



# Email Customer Invoices

## Business Operations – Supplies Purchases

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## **Email Introduction**

equineGenie has over 600 reports. The reports can be exported as a PDF, an Excel spreadsheet, or a word document. An exported report can be saved, printed or attached to an email. Many reports are intelligent reports and contain customer information or suggestions on how to improve your business. A Report may have Multiple Pages. When you display a report it can be magnified if necessary. Existing reports cannot be changed, but can be modified once exported. A new report can be added, free of charge or a small fee, if the report's required information has been entered in equineGenie. equineGenie owns the completed report and the report will be included in future equineGenie system releases.

To help expedite the customer invoicing process, equineGenie will convert an invoice to a PDF and email it directly to a customer's email address. The customer's email address must have been entered on the customer/client information screen. Invoices are the only document/report that can be emailed directly to a customer without being exported and attached to a customer email. All other documents or reports have to be exported and then attached to an email that is being sent to a customer.

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## Customer Email Setup

Path: Home: Security Utilities: Security/Networking/Utilities: Networking/Email Settings: Setup

***There is one prerequisite required. The customer's email address to which an invoice is to be emailed must have been previously identified on the customer/Client contact information screen. Path: Home: Customer Clients: Customer Client: Contact Information.***

***Think/Plan before you setup your business's email! The email capability is used to email invoices from equineGenie to your equineGenie customers. It is strongly recommended that an email service is used that does not require email security changes.***

***Note: There are some email services that require a 2-step validation! The popular Gmail is one of them. This document will explain how to use Gmail.***

### Prerequisite Setup

The screenshot shows the 'equineGenie Customer / Client - Information' window. The form is divided into two main sections: 'Customer/Client Information' on the left and 'Customer/Client Comments' on the right. The 'Customer/Client Information' section contains various input fields: 'Enter / Select A Customer/Client' (dropdown), 'Enter Last Name' and 'Enter First Name' (text boxes), 'Alternate Correspondence Recipient' (text box), 'Ranch or Business Name' (text box), 'Address' (text box), 'City, State, Zip Code' (text box), 'Primary Phone' and 'Emergency Phone' (text boxes), 'Cell Phone' and 'Fax Number' (text boxes), 'email Address' (text box, highlighted with a yellow box and a circled '1'), 'Website URL' (text box), 'Gender' and 'Birth Date' (text boxes), and an 'Add To Address Book' button. The 'Customer Picture' section at the bottom has 'Locate', 'View', and 'Clear' buttons. The 'Customer/Client Comments' section has an 'Enter' button and a large yellow area with the text 'Popup And Red Flag equineGenie Notes'. At the bottom of the window, there are navigation buttons: 'Go To Customer Financial Account' and 'All Customer/Client Information'.

① The customer email address must be correctly entered in the Customer/Client Information.

**Note:** The customer/client email address is the email address used by equineGenie when emailing a customer invoice. Care should be taken to make sure the email address is valid and correct.

## Invoice Email Setup

Before a customer invoice can be emailed directly to a customer's email address, the setup for the email service being used needs to be entered in equineGenie. The setup is entered on the System Security – Network Settings screen. Path: *Home: Security Utilities: Security/Networking/Utilities: Networking/Email Settings: Setup*

### Email Service Setup

- ① **Enter** the outgoing email server address for your chosen email service. Outgoing email servers are known as SMTP or **S**imple **M**ail **T**ransfer **P**rotocol servers.

**Note:** An email server is the computerized equivalent of your friendly neighborhood mailman. Every email that is sent passes through a series of mail servers along its way to its intended recipient. Although it may seem like a message is sent instantly – zipping from one PC to another in the blink of an eye – the reality is that a complex series of transfers takes place. Without this series of mail servers, you would only be able to send emails to people whose email address domains matched your own – i.e., you could only send messages from one example.com account to another example.com account.

- ② **Enter** the outgoing mail server port for the email service you will be using to send invoices to your customers. The outgoing mail server port number may be dependent on your SSL setting.

**Note:** For example; if you are using the GoDaddy Outgoing (SMTP) and your SSL is set to **No**, you would use port 80. If the SSL is set to **Yes**, you would use port 465.

- ③ Select the SSL button to **Yes** for secure email communications.

**Note:** Secure Socket Layer (SSL) is a **technology to secure the communication between a client and the server**. An SSL for email ensures that the email is not intercepted during the transit and nobody except the intended recipient can access it. An email SSL certificate can also authenticate the identity of the sender.

- ④ **Enter** the user name of your email you are using to send invoices to your customers.  
For example; info@genieatwork.com

- ⑤ **Enter** the password of your email you are using to send invoices to your customers.

**Note:** If the email you are using requires a 2-step validation, use the password generated from the 2-step validation.

- ⑥ **Enter** the email address you will be using to send invoices to your customers.

- ⑦ **Enter** the email subject of the emailed invoices you are sending to your customer.

**Note:** Your email subject could include the name of your horse business. For example: Make Believe Ranch, LLC Invoice

**Note:** If you leave the email subject blank, equineGenie will put Horse Business Invoice as the default email subject.

- ⑧ **Enter** a cc email address if you want a copy of customer invoices sent to another email address.

**Note:** Any email address can be used for a CC email address.

- ⑨ **Enter** the name you want on the invoice emails you will be sending to your customers.

- ⑩ **Select** the Enter button to save your email setup information in the equineGenie database.

**Note:** The email content sent is only the PDF of the customer invoice created by you in equineGenie. If you need to send any additional information with the customer invoice, you will need to export the customer's invoice and attach it to an email as identified in the [Email Introduction](#).

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## Emailing Invoices Using Gmail

Gmail is one of, if not the most, used email services. The Gmail service is also one of the most secure and can require a 2-step validation when connecting applications to Gmail. This is the case when using Gmail to email equineGenie created invoice directly to a customer. To use Gmail as your equineGenie invoice emailing service the 2-step Gmail validation must be implemented. To create and use an app password with equineGenie you need to select the following link: [Sign in with App Passwords - Google Account Help](#). The link will guide you through the app password creation process. **Note:** The app you are creating the 2-step Gmail validation for is equineGenie.

### Gmail Service Setup

The screenshot shows the 'equineGenie System Security - Network Settings' window. The 'Email Setup' section is active, displaying various configuration fields. On the right, a yellow box contains the text 'Popup And Red Flag' and the equineGenie logo with the word 'Notes' below it. A vertical line separates the configuration fields from the right-hand side of the window.

Networking Setup	Enter Server Name
Allow Remote Access?	<input type="checkbox"/> No
Listen IP Address	<input type="text"/>
Listen Port	<input type="text"/>
<b>Email Setup</b>	
Email Server Address	smtp.gmail.com ①
Server Port	587 ②
Use SSL?	<input checked="" type="checkbox"/> Yes ③
User Name	Gmail Account Name ④
Password	Gmail App Password ⑤
From Email	Sent From Email ⑥
Email Subject	Email Subject ⑦
CC Email	Copy to Email ⑧
From Name	Senders Name ⑨

- ① Enter the Gmail server address: **smtp.gmail.com**
- ② Enter the outgoing Gmail server port: **587**
- ③ Select the SSL button to **Yes**.
- ④ Enter the user name of your Gmail Account. For example; 'your business'@gmail.com

⑤ **Enter** the 16-character code generate by your Gmail account from the 2-step validation procedure.

⑥ **Enter** the email address you will be using to send invoices to your customers.

⑦ **Enter** the email subject of the invoice emails you are sending to your customers.

**Note:** Your email subject could include the name of your horse business. For example: Make Believe Ranch, LLC Invoice

**Note:** If you leave the email subject blank, equineGenie will put Horse Business Invoice as the email subject.

⑧ **Enter** a cc email address if you want a copy of customer invoices sent to another email address.

⑨ **Enter** the name you want on the invoice emails you will be sending to your customers.

⑩ **Select** the Enter button to save your Gmail setup information in the equineGenie database.

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