

Nummer:

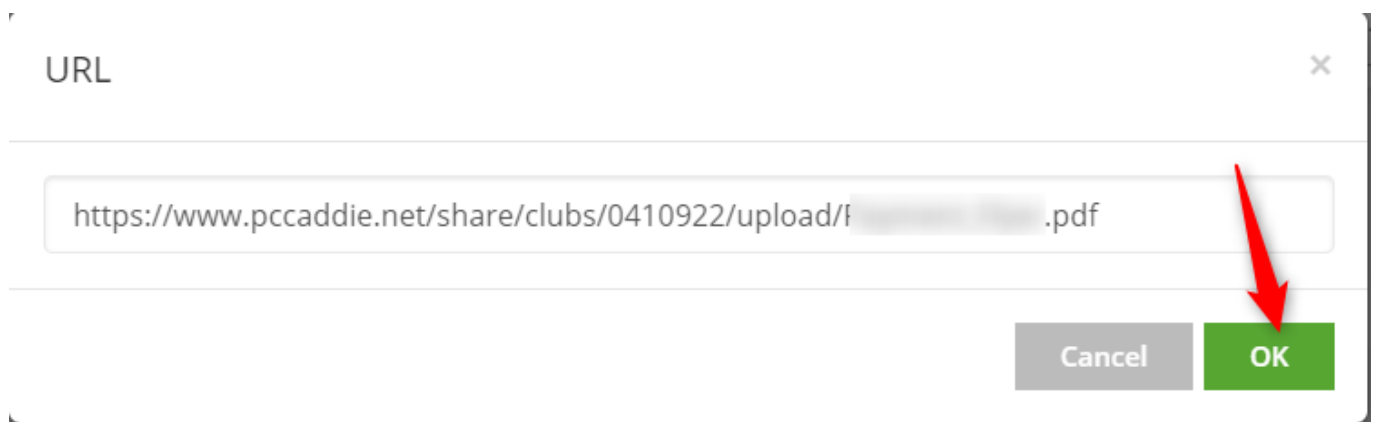
Name:

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:



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



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

## @ Mailvorlage konfigurieren - Einladung GV

Empfänger: <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 freundlichen Grüßen

Traktandenliste::https://www.pccaddie.net/share/clubs/0410922/upload/f[REDACTED].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**

Empfänger: <MAILTO.>  
 Kopie-Empfänger:  
 Blind-Kopie:  
 Von: support@pccaddie.com  
 Antwort an: support@pccaddie.com  
 Betreff: Einladung GV für

Text Fusszeilen HTML Anhang Optionen **Vorschau**

Master-Vorlage (Keines)

Ausdruck als PDF anhängen

Beim Bildschirmdruck E-Mail-Versand starten

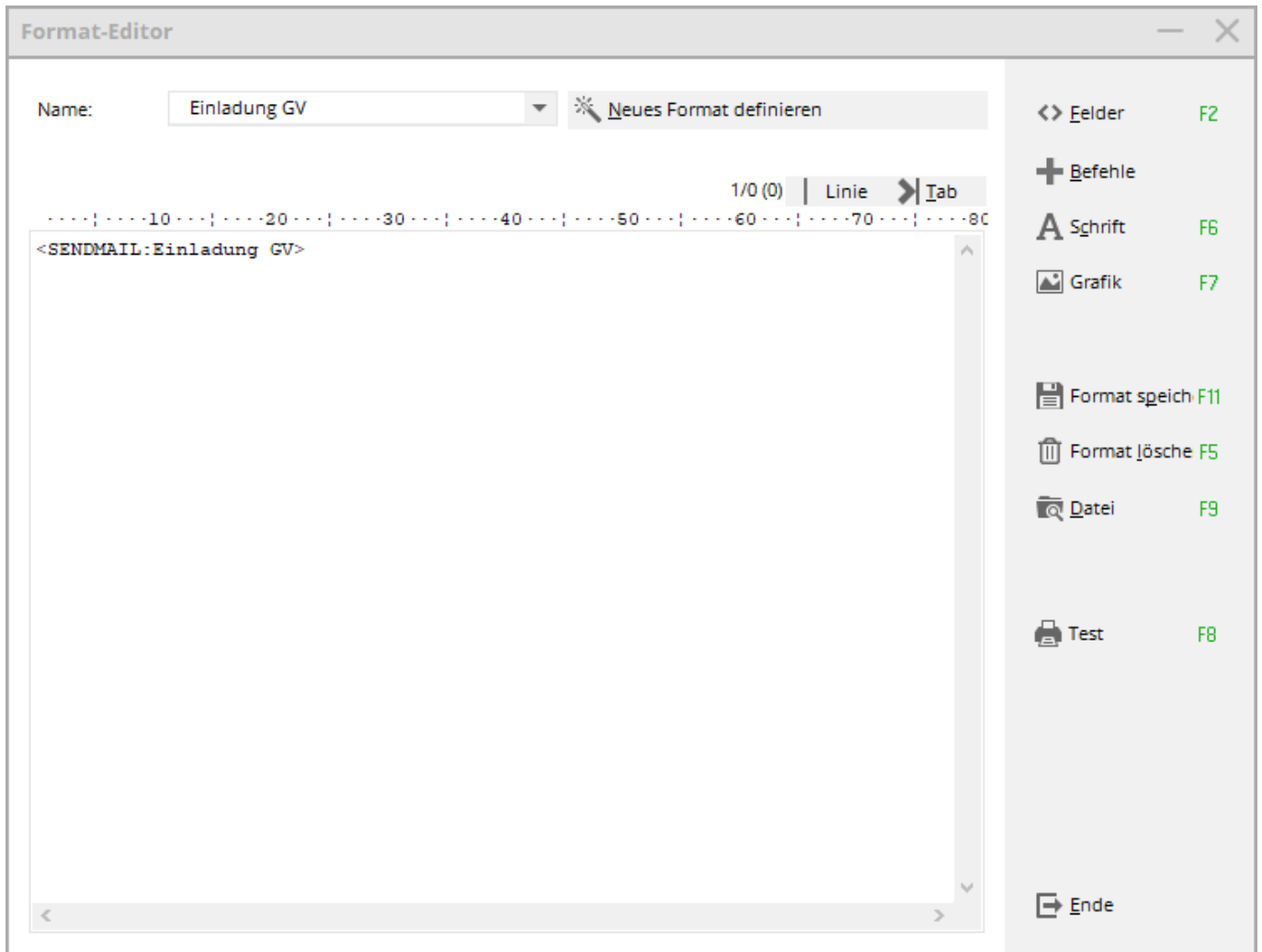
Vor dem Versand im Editor anzeigen und bearbeiten

Sendeverzögerung 0 Minuten

OK F12  
 Sichern F11  
 HTML F9  
 Felder F2  
 Textblock

Abbruch

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).

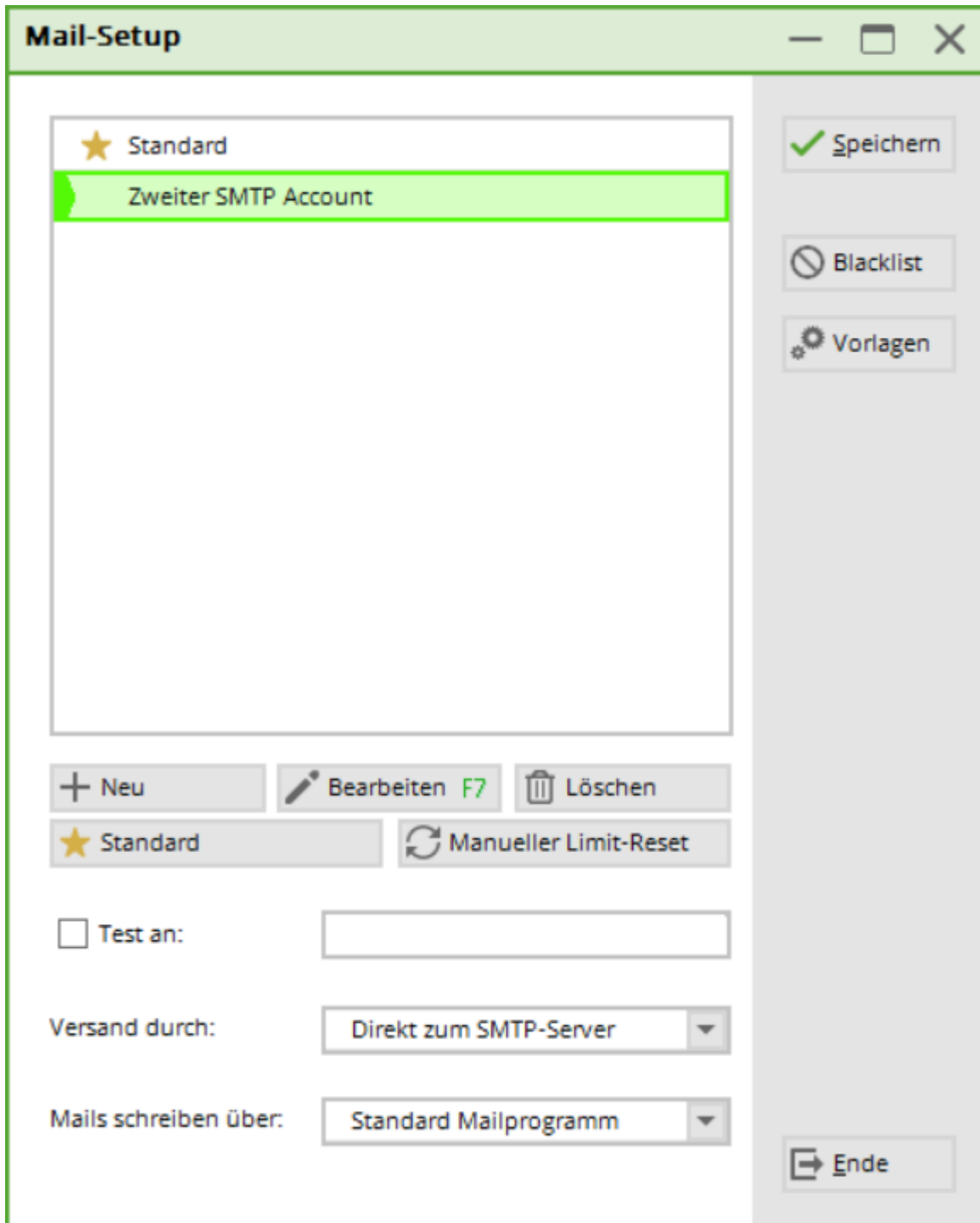


Then select the desired person filter and print the mail merge to the screen.

## 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:



Make the settings for the two SMTP accounts accordingly:

### SMTP-Server

Bezeichnung:

Filter (z.B. Domain):

Absender Name:

Sicherheit:

Sende-Limit:

### SMTP-Server

Bezeichnung:

Filter (z.B. Domain):

Absender Name:

SMTP Auth.:

Sicherheit:

Sende-Limit:

OK

Abbruch

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

### Mailvorlagen

Mailvorlage konfigurieren - INVOICE

Empfänger:

Kopie Empfänger:

Blind-Kopie:

Von:

Antwort an:

Betreff:

Text Fusszeilen HTML Anhang Optionen Vorschau

<ANREDEBRIEF.>

hiermit erhalten Sie die Rechnung.

Freundliche Grüße

Ihr Team vom GC

Fett

Kursiv

Unterstrichen

Überschrift 1

Überschrift 2

Überschrift 3

Überschrift 4

Überschrift 5

Aufzählung mit

Aufzählung mit

OK F12

Sichern F11

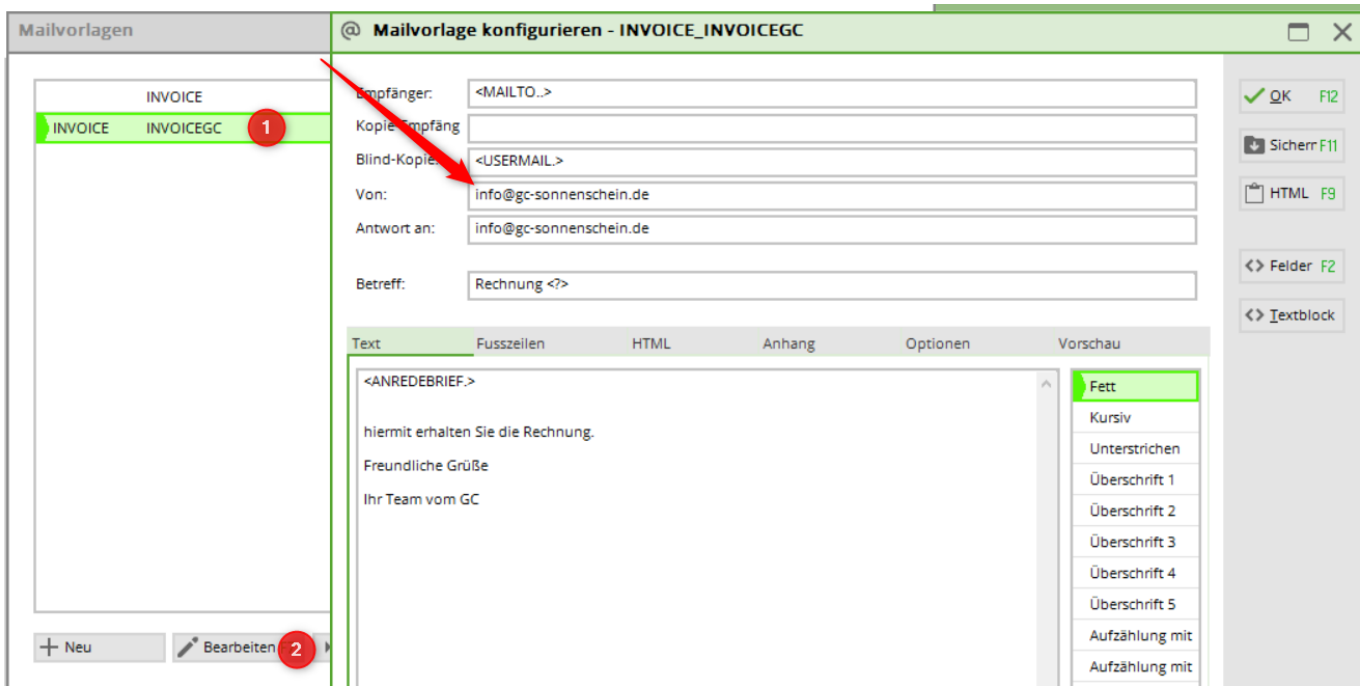
HTML F9

Felder F2

Textblock

Neu Bearbeiten

OR



## 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

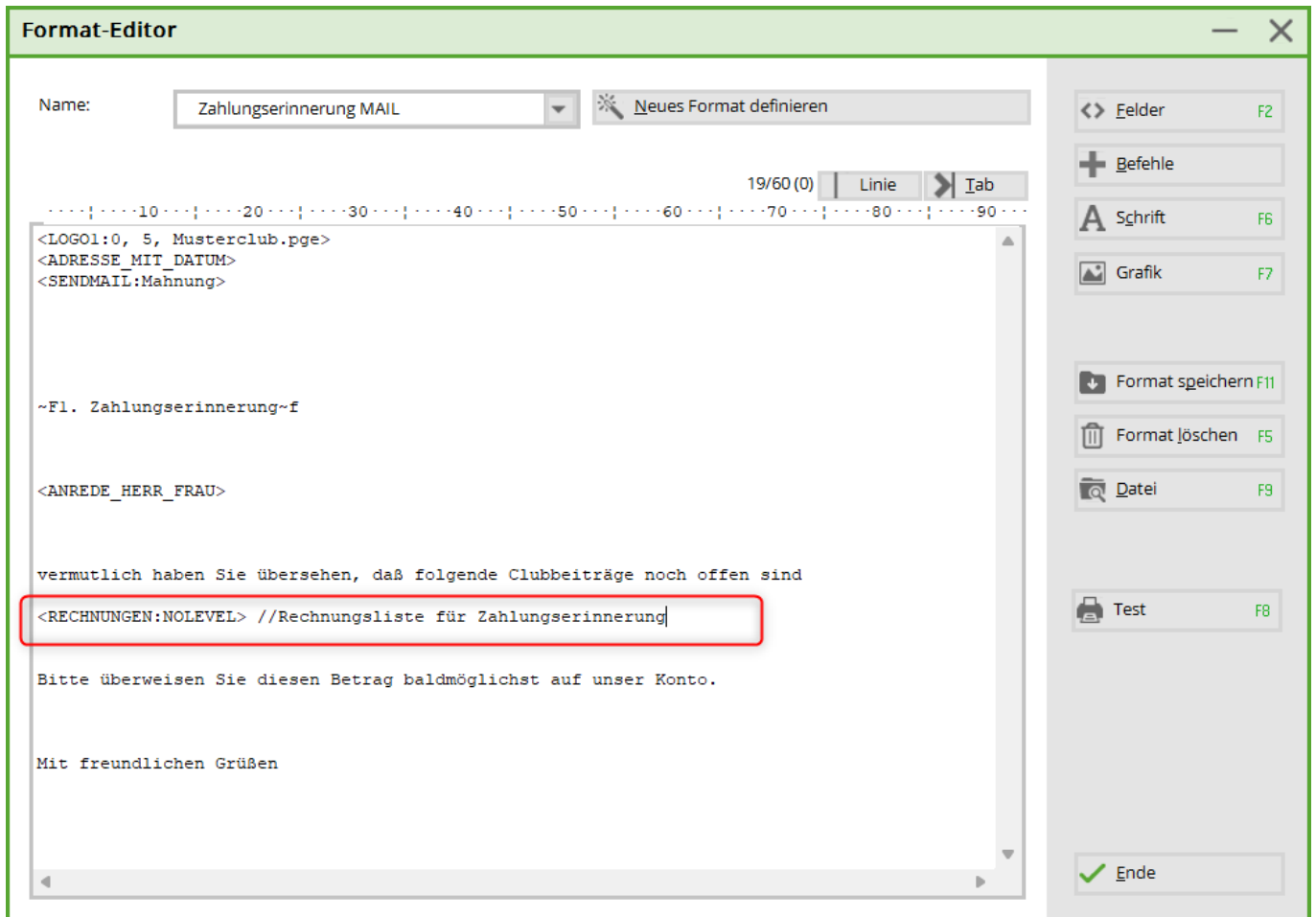
Rechnungs-Nr.	Datum	Betrag/CHF
202400001	31.01.24	894.00

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:



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

**Mail senden**

Empfänger: \_\_\_\_\_

Kopie-Empfänger: \_\_\_\_\_

Blind-Kopie: \_\_\_\_\_

Von: \_\_\_\_\_

Antwort an: \_\_\_\_\_

Betreff: Zahlungserinnerung

Text	Fusszeilen	Anhang (Z)	Status	Vorschau
Anhang 1:		C:\SSS\PCCADDIE\MAIL\2022\2022102109450300014Z\ATT1.Zahlungserinnerung).PDF		1
Benennen:		1.Zahlungserinnerung).PDF	<input checked="" type="checkbox"/>	speichern
Anhang 2:		C:\SSS\PCCADDIE\MAIL\2022\2022102109450300014Z\ATT\Rechnung 202200002.PDF		2
Benennen:		Rechnung 202200002.PDF	<input checked="" type="checkbox"/>	speichern
Anhang 3:			<input checked="" type="checkbox"/>	speichern
Anhang 4:			<input checked="" type="checkbox"/>	speichern
Anhang 5:			<input checked="" type="checkbox"/>	speichern
Anhang 6:			<input checked="" type="checkbox"/>	speichern

Abbruch

1. Payment reminder or reminder
2. Original invoice

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