

# Email "Green" Receipts Table of Contents

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#### Introduction

In an effort to save paper, customers can opt to receive receipts by email. This option is known as Green Receipts. This document outlines the steps required to get you started with Green Receipts.

### **System Options**

For Green Receipts to work, it must be configured in system options. To do so:

1. Select Administrative=>System Options and scroll down to Receipt Options.

🖳 System Options	
₽₽₽	
Receipt Options	×
AskBeforePrintingReceipt	True
Description_Max_Height	1.5
DescriptionLimit	1024
disclaimers	String[] Array
EnableEmailingOfReceipts	True
LogoFile	C:\Documents and Settings'
OmitReceipt	False
PrePrinted	False
PrePrinted_StoreCopy	False
PreviewReceipt	False
PrintBarcodes	True
PrintTearGuide	False
RcptShowAddrPhone	True
RcptShowAssocLastName	True
ReceiptCopies	1
RepairPriceBreakdown	False
RepairTaxWithRepair	False
ReserveHeight	125
ShowBalances	False
ShowDiscount	False
ShowDiscountPercentThresh	1 <b>O</b>
ShowPhotos	True
ShowStoreCreditBalance	True
SpecialOrderTaxWithSpecia	True
WhereAntiPiracy	PreDisclaimers
Barcode Options	
	OK Cancel

- 2. Set EnableEmailingOfReceipts to True.
- 3. Select OK.

#### **User Permissions**

Associates who should be able to setup email configuration settings must be granted permissions to do so. To grant that access:

- 1. Select Administrative=>Associates.
- 2. Select the associate's record and select Edit.

3. Select the **Security** tab.

🖳 Edit Associate #1: Dingle, Dick	
General Commission Security	
Credentials	
Configure Email Settings	
Create a 'Take-off' item	
Create a Non-Bulk Item when a Bulk Master Exists	
Delete a Wish List Entry	
Delete Category	
Delete Customer	
Delete Item	
Edit Credit Card Types	
Edit Merchant Settings (Credit Card)	
Edit Saved History	
I I of 5 >>> Save and New Save and Duplicate Supervisor Revert Save and Stay OK/S and CI	ave ose Cancel

- 4. Check the option to permit **Configure Email Settings**.
- 5. Select OK/Save and Close.

#### **Configuring Email Settings**

To send email receipts, The Edge must be configured to use the email settings associated with your store email account. The fields marked with an asterisk below are specific to your email account. You should contact your email vendor or ISP (internet service provider) and ask them specifically for this information.

#### NOTE!

## Some web-based email applications such as Yahoo mail, Hotmail, AOL mail may not work well from within The Edge.

The Edge email server must be configured to send messages. To do so:

1. Select Administrative=>Email Settings=>Receipts. The Email Receipt Settings window will appear.

Email Receipt Se	ttings
From Name:	EDGE Tech Support
From Email:	support@ajsllc.com
BCC:	
Reply To:	
SMTP Server	
Port #	25 Server Requires SSL
	Server Requires Authentication
User Id	
Password	
Logo File	Browse
Test Connection	OK Cancel

Fields and options to complete in the **Email Receipt Settings** window include:

From Name	The name that you want to appear as the sender of the receipt. This will probably be your store name. This also serves as the "reply to" email address.
From Email	The email address from which the receipt is being sent. This will be your store email account.
SMTP Server*	The outbound server as provided by your email provider. It will probably be an SMTP account.
Port #*	The port number with which your email interacts.
Server Requires SSL*	Whether the outgoing server requires a secure socket layer.
Server Requires Authentication*	Whether the outgoing server requires authentication.
User ID*	The email account's user ID.
Password*	The password for the email account.
Logo File/Browse	Optionally you can supply a logo file (image) containing your store's logo. If you do, the image will appear at the top of the email receipt

- 2. Complete these fields with user and server settings (SMTP) provided by your email provider.
- 3. Select **Test Connection** to have a test email sent to you to verify set up is correct.
- 4. Select OK.

#### Sending a Receipt by Email

To send the receipt by email, after verifying that option with the customer:

- 1. Complete a sale as you normally do.
- 2. After selecting **Done**, you will see a preview of the receipt. If you do not use print preview, but have e-mails enabled, the print preview dialog will be shown with a new e-mail button on the bottom left of the dialog.

Print	EMail	
Presets	Fit Page	
Cancel		

3. Select **Email**. The **Customer Email Selection** dialog will appear showing the list of e-mail addresses associated with this customer.

EMail Type	EMail Address		
HOME	Mary@MyMail.com		
New F	Mail	Send FMail	Cancel

- 4. Select an email address to send the receipt and select **Send Email** to complete the process. You can also provide an alternate e-mail address by selecting **New Email**. If you add a new email address to the customer's record here, it will be available for use in other electronic notifications.
- 5. A confirmation dialog will confirm the status of the email.

Email Receipt Content Setup can be found in a separate tip sheet, Notification and Email Receipt Setup.