

## eZee IT Solutions

Your partner in Business Management and Accounting Software



### eZee And The Mailing of Documents

When a PC/Laptop is purchased, it normally gets supplied with a legal Operating System (Windows). This Operating System supplies the user with two types of mail agents (E-Mail Applications). Depending on how the supplier configures the PC/Laptop, as a rule Microsoft Outlook Express will be the default mail agent. For some reason it has surfaced that some suppliers do not configure this, and as a default during the installation of the OS (Operating System), the system then uses Microsoft Mail as default mail agent.

So, what's the difference? MS Mail is a form of one of the most basic mail agents one can get. We are not sure when the use of this application started, or when Microsoft published it, but what is sure is that Outlook Express was used as a rule from hay-day times. This influenced the development of eZee. Being focused at the small to medium enterprise, eZee was designed with Outlook Express in mind, making it easy for the entry level user that started up his business and only had Outlook Express to mail from.

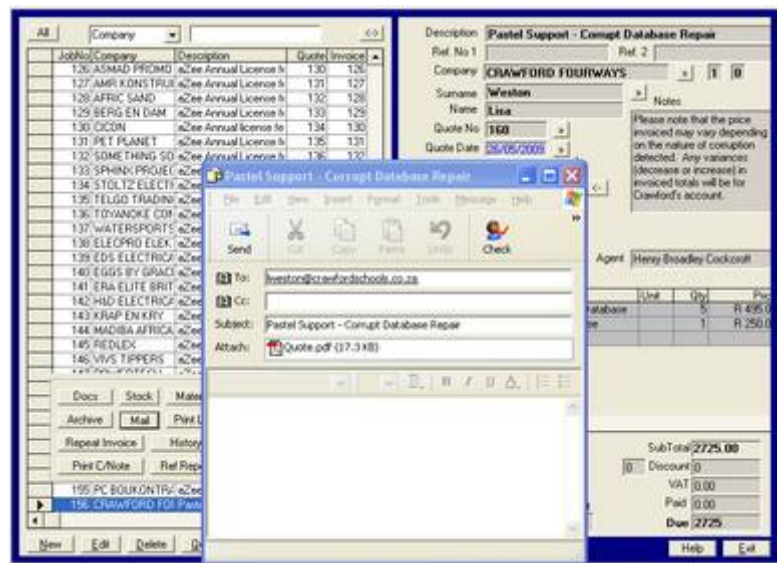
Come the next step – Some users then purchased the Microsoft Office Suite. Keeping in mind that the package comes at a premium and that not all users can afford it, the decision was made not to adapt the programming code of the software. **The result of this is that Outlook Express users have the feature to mail directly from the eZee software, but not the users of Microsoft Mail (which we did not cater for at all) or Microsoft Outlook (the pumped-up version of Express), which not everyone has got – Everyone has got Outlook Express!**

The outsider: VISTA – In comparison to some of our competitors, eZee runs stable on Vista. The mail function of eZee running on a Vista platform however, does not work either. This is something we will sort out over time. Currently the development on Vista continues – Windows 7 (Beta) has already been released. For this reason we are stalling on this process.

### HOW NOW?

#### **Running Windows XP – Service Pack 2 and Outlook Express**

1. In the Income/Sales Screen select the specific transaction.
2. Click on More
3. Click on Mail
4. Click on Quote or Invoice
5. A .pdf file will be created automatically. Outlook Express will launch automatically. The clients e-mail address will be inserted in the "To:" field. A "Subject:" will be generated, which will be the description on the invoice/quote. Furthermore a document (.pdf) titled "quote" or "invoice" will be inserted in the "Attach:" field. One can now type in a message and insert a signature if required. Hit on the "Send:" button and off goes the mail.



### **eZee IT Solutions**

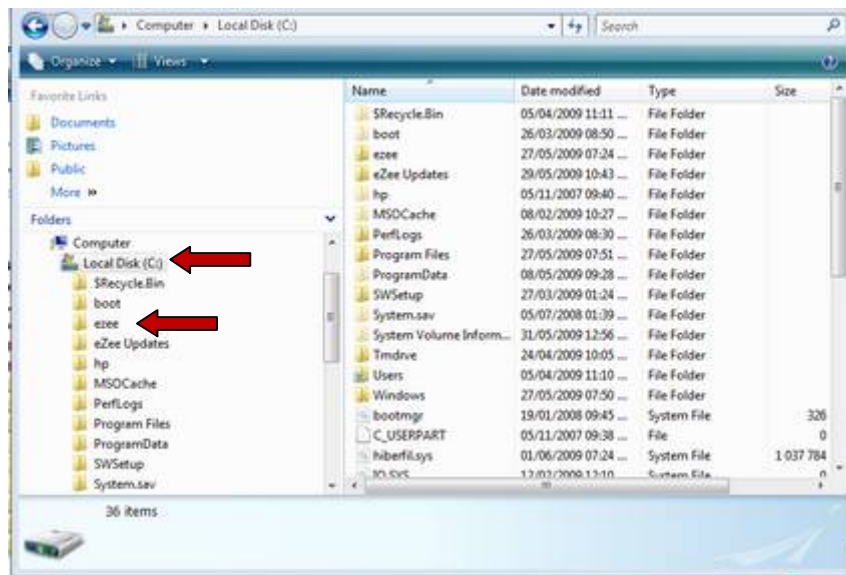
Your partner in Business Management and Accounting Software

---

#### **Running Windows XP – Service Pack 2 and Microsoft Outlook**

When Running Windows XP and Outlook, the procedure is similar to above, with the exclusion of the attachment being attached to the Outlook mail screen.

1. Outlook will launch automatically. The clients e-mail address will be inserted in the “To:” field. A “Subject:” will be generated, which will be the description on the invoice/quote.
2. The attachment will be created but not inserted.
3. The attachment will be saved under: **C:\ezee**, and named either “quote.pdf” or “invoice.dpf”



#### **4. Attach the file from this location into the mail.**

5. One can now type in a message and insert a signature if required. Hit on the “Send:” button and off goes the mail.

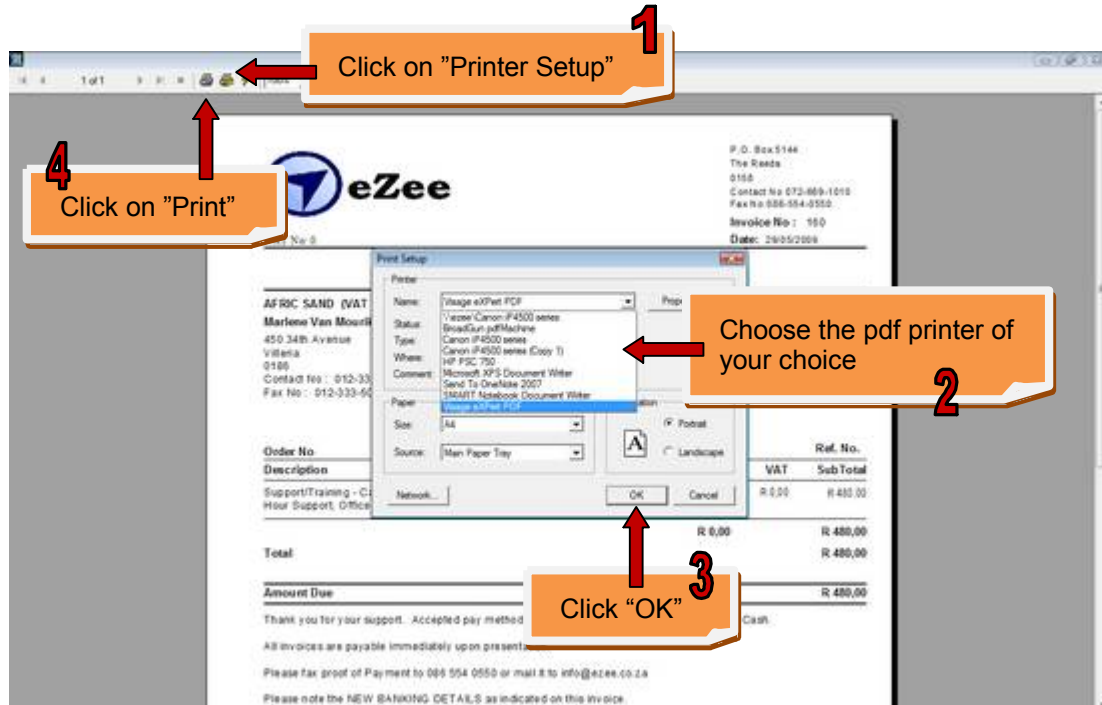
There is no problem in using this procedure. The concern is that the file gets stored in the eZee folder which contains all the eZee program files. **One would not want to delete or move one of the files by accident.**

#### **Running Windows XP or Vista – Service Pack 2 and Microsoft Outlook or any other mail agent.**

1. In the Income/Sales Screen select the specific transaction.
2. Click on Quote or Invoice
3. A quote/invoice will be generated
4. Follow the steps below

### eZee IT Solutions

Your partner in Business Management and Accounting Software



5. The pdf printer of your choice will now open.
6. Save the file, with a file name of your choice, in a location on your PC/Laptop of your choice e.g. "My Documents" or whatever the case might be.

From here you will use your normal mail agent to send a mail to the specific client. Open the e-mail program. Type in the clients e-mail address in the "To:" field. Add a title in the "Subject" field....Then click on "Attach:" in order to attach the file you saved. Attach the file from the location where it was saved. Complete the mail by typing any additional text and hit the send button!