



## Emailing and Printing as a Single Job

Megan De Freitas - 2024-11-22 - System

### Overview

Users can send multiple documents for the same customer in a single email, fax, or print job, from modules that permit bulk faxing or emailing (Sales Batch Processing, Sales Batch Line Processing, Sales Document Search). If documents for more than one customer are selected for print/fax/email, one email will be sent to each customer with only the customer's documents attached.

### Usage

In Sales Batch Processing, you can select multiple sales documents and click on the "Print" button in the header. This brings up the "Printing Sales Document Report" screen:

The screenshot shows the 'Printing Sales Document Report' dialog box. On the left, under 'Print Options', the 'Print as Single Job' checkbox is checked and highlighted with a red rectangle. Other options include 'Select All', 'Select None', 'Collate', 'Close after Print', 'Email as Single Job', 'Prevent Changes', 'Properties...', 'Mark Default Reports', and 'Print Attachments' (set to 'Print None'). The main area, 'Available Reports', contains a table with columns 'ReportName', 'Printer', and 'Copies'. The table lists various documents, with the first two rows highlighted in blue. At the bottom, there are buttons for 'Preview...', 'Print To...', 'Quick Print', and 'Close'.

ReportName	Printer	Copies
<input type="checkbox"/> 27503 - Circa Lighting Invoice		
<input type="checkbox"/> 28494 - Agora Foods Pick Ticket		
<input type="checkbox"/> 31422 - DSG Picking Ticket		
<input type="checkbox"/> Customer RGA		
<input type="checkbox"/> Detailed Packing Slip		
<input type="checkbox"/> Excel Sales Document		
<input type="checkbox"/> Internal RGA		
<input type="checkbox"/> Invoice		
<input type="checkbox"/> NYX Sample Pick Ticket		
<input type="checkbox"/> Order		
<input type="checkbox"/> Order Confirmation		
<input type="checkbox"/> Packing Slip		
<input type="checkbox"/> Picking Ticket		
<input type="checkbox"/> Quote		
<input type="checkbox"/> Return		
<input type="checkbox"/> Sales/Word Document		

You can check the box marked "Print as a Single Job" to send all the selected documents to a chosen printer. Check the "Email as Single Job" box to email all the selected documents as one job.

### Usage Scenario

In this example, five sales documents for two different customers are selected:

Customer Search Sales Batch Processing

Close Search Print Transfer to Invoice Forward Allocate Charge CC Payments Email Fax

Search By

Sales Batch:  ☒ Selected Documents Only ☐ Forward After Print ☒ Forward After Email

Search Results

Sales Batch	Sou...	Sales Doc Type	Sales Doc Num	Customer...	Customer Name	Entere...	Fr...	Shipping ...	Payment T...	Warehouse ...	Status	Total	Billing Email	Shipping Email
SENT TO BUILD	Open	ORDER	ORDST2393	AARONFI...	Aaron Fitz Electrical							0.00		
TO INVOICE	Open	ORDER	ORDST2394	AARONFI...	Aaron Fitz Electrical							0.00		
READY TO PICK	Open	ORDER	ORDST2392.2	ADAMPAR...	Adam Park Resort							0.00		
READY TO PICK	Open	ORDER	ORDST2392.1	ADAMPAR...	Adam Park Resort							0.00		
READY TO PICK	Open	ORDER	ORDST2392.3	ADAMPAR...	Adam Park Resort							0.00		
SHIPPING MODE	Open	ORDER	ORDST2395	AARONFI...	Aaron Fitz Electrical							0.00		
SHIPPING MODE	Open	ORDER	ORDST2396	AARONFI...	Aaron Fitz Electrical							0.00		
SHIPPING MODE	Open	ORDER	ORDST2398	AARONFI...	Aaron Fitz Electrical							0.00		
SHIPPING MODE	Open	ORDER	ORDST2397	AARONFI...	Aaron Fitz Electrical							0.00		
SHIPPING MODE	Open	ORDER	ORDST2399	AARONFI...	Aaron Fitz Electrical							0.00		

Starts with([Sales Doc Num], 'ORDST239')

Sales Batch Processing Emails

Print Options

Select All Select None Collate Properties... Mark Default Reports

Available Reports

ReportName	Printer
<input type="checkbox"/> Customer RGA	
<input type="checkbox"/> Excel Sales Document	
<input type="checkbox"/> Internal RGA	
<input type="checkbox"/> Invoice	
<input type="checkbox"/> Invoice DESIGN	
<input type="checkbox"/> Invoice WIRE	
<input checked="" type="checkbox"/> Order	
<input type="checkbox"/> Order Confirmation	
<input type="checkbox"/> Packing Slip	
<input type="checkbox"/> Packing Slip DESIGN	
<input type="checkbox"/> Picking Ticket	
<input type="checkbox"/> Picking Ticket DESIGN	
<input type="checkbox"/> Quote	
<input type="checkbox"/> Return	
<input type="checkbox"/> Sales/Word Document	

**IF EMAIL (OR FAX) IS CLICKED AND THE APPROPRIATE REPORT IS SELECTED:**

If Email As Single Job and Print As Single Job are both checked, SalesPad will send 2 emails—one for each customer—with one customer's documents together as one attachment.

If Email As Single Job is checked, but Print As Single Job is not, SalesPad will send both customers a separate email with each of their documents attached separately.

If Email As Single Job is not selected, each document will be sent to the corresponding customer in a separate email, regardless of the Print As Single Job check box.

**IF PRINT IS CLICKED AND THE APPROPRIATE REPORT IS SELECTED:**

If Print As Single Job is selected, one print job will be created, and all documents will print together (regardless of the Email As Single Job check box).

If Print As Single Job is not checked, each selected document will print separately (regardless of the Email As Single Job check box).