Emailing in QB using personal Email:

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	Preferences								

In QuickBooks, click on "Edit" then "Preferences"

52			Preferences		×
	Accounting	My Preferences	<u>C</u> ompany Preferences		ок
	Bills				Cancel
	Calendar	Auto-check the "Em	iail Later" checkbox red Delivery Method is a mail	Use "Plain Text" format	
P	Checking	ii customers <u>r</u> iele	red Denvery Method is e-mail.	tor e-maneu monces.	Help
13	Desktop View	SEND E-MAIL USING:			Default
%	Finance Charge	Web Mail			
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20	Integrated Applications	O UliskBooks E m	check for vz	alid subscriptions	General
-	Items & Inventory	Please refer to the "	and email using' section in Hel	n to understand how to	
2	Jobs & Estimates	configure a default e	⊢mail client	p to understand now to	
	Multiple Currencies	E-MAIL IDS	SELECT	DEFAULT	
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06	Send Forms	<u>A</u> dd	Edit	Delete	
	Service Connection				
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On the Preferences screen go to the "Send Forms" tab on the left side list then click on the "Add" button

Email Id	accounting@gmail.com	
Email Provider	Gmail	
For some features	(Select)	ince and store it
securely in QuickE	🗸 Gmail	
SMTP SERVER DETAIL	Yahoo	
These default set	Hotmail/Live	if you need to edit
Server Name	Others	
Port	587	
	SSL/TLS	

Enter the personal email address you would like the email to be sent from (i.e. Gmail, Yahoo, etc.) along with selecting the proper email provider in the next box. (The SMTP Server Details will be filled in automatically after selecting an email provider). Click "OK" when finished and "OK" again on the preferences screen.

	Create Invoices	_ 🗆
Main Formatting Send/Ship Reports		8 ^
Find New Save Delete & Memorize	Mark As Pending Print Email Email Later Attach Invoice	Apply Credits
CUSTOMER:JOB test	TEMPLATE Intuit Invoice and Attached Files Batch	> test
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		Email accounting@gmail.com Preferred delivery method E-mail Open balance 0.00
QUANTITY : ITEM CODE : DESCRIPTION		
1 Test	ea 0.00	0.00 CUSTOMER PAYMENT
		Your customer can not pay online Edit customer preferences
		RECENT TRANSACTION
Your customer can't pay this invoice online Turn on CUSTOMER MESSAGE	TOTAL PAYMENTS APPLIED BALANCE DUE	0.00 0.00 0.00 0.00 0.00
MBMO	Save & Close Save & N	New Revert

Now proceed to the document you would like to email, as an example I will be emailing an invoice. Click on the "Email" button located near the top of the screen and choose Invoice from the options

1			
FROM	accounting@gmail.com		•
то	customer@gmail.com	Cc:	Bcc:
ATTACH	Inv 1 from Blank 18940.pdf		0
	Attached 60KB of 2MB limit.		
EMPLATE	Basic Invoice		•
SUBJECT	Invoice 1 from		
BODY	Dear Customer : Your invoice is attached. Please remit payment at your earliest convenience. Thank you for your business - we appreciate it very much. Sincerely,		
	Check Spelling		

On the send invoice screen, your personal email address should be inserted into the "From" box, if it is not, open the drop-down menu and select it. Edit the "To, From, Subject & E-mail Text" areas as you would a regular email. After you are finished editing, click "Send" to send your email, the document will be attached as a PDF file.

Provide Emai	Information	X
Email Id	company@gmail.com	
Password	••••••	
	or Cana	. I

After clicking "Send" you will be presented with a screen to enter your personal email's password, after entering your password and clicking "OK" your document & email will be sent and a confirmation message will be displayed.