

Print/Reprint or Email/Resend Invoices

Document #:	3334	Product:	CenterPoint® Accounting
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Invoices can be printed, reprinted, emailed or resent in CenterPoint. CenterPoint allows you to email or print your invoices at the time you save the transaction entry. The invoice 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 invoices after transaction entry via the **Processes > Sales > Print/Email Invoices** screen. During the reprint process, you can choose to keep the original invoice number or assign a new check number. There are also additional options for reprinting/resending invoices defined in this document.

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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 Customer Invoices 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.

4. 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.
5. 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. See the [Email Setup](#) topic for additional information.

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

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

Optional Setup - Define a Default Subject and Message for Emailed Invoices

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 Number
Invoice Total	Memo 1	Memo 2	Payment Terms Abbreviation	Payment Terms
Shipping Method Abbreviation	Shipping Method			

- » For example, if you enter a customer invoice number 02389 for Andy Johnson for Alpine Sports and in the Subject you always want the Company Name/Invoice Number text/ Invoice Number from the customer invoice and the Message to include Dear/Customer Name, on the first line. Attached please find Invoice Number text/Invoice Number from the customer invoice/for text/Invoice Total from the customer invoice/on text/Invoice Date from the customer invoice on the next line, Sincerely on the next line, and then Customer Contact on the final line.
- In the **Subject** box, click **Fields** or type [, select **Company Name**, type **Invoice Number**, click **Fields** or type [, and then select **Invoice Number**.
 - In the **Message** box, type **Dear**, click **Fields** or type [, select **Customer Name**, and then type a **comma**.
 - 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**.
 - In the **Message** box, type **Sincerely**,
 - In the **Message** box, click **Fields** or type [, select **Customer Contact**.

Preferences - Customer Invoices

Current Settings | Global | Application | Database | User

Subject: [Company Name] Invoice Number [Invoice Number]

Message: Dear [Customer Name],
Attached please find Invoice Number [Invoice Number] for [Invoice Total] on [Invoice Date].
Sincerely,
[Company Contact]

*Type [to insert fields relating to the customer invoice that will be populated when generating the email.

Form: Not Set

Reset Defaults | Clear | Save

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

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

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.

- Click **Save**.

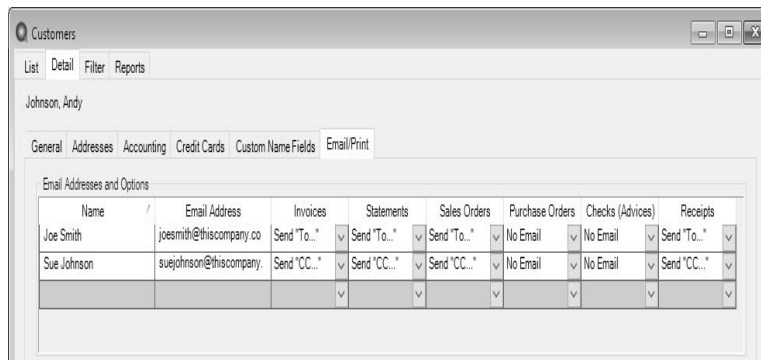
Set Customer Email/Print Defaults

Prior to emailing an invoice 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 Invoices 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 Customer Invoices (Basic) or Customer Invoices (Detail) 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.



The **Print Options** section on this tab for **Print Customer Invoices** is used to determine if invoices 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 Customer Invoices (Basic) or Customer Invoices (Detail) 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.

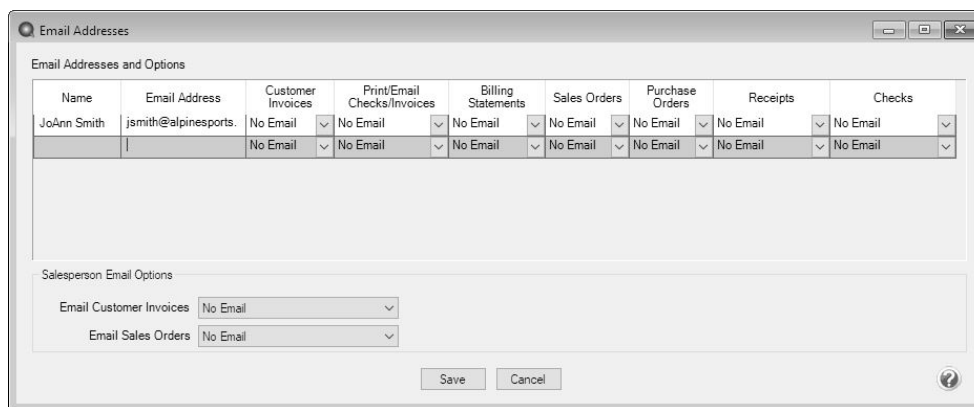
4. Click **Save**.

Set Sent From and Optional Email Addresses

The Setup > General > Email Addresses menu selection is used to set the name and email address invoices 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.

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



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

Printing or Emailing an Invoice During Entry

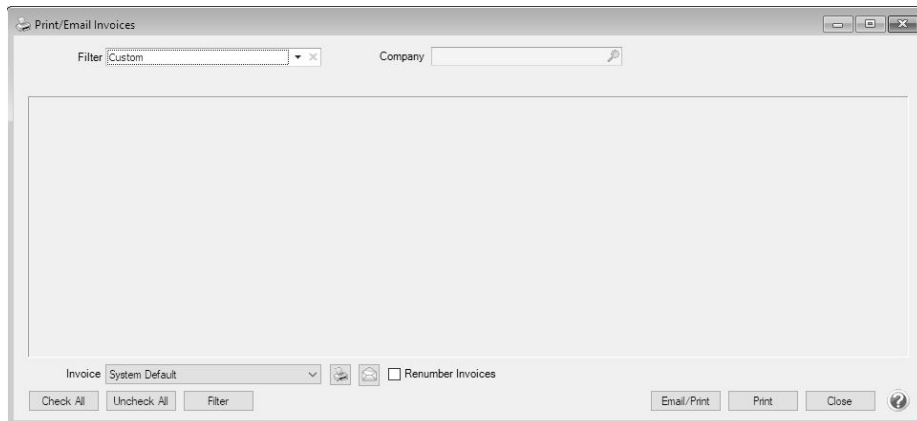
When entering invoices, the Print and Email icons will display the defaults for the selected customer. For example, if you have a customer setup to email only, the Print icon will display a red X on it and the Email icon will have a green check mark on it.

1. 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 Print icon, you can determine if the invoice should be printed and select and change the form type, printer, or number of copies. 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 Optional Setup - Define a Default Subject and Message for Emailed 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 edited and saved a customer invoice, either/both messages: *Print this customer invoice?* or *Email this customer invoice?* display to allow you to skip emailing/printing an edited invoice. Which question displays depends on the selections on the customer's Email/Print tab in Setup > Customers or Setup > Names.
4. Use the Print/Email Invoices screen to email a group of invoices after transaction entry.

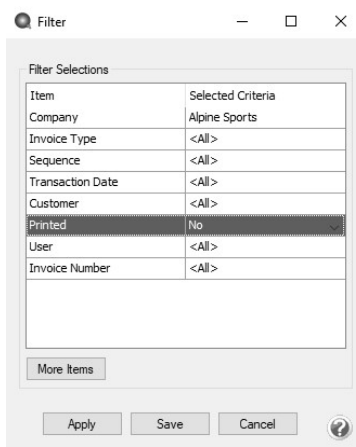
 Note: if a customer has multiple invoices selected in the Processes > Sales > Print/Email Invoices screen, they will get a separate email for each invoice being sent. See the *Printing or Emailing Multiple Invoices* section of this document for more information.

Printing or Emailing Multiple Invoices

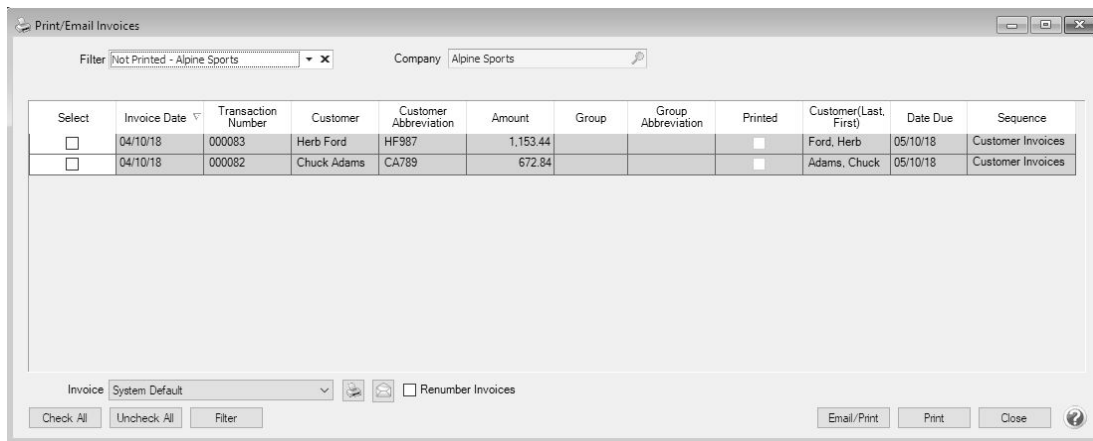
1. Select **Processes > Sales > Print/Email Invoices**.
2. If this is the first time entering this screen, the screen will not list any invoices. After using the screen for the first time, the previous filter selection will automatically display.



3. If you would like to filter the list of invoices 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 invoices that aren't printed and the filter was saved with the name Not Printed - Alpine Sports.



Note: To display a range of invoice numbers to print/email, click in the Invoice Number Selected Criteria column and then enter a range to print/email From and To.



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

Reprint/Resend Invoices

Option 1: Reprint/Resend Invoices from Print/Email Invoices

- Select **Processes > Sales > Print/Email Invoices**.
- Choose a saved filter that will include the invoice or click the **Filter** button to define new filter criteria.
- To select all invoices for reprinting/resending, click **Check All** or select each invoice you want to reprint/resend. To unselect all invoices from the selection, click **Uncheck All**.
- Select the **Invoice** form type.
- Click the **Printer** icon to change the default printer and the number of copies to print.
- Select the **Renumber Invoices** check box to change the invoice number for printed invoices.

7. Click the **Envelope** icon to change the defaults set in File > Preferences > Email Setup > Customer Invoices for the Subject, Message, and Form.
8. Click **Email/Print** to resend and/or reprint all selected invoices or click **Print** to reprint all selected invoices. Invoices will be reprinted and/or resent based on the selections made for the invoices in Setup > Customers or Setup > Names > Names.
9. You will receive a *Process Completed Successfully* message when the invoice(s) complete resending.
10. Click **Close**.

Option 2: Reprint/Resend Transactions from Transaction Search

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

The screenshot shows the 'Transaction Search' window with the following data:

Transaction Date	Transaction Number	Entry Screen	First Name, Last Name	Total Journal Amount
06/01/05		Accrued Interest		0.00
06/01/05	007263	Payments	BCBS	3,574.45
06/01/05	007264	Payments	Jenner Farm Equipment	2,318.24
06/01/05	007265	Payments	Hawkeye Pest Manager	30.00
06/01/05	007266	Payments	Johnson Auto Parts	536.72
06/01/05	007267	Payments	Tim Black	624.92
06/01/05	007268	Payments	Hadley Hardware	248.90
06/01/05	007269	Payments	Steven King	3,500.00
06/01/05	007270	Payments	Jeremy King	561.00
06/01/05	007271	Payments	Tim King	3,500.00
06/01/05	Journal0000	General Journal Entries		0.00
06/02/05	EFT014	Receipts		150,000.00
06/03/05	007272	Payments	Area Ag Center	11,499.02
06/03/05	007273	Payments	Johnson Auto Parts	205.29
06/07/05		Vendor Invoices(A/P)	Upper Midwest Telecon	71.66
06/07/05	007274	Payments	Tracy Williams	125.72
06/08/05		Vendor Invoices(A/P)	C&H Disposal Service	106.06
06/08/05	007275	Payments	Farm Bureau Insurance	115.00

- » 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 invoice will be reprinted/resent when you click **Save**.