

Emailing from CLIP

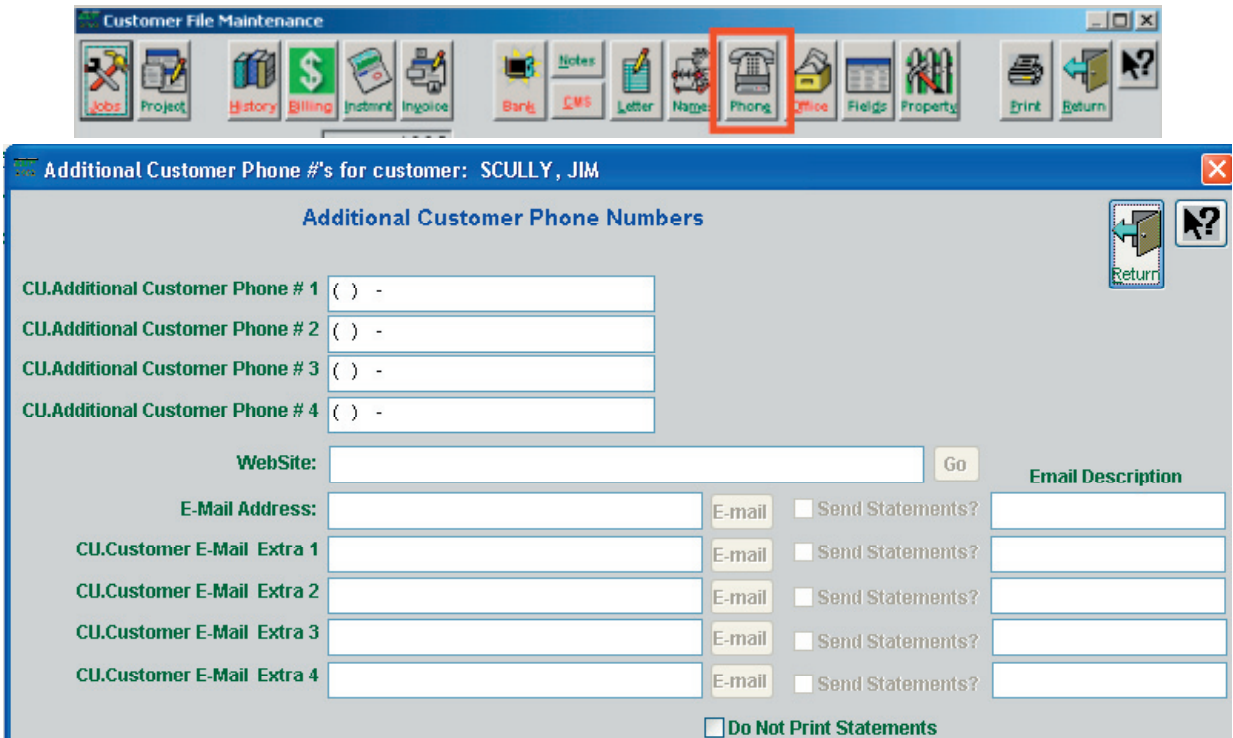
*****This feature available in Pro*****

Using the Microsoft Application Program Interface (MAPI) CLIP can email directly to your clients. There are two ways that emailing can happen in CLIP.

Note: We have included a basic trouble shooting section at the end. You still may require the expertise of your local computer technician to set up Outlook correctly with your mail server/ISP.

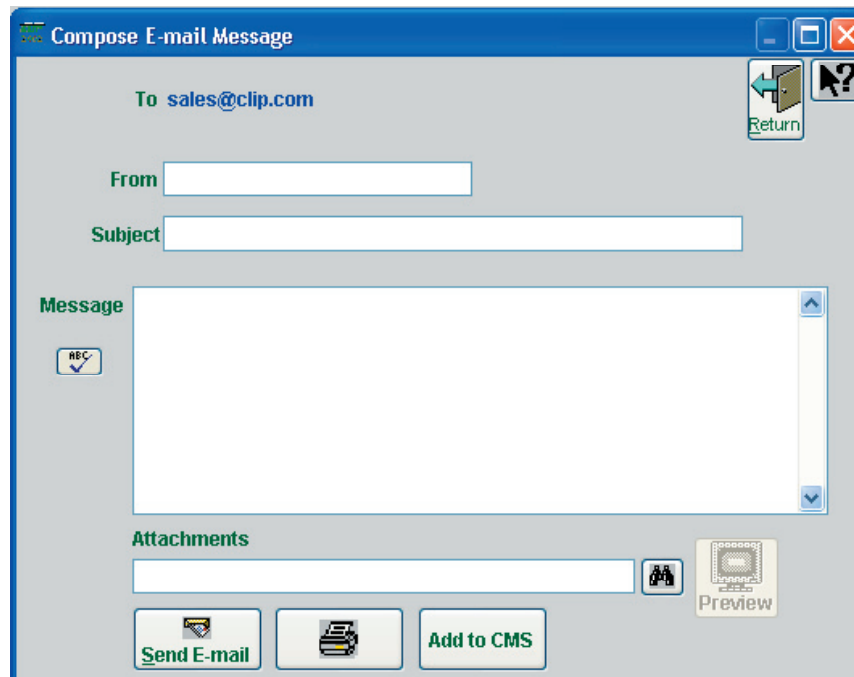
1. Creating an email and sending it to your client.

From the File Maintenance, choose a customer you want to email to and click on the "Phone" button.



Enter an email address in one of the 5 fields available. Click on the Email button to bring up the Email dialog form.

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Enter the "From" information, subject and message. You can attach a file to this email as well.

Using the "Add to CMS" button will create a new CMS with a copy of the email. (see CMS in manual for more details)

Press the "Send Email" button and *CLIP* will connect to your MAPI email application and send the email in the same way you normally send emails.

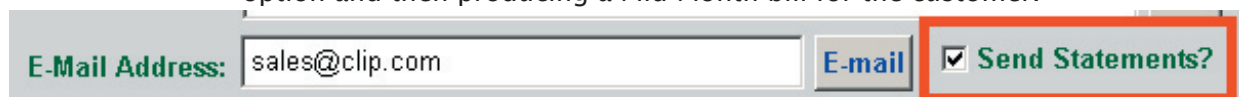
Since *CLIP* will be sending the email through your standard Email application, it will appear in your "Sent Items" just like a normal email.

Use this function to quickly communicate with your customers.

2. Emailing Statements and Invoices

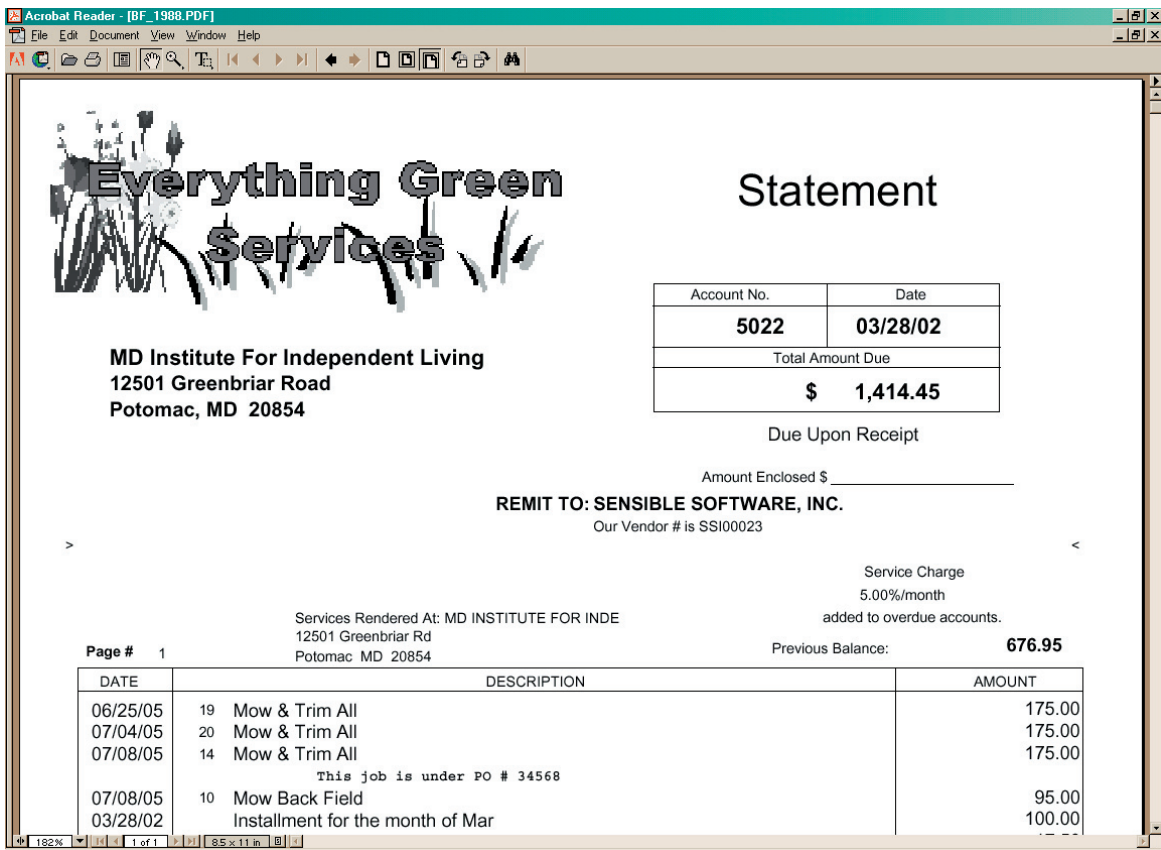
CLIP can automatically email your statements and invoices to your customers whenever you perform a billing function.

To do this, simply fill in the correct email address in the customer's record and check the box next to it that says "Send Statement". This instructs *CLIP* to send the statement via email after printing. You can test this by entering your own email address in the clients record, checking the "Send Statement" option and then producing a Mid-Month bill for the customer.



Simply go to Billing/Mid-Month Bill and choose "By Individual", then click on "Email Bills" and choose the customer you entered your email address in. You will be able to enter the text of the email.

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Your customers will need to have the Acrobat Reader installed on their system. This reader is free and most machines already come with it on and functioning. If your customers need to get it, it is available from www.adobe.com/support/downloads/main.html

This function works with either Balance forward or Open Invoice type customers.

If you combine this function with processing the credit cards automatically, your billing can be done completely paperless!

Additional Customer Phone #'s for customer: HSIEH, CHARLES

Additional Customer Phone Numbers

CU.Additional Customer Phone # 1 () -

CU.Additional Customer Phone # 2 () -

CU.Additional Customer Phone # 3 () -

CU.Additional Customer Phone # 4 () -

WebSite: Go

E-Mail Address: glennz@clip.com E-mail Send Statements?

CU.Customer E-Mail Extra 1 E-mail Send Statements?

CU.Customer E-Mail Extra 2 E-mail Send Statements?

CU.Customer E-Mail Extra 3 E-mail Send Statements?

CU.Customer E-Mail Extra 4 E-mail Send Statements?

Do Not Print Statements

If you do not want to print a statement for this customer, click on the "Do Not Print Statement" check box and *CLIP* will not print a statement. We recommend that you do this after you have emailed statements and both you and your customers are comfortable with the process.

3. Troubleshooting the email functions.

Because *CLIP* relies on the MAPI functions of Windows (similar to printer drivers) sometimes Windows is not set up correctly with the proper profiles, firewalls and other email options.

We have found the best option is to use OUTLOOK as your email application. If you are using OUTLOOK XP, it will ask you if you give it permission to send emails from *CLIP*. This permission can be granted for up to 10 minutes but after that it reverts to blocking the use. Thus, every time you email from *CLIP* (or any other program) Outlook will ask you if you give it permission. Microsoft built this into Outlook to avoid viruses from using Outlook to send out their messages. Unfortunately, this hampers the other programs that want to use Outlook legitimately.

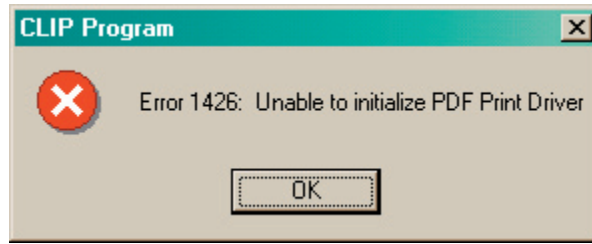
Another thing to note is that technically you do not have to have Outlook or any other MAPI email program open for *CLIP* to be able to send emails but it seems to work better if you have your email application open before attempting to email out of *CLIP*.

If you are having problems and you are using Outlook try changing the email setting under System > Email Settings to one of the other settings.

A note to AOL users. Because AOL does not use the standard MAPI functions of Windows, we have found that most of the time Emailing out of *CLIP* through AOL causes problems. A solution to this is to set up your Outlook or Outlook Express to email through AOL, then *CLIP* can effectively communicate with Outlook and it communicates with AOL through the POP3 server, bypassing the AOL interface.

Please consult your local computer technician if you are having problems. Again we are using Windows functions over which we have no control.

E-mailing in CLIP



If you receive the above error, your PDF driver is not registered. You can usually register it by hand if necessary by doing the following:

From Windows:

Click on Start

Click on Run

Type in:

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regsvr32 C:\CLIP\cdintf.dll
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(substitute your own path and directory for wherever you placed your *CLIP*)

This usually solves this problem. If it does not for you, please call us and let us help you.

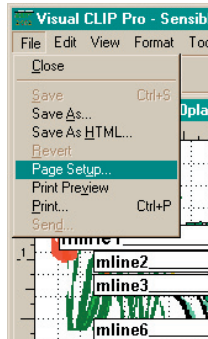
Color or Black and White?

If the pdf files you send are in black and white instead of in Color, it could be the setting of your printer driver for the report. If you are sending this from Mid-Month Billing, check the report file by doing the following:

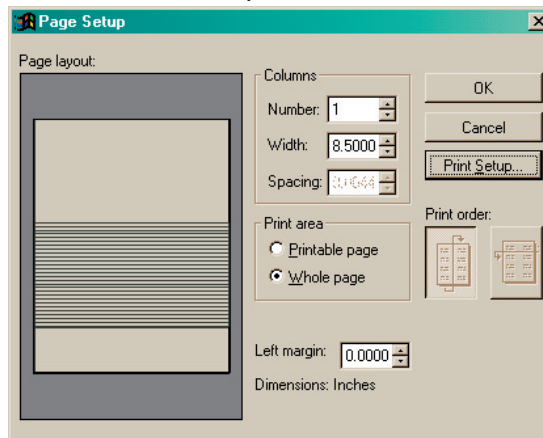
From the Dot Prompt

Type MODIFY REPORT b0plain

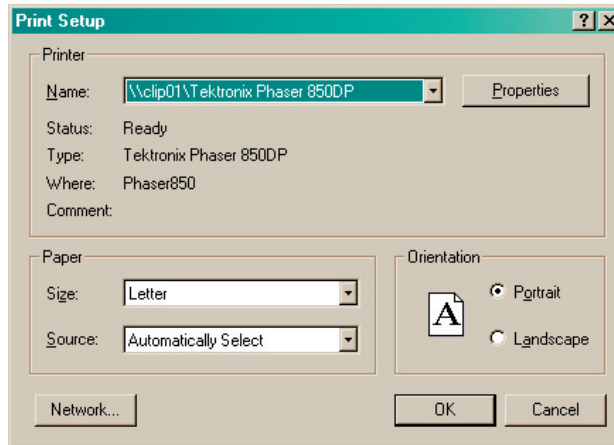
Now pull down the File Menu and click on Page Setup



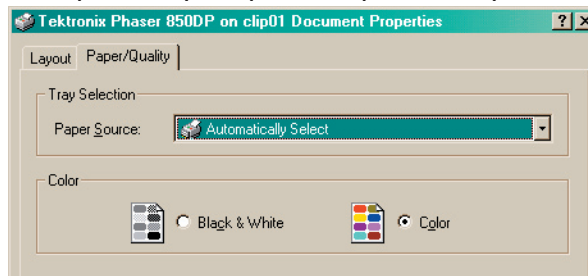
Now click on the Print Setup



Now make sure that your printer driver is set to color here.



Click on Properties (your printer options may differ)



Then save your changes and exit the Dot Prompt by pressing "Enter" on a blank line.

