



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

Megan De Freitas - 2024-11-22 - FAQ

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 document](#) 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](#) screen.