User Manual

Email Documents v1.x
For Retail Pro® 8-Series v8.52 and Above

Overview

The Email Docs plugin allows you to email Purchase Orders and Sales Orders.

It also allows you to email Receipts as well as print normal and EFT receipts. The plugin is designed to replace the normal Print/Update behavior of Retail Pro. As such, it will probably require a change in procedure for the Cashier.

With this version, Receipt emailing and printing must be done after the receipt is saved. So you should decide how you want to best handle this. There are several possibilities:

> Set up Retail Pro to return to the Former Receipt list after a receipt is saved. Remove the Print/Update button from the Tender screen and make the Update Only button available. In this case, the Cashier will save the receipt, Retail Pro will display the Former Receipt List and the Cashier will select the Email Receipt button from the side menu.

> Set up Retail Pro to print receipts as it normally would do, but enable the Print dialog so that the Cashier can cancel the printing of the normal or EFT receipt.

A future version will enable the Email Receipt functionality when a receipt is updated. In this case, these procedures will not be necessary.

No special procedures are needed to email Purchase Orders and Sales Orders.

Setup

Before you can email any documents, the plugin must be set up. Go to POS>Receipts and click the Email Docs Setup button from the side menu. The Email Documents setup screen will be displayed.

This screen has four sections for General, Receipts, Sales Orders and Purchase Orders.

General Tab

Email Documents Setup

General | Receipts | Sales Orders | Purchase Orders

Email:

Host (SMTP):

User ID and Password are only entered if the SMTP server uses Authentication:

SMTP User ID:

SMTP Password:

Local Directory for PDF Files:

Browse...

✓ Done

Enter the name of the SMTP server. (This is your outgoing email server).

If your server uses authentication, enter the User ID and Password here.

In the Local Directory for PDF Files box, enter or browse for the local directory where PDF files are created. THIS MUST MATCH THE DIRECTORY ENTERED IN THE NOVAPDF PRINTER SETUP.

Receipts Tab

This section is used for the default settings for Receipts:

Create Customer Records for New Email Addresses

In the case where there is no Bill To Customer on a receipt and an email address is entered so the receipt can be emailed, the plugin can generate a new Customer record in Retail Pro. Check this checkbox if you want a new record created. The Cashier does have an opportunity to enter additional information (such as a name). See the section below on Email/Print Receipts for more information.

Email Defaults

From (Email): The email "From" Address. This is required.

From (Name): The name for the address. This is optional.

BCC To (Opt): If you want a blind CC sent to an address, enter it here.

Reply To (Opt): A Reply To email address. Also optional.

These settings (From Email, From Name, BCC and Reply To cannot be changed by the Cashier at run-time.

Subject: The default subject line for the email.

Body: The default message that is sent.

Subject and Body can be changed at run-time by the Cashier.

The Receipt itself is always sent as a PDF attachment.

Receipt Settings

Email Design and Printer: Select the receipt design that should be used when generating the PDF file. The Printer should be set to the novaPDF printer. (If, for some reason, the novaPDF printer was installed with a different name, select that name).

The plugin can also print the normal and EFT receipts. Select the document designs and printers for the normal and EFT receipts.

Sales Order Tab

This section is used for the default settings for Sales Order:

The meanings of the settings are the same as for Receipts. However, only a design and printer for emailing the Sales Order are required.

Purchase Order Tab

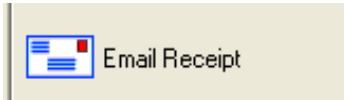This section is used for the default settings for Purchase Order:

Again, the settings are basically the same as the settings for Receipt and Sales Order.
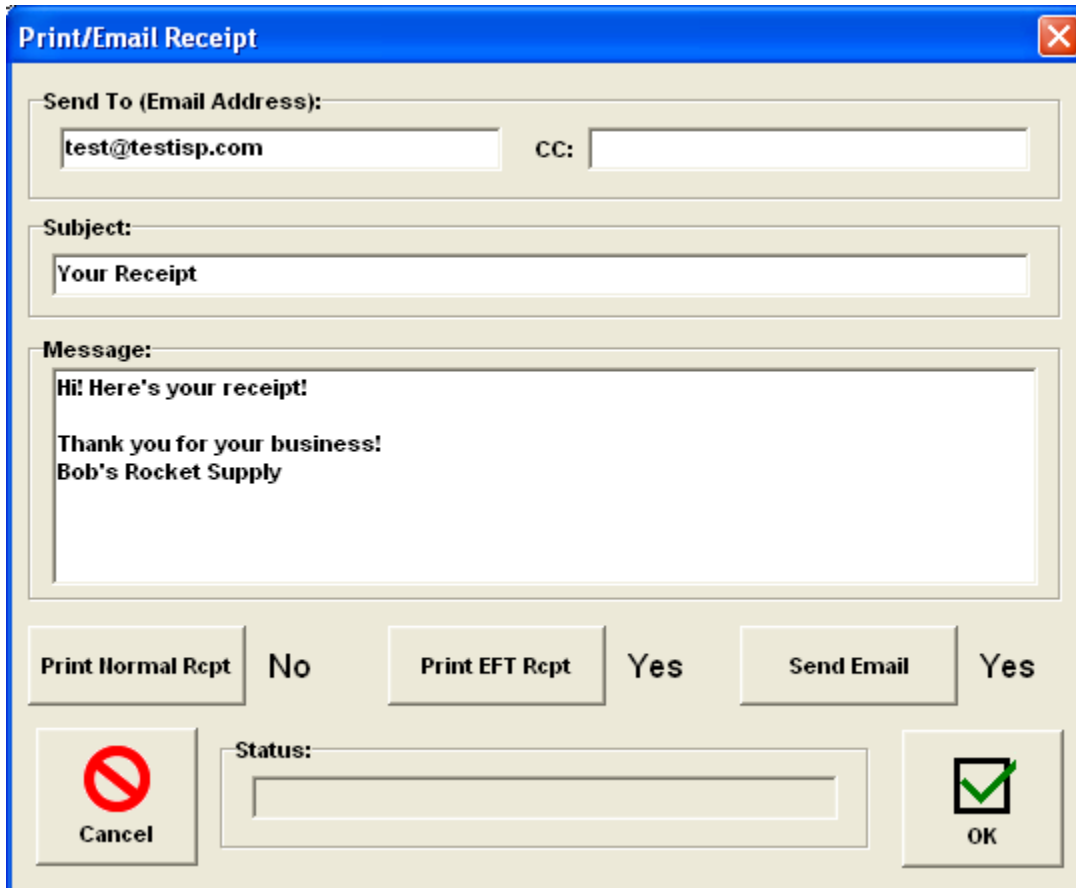
However, when emailing a Purchase Order, it is possible to change the From Email, From Name and PO Document Design at runtime.

Emailing and Printing Receipts

To print and/or email a receipt, select the Email Receipt button from the Receipt List or Form View screen. This button is only active when the receipt has been saved.

The Print/Email Receipt screen is displayed:

If the receipt has a Bill to Customer and the Bill To Customer has an email address, it is shown in the Sent To (Email Address) text box. Otherwise, the Send To box is blank.

If you are emailing the receipt and there is no Send To address, enter it.

To send a copy of the email to another address, enter it in the CC box.

The default Subject and Message from the setup screen are shown.

From this screen you can control all printing and emailing.

Click the Print Normal Rcpt button to change the setting between Yes and No. The default is no.

Click the Print EFT Rcpt button to change the setting between Yes and No. This button only appears if there is a credit card tender on the receipt.

Click the Send Email button to change the setting between Yes and No.

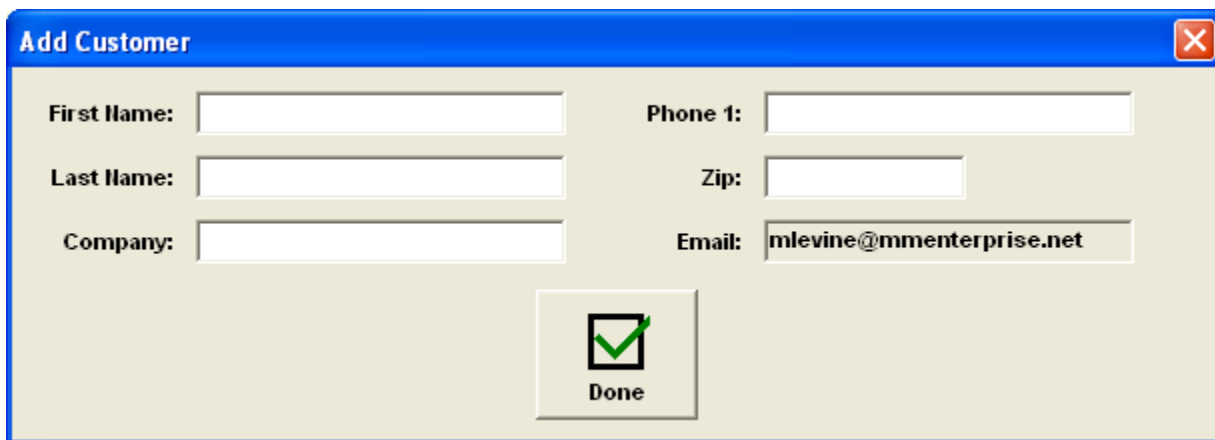The default settings are designed so that the Cashier has a minimum of data entry.

When Done is clicked:

>   If Print Normal Receipt is Yes, a normal receipt is printed.

>   If Print EFT Receipt is Yes, an EFT receipt is printed.

>   If Send Email is Yes, an email is sent. Receipts are sent as PDF attachments to the email.

>   If there is no Bill To Customer on the screen and Create Customer Records for New Email Addresses was selected in setup, then the Add Customer dialog is displayed:

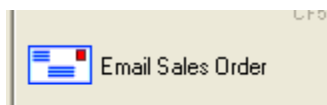None of the information on this screen is required. The Cashier can click the Done button and continue.

In any case, a new Customer record is created and the email address is saved.

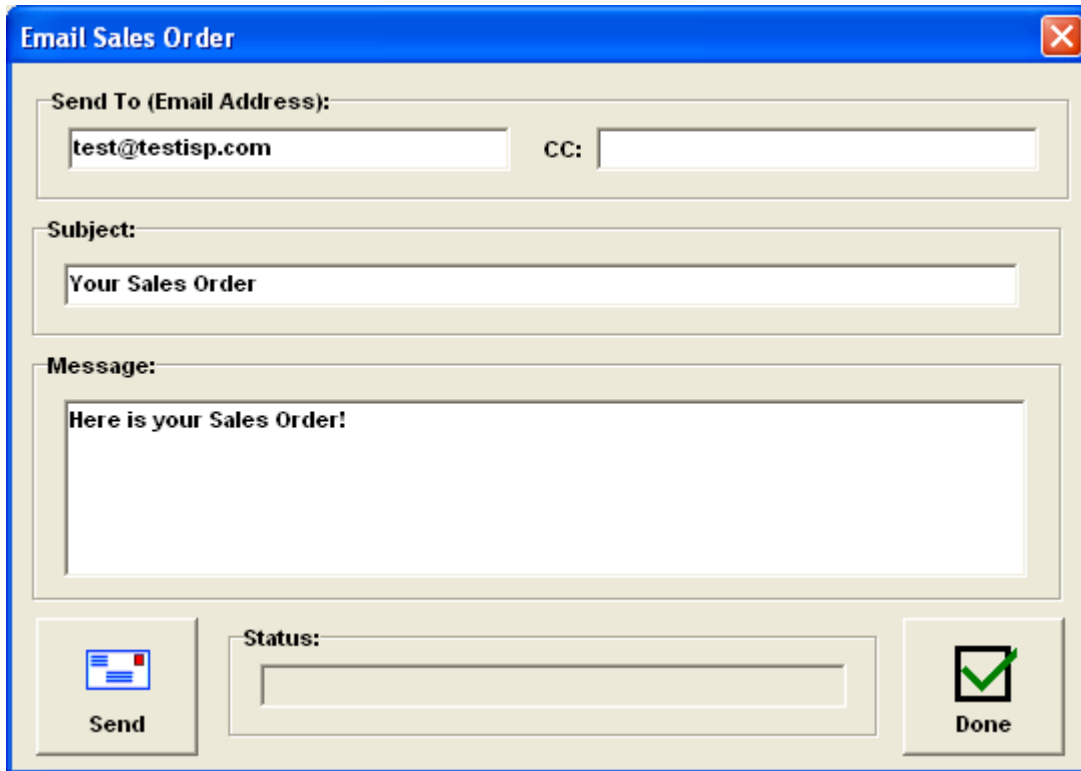Use the Cancel button to exit without printing or emailing anything.

Emailing a Sales Order

From the Sales Order Form View screen, click the Email Sales Order button:

The Email Sales Order screen is displayed:

If the Bill To Customer on the Sales Order has an email address, it is shown in the Send To box. Otherwise, enter the Send To email address.
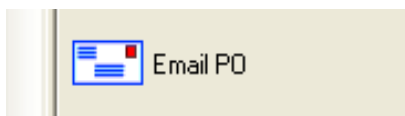
To send a copy, enter a CC address.

The Subject and Message default to the entries from the Setup screen.

Click the Send button to send the email.

Emailing a Purchase Order

From the Purchase Order List or Form View screen, click the Email PO button:

The Email PO screen is displayed:

Email Purchase Order

Send To (Email Address):
vendor@abc.com

CC:

From (Email):
info@mmenterprise.net

From (Name):
Bob Rocket

Subject:
Purchase Order

PO Doc Design:
PO, Active Sngl Vndr

Message:
Here's your PO!

Status:

Send

Done

The Email Purchase Order screen is slightly different than the other screens.

First, if the vendors on the PO have email addresses, they are added to the Send to and CC drop down boxes. However, you can also enter a new address in either one of these boxes. If a new address is entered, it is saved in a database linked to that vendor. So the next time you send a PO to that vendor, the email address will appear in the drop down.

Second, the From Email and Name from the setup screen are shown on this screen and can be changed.

Third, the PO Doc Design drop down is set to the setting from the setup screen, but any other PO design can be selected.

The Subject and Message default to the entries from the Setup screen.

Click Send to send the email.