

## Emailing the Customer's Receipt



Enter the customer's email address

Cancel

Backspace

1 2 3 4 5 6 7 8 9 0 -

Q W E R T Y U I O P

A S D F G H J K L :

Z X C V B N M , . /

Shift SPACE ENTER

Both Cash Register Express and Restaurant Pro Express have the ability to email receipts to your customers, providing a “green” alternative to traditional printed receipts.

## Creating the Customer Account with a Valid Email Address

**Manager**

**Options**

1. Select the **Manager** or **Options** button.
2. Enter the administrator password (default: admin) where applicable.
3. Select **Administrative** then, **Customer Maintenance**.

The screenshot shows the 'Customer Maintenance' window with the following details:

- Customer #: 8459200880
- First Name: PCA
- Last Name: Customer
- E-mail Address: tech@pcamerica.com
- Company Name: [Empty]
- Primary Phone #: [Empty]
- Bonus Points Achieved: 0
- Street Address: [Empty]
- Alternate Phone #: [Empty]
- Birthday: [Empty]
- Street Address 2: [Empty]
- City: [Empty]
- Application Date: 9/16/2010
- State: [Empty]
- Zip Code: [Empty]
- County: [Empty]
- Card Swipe IDs: [Empty]
- Discount Percentage: 0.00%
- Discount Level: A
- Loyalty Plan: NONE
- Charge At Cost: [Checked]
- Tax Exempt: [Unchecked]
- Print Notes on Receipt: [Unchecked]
- Buttons: Previous, Look up, Next, Add (Add a new customer.), Delete, Update, Exit

4. At the **Customer Maintenance** screen select **Add**.
5. Enter the following required information:
  - **Customer Number** (tip: Use the phone number as the customer number for easy reference).
  - **First Name**.
  - **Last Name**.
  - **E-mail Address** (if this is not filled in then you will need to enter the customer's email address each time a transaction is done).
6. If applicable fill in the information under **General Info**.
7. Select **Save** and then select **Exit**.

## Email Setup

**Manager**

**Options**

1. Select the **Manager** or **Options** button.
2. Enter the administrator password (default: admin) where applicable.
3. Select **Setup** then, **Setup Screen**.
4. Select the **Internet Features** tab.

The screenshot shows a software window titled "Setup Screen" with multiple tabs. The "Internet Features" tab is selected. Within this tab, the "SMTP E-mail Options" section is active. It contains the following fields and options:

- SMTP Server: [Empty text box]
- SMTP Server Port: 120
- Connection Timeout: 0
- SMTP Authentication Type:
  - Anonymous / None
  - Basic (Clear Text)
  - NTLM
- Use SSL
- Username: [Empty text box]
- Password: [Empty text box]
- Domain: [Empty text box]
- Send As Address: [Empty text box]
- Bcc: [Empty text box]
- Portal Settings:
  - URL: [Empty text box]
  - Portal ID: 0
  - Username: [Empty text box]
  - Password: [Empty text box]
  - Enabled

At the bottom of the window are three buttons: **Scale**, **Update**, and **Exit**.

5. At the Left of this screen under SMTP E-mail Options the following information will need to be entered in order for the mass emails to be sent.

**Note:** This information can be acquired by contacting either the network administrator (who runs your email) or the company who is in charge of your email account (e.g. AOL, Yahoo, Gmail, etc...).

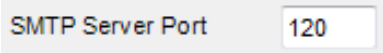
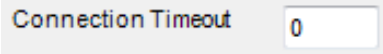
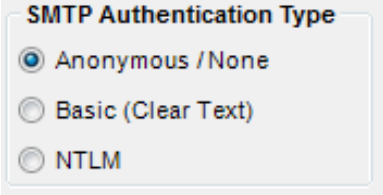
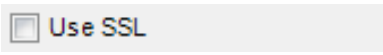
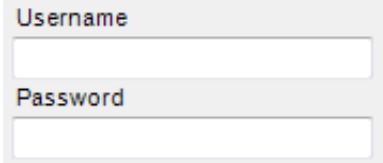
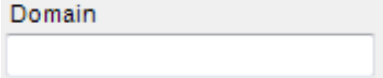
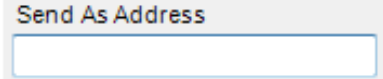
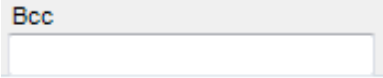
### SMTP E-mail Options

SMTP Server

smtp.gmail.com

6. Under **SMTP Server** enter the address of your outgoing mail server.

For example: If you are using Gmail, this field should contain **smtp.gmail.com**.

	<p>7. Under <b>SMTP Server Port</b> enter the port used to communicate with your outgoing mail server.</p> <p>If you are using Gmail, this field should contain <b>587</b> or <b>465</b>.</p>
	<p>8. Under <b>Connection Timeout</b> enter a value (in seconds) that the program will attempt to connect to the server.</p> <p><b>Note:</b> If the value is left at <b>0</b> then the connection attempt will not timeout, and will continuously try to connect to the server.</p>
	<p>9. Under <b>SMTP Authentication Type</b> select the server's authentication method.</p> <p>If you are using Gmail, <b>Basic (Clear Text)</b> should be selected.</p>
	<p>10. Check <b>Use SSL</b> if the server requires the use of a Secure Sockets Layer to communicate with it.</p> <p>If you are using Gmail, check this.</p>
	<p>11. These fields should contain a valid username and password for an email address on the mail server.</p> <p>If you are using Gmail, your username is your full email address.</p>
	<p>12. This field should contain the domain that you are a part of. For more information please contact your network administrator.</p>
	<p>13. This field should contain the email address you would like displayed in outgoing emails.</p>
	<p>14. If you would like to Blind Carbon Copy the email to another address enter the email address under <b>BCC</b>.</p>

Setup Screen

Account Control Company Info Coupons Hardware Internet Features Inventory **Receipt** Invoice Settings

Payment Processing Quick Invoicing & Alerts Quick-Add **Receipt** Reports

Restaurant Features Station Specifics System Access Touch Screen

Page 1 Page 2

**Receipt Size**

Receipt

**Short Receipt**

Full

Full Professional

**Print Invoices**

No

Yes

Prgmpt

CC DC And EBT

Prompt Size

**Prompt Media**

**Prof Logo**

None

Picture

Company Info

Pic and Info

Prompt to Email Purchase Order

Print Bar Code On "On-Hold" Receipts

Print Bar Code On "Complete" Receipts

Print Extra Copy of On Account Receipts

Suppress Extra Signature Copy

Print Notes on CC Receipt

Print Dept Notes Receipt

Print item count on Receipt

Print Second Description on Full Size Professional

Validate Checks

Combine Lines on Short Receipt

Print Paid Status in Kitchen Receipt.

**Print Modifiers on Receipt**

Print all, total only

Print all, breakdown

No, Print None

Print charged, total only

Print charged, breakdown

# of Copies: 1 # of Store Credit Receipts: 1 Kitchen Receipt Font Size: Small

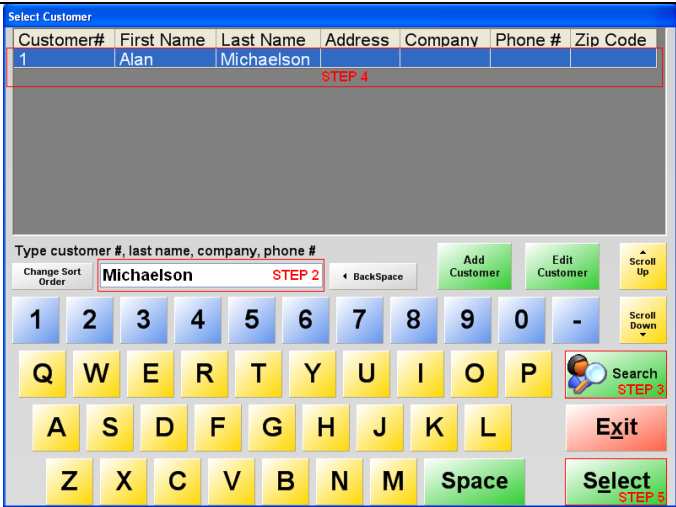
**Scale** **Update** **Exit**

15. Select the **Receipt** tab.
16. Under Print Invoices select **Prompt Media**.
17. Under **Receipt Size** select one of the following:
  - **Receipt**
  - **Short Receipt**
18. Select **Update**.

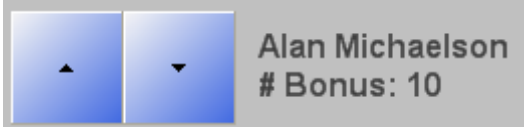
**Emailing the Receipt**



1. At the invoice screen, select **Lookup Customer** in RPE or **FIND** in CRE.



2. Enter search terms.
3. Select **Search**.
4. Highlight a customer on the list.
5. Select, **Select**.



6. In RPE, the customer's information will be located below the items on the touch screen.  
  
In CRE, the customer's information will be located near the **FIND** button.

Question Box

## Would you like a receipt?

<u>P</u> RINT	<u>E</u> MAIL
<u>B</u> OTH	<u>N</u> ONE

Cancel

- After items are added to the invoice and it has been closed to a tender type, you will be asked how the customer would like the receipt.
- Select **Email** (or Both).

Enter the customer's email address

tech@pcamerica.com

Cancel

← Backspace

1	2	3	4	5	6	7	8	9	0	-	
Q	W	E	R	T	Y	U	I	O	P		
A	S	D	F	G	H	J	K	L	:		
Z	X	C	V	B	N	M	,	.	/		
Shift	SPACE								ENTER		

- If the customer you selected earlier had an email address setup in customer maintenance then this field will automatically be filled with that email address.
- Note:** If the customer would like the receipt sent to another email address you can select backspace and type in the alternate address.