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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.

### <u>Setup</u>

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

Tools	
Service Provider	🛅 Tax
Payment Method	Tip Code Table
👿 Terms	Freight Table
Finan	cial

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

New	Сору	Save	Delete	Cancel	Close	_		2
Name	Email No	otification	ns			Туре	Email Notifications	-

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

▲ Email Setup								
Email Through SMTP Host 👻				]	SMTP Authentication			
SMTP Host	mail.somewhere.com			SMTP Port 25	Authentication Required			
From Email Add	From Email Address profitshield@asicomp.com			]				
From Name	From Name ASI Computer Systems Support Dept.		]					
Use SMTP S	Use SMTP SSL							
Send Test	Messag	ge						

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.

∧ Email Lists						
Pause All		0				
List	Se	hedule	Template		Last Sent	
Invoices	Q	Paused	<b>\$</b>	Send Now	6/24/2019 9:38:09 AM	
+ Add List						

Select a list

Tab Name	List Name	Parent List
(Select)		
Allocated Not Invoiced	Allocated Not Invoiced	Allocated Not Invoiced
Balance Sheet	Standard	Standard
Balance Sheet	Previous Fiscal Comparison	Previous Fiscal Comparison
Booked	Booked	Booked
Booked	- Selected Customer	Booked
Booked	Booked by Customer	Booked by Customer
Chart of Accounts	Sorted By Number	Sorted By Number

Once a list is selected click on the clock icon

to setup the recurrence schedule.

List		Schedule	Template		Last Sent	
Invoices	Q	Paused	<b>&gt;</b>	Send Now	6/24/2019 9:38:09 AM	ж
Standard	Q	<b>Q</b>	<b>&gt;</b>	Send Now		×
+ Add List		Click to setup the rec	urrence 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.

Schedu	er	
Schedule	Daily	T
At	Pause	VS
7.4	Daily	
	Weekly	
	Monthly	

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.

Schedu	er			
Schedule	Daily		-	
At	12:00 AM	× v		
	-			

#### Weekly

•

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

	ler
Schedule At	Weekiy 👻
Day(s)	<ul> <li>Monday</li> <li>Tuesday</li> <li>Wednesday</li> <li>Thursday</li> <li>Friday</li> <li>Saturday</li> <li>Sinday</li> </ul>

#### Monthly

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

Schedu	ler
Schedule	Monthly
At	12:00 AM 😴 💌
Day(s)	🖌 1 💌 day
	First 💌 Sunday 💌

#### Pause

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

Schedul			
Schedule	Pause	<b>v</b>	ß

 $\square$ 

The template icon will allow the setup of an email template and indicates the form type the list should be generated in and attached.

Standard Q.	Send Now
+ Add List	Click to setup the email template
	Attachment Type PDF (.pdf)
	PDF (.pdf)
	Excel (.xls)
	Excel XML (.xml)
	Comma Delimited (.csv)
	HTML (.html)
	Word (.doc)
	XML (.xml)

- 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.

List	Schedule	Template	Last Sent	
Booked	Q. 🕒 Daily At 4:00 AM	Send Now	1/8/2019 4:00:03 AM	(8)

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



Attached is the booked list