

Adminsoft Accounts Basic User Guide – Email

adminsoft

Adminsoft Accounts User Guide

EMAIL

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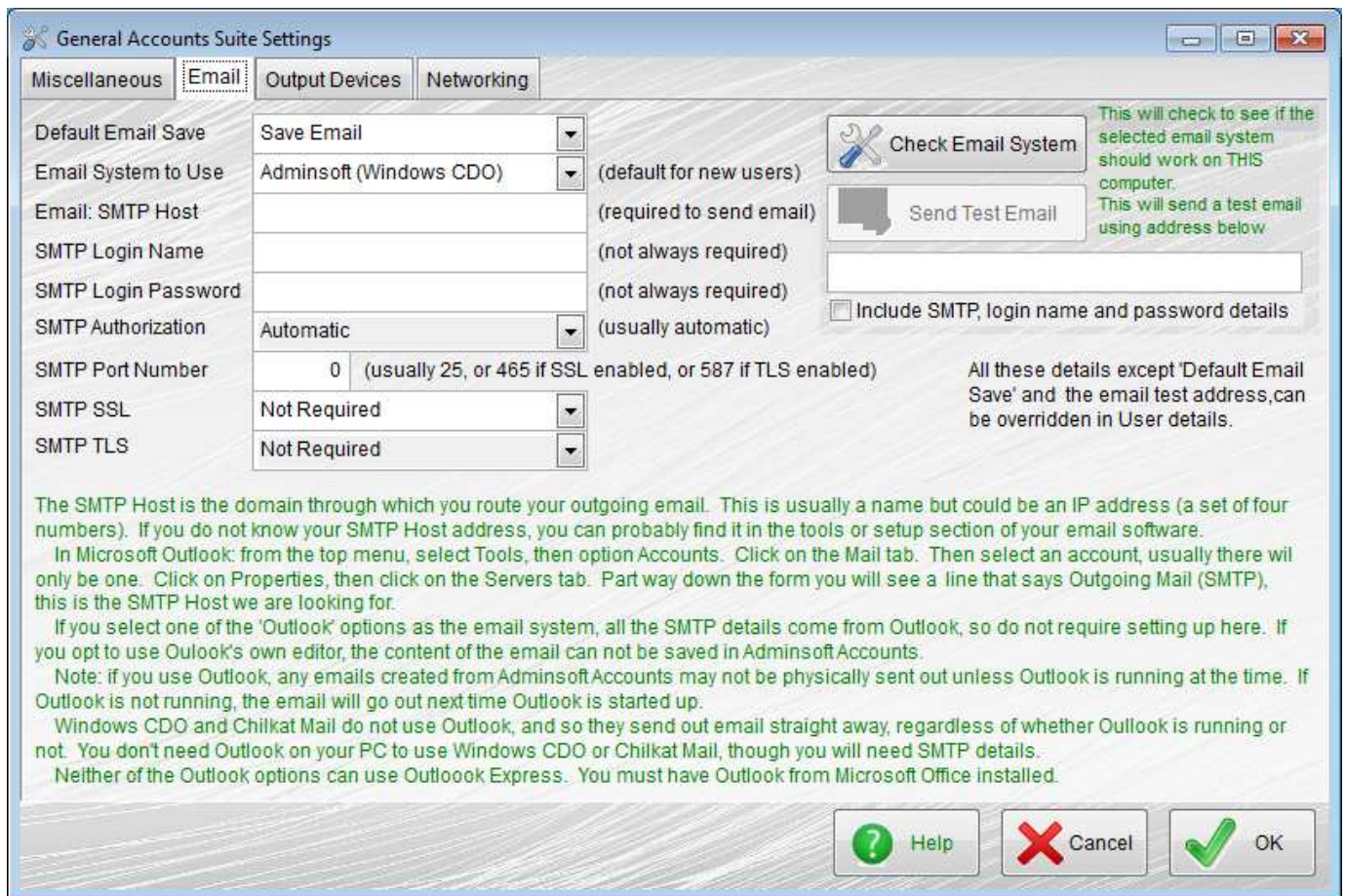
Introduction

Emails can be sent out from within Adminsoft Accounts from numerous places. They can be sent out from a customer’s account, a supplier’s account, a sales prospect record, from a contact record, from reports, from email shot options for customers, suppliers, sales prospects, and imported email lists. So, it’s well worth setting up the ability to output email.

Adminsoft Accounts cannot receive email, it can only send it.

Setting up to send email

To setup email, select ‘Setup’ on the top menu bar, go down to ‘Miscellaneous’ and select ‘General Settings’. In the window that appears, click the ‘Email’ tab. The window will now look something like this:



This allows you to setup the default email settings that will be used by all users of Adminsoft Accounts. However, settings can be setup for individual users, which will be discussed later.

‘Default Email Save’ when set to ‘Save Email’ means that whenever an email is sent out, a copy of it is recorded within Adminsoft Accounts. This setting can be changed when editing an email. This setting only applies to individual emails, it does not apply to email shots.

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'Email System to Use'. Adminsoft Accounts can use one of several methods to send out email. As follows:

Adminsoft (Windows CDO)

This is the default setting. This method uses the email system built into Windows. However, it is only available from Windows 2000 onwards. So, if you're using a really old version of Windows, it may not work (though it's pretty unlikely you're going to be using a version of Windows that old). You will need to enter your SMTP details either here, however, this email system does not support TLS, which superseded SSL. An increasing number of SMTP servers now require TLS instead of SSL. It also does not allow you to specify the authorization method, when using Windows CDO this is always automatic, which may work or it may not. Some email hosts now require security processes that are not available in Windows 7 or older versions. If this is the case with your email host, you may not be able to use the Windows CDO setting.

Adminsoft Accounts (Chilkat)

If you're using a really old version of Windows, or can't get CDO to work, or need to enable TLS, then try this method. It is reliable, but it uses some third party software, which requires a DLL file to be registered with Windows. The accounts system will try to do this registration for you, but it may not be able to depending on your Windows security setting. If it can't, you will have to register it yourself. Please see 'Frequently Asked Questions' in the 'Support' section of our web site for further details and instructions. The other downside to this method, is that because it requires a DLL file to be registered, it means your Adminsoft Accounts is no longer truly portable. As this DLL file will need to be registered on any PC you will be running the accounts system on (which the software will try to do automatically). This is true whether it is being run off a USB memory stick or on a network. As with 'Adminsoft Accounts (Windows CDO)' you will need to enter your SMTP email details.

Adminsoft Accounts (using Outlook)

This uses the email facility built into Microsoft Outlook. You never actually see Outlook, only Adminsoft Accounts own email screen. Obviously, you need to have Outlook installed on your PC, and set up for use. It has the advantage in that there may be no setup required, as it uses your SMTP details that are already set up in Outlook. There is a possible disadvantage, in that on some PC's, depending on how your Outlook is set up, when an email is 'sent' it doesn't actually go out until the next time you start up Outlook. So, if you intend to use this method, please check to see what your Outlook does when you send an email.

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Microsoft Outlook

Instead of displaying the Adminsoft Accounts email window, it will display Outlooks email window (only the PC version, NOT the on-line version). Outlooks email editor is much better than that provided by Adminsoft Accounts, but it does not have access to any email addresses stored in the accounts system,. The other problem is that it's not possible for Adminsoft Accounts to store email messages created with this method. Note: if you decide to use this method, email shots will go out using the 'Adminsoft Accounts (using Outlook)' described above. As each email can go out without human intervention. As with the **Adminsoft Accounts (using Outlook)** option, there are no SMTP details to worry about. But of course, a Windows version of Outlook must be installed and running on your PC.

Windows Default

attempts to start up whichever email system is set as the default in Windows. If it is successful in starting up your email software, it should populate the relevant fields with the email addresses, subject and the email body. Like the '**Microsoft Outlook**' option above it will not have access to any further email addresses with Adminsoft Accounts, it also has the restriction in that it cannot send out attachments from Adminsoft Accounts such as sales invoices or statements (they could be sent, but as HTML documents incorporated into the email body)

If using Gmail use Windows CDO as the email system. set the SMTP host to smtp.gmail.com, the user name is your Gmail email address, the password has to be obtained from Gmail (Gmail will create it for you), use port 465 and enable SSL, or use port 587 and enable TLS. However, if you need to enable TLS, you will need to set the email system to **Adminsoft Accounts (Chilkat)**, as **Windows CDO** can't handle TLS. Due to Gmail updating their security, at the time of writing (Aug. '22) it is possible, but not yet known for certain, you may have to use **Adminsoft Accounts (Chilkat)** anyway if you are not running Windows 8 or a later version.

Generally for most SMTP servers, if using SSL you'll usually use port 465, If using TLS, you'll usually use port 587. If you're not using either, then port 25. Although in Adminsoft Accounts you can enable both SSL and TLS at the same time, in practice you would probably never do this. As TLS is a replacement for SSL. Also note, we're talking about port numbers 465 for SSL and 587 for TLS, as these are the most common settings. But there is no guarantee an SMTP server will use these port numbers, they can vary.

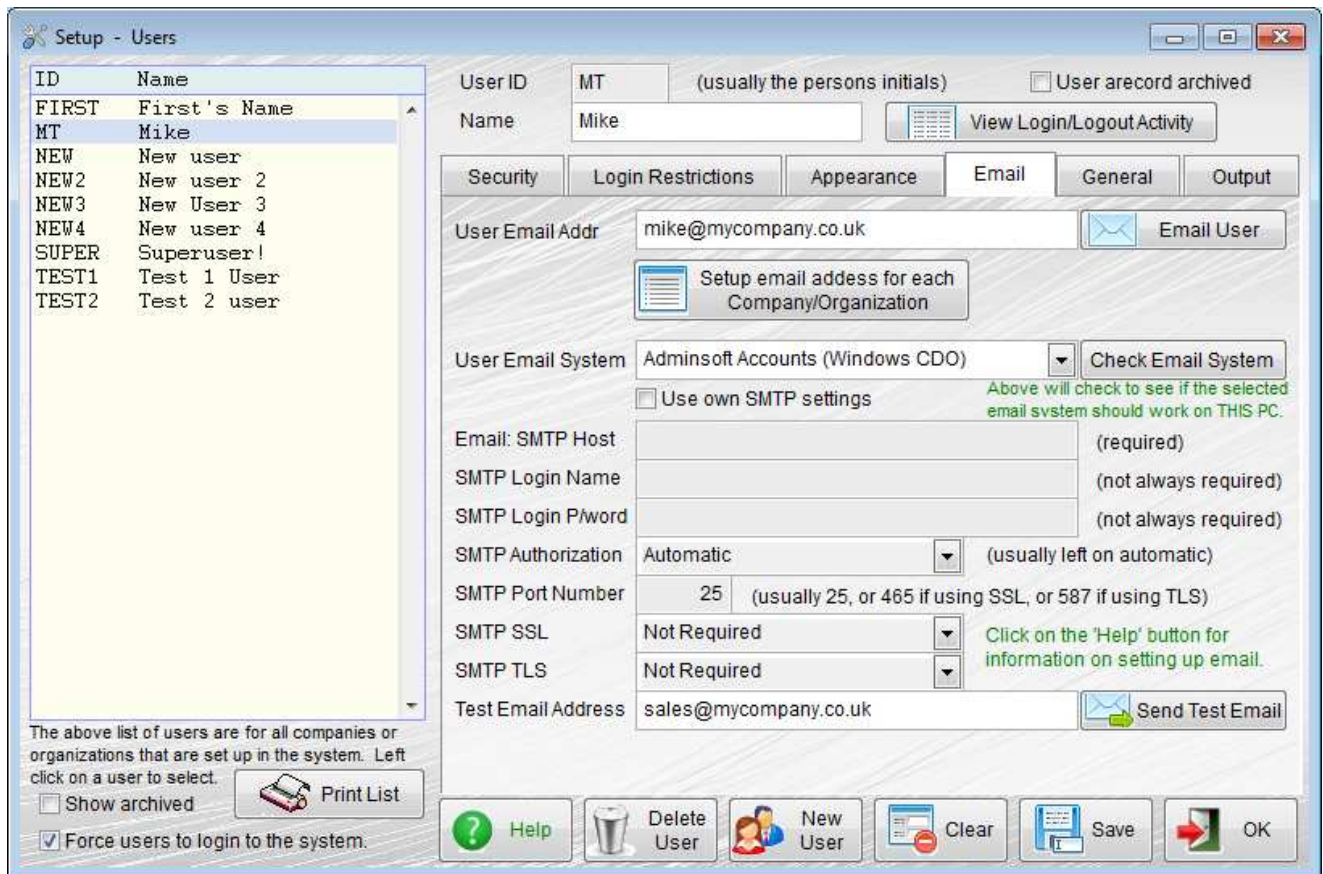
Some SMTP servers may require authentication. This is automatically enabled if you provide a login name and password. If using the '**Chilkat**' email system, you do have the option using '**SMTP Authorization**' to change to a specific authorization method if required. The available methods are: NONE, LOGIN, PLAIN, CRAM-MD5, and NTLM. As part of the authorization process, some of these methods require encrypted keys. The encryption methods tend to change over time to improve security. If the connection to the SMTP server fails due to an authentication problem, it may be your version of Windows does not support the required level of encryption.

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Note: the settings here only relate to the selected company/organization.

If you struggle with your SMTP settings, and can't get email to send, don't worry, you're not alone! It used to be easy to setup, but as security becomes ever tighter, it becomes increasingly difficult. If you can't get it work, you may need to contact the support department of whoever provides your email facility. One thing to watch out for when trying to send email through an on-line platform, is that many of them now require their users to change their account settings to allow third party email.

As mentioned previously, each individual user of Adminsoft Accounts can have their own email settings if required. To do this, from the top menu bar select 'Setup', go down to 'Miscellaneous', and select the option 'Maintain Users'. Whereas the settings discussed above only relate to the currently selected company/organization (you may only have one), the settings in the Adminsoft Accounts user details are used regardless of which company/organization they are working on. Anyway, with the 'Maintain Users' window displayed, select the user name, then click the '**Email**' tab. The window will look something like this:



As you can see, the first input field is 'User Email Addr', which of course is the email address of the selected user. If you only handle one company/organization within Adminsoft Accounts, or if you operate multiple companies/organizations but only use one email address, then is fine. However, if the user needs a different email address for each company/organization, then click the '**Setup email address for each Company/Organization**' button. It only allows the email address itself to be changed though, not the SMPT details.

By default, the email settings are taken from the 'General Settings' option discussed earlier. The only thing that can be changed is the method of sending email. There's a button '**Check Email**

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System’ to the right of the ‘**User Email System**’ input selection field, this will perform a rudimentary check to see if the selected method of email is likely to function on the PC currently being used.

To enter SMTP details for the selected user, click on the ‘**Use own SMTP settings**’ option. The input field below will be enabled, allowing you to enter the SMTP details as necessary. They all work in the same way per the ‘General Settings’ option.

Any settings entered in here will be saved when the ‘**Save**’ button is clicked at the bottom of the window. They will remain, and cannot be changed by any changes made in the ‘General Settings’ option.

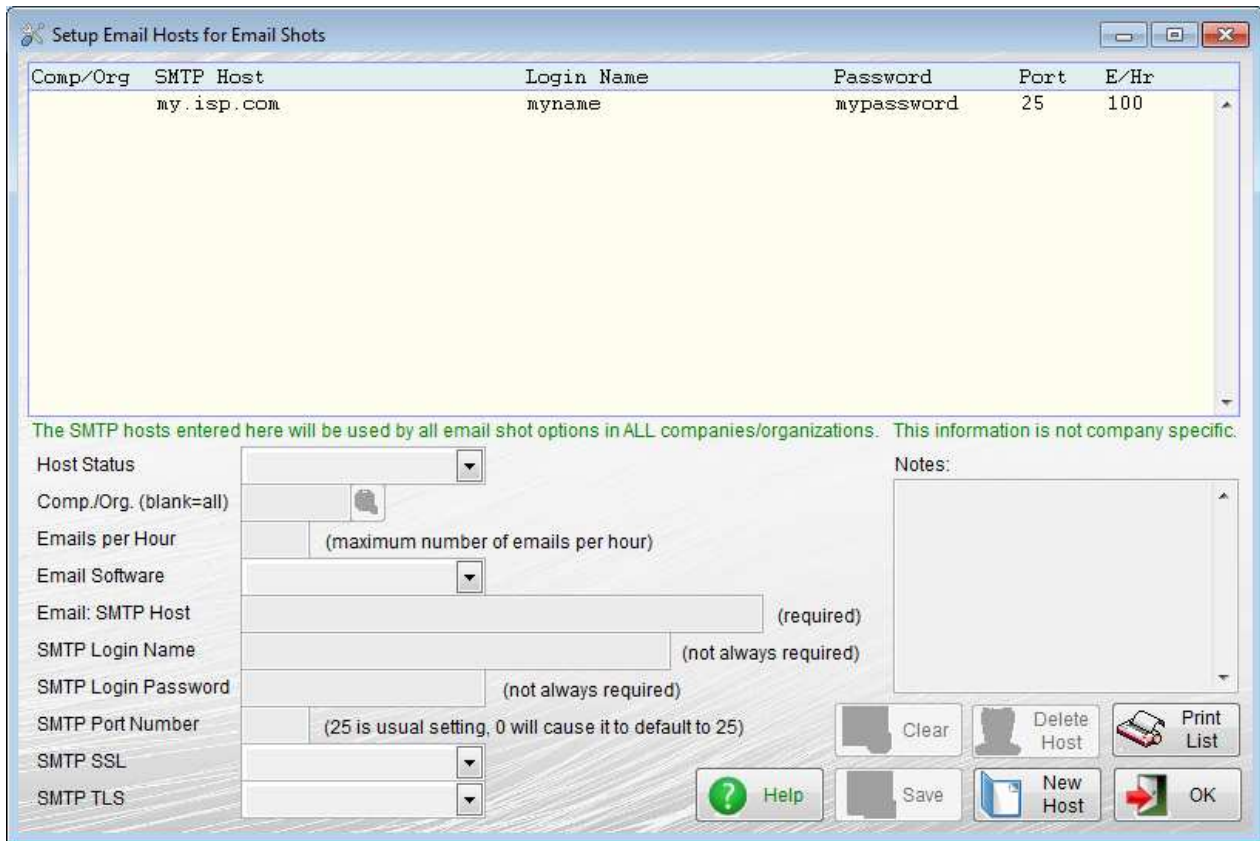
One potential issue is that when operating more than one company/organization and using a different email address for each one, sometimes the SMTP details will also be different for each one. Adminsoft Accounts currently (as of v4.247) does not support different SMTP details for each user for each company/organization. The only way around this is to use default email settings for each company/organization (Setup → Miscellaneous → General Settings, Email tab). Each company/organization will then use its own email SMTP settings, but the settings will be used by all users.

Setting up for email shots

Most ISPs (Internet Service Providers) do not allow bulk email to be sent through their servers. If you try to send out more than maybe 100 emails in one go, you may find your ISP will stop your email service. It varies a lot from ISP to ISP. So, the way around this is to put a delay in between each email that goes out. That way, your ISP doesn’t see a spike in outgoing emails. But you may have to introduce a delay of between 10 and 40 seconds to remove the chance of your ISP stopping your email. One way around this is to use several ISPs. If you have several email servers you can use to route outgoing email through, that makes quite a difference. For example, if you feel you need a 40 second delay between each outgoing email, but you have four ISPs you can use, then the effective rate of send will only be 10 seconds per email.

Don’t get me wrong. It’s still slow. Unless you have an ISP that’s cool with you sending out thousands of emails over the space of 5 to 10 minutes (which Adminsoft Accounts could do), then email shots of more than a few hundred emails aren’t really practical. As you’d have to leave your PC running while it’s doing it. If you don’t set up specific ISPs for email shots, then the software will use the email details as set up in your Adminsoft Accounts user details (the problem with that is they’ll be no delay between each email going out, which might be OK for a few dozen emails, but not for a few hundred). The option for setting up several ISPs, or just one ISP but with a timed delay between each email is in the ‘Miscellaneous’ menu in the ‘Setup’ menu, it’s called ‘**SMTP Hosts for email Shots**’. This same setup option is used by all the email shot options. When selected, you’ll get a window something like this:

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As you can see, in the above option I've already setup the details of one ISP. To add an ISP just click the 'New Host' button. To view or edit an existing ISP, just click it, and the details will appear in the section below the list.

Most of the details are exactly the same as you would need to fill in when entering the email details for an Adminsoft Accounts user. With a few exceptions:

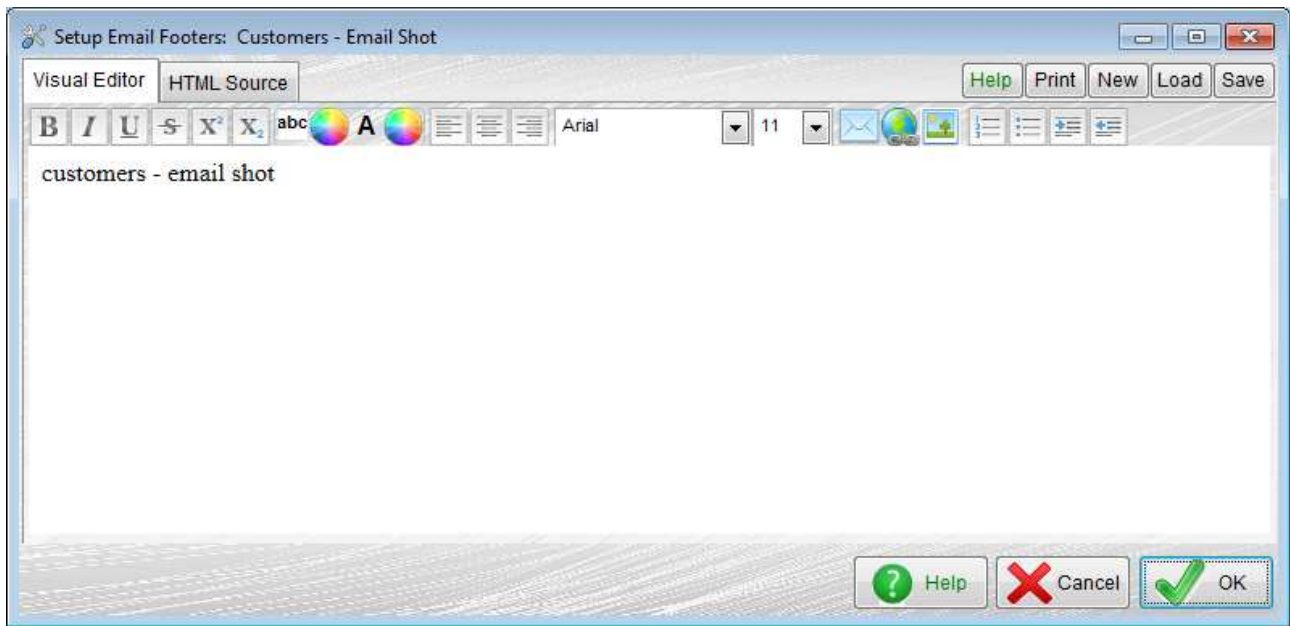
'Host Status', you can select either 'OK', or 'Suspended'. If you select the latter, the email host will not be used for email shots. This is useful if you want to avoid using a particular host for a while, but do not want to delete the SMTP details. If an email host has been set to 'Suspended', and asterisk (*) will appear to the left of the SMTP host name in the list.

'Comp./Org. (blank=all)' allows you to set up an email host for a particular company/organization. If you leave this input field empty, then an email shot sent from any company/organization may use this email host

'Emails per hour', if you set it to 0, the SMTP host will not be used. It's a useful way of temporarily disabling an SMTP host. You can enter any value you like up to 9,999. It defaults to 100, which works out at one email every 36 seconds. If you had to send out 1,000 emails, it would take ten hours! Hence the considerable advantage of using multiple SMTP hosts if you intend to send out email shots of a significant size.

In the 'Miscellaneous' menu below the 'SMTP Hosts for email Shots' option is the option 'Setup Email Footers'. This opens another menu, and in there are options for setting up the footers for email shots to customers and suppliers. Separate options, as you may wish the email footers to be different. On selecting 'Customers – Email Shot' you'll be presented with the following window:

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It looks much like the window for composing an email, and works the same way. The small buttons in the top right can be ignored if you wish. You can only setup one footer for customer email shots (and one for supplier email shots). So, if you require a different footer for a particular email shot, you will have to edit it.

In the 'Miscellaneous' menu, there is another option below this one: '**Setup Email Document Attachments**', which is nothing to do with email shots. It's all about setting up files to be automatically included when specific documents (such as sales invoices, remittance advices, and so on) are sent out.

Creating an email shot

The option for sending out emails is the same for sales prospects, customers and suppliers. So, I'll just show the option for customers.

There are four steps to sending out an email shot. The first is to build a list of potential recipients, the second is to check through that list and remove or add recipients, the third is to create the email to go out (this may already have been created, and you just need to paste the HTML code into the editor), the fourth is simply to click the '**Send Emails**' button and get them out there. There are some options along the way, for example you can build the list of recipients but output that list instead of sending out emails form Adminsoft Accounts (perhaps you have an account with a on-line email shot platform).

In the '**Reports**' section of either the customer or supplier menu, you'll see the option '**Email Shots**', Sales Prospecting has a menu section called '**Email/Mail Shots**', and the option '**Email Shot Prospects/Contacts**' is in there. When you select it, a window will appear that looks like this:

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The email shot window in Sales Prospecting looks a little different to the email shot options for customer and suppliers, but it operates in much the same way.

This first job to do is to select who you want to email. The page that appears ‘**Customer Selection Criteria**’ allows you to select customers and contact details to build a list. If you don’t enter any criteria, it will add every customer and contact that has an email address. Which may be what you want. But if you want to be more selective, you can filter the customers, based on account code range, size of credit limit, and so on. The top righthand side of the form, is all about selecting customers based on transaction activity. This is an additional method of filtering customers. It will filter customers based on anything entered in the left hand side, and will then filter further based on transactions.

By default, it will select both account and contact email addresses. But it won’t duplicate email addresses. So, if the email address on an account is the same as the email address used in a contact record, it will select the contact record. The ‘**Send Email to**’ input selection field allows to you select whether to collect email addresses for account and contacts, accounts only, or contacts only.

In a contact record, there is an option to tell the software not to include in email shots. It may be the contact has specifically requested not to be included in any email shots. So, the input field ‘**Ignore Contact Email Shot Setting**’ defaults to ‘N’. We recommend you leave it set to ‘N’, unless for some reason you have to email the contact regardless.

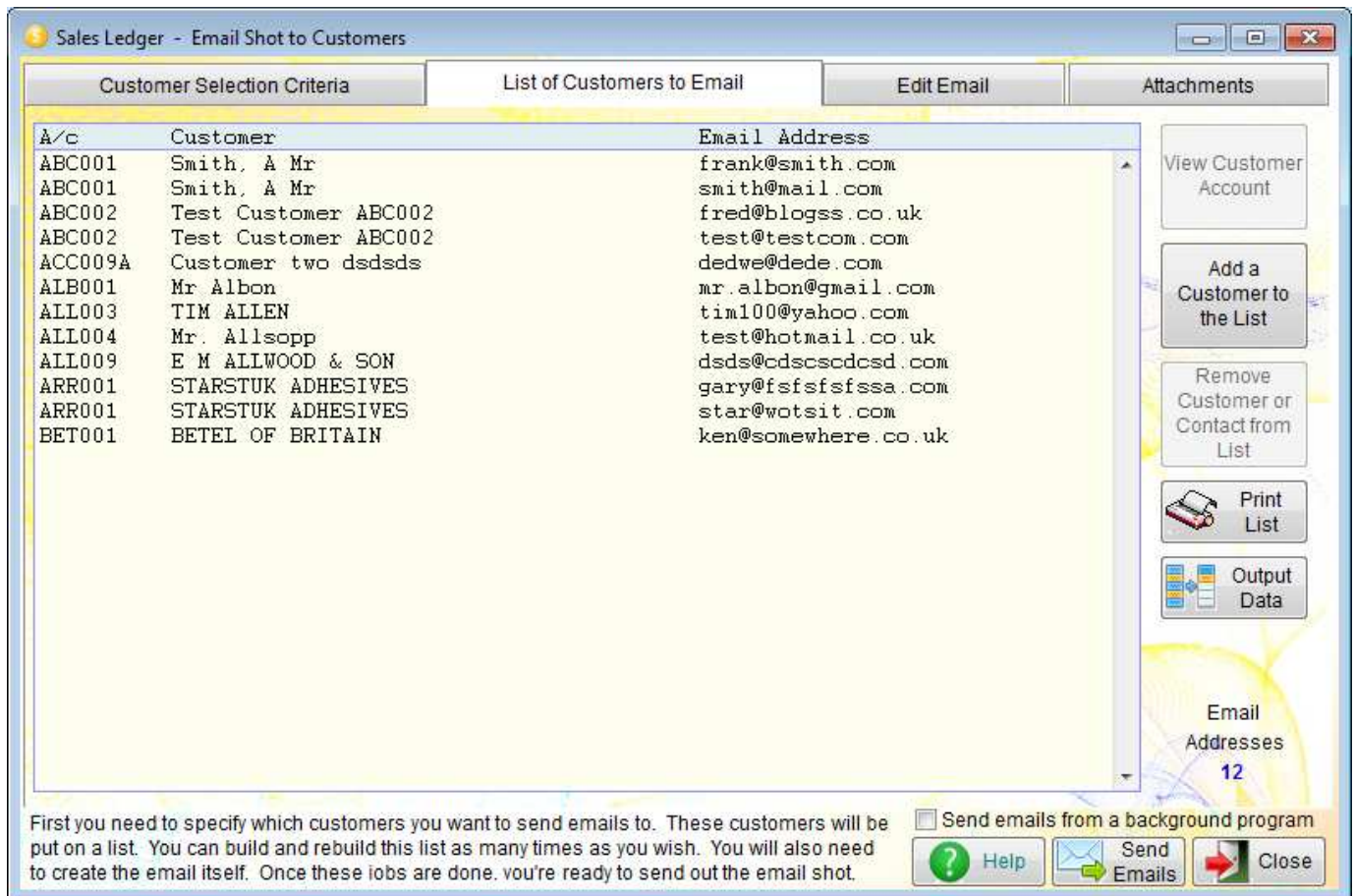
The ‘**Record Email in Customer Diary**’ will do exactly that. If you only rarely send out email shots, you may wish to do this. But if you send them out frequently, you may choose not to, as they could simply clog up the diary. It defaults to ‘N’.

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The ‘**Validate email addresses**’ option will check each email address to see if it looks valid. If it doesn’t look valid, the email address will be ignored. It doesn’t guarantee an email address works, just that it looks like tis hold work. By default, this option is not selected.

The ‘**Include archived accounts**’ option does exactly that, if selected. If not selected (which is the default), any archived accounts and associated contacts will be ignored.

When you think the filtering is setup about right, click the ‘**Build List of Customers**’ button. The software will run through the database building a list of email addresses. When complete, you can click on the ‘**List of Customers to Email**’ tab at the top, to see the list it has created. You can remove any email addresses, and add email addresses by clicking the ‘**Add a Customer to the List**’ button. This will add any email address that’s in the account details, and the email addresses of any contacts for that customer. If you wanted to just email a handful of specific customers, you could actually ignore the filtering we discussed above, and just go straight to this ‘**List of Customers to Email**’ tab. The form will look something like this:



Obviously, yours will look a lot more sensible than mine! The above list is clearly rubbish, but you get an idea of what this list should look like.

You’ll notice some lines appear to be doubled up. This is because it’s found an email address in the customer account details as well as in a contact record. If the email addresses were the same, the email address in the contact record would be used (as it may have the contact name), if they’re different then both are used (provide the input selection ‘**Send Email to**’ in the ‘**Customer Selection Criteria**’ tab is set to ‘Account and Contacts’). It isn’t limited to two lines, it can display a

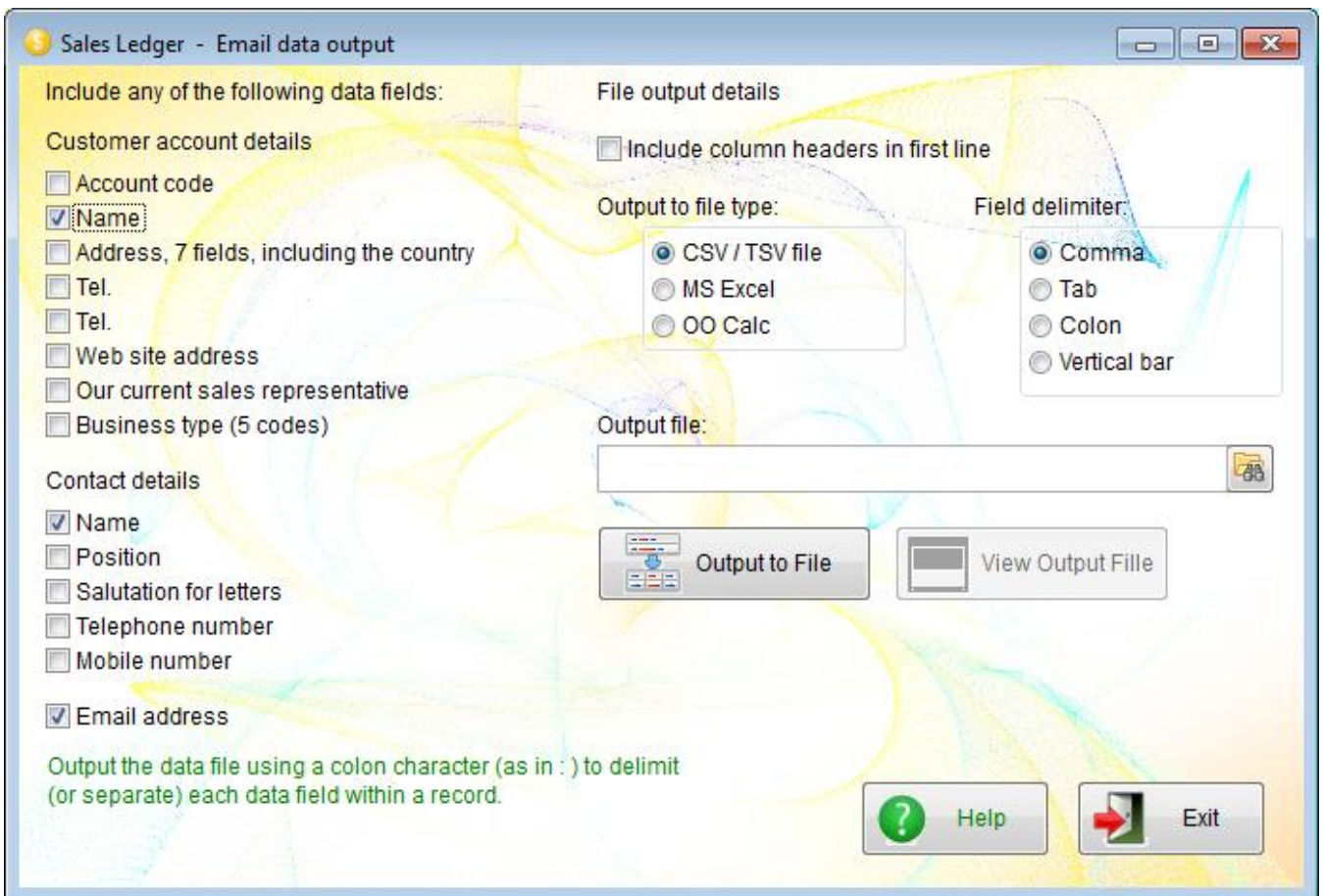
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customer on as many lines as necessary to display all the different email addresses.

To remove an email address, click on it, and click the ‘**Remove Customer or Contact from List**’ button.

‘**Print List**’ will allow you to output the list to the printer or a file. Though, if want to output the list for use in another software package or on-line bulk email platform, the ‘**Output Data**’ option is best. This is discussed below

Once you’re happy the list of email addresses is correct, you have choice. You can click the ‘**Edit Email**’ tab, and start entering the email details, in much the same way as creating any email, or you can click the ‘**Output Data**’ button. This allows you to output the email addresses and other data to a file or into a spreadsheet. When selected, the option looks like the form image on the next page:



On the left hand side you can select which data fields you want to output. By default, the customer’s business/organization name, the contact name (if there is one) and of course the email address, are selected. But you can select as many or as few data fields as you wish. You could even ignore the email address, and just selected the fields that required to send a mail shot instead of an email shot.

Once the output fields are selected, on the righthand side you need to set up how you want them to be output. Generally, CSV/TSV files (Comma Separated Values/Tab Separated Values) require the name of each data field to be in the first line of the file, so you may wish to select ‘**Include column headers in first line**’. You can then select how you want each field to be delimited. That is, how is each data field to be separated, usually it’s a comma. The section ‘**Field delimiter**’ defaults to

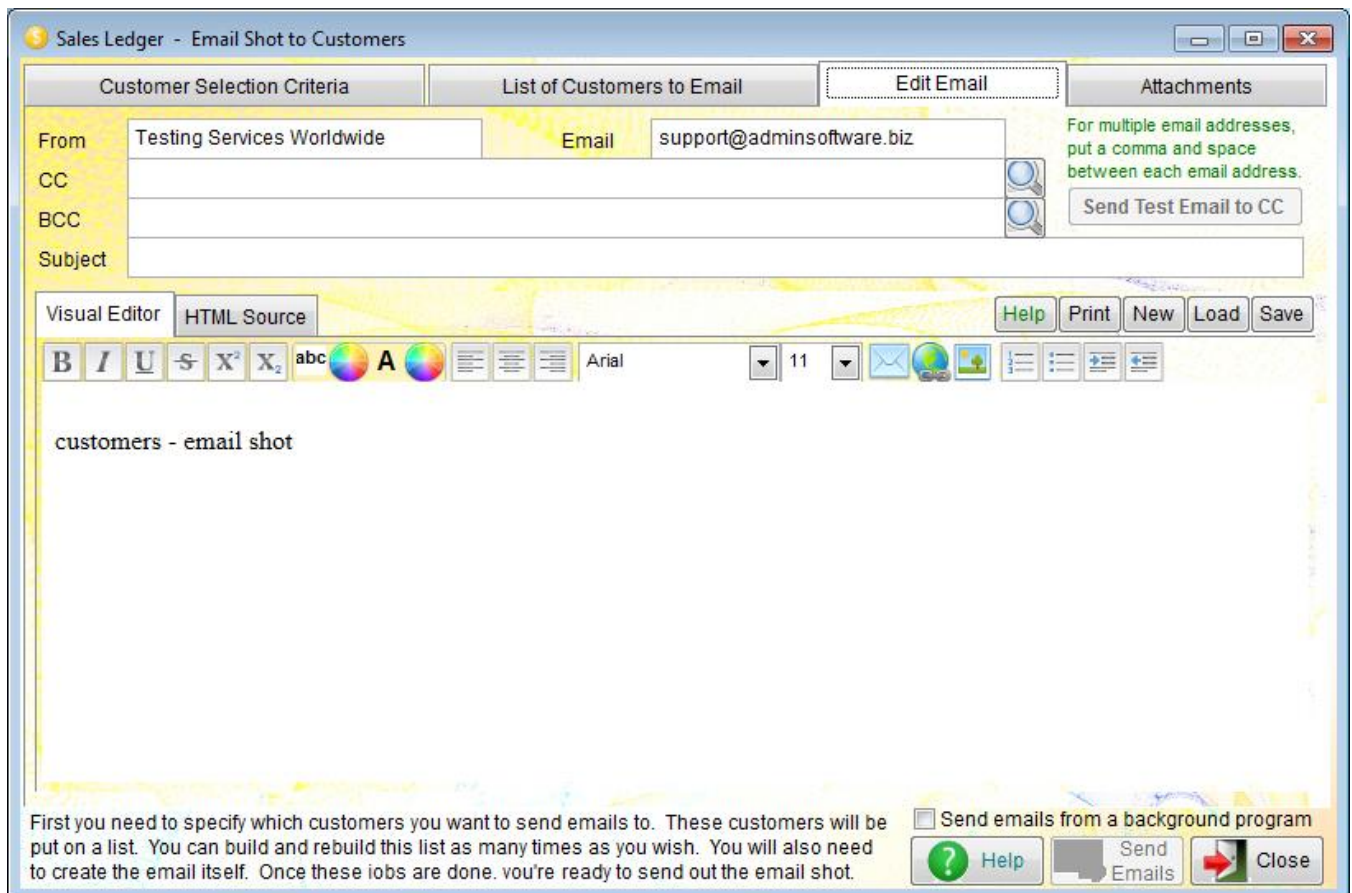
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‘Comma’. Then just enter the location and name of your output file. You can use the ‘find’ button to the righthand side of the ‘**Output file**’ input field to select a location. Then click the ‘**Output to file**’ button to create the file. If you want to output the data into a spreadsheet, then click the ‘**MS Excel**’ or ‘**OO Calc**’ selections. If you do, most of the other options to do with outputting to a file be become greyed out, as they’re no longer required. What was the ‘**Output to file**’ button will change its description to ‘**Output to Excel**’ or ‘**Output to Calc**’. It will, of course, then do exactly that when clicked. It’s a pretty flexible option.

If you’re sending email from within Adminsoft Accounts, then you’ll need to click the ‘**Edit Email**’ tab. You can type in the details of your email, or if you’ve created something in HTML in another application, you can click on the ‘**HTML Source**’ tab, and paste the HTML into there.

Some quick advice on HTML. Unless an email is read on an on-line platform (such a Gmail, Hotmail, etc.), then rendering is not as sophisticated as it is in most browsers. While you may be used to using DIV to position text and images on a web page, it does not work so well in an email. You’ll find you need to use TABLE a lot more to create your layout. Also, avoid using ‘width:’ in CSS, because if the email isn’t being viewed on an on-line platform, then it probably won’t work. One reason why TABLE is often used instead of DIV, is that you can control the width without using CSS.

The edit tab looks something like the next image:



If you add any images into the email from your hard drive, those image files will be bundled up as part of the email, perhaps making it quite large, depending on the images you’ve used. While the recipients may not appreciate it, it does have the advantage that they will see the images (when the

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email has eventually loaded up.....). So, to keep the email size down you could load images off the internet instead. The problem with this is when the email is received, many people have the feature that allows an email to download an image off the internet turned off. My advice is to use only small images off your hard disk to produce a nice looking email, and pictures downloaded from the internet that will not ruin the look of the email if they're not downloaded.

You can also add attachments to the emails, click the '**Attachments**' tab in order to do this. I suggest you keep the size of any attachments low. If you add 10mb of attached files to each email, and send out several hundred emails, your ISP is probably not going to be happy. Anyone receiving an unsolicited email with 10mb of attachments may not be too happy either.

It is possible to have the software personalize each email sent out. To do this, a number of data fields are available that can be used within the HTML body of the email. The list is below:

#accno#	Customer or supplier account reference.
#name#	Customer, supplier or sales prospect company/organization name.
#addr1#	Customer, supplier or sales prospect company/organization address.
#addr2#	
#addr3#	
#addr4#	
#addr5#	
#pcode#	Post code or ZIP code.
#country#	Country code (up to 8 characters).
#cname#	Country name (will be empty if no country code or code unknown).
#tel_1#	Telephone number.
#tel_2#	Telephone or fax number.
#mob#	Mobile/Cell number.
#web#	Recipient's company/organization web site URL.

Below only available where there is access to a customer or supplier account:

#accref#	Our account number in the customer/suppliers account system.
#balance#	Total balancing outstanding (in ledger currency).
#terms#	Credit terms (will be in form of a short description).
#credit#	Credit limit.
#eper#	Early Settlement Discount percentage allowed.
#edays#	Early Settlement Discount days from date of invoice.
#curr#	Account's default currency (coded, up to 8 characters, but usually 3).

Below relate to contact records from both ledgers and Sales Prospecting:

#contact#	Full contact name.
#first#	Contact's first name.
#last#	Contact's last name.
#title#	Contact's title.
#pos#	Contact's position within company/organization.
#sal_e#	Salutation for emails (this is the greeting, for example 'Hi Joe,').
#sal_m#	Salutation for mail (this is the greeting, for example, 'Dear Joe,').
#tel_c1#	Contact's first telephone number.
#tel_c2#	Contact's second telephone number.
#mob_c#	Contact's mobile/cell number.
#email#	Contact's email address (the address being used to send the email).

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When you think everything is set to go, you can click back to the **'Edit Email'** tab and click the **'Send Test Email to CC'** to check the email is OK. This will send the email to whatever address you have entered into the email **'CC'**; input field. I recommend you always enter an address in here. There are find buttons the righthand side of the **'CC'** and **'BCC'** input fields, these allow you to setup and select email addresses you use on a regular basis (perhaps to colleagues).

Any email addresses in the **'CC'** and **'BCC'** input fields when you start the actual email shot will only be used on the first email that goes out, subsequent emails will ignore the **'CC'** and **'BCC'** input fields.

There are two ways to send out the emails. One is from within Adminsoft Accounts itself, which is the default option. The downside to this is that you can't do anything else with Adminsoft Accounts while it's doing this. Although you will be able to pause or cancel the email shot at any time (obviously, clicking **'Cancel'** will NOT recall any emails already sent! Once they've out there, they're out there). You can get around this by starting up another instance of Adminsoft Accounts and using that to continue your work. The alternative is to click the **'Send emails from a background program'** option, which is just above the **'Send Emails'** button. When that option is selected, when you click the **'Send Emails'** button, the emails are very quickly output to another program called an Email Engine, which starts up and starts sending out the emails. This all happens within seconds, and allows you to then continue using Adminsoft Accounts as usual. The Email Engine takes all the host email settings from Adminsoft Accounts. When opened it looks like this:



This may appear in front of Adminsoft Accounts, just clicking anywhere in Adminsoft Accounts will push this Windows application into the background. The above screen shot shows the Email Engine just before it receives a batch of emails to send out. It calls a batch of emails a **'Job'**, and will list each job sent out. When a job is being sent out, it will indicate this in the **'Status'** at the top of the window, and will count its way through the emails. You can drag this window wider to see further information.

The output of emails can be paused at any time by clicking the **'Pause Email Engine'** button. Output can resume by clicking the same button again.

It is quite possible to submit several email shots to the Email Engine in quick succession. You don't have to wait for it to finish one before submitting another. The Email Engine will queue them up,

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and send them out on a first submitted first sent out basis. When all jobs have been completed, the Email Engine will sit idle. You will need to manually close it down.

There is an option in the Setup → Miscellaneous menu called ‘**Monitor/Control Email Shot Engine**’ that allows you to start, pause, close down the Email Engine, clear out old jobs, remove individual jobs, put individual jobs on hold, edit individual jobs – even if the job has been partially sent, and put it into TEST mode (where you can try out an email shot without actually sending out any email) all from within Adminsoft Accounts.

Unfortunately, this ‘Monitor/Control Email Shot Engine’ option, or the email engine itself, is not available when the software is running as Freeware. But you can still send out email shots (as of v4.246, this may change in the future).

End of document