**SOP For Sending Invoices through mail**

**Objective**

This SOP outlines the process for sending automated emails with attachments using a VBA script in Excel. The script reads email details from an Excel sheet, attaches relevant files, and sends the emails through Outlook.

**Prerequisites**

* Microsoft Excel installed
* Microsoft Outlook installed
* Verify that the ActiveX Installer service startup type is set to Automatic in the Services of the laptop
* Access to the folder containing the attachment files
* An Excel workbook with a sheet containing the necessary email details
* An Excel workbook should be saved as an Excel Macro-Enabled Workbook (\*.xlsm)
* In the VBA editor, you must first attach the correct Microsoft Outlook reference in the Tools dialog box

**Sheet Setup**

Ensure the Excel sheet ("Sheet1") contains the following columns:

1. **Client Name** (Column A)
2. **From** (Column B)
3. **To** (Column C)
4. **CC** (Column D)
5. **Subject** (Column E)
6. **Body** (Column F)
7. **Status** (Column H) - This will be updated by the script
8. **Dialog Box** (Anywhere) –Type "Send Email" and then attach the VBA code to it.

**Folder Structure**

Ensure all attachment files are stored in the specified folder:

**Note** : Please provide the correct attachment link of your PC (Change)

* C:\Users\ANAROCK\OneDrive - Anarock Property Consultants Pvt Ltd\Documents\Automatic email\Checking invoice\

**File Naming Convention**

The attachment files should contain the Client Name and have a .pdf extension.

**Procedure**

1. **Open the Excel Workbook**
   * Open the workbook containing the email details.
2. **Access the VBA Editor**
   * Press Alt + F11 to open the VBA editor.
3. **Open the Services Manager:**
   * Press Windows + R to open the Run dialog box.
   * Type services.msc and press Enter. This will open the Services Manager.
4. **Locate the ActiveX Installer Service:**
   * In the Services Manager, scroll through the list of services to find "ActiveX Installer (AxInstSV)."
5. **Open the Properties Dialog Box:**
   * Right-click on "ActiveX Installer (AxInstSV)" and select "Properties" from the context menu. This will open the Properties dialog box for the service.
6. **Set the Startup Type:**
   * In the Properties dialog box, find the "Startup type" dropdown menu.
   * Select "Automatic" from the dropdown options.
7. **Apply the Changes:**
   * This needs the admin excess in your latop.
   * Click the "Apply" button to save the changes.
   * Click "OK" to close the Properties dialog box.
8. **Start the Service (if not already running):**
   * If the service is not already running, click the "Start" button in the Services Manager toolbar or right-click on the service and select "Start."
9. **Verify the Changes:**
   * Ensure that the "Status" column for the "ActiveX Installer (AxInstSV)" service shows "Running" and that the "Startup Type" column shows "Automatic."
10. **Access the References Dialog Box:**

* In the VBA editor, click on the "Tools" menu.
* Select "References" from the drop-down menu. This will open the References dialog box.

1. **Select the Microsoft Outlook Library:**
   * In the References dialog box, scroll through the list of available references.
   * Look for "Microsoft Outlook XX.X Object Library," where "XX.X" represents the version number of Outlook installed on your computer.
   * Check the box next to "Microsoft Outlook XX.X Object Library."
2. **Confirm Your Selection:**
   * Click the "OK" button to close the References dialog box and save your selection.
3. **Verify the Reference:**
   * Ensure that the reference to the Microsoft Outlook Object Library is now listed under "Available References" with a check mark next to it.
4. **Insert a New Module**
   * In the VBA editor, insert a new module by right-clicking on any existing module or workbook name, selecting Insert, and then Module.
5. **Paste the VBA Script**
   * Copy and paste the provided VBA script into the new module.
6. **Run the Script**
   * Close the VBA editor and return to Excel.
   * Press Alt + F8, select SendEmailsFromSheet, and click Run.
7. **Monitor the Status**
   * The script will send emails and update the "Status" column to "Done" for each successfully sent email.
   * If an attachment is not found, a message box will notify you of the missing file for the specific client.

**Error Handling**

* If an attachment file is not found, the script will display a message box with the client's name.
* Ensure all attachment files are correctly named and placed in the specified folder.

**Completion**

* Once the script has run, a message box will confirm that all emails have been sent successfully.