Profiles Help and Information Sheet

Profiles can be used to categorise your clients and creditors for different purposes. You may wish to send some types of information to only some of your clients or creditors. Profiles enable you to send certain information by email to those clients or creditors in a select group or 'profile'. The following guide represents the process for Clients but the same process is used for Creditors.

Client Profile Maintenance

Profile maintenance allows client profiles to be defined. This information must be available before profiles can be assigned to a client. Go to "Clients | Profile maintenance". The profiles added will be available to both clients and creditors.

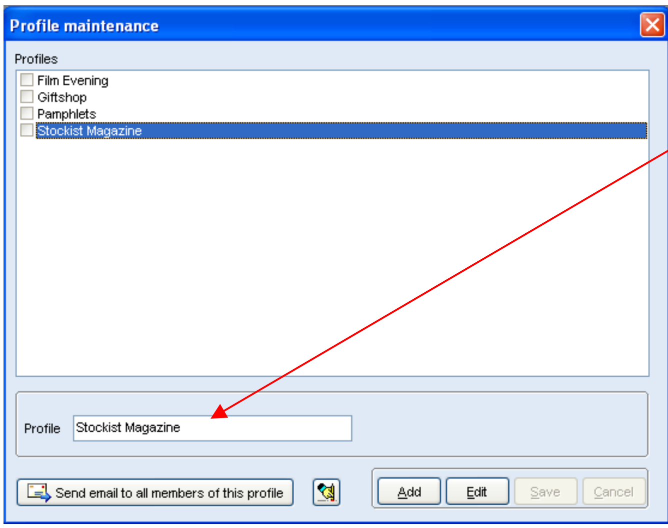


Fig 1. Profile Maintenance Screen

To add a Profile click [Add] and enter the information.
Click [Save].
The Profile will appear in the list.
To edit a Profile click [Edit]. Edit the information and click [Save]. Any clients assigned the edited profile will now display the new version.
To delete a Profile click [ ]. The profile will not appear the next time you open the "Profile Maintenance Screen" (*Fig1.)*.

Assigning Profiles

To assign a profile to a client go to "Clients | Client management | Client detail and select the 'Profiles' tab. See *(Fig 2.)*.

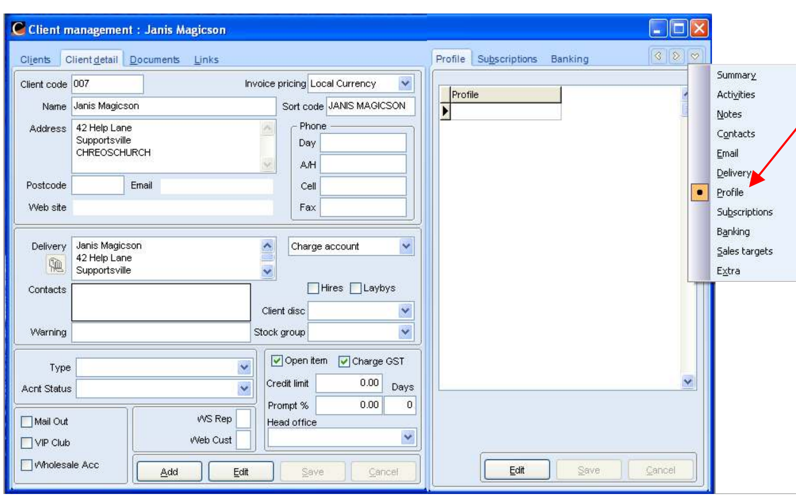


Fig 2. Profile Tab Screen

To assign a Profile to a client, click on the Profile tab and then click [Edit].
A list of the available profiles that you have setup in the Profile Maintenance *(Fig 1.)* will appear.
See *(Fig 3)*.

Assigning Profiles cont.

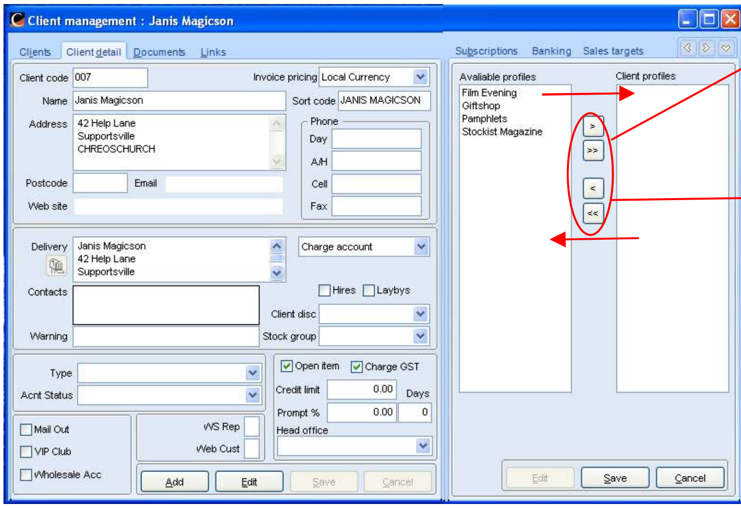
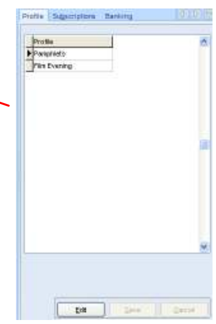


Fig3. Assign Profile Screen

To assign the profile to the client, select from the list of available and double click or use the [>] or [>>] buttons to move into the Client profiles list for that particular client.
Click [Save].
If needed you can move profiles out of the 'Client profiles' into the 'Available profiles' list using the [<] and [<<] buttons.

Once you have selected the profiles they will appear in the 'Profile' tab until you edit them.



Emailing Clients of a Selected Profile

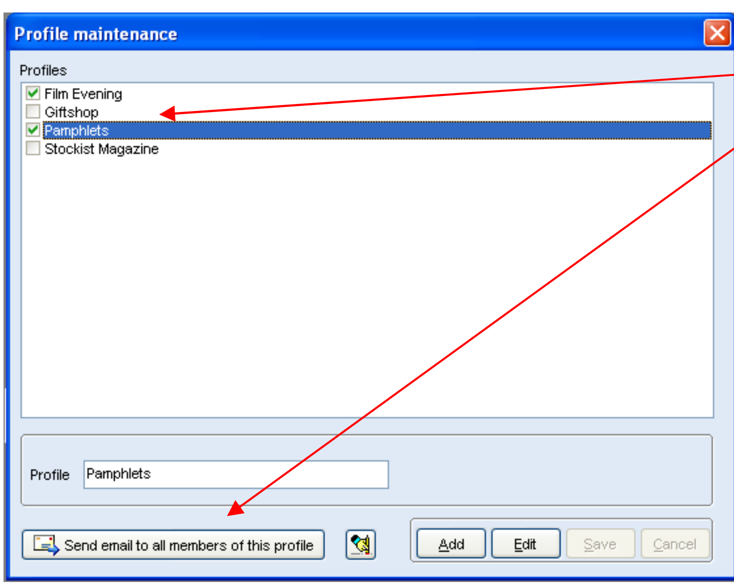


Fig 4. Profile Maintenance Screen

Select the required profile by ticking the box.
Click [Send email to all members of this profile].

A message box will appear asking you to confirm if the email is to be sent to All profile members, Clients only or Creditors only.

After you have made the selection, the "Send Email Screen" *(Fig 5)* will appear.

Emailing Clients of a Selected Profile cont.

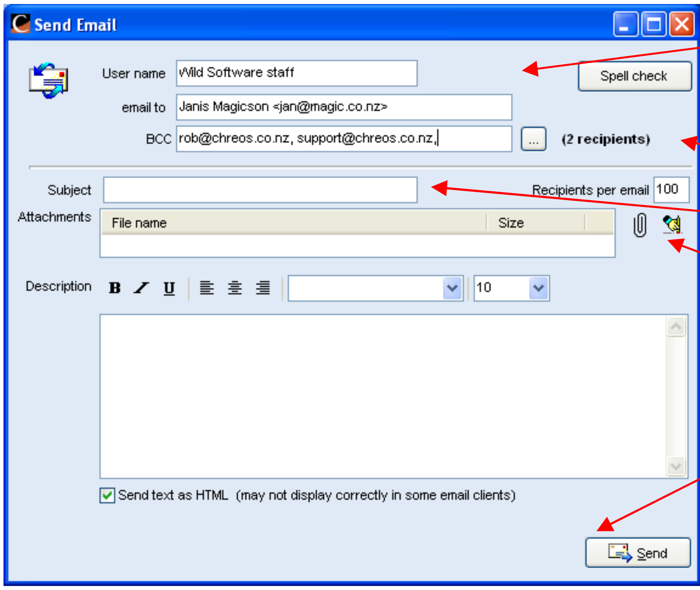


Fig 5. Send Email Screen

The "Send Email Screen" displays the staff user name and the company email address.
The BCC shows the email address of each client in that selected profile that will receive the email and the number of recipients is in brackets.

Enter the subject details of your email.
Add any attachments. If you need to delete an attachment click [ ].
Enter the body of the email, using the [spell check] if necessary.

Click [send] and a progress bar will appear and the email will be sent.

If there are no clients within the selected profile that have email addresses an information message will display and the "Send Email Screen" will not open.

Printing Labels for Profiles

Reports are available that enable you to print labels for clients with selected profiles.
To access these reports go to "Print | Reports and select the report you wish to run.
A useful report for printing labels would be the 'Address labels (6434) Profile (4)' report.