Setting up and using email in PGdebt 9

MAIL MERGE AND EMAIL

The Mailmerge/Word processor screen is split horizontally by a blue divided, this can be dragged to change the size of the sections. WP is at the top and email at the bottom. Either can be completely hidden if required. You can make a setting in Options to completely lock out the email section if you don't not wish to use it, thus saving screen space. If you lose the blue line it can be reset from the "Window" item on the top menu "Reset splitter bars".

When the merge button is pressed the letters are merged . A list of creditors included in the merge appears on the right and you can click on a particular creditor to see his letter.
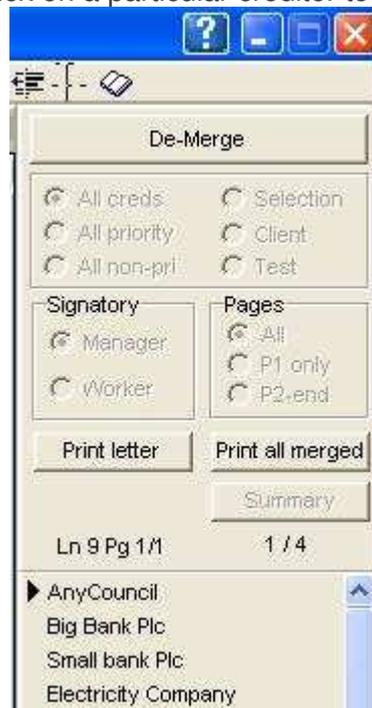
This shows fours creditors merged. The AnyCouncil letter would be displayed in the WP. A letter P will appear on the AnyCouncil line when the letter has been printed, or an E if it has been emailed.

CONTROLLING THE EMAIL

The lower half of the WP screen, below the blue line is for email merge. If you know you are not going to use email, you can lock it out to save screen space at Options/supervisor/email. A lock out checkbox is at the bottom right.

When a letter is loaded as it comes on screen in its pre-merge state, a pre-merge email is also loaded and comes onto the lower screen. When the merge button is clicked, the letter and email both mailmerge at the same time. You can then decide whether to print and post the letter, or send it by email it as a file attachment, or just send the email.

You can write your own emails just as you write new standard letters. They appear in the letters list prefixed with the word EMAIL and you must always save them with this prefix or they will not be found by the program. The intention is that the correspondence should be in the letter which is then sent as an attachment. It is not intended that the email should do more than say "Hello…please find our letter attached". However you *can* write a much longer email if you wish. Hopefully you should only need two emails…one to creditors and one to the client. The program remembers the last email use and always loads this until it is changed, so please check to see you have the correct email.

Emails should be written in plain text, ie no BOLD, ITALIC or UNDERLINE etc. Many companies do not allow their staff to receive formatted HTML emails and these are converted to plain text by various means, this is not always a great success. PGdebt only allows plain text in the first place, so

you can control the layout that will be seen at the other end. If you do put formatted text into the standard email, PGdebt will remove it before sending.

When the merge takes place the program also calculates an email subject line and pulls up the correct email address. You must enter the correct email address for the client on client data and for each creditor on the creditor data screen, you cant edit these on the mailmerge screen

Email has a special set up screen on the Options/Supervisor/Email tab. It will not work unless your IT expert has set this up.   See later.

On the WP screen, below the horizontal blue line is the Email control panel

The normal sections are all filled in for you automatically, but you will need to make some choices.

Subject is filled automatically with a line generated by PG9

To: is filled automatically with the recipient's email address, client or creditor as required

Cc: allows you to copy to another person, you must fill the address yourself

Attach: allows attachment of an external file, you must fill this yourself using the Browse button to find the file. NB. This is not for the PGdebt letter or FS…it is for separate files if required. A scanned authorisation perhaps.

Load email: has your standard email name in it, you can change the email from here
The four round 'buttons' allow you to choose what to send as an attachment
> **Email with letter attached**
> **Email with FS attached**
> **Email with both attached**
> **Email with nothing attached**

Two checkboxes allow you to **encrypt** the email and FS and/or send a **copy to yourself**

Two buttons allow you to actually send the email…(take care), or to test it. Testing will send the email to yourself only, so you can see what it will be like.

You cannot, with this version, send all merged emails with one click, in the same way as you can print all merged letters with one click…its too dangerous…30 emails sent in error !!!!

Demerging the letter also de-merges the email. De-merging also stops the program asking if you want to enter the letter in the case record. It is not necessary to de-merge routinely.

Printing letters and sending emails are recorded in the case record, the window to confirm this appears later than with PG8

SETTING UP THE EMAIL SYSTEM
The Options/Supervisor/Email screen

Please make sure you understand what you are doing before changing these settings

Email won't work without these settings which are vitally important
If you are not sure what these are, take a look at the account settings in Outlook or Outlook Express where you will find much of the same information already set up.

Your email address: You know what this is, it is essential

Agency Name: Not essential but it looks much more professional to the receiver

Reply To: The email that the recipient will reply to if he clocks "reply"

Passwords: Probably not required but if you need them you will know what they are

Auto generated .pdf letter and FS name: The PG merged letter and FS are combined into a single PDF file for sending. This is where you set the rules to specify what the name of that file will be.

Auto generated subject line: This is where you set the rules to specify what the automatically generated email subject line will be.

Encryption password: If you encrypt the attachment, the password used will be the one shown here.

Outgoing mail server: As supplied by your ISP probably. Something like mailhost@myisp.com or smpt@myisp.com You can find these settings in Outlook if you cannot remember yours. VITAL. Recheck every letter, space, dot and @.

Outgoing mail server port: **25** unless your IT expert says different

Disable entire email facility: Tick this to completely hide and ignore all email capability thus allowing more space on the WP window

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EMAIL STATIONERY

If you are going to send letters as email attachments, you cannot use a letter which has been set up for printing on headed paper. It will look as though it has been printed on plain paper. So letters for emailing need to have a header. There are two options:

1. *Set up proper headers and footers using the PGdebt system for this. This is NOT easy to do because this part of PGdebt is very fiddly and difficult to use. But it can be done by someone who is patient and has time to work at it. The principle to use is to set up a table at the top of the document, and place the letterhead details and logos in the various cells of this.   There is a specific data sheet on the web site covering this subject.*

2. Set up a simple header, for use only on emailed letters. This could look like the following example which is just text added to the top of the standard letters, and does all that is required, and a great deal more than would be there on a simple email without attachment. You might add the words "Letter sent by email and therefore not signed" in a convenient place if you wish. This is much easier to set up, just using text at the top of the page

- Open a standard letter (say "holding.rtf")
- Place the cursor at the top of the page
- Type in your Agency name and address details etc
- Highlight the new address etc
- Set the colour, font and size …see next section re fonts
- Set the text alignment to central (probably)
- Remove unwanted white space between the bottom of the new Agency name and address and the creditor address top line
- Save the letter as "holding-e version", or whatever name you choose
- NB. Do NOT save the letter with the word EMAIL as the first word...that will cause PGdebt to think it is a standard email, not a standard letter.

That is it, you now have two letters, "holding" and "holding-e version" which you can use as required. To make other letters you can cut and paste the new Agency address details into the next letter.

If you want to insert logos, you will need to use a table and study the web site tutorial on setting up headers and footers, and this is not easy to do and the files can get very large. We may be able to set up your letterhead for you, but there will be a charge for this graphic design work. It may not be possible to get your letterhead exactly matching, but it will usually be acceptably close.

NB. NEVER try to design a letterhead using MS Word.   PGdebt and Word do not mix.

NB. IMPORTANT INFO. ABOUT FONTS… FOR EMAIL USERS ONLY

If you are sending emails from PG9 direct, the program will convert any mail-merged letters to a .pdf format and add these to the email as an attachment.

Unfortunately the conversion to .pdf is not perfect for certain fonts.   They are usually quite readable, but small flaws can occur. For that reason it is recommended that you change the fonts on email letters to a font which converts well.

The recommended serif fonts are GEORGIA, BOOK ANTIQUA and NEW CENTURY SCHOOLBOOK.   These are all quite close to TIMES ROMAN which does not convert well

For sans serif fonts we suggest TREBUCHET MS, UNIVERS or VERDANA which are all similar to ARIAL which does not convert well. We suggest you avoid TIMES ROMAN and ARIAL.

You can test the fonts by emailing yourself (using the PG9 test email facility) a copy of the standard letter called " Font test ".   You can add any of your own fonts to this letter to test them.

When you know the font you want, you can change the standard letters.

- Open the standard letter to change
- Highlight the text and merge codes to change
- Select the right font and size
- SAVE the standard letter
- Then it will always have the font you have chosen.

Unfortunately is unlikely that this minor bug can be fixed soon, however it is quite minor as many fonts are perfectly rendered and most people will not notice any difference

Note that the conversion of fonts for the Financial Statement does not have this problem…(different system) so FS fonts are not affected if the FS is emailed as an attachment.

If you do not intend to send letters as email attachments, you can ignore this section and use any font you wish.

SENDING EMAILS WITHOUT ATTACHMENTS

The system described has been designed to send your message as an attachment. But if you wish you can just write the email in the normal way and send it without an attachment, or with only the FS as an attachment.

- Open the client file and move to the mailmerge window, but do not open a standard letter
- Choose the email you want from the email dropdown box
- Drag the blue splitter bar up to show the whole email
- Click the Option   Email+FS (no letter)
- Click "Merge" to merge the email and you can send it without any attached letter. You can send the FS as an attachment if you wish by clicking Email+letter with FS

To do this properly, you will need to set up a whole series of standard emails matching the text of the standard letters. This is easy to do with cut and paste, but remember to save all the standard emails with the word EMAIL as the first letter or PG9 will not find them
Do not use anything other than plain text, it will be removed if you do use it.
Direct emails like this cannot be encrypted.