protel SPE/MPE

Sending invoices via email

User Guide
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Introduction

What is the feature “Sending invoices via email”?

This feature allows a copy of an invoice to be sent by e-mail, e.g. during the checkout process. The email is initiated via the invoice dialog, the invoice history or the "Invoices" tab in the guest profile.

The email is being created on the basis of a previously defined template. The email address is taken from the profile linked to the current invoice window. Address, recipient and subject of the email can be edited before sending.

What’s this document about?

This documentation describes step by step the use of the feature. The possible protel workflows using this feature are described here.

The second part consists of the possible protel workflows using this feature, which describe how the invoices can be sent via email:

- Directly after creating the invoice during checkout.
- Already existing invoices from the Invoice History.
- Invoices of a certain guest in the guest profile.

Need help?

If you require assistance, please contact our support team via support@protel.net or +49 231 915 930.
Functionality

After everything has been configured, you can now send invoices to profiles suggested by protel or to other email addresses.

Very important!

It is absolutely necessary that you have Microsoft Word Version 2010 or higher installed on your PC, in order to use this feature.

Furthermore, the templates for the invoices and for the emails have to have been set up with MS Word.

For protel guest profiles the respective opt-in settings apply. Both available protel modes are supported:

- **Simple Mode**
  - **Include in Mailings**
  - "Mailings allowed" has to be activated, in order to enable the sending of invoices.

- **Extended Mode (XSetup profiles;optin;1)**
  - **Contact related issues**
    - via letter: yes
    - via phone: yes
    - via e-mail: yes (created on 10/03/19 by protel 23)
    - via text message: yes

- "Contact desired for invoice enquiries" via Email has to be activated, in order to enable the sending of invoices.
Workflows

The feature has been integrated in the following protel workflows:

1. Checkout process

The invoice dialog has been expanded with the addition of the "Send copy as email" checkbox. The XSetup Invoice;SendCopyAsEmail determines whether this checkbox is activated by default.

If the checkbox is activated, the following dialog box appears after the invoicing:

You can make the following settings for sending invoices:

- **Combo box "Recipient"**
  The (main) email address of the profile currently active in the invoice dialog box is preselected here. Here you can also select the following email addresses, depending on the opt-in status:
  - All profile email addresses, which are active in at least one invoice dialog box.
  - All profile email addresses, which are active in the current reservation.
  - All email addresses, which are listed under "Further communication methods" in one of the above-mentioned profiles.
Input fields "Recipient name" and "Recipient email"
If "(nobody)" was selected in above-mentioned combo box, you can use these fields to enter the recipient name or email address of an alternative addressee.

Input field "Email subject"
The subject line of the selected email template (first line) is displayed here. You can edit it, if required.

Combo box "Email template"
The default template for the language of the recipient is preselected here. You also have the option of selecting a different template.

"Send" button
Click this button to send the invoice in accordance with the settings made beforehand.

2. "Invoice History" dialog box
You can now also send invoices via email from the "Invoice History" dialog box. For this purpose, highlight one or more invoices. Then, click either on the "Send via email" button or right-click to open the context menu and select "Send documents per email". Now the dialog box described under "1. Checkout process", with the email address of the initial invoice recipient preselected.
3. "Invoices" tab within the guest profile

Highlight the desired invoice, right-click to open the context menu and select "Send via email".
About this document

Please check: Is this the latest version?
All of our documents are constantly updated in accordance with the on-going development of the software.

If you notice that the processes described in this manual don't "seem right", you might not be using the latest version of the manual.

Should you be unsure about whether you are using the latest version of the manual, please contact us at documentation@protel.net.

Fragen und Anregungen sind jederzeit ausdrücklich willkommen!

Feedback
If you are sure that you are using the latest version and still cannot find certain information or find the descriptions to be unclear, please write to documentation@protel.net.

Your appraisal or suggestions are always welcome!

Need help?
If you need any support, please feel free to contact us at support@protel.net or +49 231 915 930.

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Contact
protel hotelsoftware GmbH
Europaplatz 8
44269 Dortmund
Germany
T: +49 231 915 93 0
F: +49 231 915 93 999

support@protel.net
www.protel.net