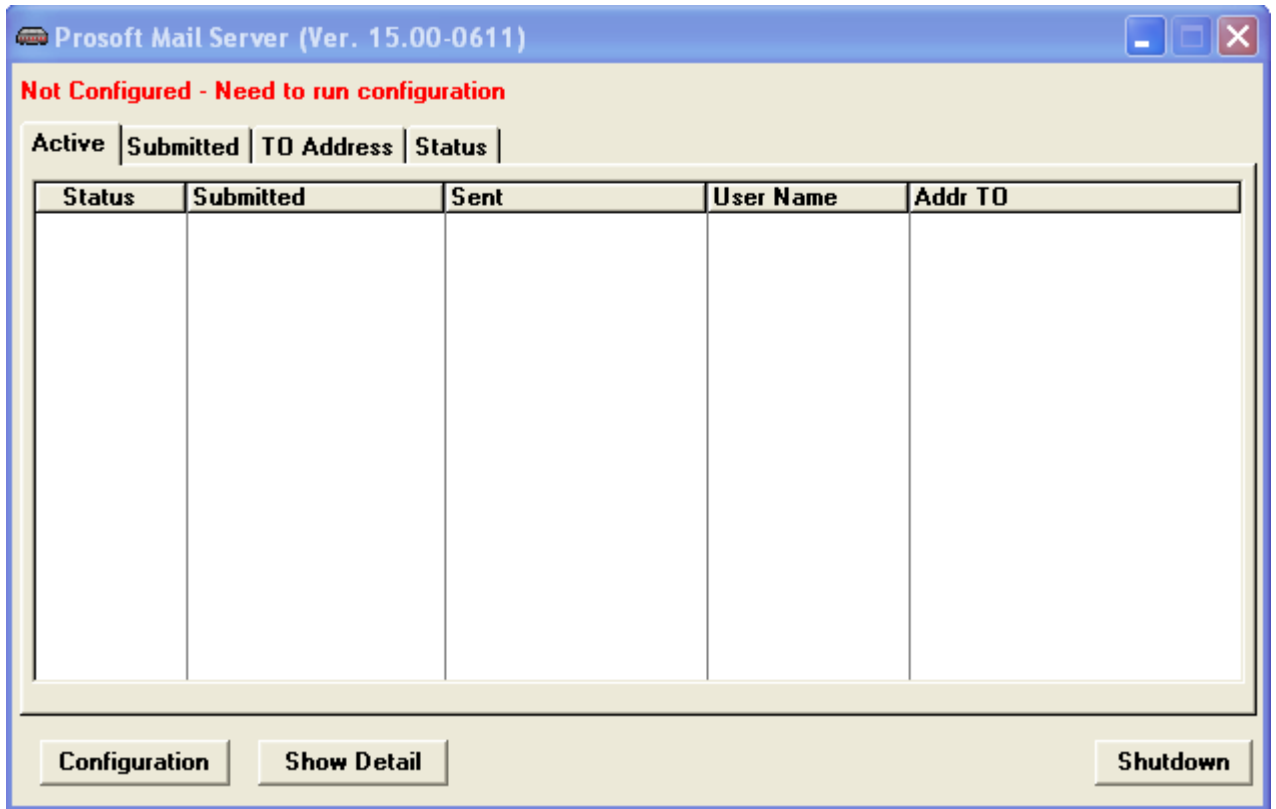


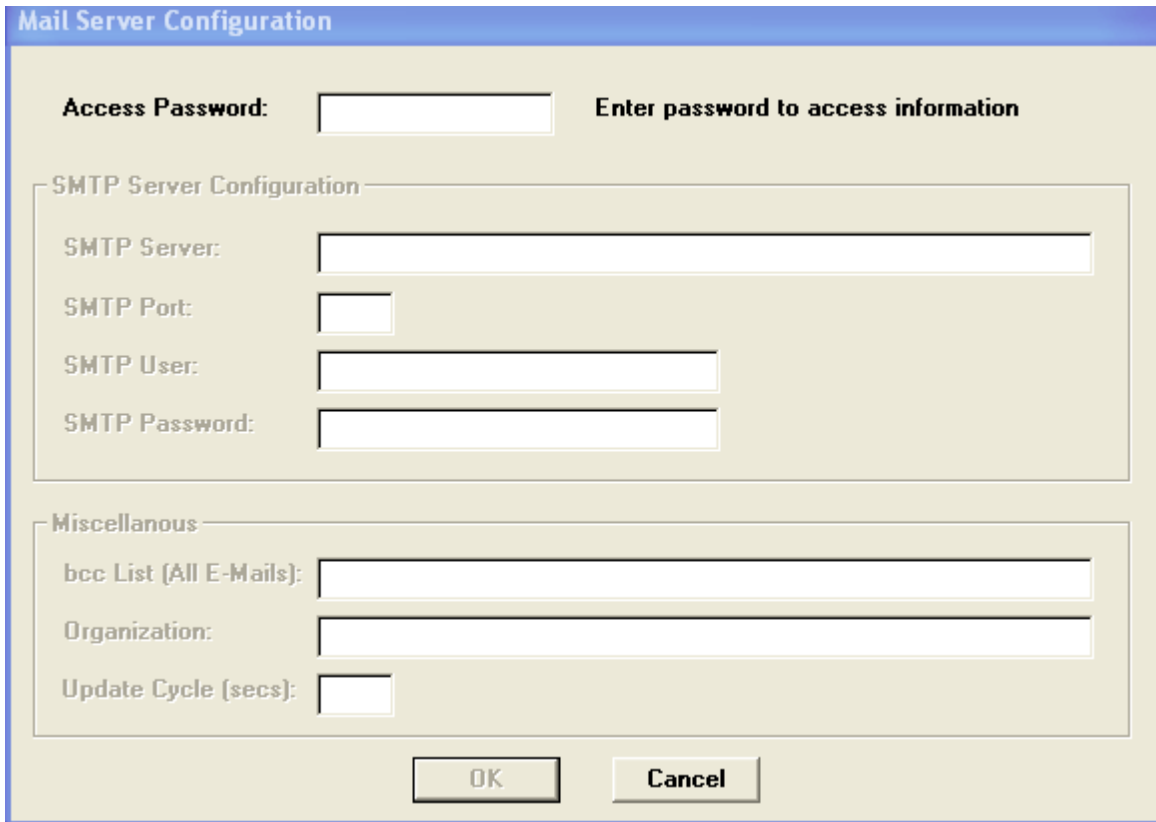
## Installation of Prosoft Mail Server

To install the Prosoft Mail Server, please follow the information below:

1. Install the MailPS Server program on the computer that will become the “Mail Server”. Note that this computer must have continuous internet access (Dial-up is not supported). Please make a note of where the program is installed as you will need this later to setup the Prosoft Programs PSClient, Eclare or Gemini.
2. Once the program is properly installed, open the Start | All Program | Prosoft Menu as “MailPS Server”. To insure that this program is running automatically, it is recommended that it be added to the Program, Startup folder.
3. The first time you run the program, the following window will come up and will show the message at the top of the screen “Not Configured – Need to run configuration”.

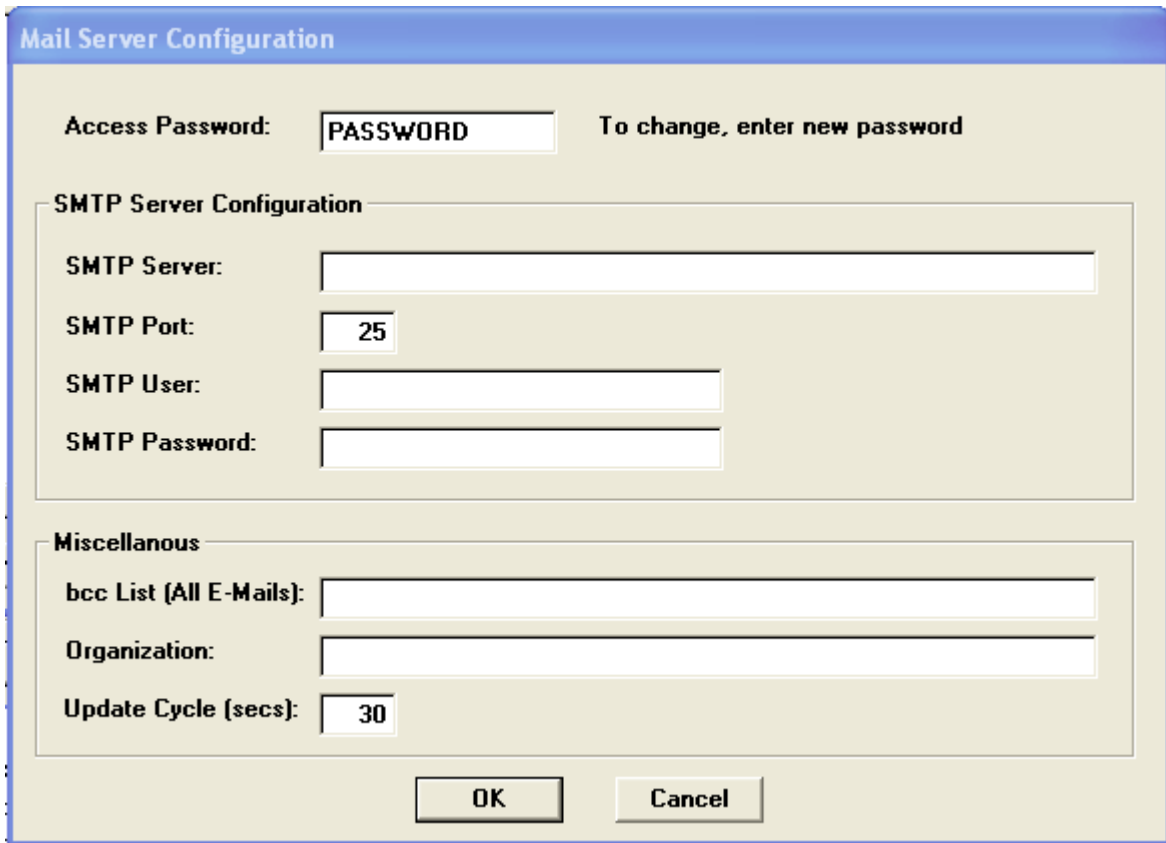


4. To configure the program, click on the “Configuration” button in the lower left corner of the window. Once that is done, you will see the following.



The image shows a 'Mail Server Configuration' dialog box with a blue title bar. It contains several input fields and two buttons. At the top, there is an 'Access Password' field with a placeholder text 'Enter password to access information'. Below this is a section titled 'SMTP Server Configuration' containing four fields: 'SMTP Server', 'SMTP Port', 'SMTP User', and 'SMTP Password'. The 'SMTP Port' field is a small numeric input. Below the SMTP section is a 'Miscellaneous' section with three fields: 'bcc List (All E-Mails)', 'Organization', and 'Update Cycle (secs)'. The 'Update Cycle (secs)' field is a small numeric input. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

5. The program requires that a password is entered in order to prevent unauthorized changes to this information. When the program is first installed the password is "PASSWORD". Enter this into the Access Password field and then tab off of it. If the password is entered correctly, the remaining fields on the screen will become enabled.



The image shows a 'Mail Server Configuration' dialog box with a blue title bar. It contains several input fields and buttons. At the top, there is an 'Access Password' field with the text 'PASSWORD' and a note 'To change, enter new password'. Below this is a section titled 'SMTP Server Configuration' which includes fields for 'SMTP Server', 'SMTP Port' (set to 25), 'SMTP User', and 'SMTP Password'. A 'Miscellaneous' section follows, with fields for 'bcc List (All E-Mails)', 'Organization', and 'Update Cycle (secs)' (set to 30). At the bottom are 'OK' and 'Cancel' buttons.

If you want to change the password to something else, just enter the new password into the Access Password field and when the form is saved, it will be updated.

The section “SMTP Server Configuration” is where you tell the program how to access your internet mail server. If you are not sure of the values to use here, check your current e-mail program setup to see what it is using.

**SMTP Server:** This is the address of your server. It will probably be something like “mail.prosoftinc.com”. Note that this program will not access AOL.

**SMTP Port:** This defaults to port 25 and should normally be left alone. You will only need to change this if your mail server is using a non-standard port.

**SMTP User:** This is the user name to access the server if required. We suggest that you try leaving it blank at first.

**SMTP Password:** This is the password for the user name if required.

The last section “Miscellaneous” contains some general configuration information.

**Bcc List (All E-Mails):** If you put in an e-mail address into this field, then ALL messages that are emailed will contain a “BCC” or Blind Carbon Copy of that address. This will cause a copy of everything to be sent to this address as well as the intended

recipient. The recipient will not see this address. This might be used as a security or archive of what has been sent.

**Organization:** If you enter a value here, this will be added to all e-mails sent as the Organization name.

**Update Cycle (secs):** This initially has a value of 30 seconds but can be changed to anything from 1 to 999 seconds. This determines how long the program waits between checks to see if anything new needs to be sent. Although decreasing this will cause e-mails to be sent quicker, it will also add additional overhead and traffic on the network. We strongly recommend leaving this value at 30 seconds.

Once you have all of the values entered, click on the OK button to save the changes.

### Prosoft Program Setup

In order for the programs to use the server, the programs (Gemini, Eclare and/or PSCClient) must have the location defined under the Terminal Configuration. Although the following screen is for Gemini, all three Prosoft programs will need the same location definition.

Under the File Menu, there will be an option called “Terminal Configuration” or something similar. At each computer, select this option.

**Note: the following configurations apply to this computer only and applies to all companies.**

On Program Exit: Do not show Backup Prompt

PO & AR Forms: Show Boxes with Shadowing

Full Excel Filename: C:\Program Files\Microsoft Office\Office10\EXCEL.EXE

FAX Server:

E-Mail Server Path: Z:\MailPS Server\

Default Reports to Preview       Prompt for Printer in AP Checkwriter  
 Numeric keypad "+" acts like Tab Key       Prompt for Printer in PR Checkwriter

OK      Cancel

The field “E-Mail Server Path” is where you need to define the location of the Prosoft Mail Server. Either type in the path to the folder that contains the server or use the lookup

button for selection. In the example above, our server is located on drive Z in the folder “MailPS Server”.

This needs to be done on each workstation that uses any of the Prosoft Programs but only needs to be done once. It is not required to repeat this for each company.

This completes the installation and setup of the Prosoft Mail Server.

## TO USE THE E-MAIL / PDF SYSTEM OPTION

Once you have installed and setup the mail server location you are ready to use the E-mail/PDF options in the Gemini, Eclare and/or PSClient program(s).

### PDF SYSTEM OPTION

1. Select the report you wish to run and select to preview the report to the screen.

Vendor Number / Name	Invoice #	Inv Date	Due Date	PC	Inv Amount	Discount	Retainage	Amt Paid	Net Due
<b>ARABIC Arabic Oil Company</b>									
A67513	H	06/09/99	06/24/99		45.50	0.00	0.00	0.00	45.50
L67513		07/18/99	08/02/99		36.50	0.00	0.00	0.00	36.50
V67513		08/10/99	08/25/99		64.23	0.00	0.00	0.00	64.23
Vendor Total					146.23	0.00	0.00	0.00	146.23
<b>BJCARP B.J. Carpet World</b>									
33143		04/01/99	06/28/99		2,960.00	0.00	0.00	0.00	2,960.00
Vendor Total					2,960.00	0.00	0.00	0.00	2,960.00
<b>BELLCO Bell Consultants Inc.</b>									
AP-257		06/09/99	06/24/99		132.50	0.00	0.00	0.00	132.50
VP-257		07/14/99	07/31/99		74.52	0.00	0.00	0.00	74.52
LP-257		07/18/99	08/02/99		183.21	0.00	0.00	0.00	183.21
Vendor Total					390.23	0.00	0.00	0.00	390.23
<b>BISHOP Bisop Corporation</b>									

2. Note the **PDF** and **Mail** buttons are now activated on the preview screen. Select the **PDF** button and the following screen will pop up.

Save Report to PDF

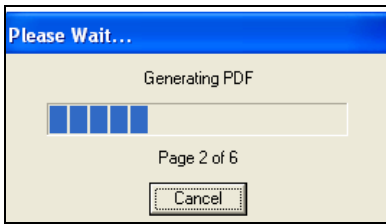
Filename: C:\PROGRAM~1\Gemini\pdf\AP Open Items Report.PDF

Password: (Password will be case sensitive)

Save Cancel

3. The location of where the PDF file is being saved to will be displayed. If you need to change the location where the file will be saved select the lookup button to the right of the filename box and select the location you would like to place the file. The default location is in the program directory of your Prosoft program in a folder called PDF, and the default name is the name of the report in most cases.
4. You may give the PDF file you are creating a password. This will put a password protection on the file so only the person(s) you are sending the PDF file to will be able to view the report beside yourself.

5. A “Please Wait” screen will appear showing the progress of the report being wrote to a PDF file.



6. Once the file is written to the location where you have saved it, then you are ready to send the file.
7. The file may be opened by clicking on the file, Adobe Acrobat will recognize there is a password on the file and ask for the password as in the following screen.




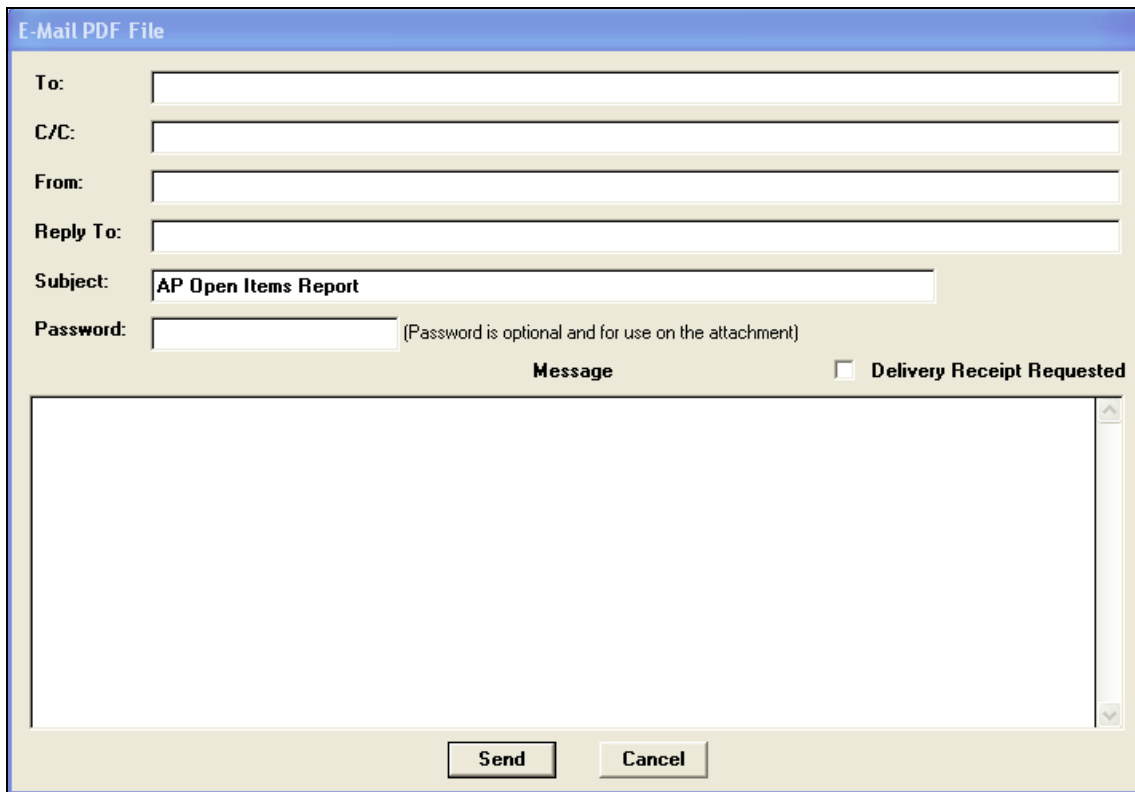
8. After the password is entered the report will open in Adobe Reader.

Vendor Number / Name	Invoice #	Inv Date	Due Date	PC	Inv Amount	Discount	Retainage	Amt Paid	Net Due
<b>ARABIC Arabic Oil Company</b>									
A67513		H 06/09/99	06/24/99		45.50	0.00	0.00	0.00	45.50
L67513		07/18/99	08/02/99		36.50	0.00	0.00	0.00	36.50
V67513		08/10/99	08/25/99		64.23	0.00	0.00	0.00	64.23
Vendor Total					146.23	0.00	0.00	0.00	146.23
<b>BJCARP B.J. Carpet World</b>									
33143		04/01/99	06/28/99		2,960.00	0.00	0.00	0.00	2,960.00
Vendor Total					2,960.00	0.00	0.00	0.00	2,960.00
<b>BELLCO Bell Consultants Inc.</b>									
AP-257		06/09/99	06/24/99		132.50	0.00	0.00	0.00	132.50
VP-257		07/14/99	07/31/99		74.52	0.00	0.00	0.00	74.52
LP-257		07/18/99	08/02/99		183.21	0.00	0.00	0.00	183.21
Vendor Total					390.23	0.00	0.00	0.00	390.23

## E-mail System Option

The e-mail option creates and sends the report in PDF format attached to an email that is created from the system you are in (i.e. – Eclare, Gemini or PS Client).

1. Select the report you wish to e-mail, then select the  button.



The screenshot shows a dialog box titled "E-Mail PDF File". It contains the following fields and controls:

- To:** [Empty text box]
- C/C:** [Empty text box]
- From:** [Empty text box]
- Reply To:** [Empty text box]
- Subject:** [Text box containing "AP Open Items Report"]
- Password:** [Empty text box] (Password is optional and for use on the attachment)
- Message** label
- Delivery Receipt Requested**
- [Large empty text area for message content]
- Send** button
- Cancel** button

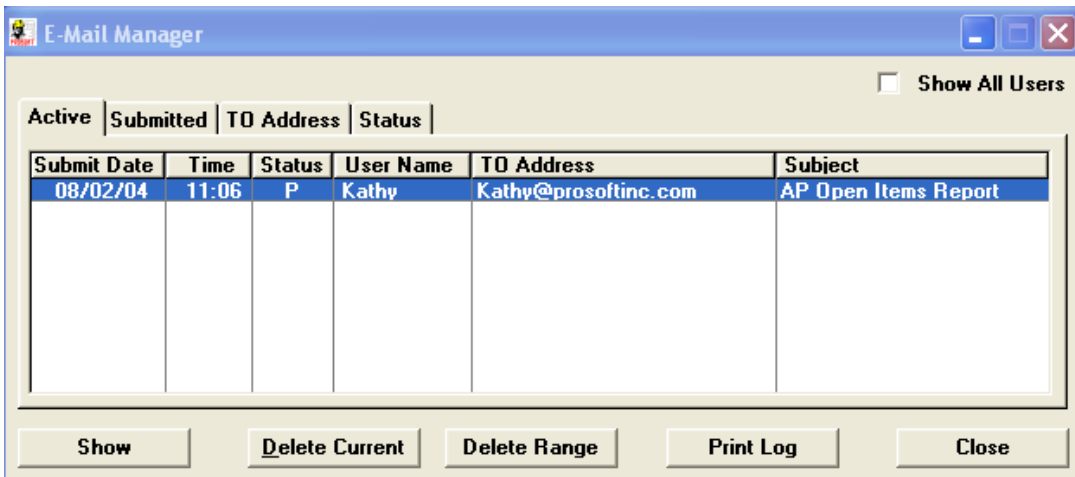
2. Complete the following fields on the screen above.

- |                         |   |
|-------------------------|---|
| <b>To</b>               | - Enter the recipients e-mail address.  |
| <b>C/C</b>              | - Enter any person(s) e-mail addresses that you would like to receive a carbon copy of the email.                                       |
| <b>From</b>             | - Enter your e-mail address.  |
| <b>Reply To</b>         | - Type the person(s) email address they should reply to if different than yourself.   |
| <b>Subject</b>          | - Note that the Subject field is automatically filled in with the name of the report. If you would like to, you may change the subject. |
| <b>Password</b>         | - If you would like the attachment of the report to be password protected enter the password you would like to give to this report.     |
| <b>Delivery Receipt</b> | - If you would like to receive a returned e-mail showing receipt of the email being received check this box.                            |

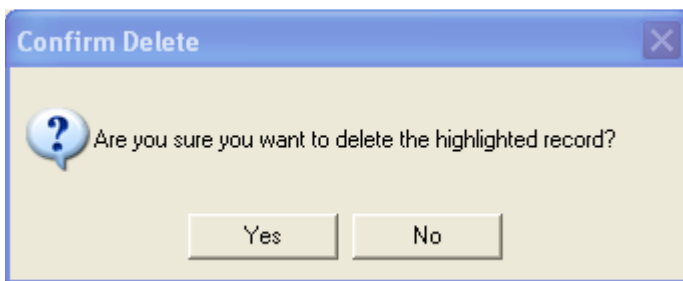
**Request  
Message**

- Type any message you need to go along with this e-mail.

3. Once you have the information completely filled in select the **Send** button to send the email.
4. Once you have sent your e-mail you may view the progress by selecting the File | E-Mail Manager. This will show you the email information on all e-mails Submit Date, Time, Status, User Name, TO Address and Subject.



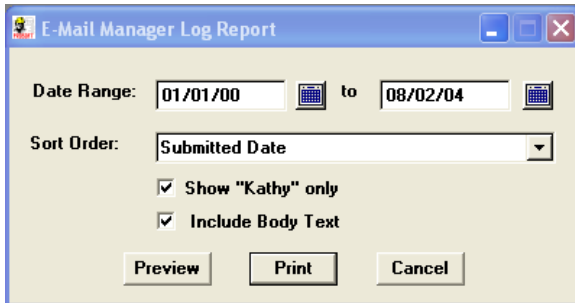
5. Once your e-mail has been sent the status will change and will only show on the last three tabs (Submitted, TO Address & Status). Since the e-mail was sent it is no longer an Active Status.
6. You may clear the currently highlighted record by selecting the **Delete Current**. The system asks you to confirm the delete once you do the record will no longer be shown through the E-mail Manager.



7. You may delete a range by selecting the **Delete Range**; this will delete a date range of e-mails.



8. The next button is the **Print Log**; this allows you to print a log of all E-mails along with the message detail.



9. The report will show all the detail of the report if the “Include Body Text” has been checked.

