How do I email/fax/print a sales document?

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Emailing, faxing, and printing are all performed from the Print dialog. Open the sales document you would like to print and click Print*. Select the report to print and select either Email, Fax, Quick Print (to print using the default printer), or Print to... (to find a printer before printing). You can also click Preview to get a preview of the report before emailing, faxing, or printing.

Emailing and Faxing in SalesPad GP requires proper setup:
• For faxing, set the Email to Fax Format String in the Settings module.

> Accepted formats include:
>
> {0}@metrofax.com
>
> When you hit the Fax button, SalesPad GP sends your fax provider (ex. MetroFax) an email with the fax number and a .PDF copy of the file to send, which the provider will fax to the recipient on your behalf.
> If you need a low-cost web-based fax service, many of our customers are using MetroFax.

• For emailing, refer to the SalesPad GP Emailing and Email Templates for more information.

Note: In versions 4.1 and later, there are "Print Allowed" security settings that must be enabled in order to print sales documents (Ex: Security Editor > Sales Documents > Print Allowed allows printing from a sales document and Security Editor > Sales Batch Processing > Print Allowed allows printing from the Sales Batch Processing module).

***Note**: You can also print, fax, or email multiple documents at once using Sales Batch Processing. In versions 4.1 and later, you can also print, fax, or email multiple selected documents from the Sales Document Search | SalesPad Desktop screen.