

## Print/Reprint or Email/Resend Receipts

<b>Document #:</b>	3336	<b>Product:</b>	CenterPoint® Fund
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Receipts can be printed, reprinted, emailed or resent in CenterPoint. CenterPoint allows you to email or print your receipts at the time you save the transaction entry. The receipt will be attached to an e-mail as a PDF file using the selected form design. You can also choose to print/email or reprint/resent multiple receipts after transaction entry via the Print/Email Receipts screen. There are also additional options for reprinting/resending receipts defined in this document.

[One Time Setup: Email Preferences](#)

[Optional Setup: Define a Default Subject and Message for Emailed Receipts](#)

[Set Customer Email/Print Defaults](#)

[Set Sent From and Optional Email Addresses](#)

[Printing or Emailing a Receipt During Entry](#)

[Printing or Emailing Multiple Receipts](#)

[Reprint/Resend Receipts](#)

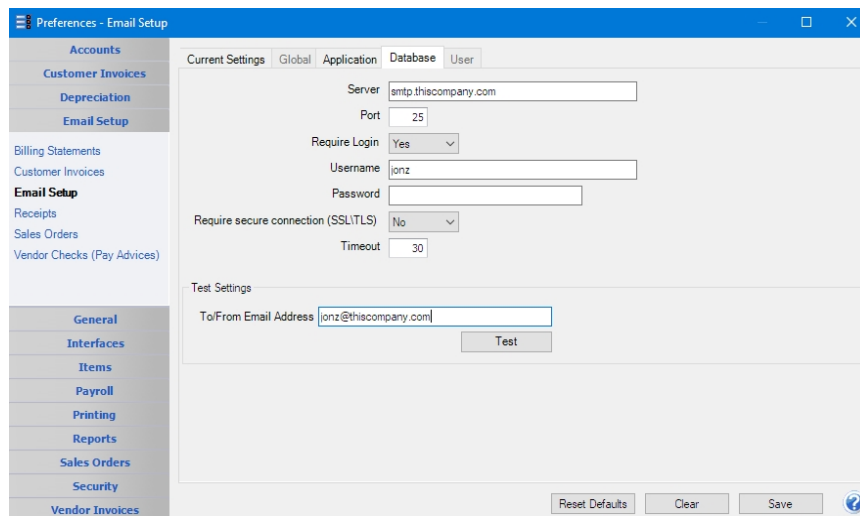
[Option 1: Reprint/Resend Receipts from Print/Email Receipts](#)

[Option 2: Reprint/Resend Transactions from Transaction Search](#)

[Option 3: Reprint/Resend From Report Drill Downs](#)

### One Time Setup: Email Preferences

1. Select **File > Preferences > Email Setup > Email Setup**.
2. Select the **Database** tab.
3. Enter your **"To/From" Email Address**. This is the email address used for testing the SMTP settings and if there aren't any Receipts Sent "From" email addresses assigned under **Setup > General > Email Addresses**. See the *Sent From and Optional Email Addresses* section in this document for more information.



- Once the To/From Email Address is entered, the system will try to auto fill the **Server** and **Port**. If it's unable to auto-fill the information, you'll have to get the information from your network administrator. They can also let you know what you should select in the **Require Login** and **Require secure connection (SSL/TLS)** fields.
- Click **Test**. An email will be sent indicating the SMTP options have been set correctly. Verify that you received the CenterPoint: Testing SMTP Configuration email.



Note: If you didn't receive the email, then the settings in step 4 must be corrected.

- Once the email is received, select **Save** in the Preferences screen.

## Optional Setup - Define a Default Subject and Message for Emailed Receipts

If you'd like to use the same email subject and message each time you email a receipt, it can be added to the preferences. Otherwise, when emailing a receipt, you'll have the opportunity to enter the subject and message at that time.

- Select **File > Preferences > Email Setup > Receipts**.
- Select the **Database** tab.

- Enter a default **Subject** and **Message**.



Note: To create paragraphs, press your Ctrl and Enter keys at the same time.

- Select a default **Form** for emailing receipts. This form will be used to format the PDF file that will be attached to the email.
- Click **Save**.

## Set Customer Email/Print Defaults

Prior to emailing a receipt to a customer, the customer file must include an email address and email form options on the Email/Print tab.

If your customers don't currently have email addresses on the **Email/Print** tab in their record, use the following step to update their records individually.

- Select **Setup > Names > Names** or **Setup > Customers**.
- Find the appropriate customer and click **Edit**.

- Click on the **Email/Print** tab. Use the Email Addresses and Options section on this tab to set up multiple email addresses where Receipts can be sent for this customer. You can also select how each email is to be sent, **No Email**, **Send "To..."** (directly to the recipient), **Send "CC..."** (as a carbon copy), or **Send "BCC..."** (as a blind carbon copy, for example, the person sending the email may want to enter their own email address so they have an audit trail of emails sent ). The Email Addresses and Options settings will be used to set the default image on the Email button on the Receipt entry screen. An envelope image with a check mark on it will mean the form will be emailed and an Envelope image with a cross-through on it will mean the form will not be emailed.

Name	Email Address	Invoices	Statements	Sales Orders	Purchase Orders	Checks (Advices)	Receipts
Joe Smith	joesmith@thiscompany.co	Send "To..."	Send "To..."	Send "To..."	No Email	No Email	Send "To..."
Sue Johnson	suejohnson@thiscompany.co	Send "CC..."	Send "CC..."	Send "CC..."	No Email	No Email	Send "CC..."

**Print Options**

Print Customer Invoices: No  
 Print Customer Statements: No  
 Print Receipts: No  
 Print Sales Orders: No  
 Print Purchase Orders: Yes

The **Print Options** section on this tab for **Print Receipts** is used to determine if receipts should be printed for this name/customer. The Print Options settings will be used to set the default image on the Print button on the Receipts screen. A printer image with a check mark on it will mean the form will Print and a Printer image with a cross-through on it will mean the form will not print.

- Click **Save**.

## Set Sent From and Optional Email Addresses

The Setup > General > Email Addresses menu selection is used to set the name and email address receipts are sent from. This menu allows you to select other Sent From email addresses for the different forms that you send via email.

You can optionally add email addresses where messages and attached documents can be sent to; including internal staff, outside accountants, or other addresses that are not related to the name/customer the transaction is entered for. You can also select how each email is to be sent, directly to the recipient, as a carbon copy, or as a blind carbon copy or set a default "From" email address for each document.

- Select **Setup > General > Email Addresses**.

Name	Email Address	Customer Invoices	Print/Email Checks/Invoices	Billing Statements	Sales Orders	Purchase Orders	Receipts	Checks
JoAnn Smith	jsmith@alpinesports.	No Email	No Email	No Email	No Email	No Email	No Email	No Email
		No Email	No Email	No Email	No Email	No Email	No Email	No Email

**Salesperson Email Options**

Email Customer Invoices: No Email  
 Email Sales Orders: No Email

2. Enter the **Name**, the **Email Address**, and select how receipts should be sent, **No Email**, **Send "From..."** (the default e-mail address the receipt is sent from), **Send "CC..."** (as a carbon copy), or **Send "BCC..."** (blind carbon copy).

## Printing or Emailing a Receipt During Entry

When entering receipts, the Print and Email icons will display the defaults for the selected customer. For example, if you have a customer setup to email only, the Print icon will display a red X on it and the Email icon will have a green check mark on it.

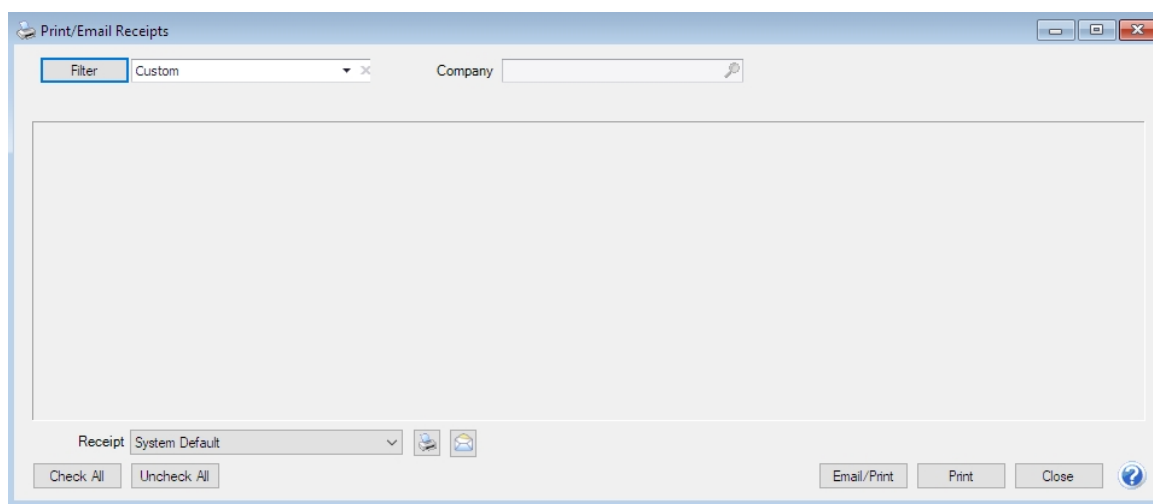
1. If a customer is setup to email their receipts, the system will automatically prompt you to email the receipt when the receipt is saved.
2. You can change the print or email settings for a customer from the Receipts entry screens by clicking on the Print or Email icons. If you click on the Email icon, the settings from the Email/Print tab in Setup > Customers or Setup > Names > Names display. You can add additional recipient email addresses to the To, CC, or BCC boxes by separating the addresses with a semi-colon. You can also change the format of the form the receipt should be emailed on.
3. Use the Print/Email Receipts screen to email a group of receipts after transaction entry.



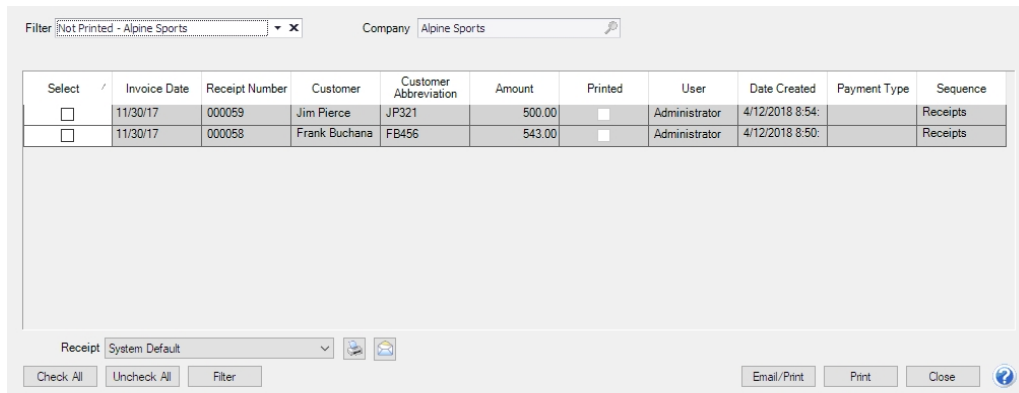
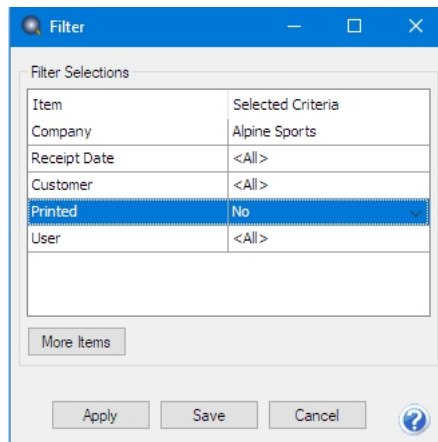
Note: If a customer has multiple receipts selected in the Processes > Sales > Print/Email Receipts screen, they will get a separate email for each receipt being sent. See the *Printing or Emailing Multiple Receipts* section of this document for more information.

## Printing or Emailing Multiple Receipts

1. Select **Processes > Sales > Print/Email Receipts**.
2. If this is the first time entering this screen, the screen will not list any receipts. After using the screen for the first time, the previous filter selection will automatically display.



3. If you would like to filter the list of receipts that display, click the **Filter** button, select your filter criteria, and either **Apply** the filter to the list (you will see Custom in the Filter box) or **Save** the filter so you can select the named filter in the Filter box in the future. In the example below, the filter is set to display receipts that aren't printed and the filter was saved with the name Not Printed - Alpine Sports.



4. To select all receipts for printing, click **Check All** or select each receipt you want to print/email. To unselect all receipts from the printing selection, click **Uncheck All**.
5. Select the **Receipt** form type.
6. Click the **Printer** icon to change the default printer and the number of copies to print.
7. Click the **Envelope** icon to change the defaults set in File > Preferences > Email Setup > Receipts for the Subject, Message, and Form.
8. Click **Email/Print** to email and or print the selected receipts. Receipts will be emailed and/or printed according to the email/print settings on the customer. Click **Print** to print a copy of all selected receipts.
9. You will receive a *Process Completed Successfully* message when the receipt(s) complete emailing.
10. Click **Close**.

## Reprint/Resend Receipts

### Option 1: Reprint/Resend Receipts from Print/Email Receipts

1. Select **Processes > Sales > Print/Email Receipts**.
2. Choose a saved filter that will include the receipt or click the **Filter** button to define new filter criteria.
3. To select all receipts for reprinting/resending, click **Check All** or select each receipt you want to reprint/resend. To unselect all receipts from the selection, click **Uncheck All**.
4. Select the **Receipt** form type.
5. Click the **Printer** icon to change the default printer and the number of copies to print.
6. Click the **Envelope** icon to change the defaults set in File > Preferences > Email Setup > Receipts for the Subject, Message, and Form.
7. Click **Email/Print** to resend and/or reprint all selected receipts or click **Print** to reprint all selected receipts. Receipts will be reprinted and/or resent based on the selections made for the receipts in Setup > Customers or Setup > Names > Names.
8. You will receive a *Process Completed Successfully* message when the receipt(s) complete resending.
9. Click **Close**.

## Option 2: Reprint/Resend Transactions from Transaction Search

1. Select **Reporting Tools > Transaction Search**.
2. Enter the selection criteria for the receipts to be reprinted:

The screenshot shows the 'Transaction Search' window. At the top, there are fields for 'Date Selection' (set to 'Custom'), 'From' (03/01/2007), and 'To' (03/30/2007). Below these are 'Format Definition' and 'Filter Definition', both set to 'Summary'. A 'Search' button is on the right. The main area is a table with columns: Transaction Date, Transaction Number, Entry Screen, First Name, Last Name, and Total Bank Amount. The table lists 18 transactions, including payments to various vendors and employees. At the bottom, there are buttons for 'Print', 'Export', 'Edit', 'Options', and 'Close'.

	Transaction Date	Transaction Number	Entry Screen	First Name, Last Name	Total Bank Amount
1	03/01/07		Pay Employees		0.00
2	03/01/07		Pay Employees		0.00
3	03/01/07		Pay Employees	Jack Stoner	-638.20
4	03/01/07	000017	Vendor Invoices(A/P)	Supreme Uniform Suppl	-134.23
5	03/01/07	000625	Payments	Granite Paging Systems	-99.17
6	03/01/07	000629	Payments	Eastview Service and S	-216.50
7	03/01/07	000630	Payments	Consumer Electronics	-216.50
8	03/01/07	000631	Payments	CenterPoint Water & Ser	-15.00
9	03/01/07	000632	Payments	CenterPoint County Dis	-456.78
10	03/01/07	000633	Payments	Office Connection	-66.20
11	03/01/07	000634	Payments	Fresh Escapes Carpet	-125.00
12	03/01/07	000635	Payments	Justin Bates	-113.50
13	03/01/07	111207 - CashRcpt	Receipts	Cash Receipts	37.50
14	03/02/07	000019	Vendor Invoices(A/P)	Stop N Go Gas Mart	-35.50
15	03/06/07		Pay Employees		0.00
16	03/06/07		Pay Employees		0.00
17	03/06/07	000636	Payments	Global Health Insurance	-366.00
18	03/06/07	000637	Payments	Thalima L...	-79.36

- » Select a period from the drop down or enter a specific date range in the **Date Selection** field
- » Select **Summary** in the **Format Definition** field.
3. Click **Search**. The transactions that meet the selection criteria specified in step 2 will display.
4. Select the transactions you need to reprint/resend. More than one transaction can be selected at a time by dragging your mouse down the rows or by holding down the Ctrl key on the keyboard while single clicking on individual transactions.
5. Right-click and select **Reprint Invoices**.

## Option 3: Reprint/Resend From Report Drill Downs

1. Select **Reports > Reports**.
2. Preview any report where the transaction will be included.
3. Click on the appropriate transaction to display the transaction in it's original format. The Printer and Email icons that display on the transaction will determine if the receipt will be reprinted/resent when you click **Save**.