

Introduction

Emailer4TaxPros was created to allow Lacerte users and possibly users of other tax software to deliver PDF organizers in email, and print paper copies for clients with no email address, all in one process. It can also be a year round bulk emailer to broadcast an email with or without an attachment to all your clients that have an email address.

Emailer4TaxPros Quick Start

You need to two things before starting, both very easy to do in Lacerte.

You need to get your clients' email addresses into a .csv format spreadsheet, with client ID in column A and email address in column B.

If you want to send the client PDF organizer or some other client specific file attachment, the name of the file needs to have the client ID in it, preceded by a space. The client specific attachments need to be in the same folder as the .csv file.

Details of how to create these items in Lacerte are below.

Get Started

Download the installation file from www.Emailer4TaxPros.com. Extract the files included in the E4TP.zip file. Click the setup.exe file to install Emailer4TaxPros.

Launch the program, go to Setup and enter your outbound email server information.

On the main screen, enter the email, select the .csv file, choose one of the options and click Start Processing.

Detailed Instructions

Create .csv file:

Lacerte Users: This is easy to do in Lacerte. Start in the client selection grid. Highlight all your clients using F3. Click Client>Export>export to file. Select the folder where you want to save the .csv file and enter a name for the file, then select "comma delimited" as the type of file. Set the right hand side display window to show Client Number and Taxpayer E-mail Address. Then click OK and you are done.

Others: You just need to export client ID or Name or Number, and their email address, to an excel spreadsheet, then save as .csv file. (Try calling your tax software help desk if you can't figure it out). Client ID should be in column A and Email address in column B. You can have information in the other columns, Emailer4TaxPros will ignore it.

Create PDF copies of the organizer:

Lacerte Users: Start in client selection grid, highlight all your clients using F3. Click Tools>Organizer. Work through the wizard to get the organizer the way you want. When you get to the print screen, uncheck Print and check File (PDF). Click OK to

process.

Others: Follow the software instructions to create PDF organizers for all clients. NOTE: the file name of the PDF file must have the client ID or Number or Name as it is shown in the .csv file, and must have a space in front of it. Lacerte uses this format by default. An example of a file name that will work is:

Organizer for smith77.pdf, where smith77 is the client ID.

You can have any words in front of the client ID, but there must be a space before the client ID and a period “.” after the client ID.

Setup

Email Server: Enter the server information. If you use a free email service like yahoo or gmail, the server information is readily available on the internet, just search for yahoo/google etc., outbound email server. (but see Scheduling and Limits).

If you have your own business domain name, probably need to contact the domain host to get the info.

Or you can use one of the many companies that offer outgoing mail servers for very low cost. Here are just a few;

Google Business APPS
TurboSMTP
EasySMTP

Common entries for the remaining setup items are listed.

Authentication Type: is usually SSL.

SSL port: is usually 465.

User Name: is usually your email address.

Password: enter the password associated with the email address entered above.

Email From: this is the email address you want your clients to reply to. It can be different from the email address used to set up the email server.

Test Email: Click TEST, enter the email address you want to send the test to, usually this will be your own email address. If it does not work, you probably need to fix the email server settings.

Scheduling and Limits:

Most email providers will have some limits on the number of emails you can send in a day.

Free email servers like Yahoo and Gmail, have such limits. They change from time to time so it's hard to really know what the current limits are. Looks like Yahoo/ATT does not even publish their limits.

Because Emailer4TaxPros sends out one unique email per client with a one second pause between each email, and does not use CC or BBC to add additional recipients, the number of emails sent out can exceed the limits of your server.

The best solution is to use an email server that you know will handle your volume of email. If you have a business domain, just contact the host of the domain to get this info. Otherwise you can use any one of a large number of email providers, here are just a few:

Google Apps for Business - <http://www.google.com/enterprise/apps/business/>

Easy-SMTP - <http://www.easy-smtp.com/>

TurboSMTP - <http://www.serversmtp.com/>

Deliver2Inbox - <http://deliver2mailbox.com/>

If you run into limit issues, you might be able to work around the limits using the Email Scheduler function in Setup. By default the scheduler is disabled and emails are sent out by Emailer4TaxPros with a one second delay between each email. Using the scheduler, you can set the number of emails to send out in one group, and how many minutes to wait until sending out the next group.

Sending Emails:

Once the setup is done, it's very easy to send emails.

On the main window, just type the email subject and body. You can copy/paste a previously prepared letter.

Enter the .csv client list file, you can browse to its location.

Select what you want to do:

- Send the same email to all your clients.
- Send the same email to all your clients and add an attachment. You need to input the file to attach, again use the browse button. This option might be useful if you have a newsletter PDF file that you want to send to everybody.
- Send an email to all clients with a client specific attachment. This is the key feature of this utility and works perfectly with Lacerte software. It will attach the client's organizer to their email automatically. To accomplish this, make sure the organizers are in the same folder as the .csv file and make sure the file name has the client ID in it. Just accept the Lacerte default to do this. Checking the Print box will make the program print a paper organizer for everybody in the .csv file that does not have an email address. All the print jobs are done first so you can start stuffing envelopes while the program sends out the emails.

Click Start Processing!

The status box will show the total number of emails and print jobs, and show a counter for each so you can monitor the process. It may take a few hours to process everything, depending on the speed of your system, printer, number of email being sent and internet connection.

That's it!