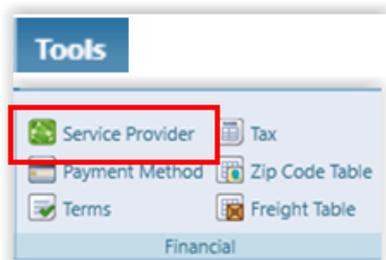# ASICOMP.COM

How do I set up Email Notifications?

Angie K - 2022-07-26 - in Supervising
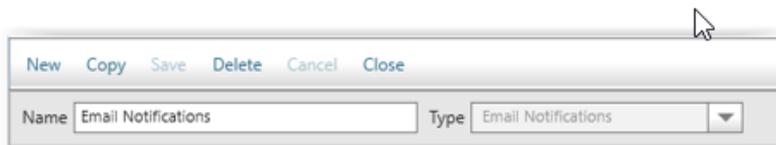
Email Notifications

This option allows lists/reports to be set up to automatically be emailed to someone at a specific time.
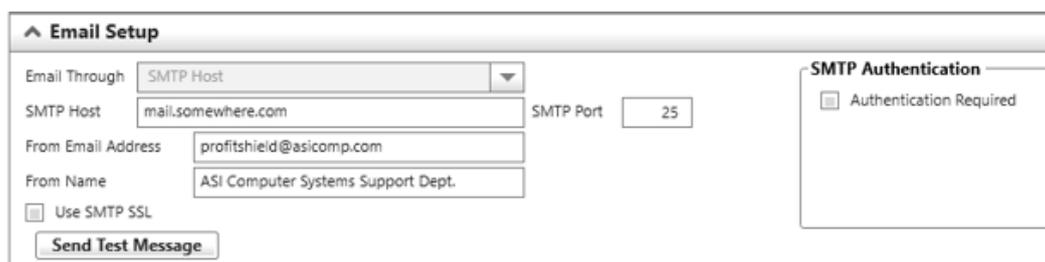
Setup

Email notifications are set up under Tools – Financial – Service Provider.

Click new to add an Email Notifications Service provider and select the type of Email Notifications.

The bottom expander (Email Setup) is where you will set up information regarding the SMTP Host for emailing.

The information in the Email Setup expander is required even if you use local email client for sending other emails in the system. Once configured properly, this process runs regardless of being logged in or out.
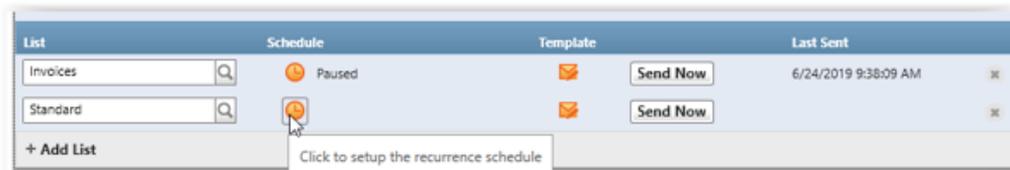
Click Add List to set up a list to be emailed. Default lists as well as custom created and saved lists can be emailed using this option.
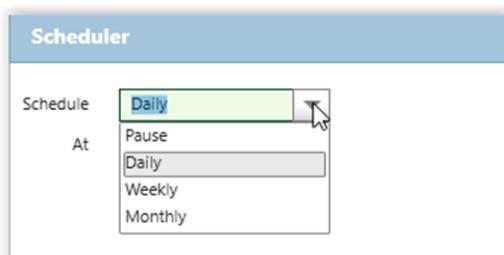
Select a list

Once a list is selected click on the clock icon to setup the recurrence schedule.

The schedule popup will allow you to select the schedule for the list to be sent out on a routine basis.   Each list can be sent daily, weekly, or monthly. You can also pause sending for one that was set up previously.
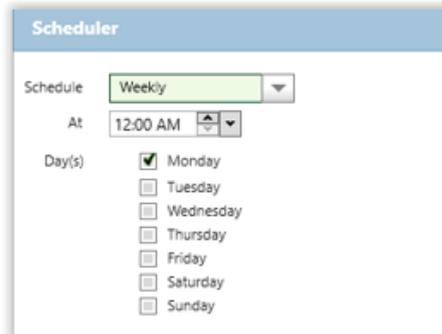

Once a frequency for sending the list has been selected you can select when to send it.

- **Daily**

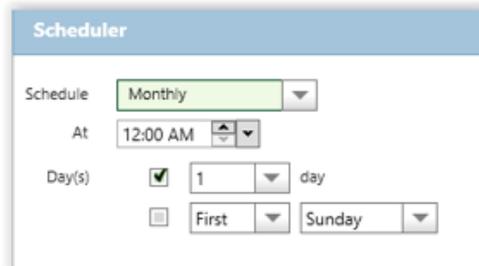 Select a time that the list will send every day.
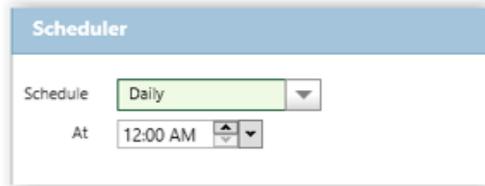
- **Weekly**

  Select the time that the list will send on the days selected.

- **Monthly**

  Select the time that the list will send out on the date selected.

- **Pause**

  The list will be paused until you select a different option.

The template icon will allow the setup of an email template and indicates the form type the list should be generated in and attached.
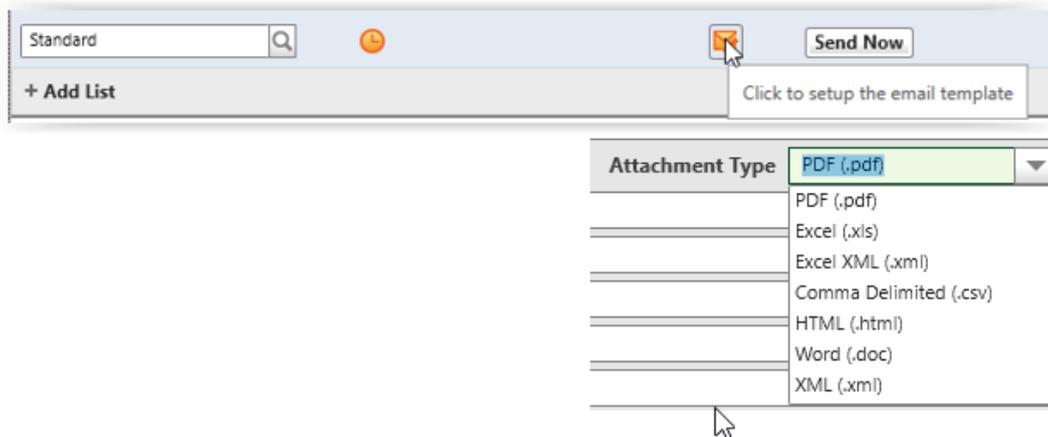
- o Schedule large lists to run during non-peak times. We recommend early morning before the office starts for the day. You do not have to be logged into ASI SmartBooks for the lists to be sent.
- o Schedule lists to run outside of any backup schedule.

After the list is successfully sent the last sent date will update.

Below is a sample of an email sent from this process.