Setting Up The Receipt Template

The Receipt Template Designer allows you to customize printed and emailed receipts or invoices by adjusting their format.

This course shows how to configure the layouts and preview the results.

Objectives

- Receipt Designer
- Invoice Designer

Receipt Designer

From the Sales menu, choose Setup and then Receipt Template Designer.

Select Add.

Choose a receipt type from the drop-down menu.

Receipt Types offer multiple options.

Use an Original Receipt for regular transactions.

It includes options for Price, Totals, Tax Details, and more.

A Gift Receipt provides the holder with proof-of-purchase without printing the price paid.

Other receipt types include Void, No Sale, and Close Register.

For more information on these and other receipt types, including print options, refer to online Help and your store's policies.

Give the receipt layout a name.

Decide which stores you want to have access to this template.

Leave this field blank to apply the receipt template to all stores.

Determine how you want to email the receipt: as a PDF or in an HTML format.

Enter the current store email address.

This is important! Avoid using a generic no-reply email address. These often end up in spam folders, go unnoticed, and otherwise create rework later when the customer cannot find the receipt.

Add a subject line that that lets the recipient know it contains a receipt.

Provide your company's website address in this field and enter the website name.

Once you select how the clerk's name will appear, enter the number of copies.

This is set to one by default.

Select Receipt to view the template.

Choose the Add icon to upload your company logo.

You can include or exclude information by selecting or deselecting the checkboxes in the layout.

Be sure to scroll through the entire layout for additional options.

For example, enabling the Barcode check box makes it easy to recall transactions at point-of-sale.

When finished, choose Save.

Review your design by selecting Preview.

Select the X icon to close the preview.

To edit a receipt or invoice template, enable the check box and then select Edit.

As always, remember to save your changes when finished.

Invoice Designer

In addition to creating receipt templates, you can generate full page Invoice templates with the designer.

Follow the same procedure as if you were creating a receipt template.

Select Sales, Setup, and then Receipt Template Designer.

Choose Add.

Select the Receipt Type and make sure the Invoice tab is enabled.

Enter a unique invoice name in the Receipt Name field.

Like the receipt template, you can add your company logo.

Enable the checkboxes that you want to appear in the invoice.

Since you would typically give an invoice to contractors, government entities, or charitable organizations, consider enabling these additional checkboxes: Credit Terms, Resale/Tax Exempt Number, Authorized to Charge, Print Loyalty Information, and Barcode.

Select Save when finished.

Choose Invoice and then Preview to check your work.

Close the Preview pane when finished.

Recap

The Receipt Template Designer makes it easy for you to customize the layout of your printed and emailed receipts and invoices.

This course showed how to configure receipt and invoice layouts and preview the results.

About Epicor

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