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Printing and Emailing PDF Attachments

Megan De Freitas - 2024-11-22 - Reporting

Settings

To allow for printing attached PDF documents when printing reports:

- 1. Go to **Modules** > **Settings**
- Filter to "print pdf" and set Print PDFs attached to Sales Documents and Items to True

Filter:
print pdf
🗆 Printing
Print PDFs attached to Sales Documents and Items True

Usage

PRINTING

To print a document in SalesPad with PDF attachments:

1. Create a user defined field with a PDF attachment

Note: You should have a user defined field on Item Master and Sales Line Item with the same name (example: uf_ItemAttachment). Refer to the SalesPad User Defined Fields document for instructions on creating user defined fields.

- 1. Create a sales document
- Click the **Print** button on the sales document. The Print Sales Document Report menu appears

Print Sales Document I	Report	X
- Print Options	Available Reports	
Select All	✓ ReportName	Copies 🔼
	Copy of Summary Packing Slip1	
Select None	Customer RGA	≡
Close after Print	Excel Sales Document	
Prevent Changes	Internal RGA	
Properties	Invoice Aubrey Organics	
Mark Default Reports	Invoice Aubrey Organics Commercial	
Mark Derault Reports	Invoice CAM2	
Print Attachments	Invoice CAM2 copy	
Print None 🛛 🔽	Invoice CAM2 tax	
	Invoice CC	
	Invoice Century Computers	
	Invoice Copy of Invoice	
	Invoice GF	
	Invoice JG Resources	
	Invoice LifeGuard	
	Invoice New	✓
Fax	Email Preview Print To Quick Print	Close

1. In the Print Options column, select the appropriate option from the **Print**

Attachments drop-- down:

- Print All Prints all attached PDFs
- **Print None** Will not print any attached PDFs
- **Report Controlled** Prints only the PDFs referenced in a custom script within the designed report
- 2. Click the **Quick Print** button
- The first time you set up the PDF attachment print functionality, you must locate the installation .exe for Adobe[™] Acrobat Reader on the screen that appears. Select this file and click **Open**

Documents Aspell Microsoft Analysis Services Broadcom Microsoft CAPICOM 2.1.0.2 Citrix Microsoft Dynamics Common Files microsoft frontpage ComPlus Applications Microsoft Office DAEMON Tools Lite Microsoft Sol Server	Movie Mozill MSN MSN MSN MSXN NetM Notep
My Recent Documents Analog Devices Messenger Aspell Microsoft Analysis Services Broadcom Microsoft CAPICOM 2.1.0.2 Citrix Microsoft Dynamics Common Files microsoft frontpage ComPlus Applications Microsoft Silverlight Dell Microsoft SQL Server ESET Microsoft Visual Studio GIMP-2.0 Microsoft Visual Studio 8	MSN MSN MSXN Notep
Documents Aspell Microsoft Analysis Services Broadcom Microsoft CAPICOM 2.1.0.2 Citrix Microsoft Dynamics Common Files microsoft frontpage ComPlus Applications Microsoft Silverlight Decuments DAEMON Tools Lite Microsoft SQL Server ESET Microsoft Visual Studio Microsoft Visual Studio 8	MSN MSXN NetM
Implementation Implementation Implementation Implementa	
Citrix Microsoft Dynamics Common Files microsoft frontpage ComPlus Applications Microsoft Office Documents Dell ESET Microsoft Visual Studio GIMP-2.0 Microsoft Visual Studio 8	NetM
esktop Common Files microsoft frontpage ComPlus Applications Microsoft Office DAEMON Tools Lite Microsoft Silverlight Dell Microsoft SQL Server ESET Microsoft Visual Studio GIMP-2.0 Microsoft Visual Studio 8	Note
ComPlus Applications Microsoft Office DAEMON Tools Lite Microsoft SQL Server ESET Microsoft Visual Studio GIMP-2.0 Microsoft Visual Studio 8	
DAEMON Tools Lite Microsoft Silverlight Dell Microsoft SQL Server ESET Microsoft Visual Studio GIMP-2.0 Microsoft Visual Studio 8	Onlin
Auments Dell Dell Microsoft SQL Server	
ments ESET Construction Microsoft Visual Studio GIMP-2.0 Construction 8	🛅 Outlo
GIMP-2.0	🚞 Pidgir
	Ques
Google 🛅 Microsoft Works	Cales Cales
	🛅 Scribu
💭 🗁 GPLGS 🦳 Microsoft . NET	C Sizer
ter InstallShield Installation Information Comparison Information	🚞 Skype
	•
Vetwork File name:	<u>O</u> pen

The sales document and attached PDFs will print.

Note: After the initial path for Adobe[™] Acrobat Reader is set, it cannot be changed, except by changing the system registry.

EMAILING

To email a document in SalesPad with PDF attachments (email configuration required),

 At the Print Sales Document Report window (steps 1--3 under **Printing**) after you select a report and whether attachments will be sent, click the **Email** button. The Send Email screen appears

Email Options:			Templates	
Report:	Order		Name	Text
Subject:	ORD3092 - Order		SALES DOC	<salesdocument.bill_to_address_code></salesdocument.bill_to_address_code> <salesdocume< td=""></salesdocume<>
Send To:		-	PO TEMP	<customer.currency_id></customer.currency_id> <billto.address></billto.address> <billto.add.< td=""></billto.add.<>
CC:		-		
rom:	Steve@salespad.net			
Display Name:	Steve Harrison			
Reply To:	Steve@salespad.net			
	the documents you requested. If you have any questions feel ct me at 123-123-1234.	*		

1. On the Send Email screen, enter the email sending options

- The Subject line defaults to the document number and document type. You can change this manually
- Send To and CC fields pull email addresses listed on the customer/vendor cards
- Enter the From email address*, Display Name, and Reply To fields. This information will persist after the first time.
- Select the template to use from the right hand column or manually enter the body (Refer to the SalesPad Emailing and Email Templates document for template setup instructions)
- 3. Click the **Send** button to send the email with PDF attachments

Note: The From email address must match the global address pointed to by the company email server set up in the Sales Email Confirmation settings in SalesPad's Settings module. (Refer to the linked SalesPad knowledge base article).