

E-mailing Invoices from Forge Ahead

(You may want to print this for future reference.)

There are two methods for sending invoices via e-mail from Forge Ahead. The first is the built-in "E-mail this" feature; you can *refer to the Help System* for instructions on using this method. However, due to increased security measures in many computers, this method may not work from your computer. If that's the case, the second method, described below, will allow you to email invoices.

The second method involves sending invoices as PDF files, which provide an exact copy of the invoice that any of your clients will be able to open, view, and print.

One-Time Setup Steps

Perform these steps one time to setup your computer to email invoices.

1. Open your internet browser and go to www.cutepdf.com. Click the link for the free download, as shown below.



The screenshot shows the CutePDF website interface. The address bar displays "http://www.cutepdf.com/". The main navigation bar includes "Home", "Products", "Developer", "Support", and "Purchase". A "Shortcuts" section lists various PDF utilities. The "CutePDF vision" section describes the software's philosophy. The "Latest News" section mentions the release of CutePDF Pro 3.61. The "PDF Creation" section highlights the "CutePDF Writer (Freeware)" and includes a "Free Download (1.6MB) (Vista Ready)" link circled in red. A red arrow points from the text "Click here" to this link. Other sections include "Desktop PDF Utilities" and "CutePDF Professional". A promotional banner for "CutePDF Pro 3.6" is also visible, along with a "COMPUTER SHOPPER" award graphic.

2. Select the option to **Run** the file; then follow the on-screen prompts to install the CutePDF Writer. (Note: this is a safe download. We have been using the CutePDF Writer at Backroads Data for years.)
3. Create a new folder in *My Documents* called "Invoices". You will use this to store the PDF versions of your invoices.

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4. Optional: Most e-mail programs support the use of signatures, which are custom blocks of text that are automatically inserted into new email messages that you create. If you create a signature to use when emailing invoices, it will save you the time of typing a message to your clients each time you email an invoice. (When you use your email for other purposes, such as connecting with family or friends, you can simply delete the signature in those messages.)

Sample Signature:

Hello – Attached please find the invoice for my farrier services. Payment is due within 10 days. Thanks very much –
ABC Horseshoeing

Steps to Email an Invoice

Once you have setup your system as described above, use the steps below each time you want to email an invoice.

1. In Forge Ahead, click **Money Matters**, then click **Print Invoices**.
2. Highlight the invoice you want to email (select only 1 invoice).
3. Click the **Preview Invoices** button in the lower left.
4. On the preview screen, click the **Print Settings...** button at the top.
5. On the *Print* dialog box, click the drop-down arrow in the Name field, and change the printer from your default printer to **Cute PDF Writer**.
6. Click the **OK** button.
7. On the *Save As* dialog box, navigate to the folder you created during the setup process (*My Documents --> Invoices*). Change the file name from "INVOICE.pdf" to something more specific, such as the client's name or the invoice number; then click the **Save** button. You have now created the PDF of the invoice you will send to your client.
8. In Forge Ahead, navigate back to the Main Switchboard. Use the **People** (or **Stables**) button to lookup the client who will receive the invoice. Click the **Edit Address Info** button to view their address information.
9. If the client's email address has not already been entered, type it in now in the Email field. Click the button at the end of the Email field to create a new email message, already addressed to your client.
10. Add a subject (such as "Invoice for Horseshoeing") to the email, and edit the text of the message if necessary.
11. Use your email program's attachment feature to attach the PDF copy of the invoice, which is located in the *Invoices* folder within *My Documents*. If you have more than one PDF in this folder, make sure you attach the correct file, so that you don't send the client someone else's invoice.
12. Send the email message.

Technical Support

If you have any questions or need additional information, please contact us at 785-594-6807, or email info@backroadsdata.com.