

MAIL – Sending mail

IMPORTANT

The mail function in the software is reliant on a service provider and you must have a mail account with your service provider.
ANY WEB BASED MAIL ACCOUNT LIKE GOOGLE MAIL, YAHOO, HOTMAIL, GMAIL etc – is not a mail service hosted by a service provider like MWEB, @LANTIC, WORLDONLINE, IBURST etc.

You must have the following information in place:
SMTP Server information
POP3 Server information
Your user name
Your password

WITHOUT THIS YOU CAN NOT USE THIS FACILITY!

The screenshot shows a mail sending interface with the following elements and numbered callouts:

- 1**: Settings button at the bottom left.
- 2**: Show clients button at the bottom left.
- 3**: Recipient Name and Email input fields.
- 4**: Cc: Name and Email input fields.
- 5**: Attachment input field with a browse button.
- 6**: Subject and Message input fields.
- 7**: Send button at the bottom right.
- 8**: Cancel button at the bottom right.

Other visible elements include a Status field, a Progress indicator, and an "Attach Road Map" checkbox.

1 Set up you mail account information here.





The screenshot shows an email configuration window with the following fields and callouts:

- Sender Email:** henry@ezeee.co.za (Callout: Type your e-mail address here)
- SMTP Server:** mail.ezee.co.za (Callout: Type your SMTP Server name here)
- POP3 Server:** pop.ezee.co.za (Callout: Type your POP3 Server name here)
- Options:**
 - Html
 - Receipt
 - Login
 - POP Login
- Username:** henry@ezeee.co.za (Callout: Type your "user name" & "password" here)
- Password:** [masked]
- Done** button (Callout: Click "Done" when done)

2 From the "Show Clients" button, select specific clients to send a mail to.

The screenshot shows a client selection window with a list of clients on the left and a selection area on the right. Callouts are as follows:

- A:** Points to the filter dropdown at the top.
- B:** Points to the "Attach Statements" checkbox at the bottom.
- C:** Points to the "Done" button at the bottom left.

A Select the client by using the filter or select a client from the list below. Use the arrow keys to pull the clients into the selection screen on the right. Use the "All" arrow key to select all the clients.

B By entering a tick in the "Attach Statement" tick box the statements for the selected clients will be attached. If not tick is entered here no statement will be attached and the mail will be handled as a normal mail (you can decide if you want to attach something else).

C Click on "Done" to go back to the main mail screen.

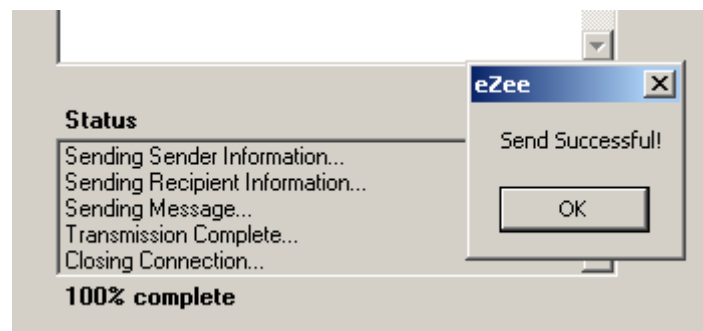
3 The "Recipient:" fields will now be completed automatically with the information captured in the "Client List".





***The more complete you client information is in the client list the more complete any automatic field will be completed in the software.
Should e-mail addresses be missing mail can not be send to those clients.***

- 4 Use the "Cc:" field to manually enter any additional recipients.
- 5 Should you have opted not to attach a statement and you want to send a mail with regards to any other information, use the "Browse" button to browse your computer and select the file you want to attach
- 6 Type in a subject and message for the mail if required.
- 7 Click on the "Send" button to send the mail. When the mail has been sent successfully you will notice a "Closing Connection...." message in the "Status" window and a **100% complete** below that. A "Send Successful" window will also appear....click on "OK".



- 8 Click on "Exit" to exit to the software's main screen.

