

# Invoice Expert

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Email Setup and Configuration

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## Email Configuration Overview:

Emailing invoices can be an affordable and fast way to get your invoices to your customers. Invoice Expert supports emailing invoices internally so you never have an extra step going through Outlook or Outlook Express. This means that Invoice Expert needs the same settings for sending mail as your e-mail client on your computer does and it also needs permission to directly access the network - be sure to "allow" Invoice Expert through any firewall software you might be running.

The information Invoice Expert needs is your ISP's SMTP server. An ISP is an Internet Service Provider (like Adelphia, or Time Warner, or AOL), and an SMTP server is your outgoing mail server. GMail's, for example, is smtp.gmail.com but yours could be anything. Please consult your ISP for this information or, if your ISP is in the "Preset Settings" list, select it from there.

Some mail servers require a few special settings like a username and password or encryption (SSL/TLS). If you are not sure what settings your mail server requires, it won't hurt anything to give it a try - just click on the Send Test Email button to test your settings.

A note to users of Yahoo, Hotmail and other free web-based email services:

Gmail is currently the only service that allows "free" users to send and receive email outside of the browser. Any server that requires you to send and receive mail through a web browser won't work with Invoice Expert. If in doubt just drop us an email at [support@invoiceexpert.com](mailto:support@invoiceexpert.com) and ask - we'll be happy to help you sort it out!

## Server Settings:

The email tab under Company Settings holds all the settings required to send out emails. If the computer that Invoice Expert is installed on isn't connected to the Internet Invoice Expert will not be able to send emails.

The screenshot shows the 'Invoice Expert XE Settings' window with the 'Email Settings' tab selected. The 'Server Settings' section includes fields for SMTP Server (smtp.invoiceexpert.com), Port (25), Username (john@invoiceexpert.com), and Password. There are checkboxes for 'Use CRAM' and 'Use SSL/TLS', and a 'Preset Settings' dropdown set to 'Custom'. The 'Default Email Format' section has a checked box for 'Send Invoices as Email' and unchecked boxes for 'Attach PDF Invoice to Email', 'Attach Text Invoice to Email', and 'Attach Images Invoice to Email'. Below these is a section for 'Default Email Settings for Statements and Invoices' with tabs for 'Invoice Settings', 'Quote Settings', and 'Customer Statement Settings'. It includes fields for 'Invoice From' (john@invoiceexpert.com) and 'Invoice Subject' (Invoice from Invoice Expert), a 'Send Test Email' button, and a rich text editor for the 'Invoice Email Body' containing a template with placeholders like {Customer\_Name}, {Invoice\_Number}, {Balance\_Due}, and {Date\_Due}. On the right side of the window is a vertical toolbar with icons for 'Update Settings', 'Reload Settings', 'Backup Database', 'Restore Backup', and an information icon.

- **SMTP Server** - Sometimes called the 'outgoing mail server', this setting is the same one used by any email client (Outlook, Outlook Express, etc). If this value is unknown please consult your ISP (Internet Service Provider).
- **Port** - This value is almost always 25. Only modify this value if instructed to do so by your ISP.
- **Username/Password** - **Outgoing** mail username and password. Most users can leave this field blank. If email errors occur try filling in the username/password from your ISP - the username is typically your email address.
- **Preset Settings** - A list of email providers that we've included the server settings for. **These are correct to the best of our knowledge - please defer to your ISP and enter your own values if needed.**
- **Use SSL/TLS** - Encryption support for sending email - only use this if your server supports it. GMail requires SSL, your ISP may as well.
- **Use CRAM** - Another encryption setting. Only use this if your ISP tells you that you need to. Most can leave it off (the default setting)
- **Send Test Email** - Use to test your email settings. When you click the button a test email will be sent to the address you enter - the test email only contains "Test email from Invoice Expert "

## Gmail Server Settings:

The screenshot shows the configuration interface for Gmail server settings. It is divided into several sections:

- Server Settings:** Includes fields for SMTP Server (smtp.gmail.com), Port (587), Username (jspiker77@gmail.com), and Password (blacked out). There are checkboxes for Use CRAM (unchecked) and Use SSL/TLS (checked). A Preset Settings dropdown is set to Custom.
- Default Email Format:** Includes checkboxes for Send Invoices as Email, Attach PDF Invoice to Email, Attach Text Invoice to Email, and Attach Images Invoice to Email.
- Default Email Settings for Statements and Invoices:** Includes tabs for Invoice Settings, Quote Settings, and Customer Statement Settings. The Invoice From field is jspiker77@gmail.com and the Invoice Subject is Invoice from Invoice Expert. A Send Test Email button is present.
- Invoice Email Body:** A rich text editor with a toolbar (Bold, Italic, Underline, Bulleted List, Numbered List, Font Color, Insert) and a text area containing the following template:

```
Dear {Customer_Name},  
  
Attached you will find {Invoice_Number}.  
  
Balance Due: {Balance_Due}  
Date Due: {Date_Due}
```

A notification dialog box is overlaid on the settings, stating: "The test email has been sent please check your inbox." with an OK button.

- SMTP Server – smtp.gmail.com.
- Port - 587
- Username/Password - **Outgoing** gmail username and password.
- Use SSL/TLS – Yes