



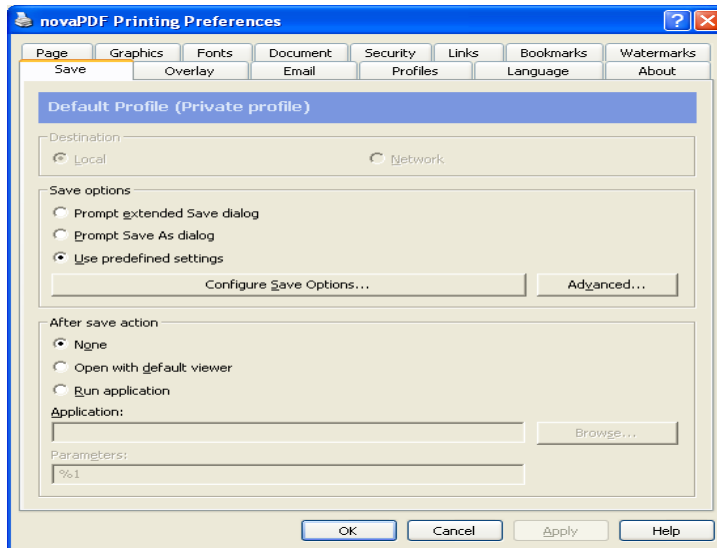
December, 2013

# Using Email Receipts

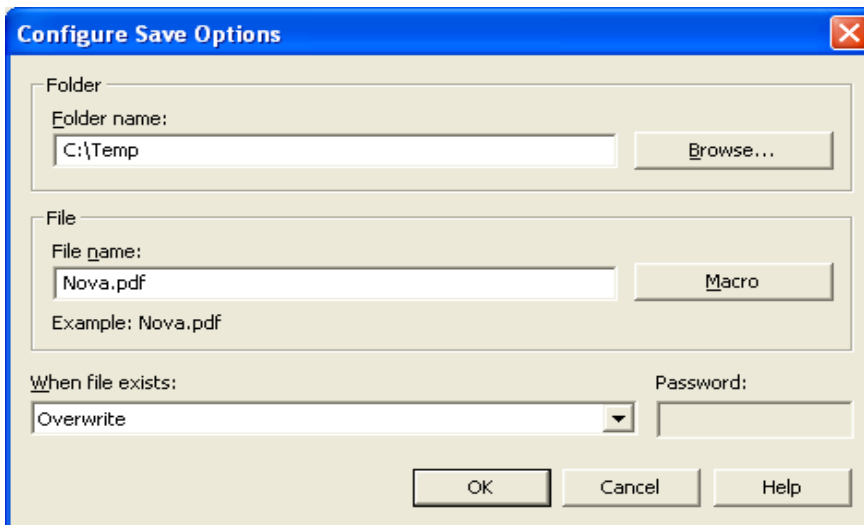
In Retail Pro v9

The following steps will outline how to use the emailing receipts plugin in v9. The features outlined here are available from Big Hairy Dog using a plugin For Retail Pro V9. Please contact your Sales Rep for more information.

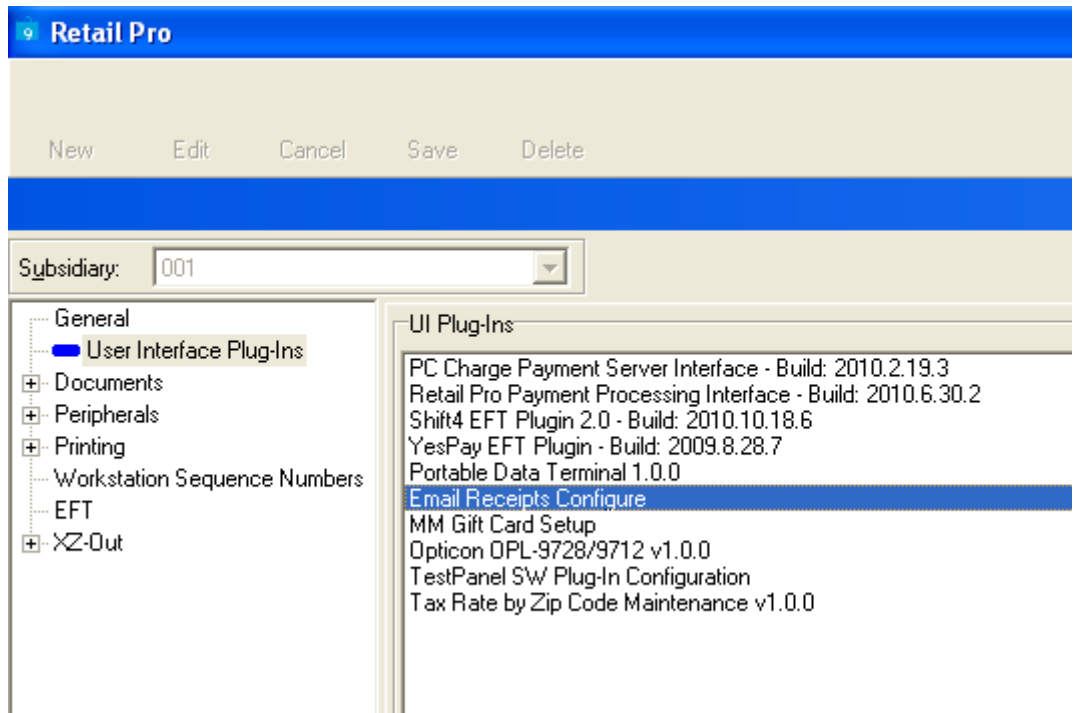
- 1) The setup for emailing receipts in v9 would need to be done by a tech from Big Hairy Dog after purchase of the plugin.
- 2) The first thing we need to do is download Nova PDF and set it up so it can send PDF files to a certain directory on your computer.
- 3) Next, open windows printers and faxes (devices and printers in windows 7/8) and find the NovaPDF. Go to Properties of the NovaPDF printer.
- 4) Select the save tab



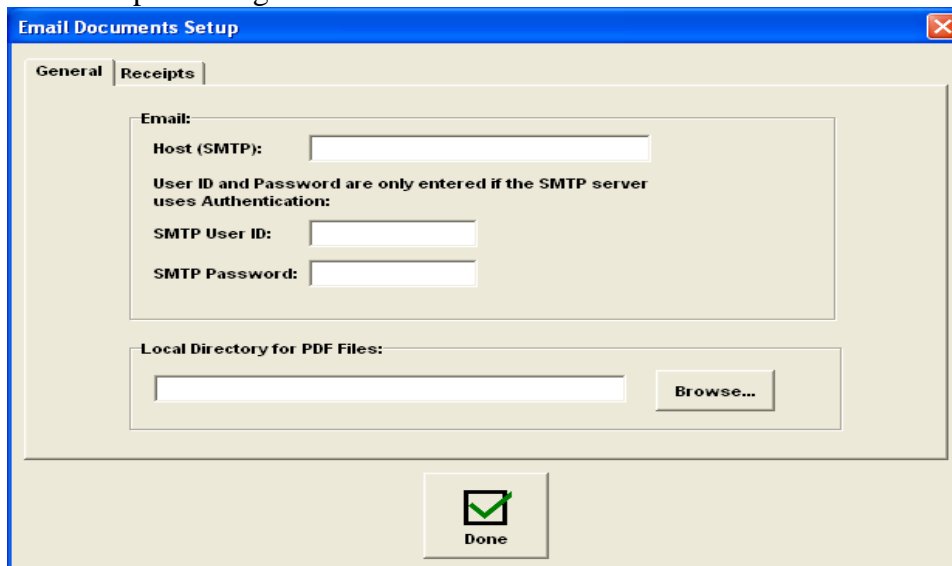
- 5) Select the “Use Predefined Settings” radio button, then “None” for the “After save action”. Click the Configure Save Options. This will display the Save Options screen:  
Browse for the folder you would like to drop the PDF files into for the emailing program to pick them up.



- 6) Once this is finished we can add the Email Receipt button to the side menu using menu designer.
- 7) Once the install of NovaPDF has been completed we can start the retail pro configuration. Go to Options and then WS Preferences.
  - a. Then User Interface Plug-Ins and double click on Email Receipts Configure.



- 8) A new screen will show with some settings. Here you will fill in the Outgoing email host. The plugin does not support SSL, so email programs like Gmail and Yahoo will not work unfortunately. To use this plugin, you can use a free smtp server to push out the data without SSL. In this case I use PostCast server. This is a free smtp emailing client.



- 9) Fill this part out using the SMTP name you have for the outgoing server. The user ID will be the ID and password for the email address you are using.
- 10) The Local Directory will be where we pointed the NOVA PDF when that was installed.

11) Next, go to the Receipts tab at the top. The area will look like this:

The screenshot shows the 'Email Documents Setup' dialog box with the 'Receipts' tab selected. At the top, there is a checked checkbox labeled 'Create Customer Records for New Email Addresses'. Below this, the 'Email Defaults' section contains several input fields: 'From (E-Mail):', 'From (Name):', 'Subject:', 'BCC To (Opt):', and 'Reply To (Opt):'. A larger text area for 'Body:' is also present. The 'Receipt Settings' section at the bottom includes a dropdown menu for 'Design' set to '40 Col' and another dropdown for 'Printer' set to 'novaPDF'. A 'Done' button with a green checkmark icon is located at the bottom center of the dialog.

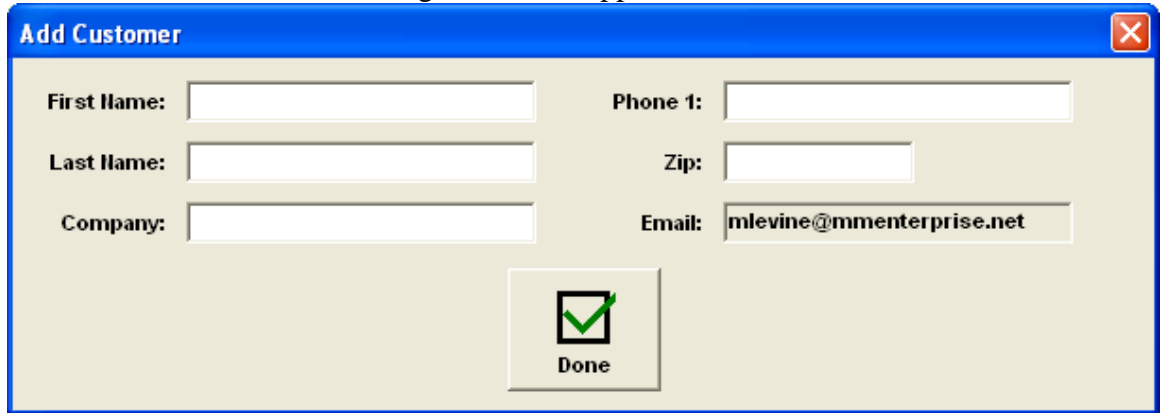
12) Fill in all the required information as far as the email address you would like to appear on the outgoing emails, the subject line and the body of the email. Make sure the printer is set to novaPDF.

- a. There is a check box "Create Customer Record for New Email Addresses." That will prompt to create a customer when an email address not already in your records when prompted to email.

13) This is all the setup and now we can test it in Retail Pro. After a receipt is updated or print/updated the Email Receipts box will prompt to send out an email.

The screenshot shows the 'Email Receipt' dialog box. It features a 'Send To (Email Address):' field with a 'CC:' field to its right. Below these is a 'Subject:' field containing the text 'Your Receipt'. The 'Message:' section contains a text area with the text 'Hey!!'. At the bottom left is a 'Cancel' button with a red 'no' symbol. At the bottom right is an 'OK' button with a green checkmark. A 'Status:' field is located between the 'Cancel' and 'OK' buttons.

14) If a new email address is entered and you have the checkbox for adding customers checked, the add customer dialogue box will appear.



**Add Customer**

First Name:

Last Name:

Company:

Phone 1:

Zip:

Email:

Done

15) Simply add the customer if they would like to be added in the system. And you are done setting up emailing receipts in Retail Pro V9!