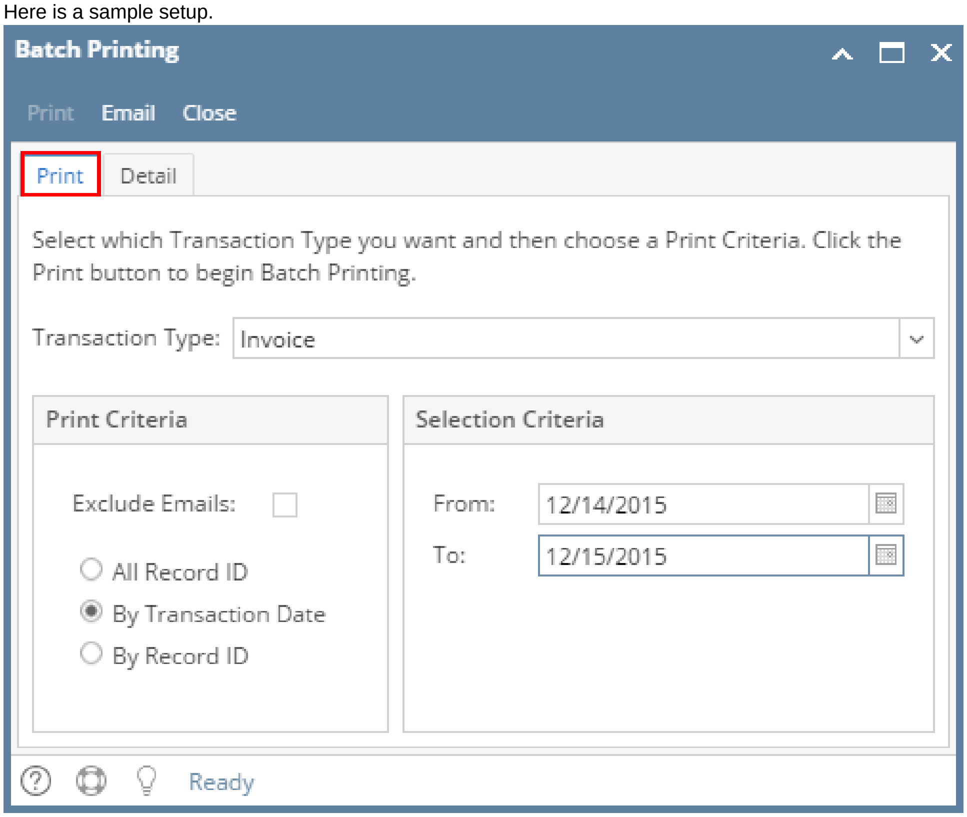
How to Batch Email Reports

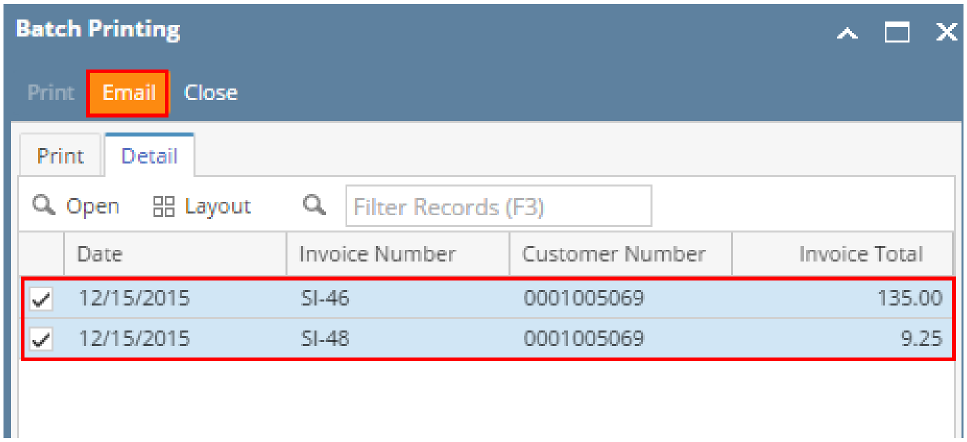
The batch emailing of reports will work only for those customers with at least one contact with complete **Email Distribution setup**. Note that for this feature to work, make sure the **Company Configuration | System Manager | SMTP Email Settings** is properly configured and the contact has complete email distribution setup. Once these setup are done, then you can proceed with the following steps.

1. Open the **Batch Printing screen** from menu, **Sales | Batch Printing**.
2. Click the **Transaction Type** combo box button and select a different type if you are going to email a different transaction. By default, this is set to **Invoice**.
3. Setup the **Print Criteria** and **Selection Criteria**.
    a. Unchecked the **Exclude Emails** option. This option will enable the **Email button** and filter out from the Detail tab all customers without email distribution setup.
    b. Batch email **All Record ID**. When this option is selected, the **Selection Criteria section** will remain blank.
    c. Batch email **By Transaction Date**. When this option is selected, the **Selection Criteria section** will display a **From** and **To** date field. Select the date range of the transactions that you want to send.
    d. Batch email **By Record ID**. When this option is selected, the **Selection Criteria section** will display a **From** and **To** combo box field. Select the range of transaction number from the combo list box.

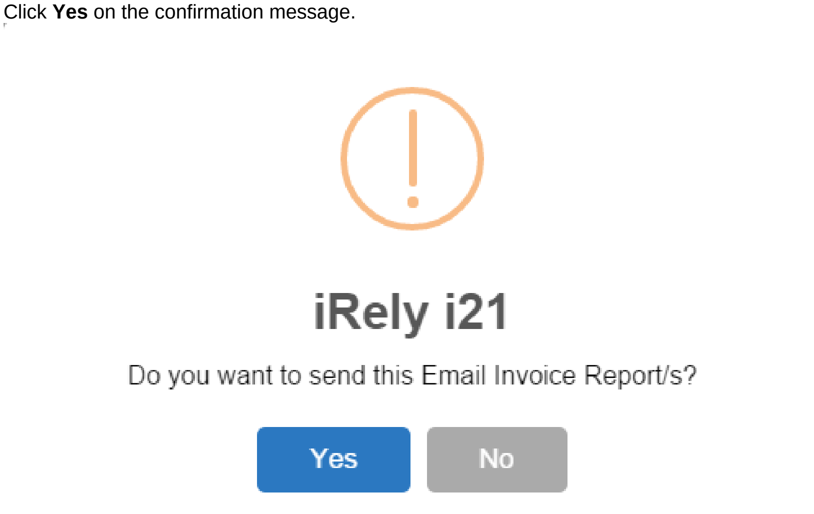
   Here is a sample setup.



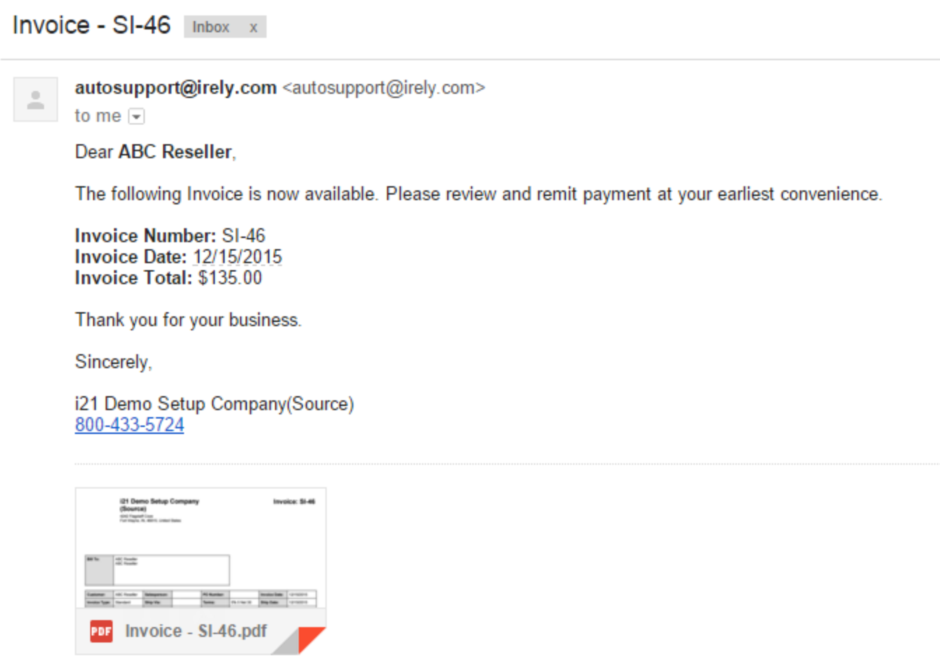
4. Go to the **Detail tab** to review the list of transactions based on the set Post Criteria and Selection Criteria.
    a. For Invoice and Credit Memo type, tab will show posted transactions only.
    b. For Sales Order and Quote Order type, tab will show all sales order transactions.
    c. For Transport Quotes type, tab will show quotes with Confirmed status only.
5. Click **Email button**.
    a. If you are currently on the **Print tab**, this will send all the transactions listed in the Detail tab.
    b. If you are currently on the **Detail tab**, select first the transactions you want to send before clicking the Email button.



6. Click **Yes** on the confirmation message.



Here is a sample email.



Related Topics

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- How to Setup SMTP Email Settings
- How to Setup Email Distribution
- How to Email Invoice