# Email "Green" Receipts

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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**.
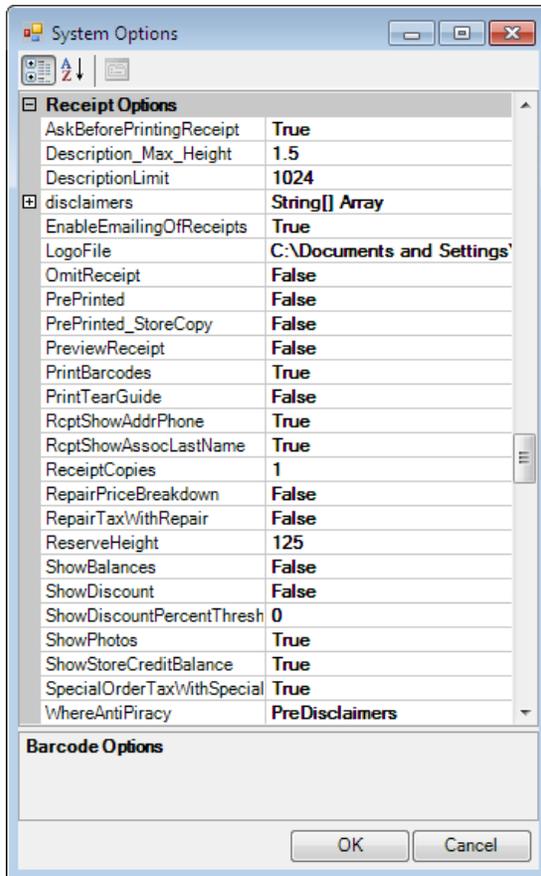


2.  Set **EnableEmailingOfReceipts** to `True`.

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**.

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3.  Select the **Security** tab.
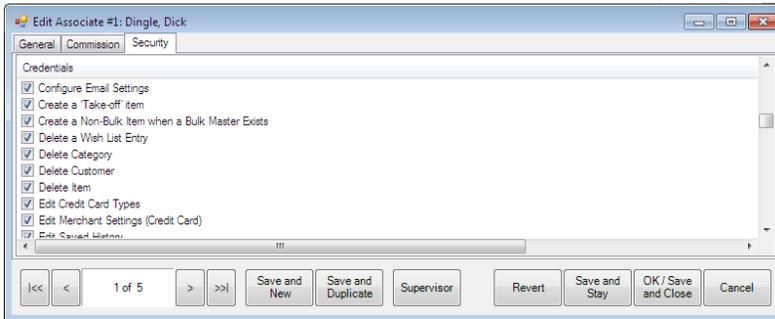


4.  Check the option to permit **Configure Email Settings**.

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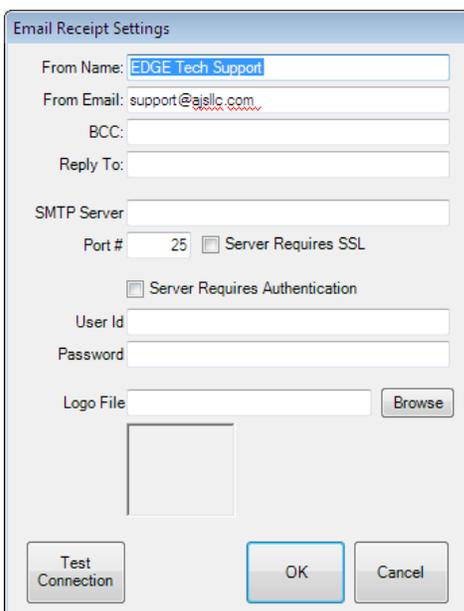
Fields and options to complete in the **Email Receipt Settings** window include:

| | |
|---|---|
| **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.
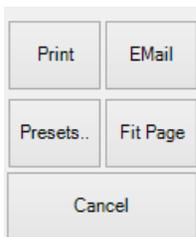


3. Select **Email**. The **Customer Email Selection** dialog will appear showing the list of e-mail addresses associated with this customer.
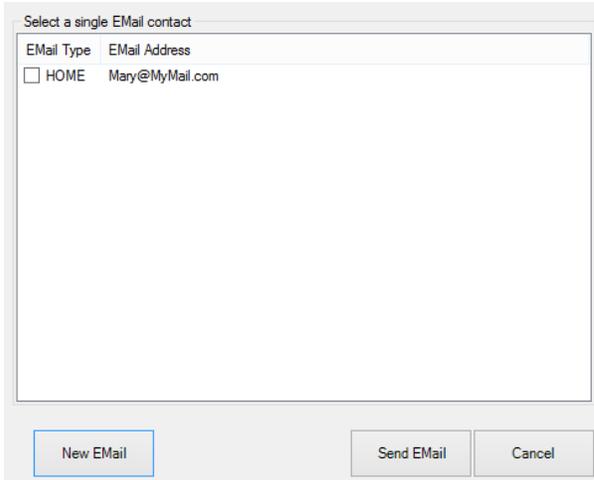
4.  Select an email address to send the receipt and select **Send Email** to complete the process.  You can also provide an alternate e-mail address by selecting **New Email**.  If you add a new email address to the customer's record here, it will be available for use in other electronic notifications.

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.