Emailing Statements Part 2.

Michael Cox

Sage

Agenda

Introduction

Demonstrations
- Take a layouts only backup
- Report Properties / Save As
- Apply email settings to a layout
- Advanced settings
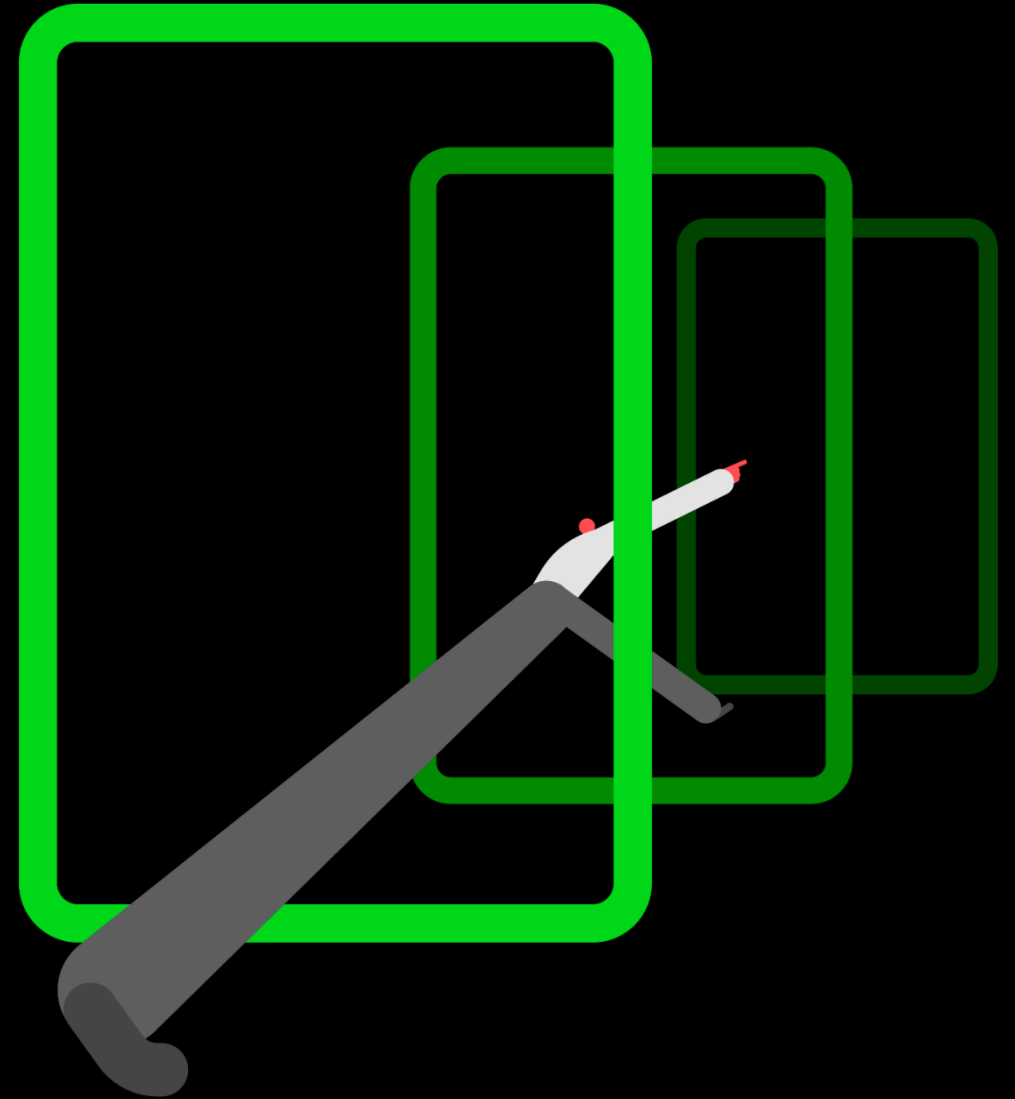- Send immediately

Further support

Emailing Statements.

Introduction

- Sage 50 Accounts makes it easy to email documents, meaning that sending invoices, orders, remittances and completing your statement run is a quick and simple task.

- Two areas to amend/apply email settings:
  Part 1 – Email Defaults
  Part 2 – Report Designer

Note: Before amending any settings, take a layouts only backup.

Demonstrations.

- Take a layouts only backup
- Report Properties / Save As
- Apply email settings to a layout
- Advanced settings
- Send immediately

Emailing Statements.

Summary

- Easy to email statements.

- Send individually or send in bulk.

- A number of layouts contain default settings to work with Microsoft Outlook.

- Two areas to amend/apply email settings:
  Part 1 – Email Defaults
  Part 2 – Report Designer

- Help Centre – <u>Use webmail to email documents</u>

Upcoming Webinars

Upcoming	Key Topics
What's new in v29 *loads of dates available* Year End Backing up your data ――――――――― **March sessions available soon**	**Emailing documents** Join our sessions to learn how to email your documents from Sage 50 Accounts. **Emailing Statements** Recording available **Emailing Invoices** Recording available **Advanced** Recording available **Advanced** Wed 22 Feb 2pm

Thank you!

Please take a minute to complete the short exit survey as you leave.

You'll receive a follow-up email with links to register for future webinars and watch recordings later today.

Sage