Emailing Customer Invoices

Document #:	3231	Product:	CenterPoint®

CenterPoint allows you to e-mail your customer invoice at the time you save the transaction entry or mass e-mail a group of invoices at any time. The invoice will be attached to an e-mail as a PDF file using the selected form design.

P r e r e q u i s i t e

The **Email Setup** preference (**File** > **Preferences** > **Email Setup** > **Email Setup** > **Database** tab) is a required part of the configuration needed to send emails from CenterPoint. See the Email Setup topic for additional information.

Step 1: Define a Default Subject and Message for E-mailed Invoices (Optional Setup)

Step 2: Customer E-mail/Print Defaults

Step 3: Sent From and Optional E-mail Addresses

Step 4: E-mailing an Invoice

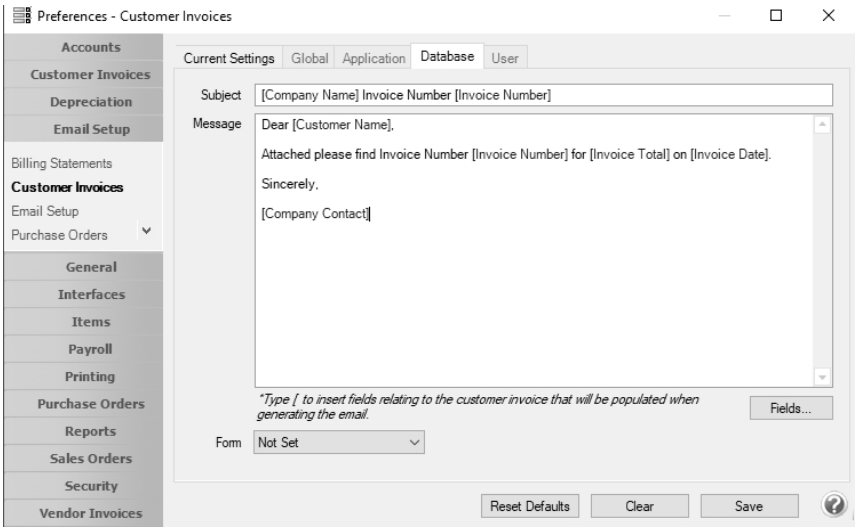
Step 1: Define a Default Subject and Message for E-mailed Invoices (Optional Setup)

If you'd like to use the same email Subject, and Message, and Form each time you email an invoice, it can be added to this preference. This preference also allows you to add Form Fields from the customer invoice data to the default Subject line or Message text.

1. Enter a default **Subject** and **Message**. If you want to insert Form Fields into the Subject or Message of the email, click the **Fields** button or type **[** at the location the form field should be inserted. The available Form Fields for customer invoices are:

Company Address 1	Company Address 2	Company City, State, Zip	Company Contact	Company Email
Company Name	Company Phone	Company Web Address	Custom 1-8	Customer Abbreviation
Customer Name	Due Date	Discount Date	Invoice Date	Invoice Num-ber
Invoice Total	Memo 1	Memo 2	Payment Terms Abbre-viation	Payment Terms
Shipping Method Abbreviation	Shipping Method			

» For example, you can customize the default Subject and Message for emailed invoices to include data fields from the customer invoices along with default text:



a. In the **Subject** box, click **Fields** or type **[**, select **CompanyName**, type **Invoice Number**, click **Fields** or type **[**, and then select **Invoice Number**.
b. In the **Message** box, type **Dear**, click **Fields** or type **[**, select **Customer Name**, and then type a **comma**.
c. In the **Message** box, type **Attached please find Invoice Number**, click **Fields** or type **[**, select **Invoice Number**, type **for**, click **Fields** or type **[**, select **Invoice Total,** type **on**, click **Fields** or type **[**, select **Invoice Date**, and then type a **period**.
d. In the **Message** box, type **Sincerely,**.
e. In the **Message** box, click **Fields** or type **[**, select **Customer Contact**.

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

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

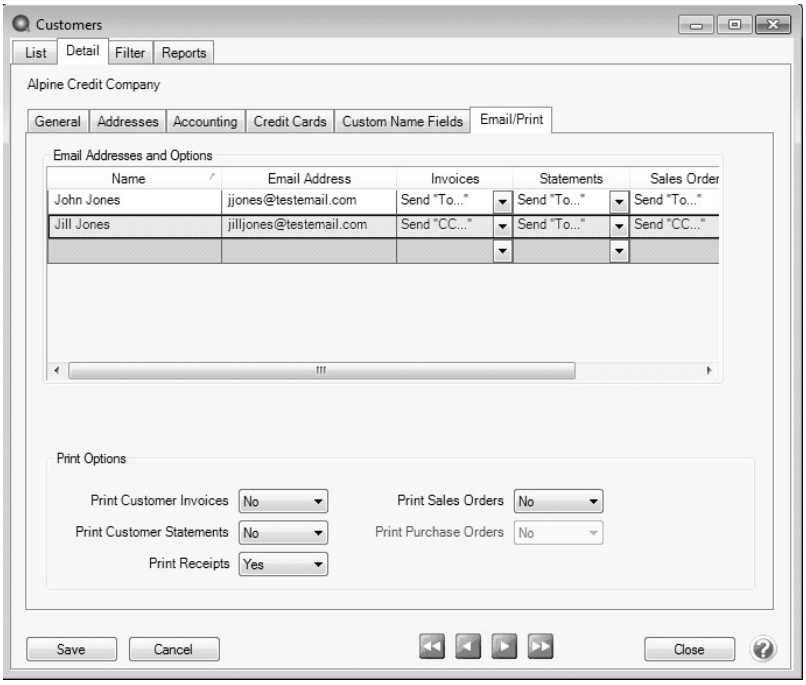
Note: For those customers who normally print invoices on letterhead or a preprinted form, you will want to select a Plain Paper form for e-mailing so that it includes all of the company/fund information also.

Step 2: Customer E-mail/Print Defaults

Prior to e-mailing an invoice to a customer, the customer file must include an e-mail address and e-mail form options on the Email/Print tab.
If your customers don't currently have e-mail addresses on the **Email/Print** tab in their record , use the following step to update their records individually.

1. Select **Setup > Names** or **Setup > Customers**.
2. Find the appropriate customer and click **Edit**.
3. Click the **Email/Print** tab.
4. Click on the **Email/Print** tab.The Email Addresses and Options fields that are active will depend on the modules that you have purchased and registered and if the name is a vendor or a customer. Use these options to set up multiple e-mail addresses where invoices, statements, sales orders, and purchase orders can be sent for this customer. You can also select how each e-mail 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 e-mail 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 Customer Invoices (Basic), Customer Invoices (Detail), Receipts, Sales Orders and Purchase Orders entry screens. 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.

This documentation is for informational purposes only. For specific accounting guidance, please contact your accountant. Last Updated 6/23/2026



The **Print Options** fields that are active will depend on the modules that you have purchased and registered and if the name is a vendor a customer. The available fields are: **Print Customer Invoices**, **Print Customer Statements**, **Print Receipts**, **Print SalesOrders**, and **Print Purchase Orders**. Use these options to determine if invoices, statements, sales orders, and purchase orders should be printed for this customer. The Print Options settings will be used to set the default image on the Print button on the Customer Invoices (Basic), Customer Invoices (Detail), Receipts, Sales Orders and Purchase Orders entry screens. 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.

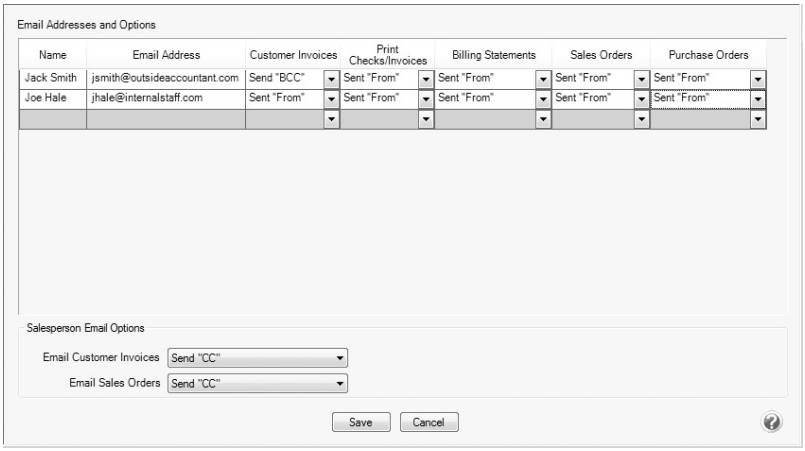
5. Click **Save**.

Step 3 - Sent From and Optional E-mail Addresses

The Setup > General > Email Addresses menu selection is used to set the name and e-mail address customer invoices and print/email checks/invoices (when you e-mail a group of invoices) are sent from. This menu allows you to select other Sent From e-mail addresses for the different forms that you send via e-mail.

You can optionally add e-mail addresses where messages and attached documents can be sent to; including the salesperson that was selected when the invoice is entered and saved, internal staff, outside accountants, or other addresses that are not related to the customer the transaction is entered for. You can also select how each e-mail 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 type (invoice or print/email checks/invoices).

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



2. Enter the **Name**, the **Email Address**, and select how **Customer Invoices** and **Print Checks/Invoices** (when you e-mail a group of invoices) should be sent, **No Email**, **Send "From..."** (the default e-mail address the customer invoice or print/email checks/invoices is sent from), **Send "CC..."** (as a carbon copy), or **Send "BCC..."** (blind carbon copy).
3. If you want the salesperson to receive a copy of the customer Invoice, in the **Email Customer Invoices** box, select either **Send "CC..."** (as a carbon copy), or **Send "BCC..."** (blind carbon copy).
4. Click **Save**.

Step 4 - E-mailing an Invoice

When entering invoices, the Print and E-mail icons will display the defaults for the selected customer. For example, if you have a customer setup to E-mail Only, the Print icon will display a red X on it and the E-mail icon will have a Green check mark.

1. You can change the print or e-mail settings for a customer on the invoice entry screen by simply clicking on the Print or E-mail icons. If you click on the E-mail icon, the settings from the Email/Print tab in Setup > Customers or Setup > Names display. You can add additional recipient e-mail addresses to the To, CC, or BCC boxes by separating the addresses with a semi-colon. You can also change the Form the invoice should be printed on.

2. If a customer is setup to e-mail their invoices, the system will automatically prompt you with the Email settings from the Step 2 - Define a Default Subject and Message for E-mailed Invoices section with the Email Invoice check box selected when the invoice is saved. You can change the e-mail settings from this screen. You can add additional recipient e-mail addresses to the To, CC, or BCC boxes by separating the addresses with a semi-colon. You can also change the Form the invoice should be printed on. Click OK to email the invoice.
3. If you attached documents to a customer invoice (for example pictures of a product, specifications of a product, warranty information, etc),. you can email the attachments with the customer invoice. See the Attach Documents to Transactions topic for detailed information.
4. If you edited and saved a customer invoice, an *Email this customer invoice?* prompt will display to allow you to skip emailing an edited invoice.
5. Use the Print/Email Checks/Invoices screen to e-mail a group of invoices.

Note: if a customer has multiple invoices selected in the Print/Email Checks/Invoices screen, they will get a separate e-mail for each invoice being sent.

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