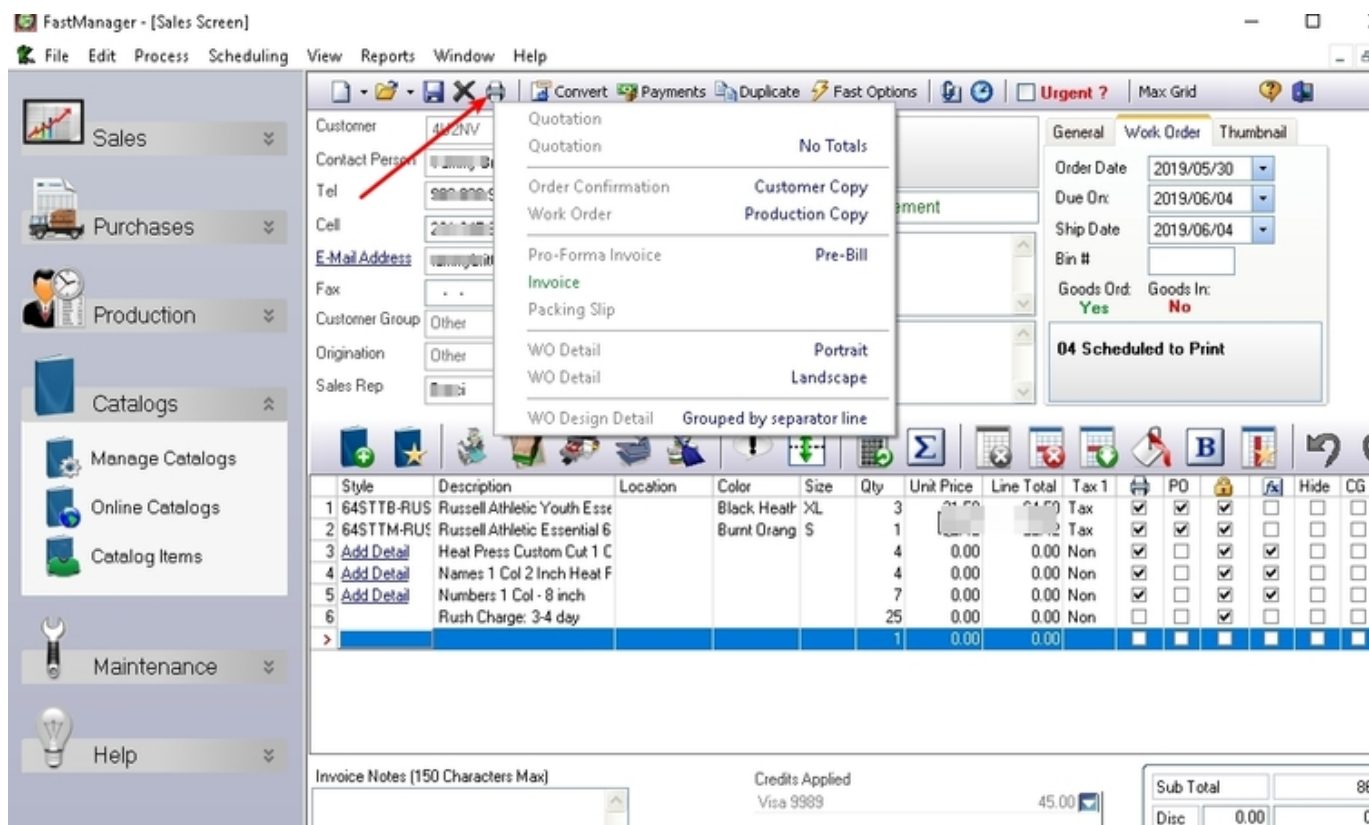


Print & Email

Printable Documents

On the Sales Screen, when you click on the Print button, you are presented with several options.



Quotation

This will print the quotation layout.

- If you have a discount amount at then FastManager will select the layout called Quotations - With Discount
- If the discount amount = zero then FastManager will select the layout Quotations - No Discount

Quotation - No Totals

This option will print a quotation without any totals at the bottom.

- This option is handy if your customer needs to choose between several options.

Work Order - Customer Copy

This option will print the Sales Order copy.

- Which you can give to your customer once you have converted the quotation to a work order.
- Important fields on this document includes, the order 'Due Date' and any deposits they paid showing the balance due when they will collect.

Work Order - Production Copy

This option is intended for your production.

- Any remark lines that was marked not print, will print on this document as it is intended for production.
- This layout will not show any pricing information.
- It is intended for a job packet at the beginning stage of the order giving your production a basic overview of what is coming, before you have the exact artwork information.

Invoice - Pro-Forma

Some bigger corporations request that you send them a pro-forma invoice in order to cut a check while you are still producing the order.

- This document is really nothing other than the quotation with a header change.

Invoice

This will be the actual invoice that you can send to your customer.

- It will also show any payment applied to the invoice as well as the balance due.
- You can print another copy of the invoice and send it to your customer once the invoice is paid.
 - The invoice will be "Stamped" as Paid and can act as a payment receipt to your customer.

Packing Slip

This is a basic list of all the items you are sending

WO Detail - Portrait

You can print this out for production which will show all the design detail including thumbnail and colors.

- This can be added to the Job Bag at a later stage once you have all the art requirements and other instructions confirmed for production to continue.

WO Detail - Landscape

This option is exactly the same as above, but is in landscape format and includes more detailed information such as mesh counts etc.

WO Design Detail

This option will print a list of the garments with the linked embellishment and it's detail below the list of garments.

- It will also print a new page for every separator group. This way it keeps the garments associated with its embellishment.
 - For example: FastManager will print 2 pages if you have an order with polo shirts with embroidery on the front and printing on the back and then you also have some caps with embroidery on it.
 - The first page will show the polos and below you will see the detail for the front embroidery as well as the back print. On the second page you will only see the caps listed with the design detail of the embroidery.
- The design detail will include everything from location, size of embellishment, mesh counts, thread colors, additional notes etc etc .
- This is a very comprehensive report and should be added to the job pack once you have all the art detail confirmed.



For information about Design Detail and Artwork, see: [Design Detail & Artwork](#)

Art Approval

The Art Approval form can be printed from the Thumbnail tab at the top-right of the Sales Screen:

FastManager - [Sales Screen]

File Edit Process Scheduling View Reports Window Help

Customer: Cash Customer
 Contact Person: Test
 Tel: 321-564-9870
 Cell: - -
 E-Mail Address: test@cash.solutions
 Fax: - -
 Customer Group: General Customer
 Origination: Walk In
 Sales Rep: House Account

Work Order - WIP
 Work Order Number: ES10014

Test Alpha Integration

Billing Address

Ship Address

General Work Order Thumbnail

Style	Description	Location	Color	Size	Qty	Unit Price	Line Total	Tax 1	Tax 2	PO	Hide
1 296	Youth 5.6 oz. DRI-POWEE		AQUATIC B	XS	1	6.27	6.27	Tax	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2 Edit Detail	Embroidered Name & #: 11		10000		1	10.00	10.00	Non	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3 Edit Detail	Custom Screen Printing: w/				1	4.82	4.82	Non	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	Artwork Preparation per ho				1	25.00	25.00	Non	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	Screen Usage Charge				1	20.00	20.00	Non	Non	<input checked="" type="checkbox"/>	<input type="checkbox"/>
>					1	0.00	0.00			<input type="checkbox"/>	<input type="checkbox"/>

Invoice Notes (150 Characters Max)

Credits Applied

Sub Total

Dis: 0.00



For more information about the Design Detail Information and printing the Art Approval, see: [Design Detail & Artwork](#)

Print Options

FastManager will first open the document in a *print preview* screen.

- From there you can select if you want to print to a printer or E-Mail the document to your customer or any other E-Mail address.
- Some documents may also be exported to PDF format.

Print preview.... Quotation Number # 10014

Quotation

Date	Quote Number
11/27/2018	ES 10014

Test Alpha Integration

Page 1 of 1

Bill To:

Cash Customer
Test

Phone: 321-564-9870 Cell: - -
E-Mail: test@cash.solutions Fax: - -

Ship To:

Ship Method: Pick Up

Terms Sales Rep
Require Deposit House Account

Style	Description	Colors / Stitches	Size	Qty	Rate	Amount
-------	-------------	-------------------	------	-----	------	--------



In order E-Mail the document you first need to setup your [E-Mail accounts](#)

Most of the print options will be disabled if you have made any changes to your sales screen. You need to Save first before you can continue.

Some options may be disabled based on the current status of your order. For example:

- If the current status is Work - In - Progress ("WIP") you will not be able to print an Invoice.

Sending Email

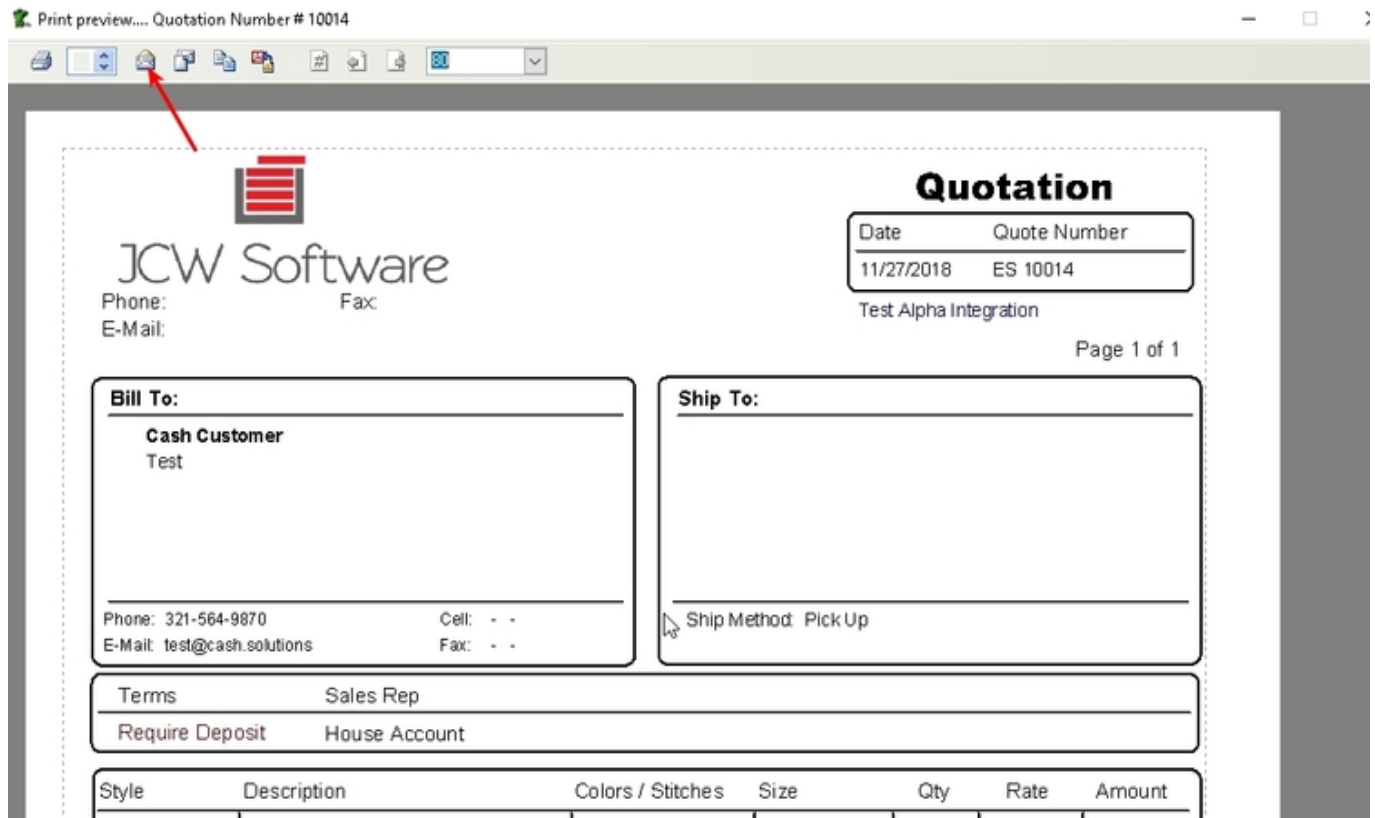


Any document that shows a Print Preview can be emailed

Sending A Normal Email

From the Print Preview screen, click on the Email icon

Print preview.... Quotation Number # 10014



Quotation

JCW Software

Phone: Fax:
E-Mail:

Date Quote Number
11/27/2018 ES 10014

Test Alpha Integration

Page 1 of 1

Bill To:

Cash Customer
Test

Phone: 321-564-9870 Cell: - -
E-Mail: test@cash.solutions Fax: - -

Ship To:

Ship Method: Pick Up

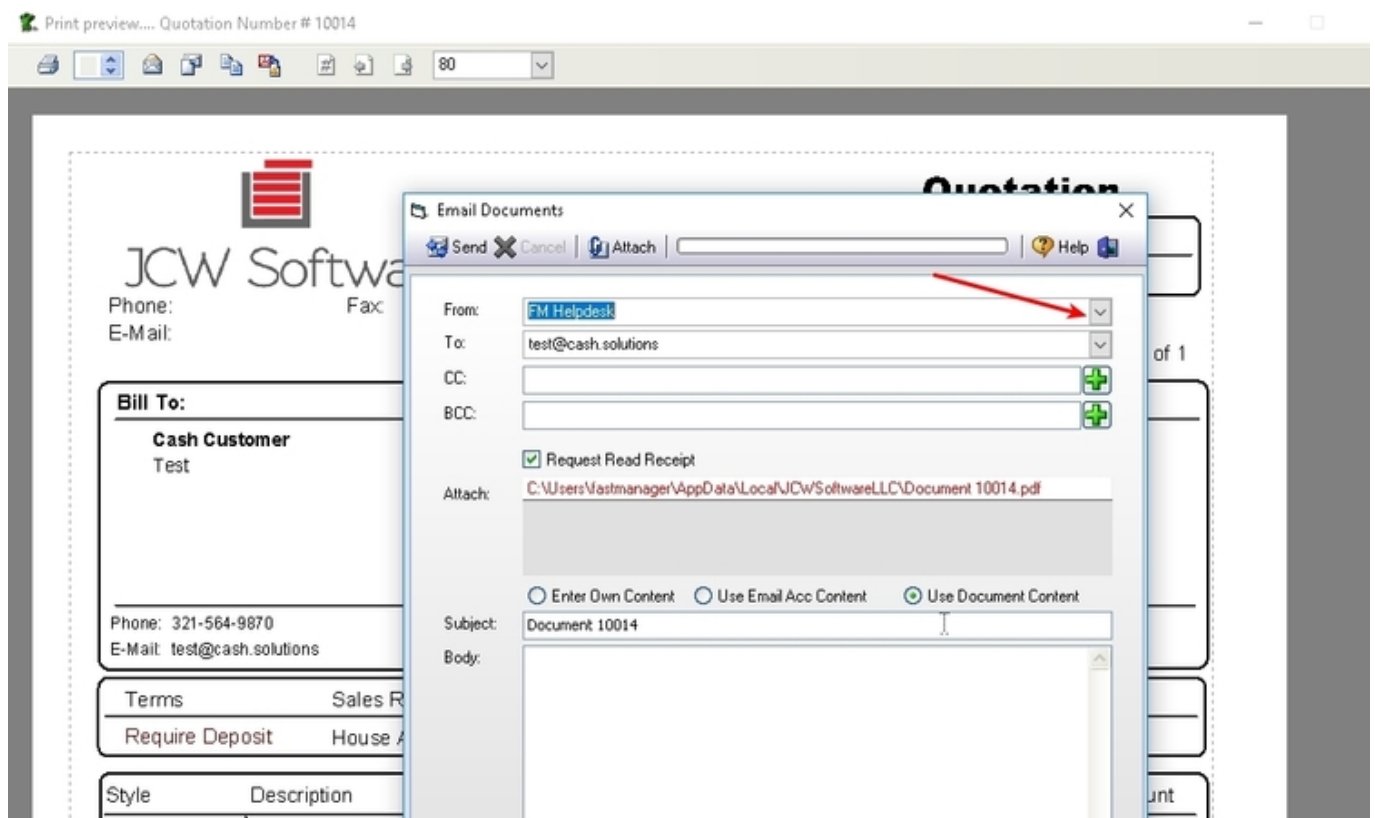
Terms Sales Rep
Require Deposit House Account

Style	Description	Colors / Stitches	Size	Qty	Rate	Amount
-------	-------------	-------------------	------	-----	------	--------

If you have properly configured an email account for your user, it will show up as the default account to send from.

- alternatively, you can select any account to send through, from the drop-down selector:

Print preview.... Quotation Number # 10014



Quotation

JCW Software

Phone: Fax:
E-Mail:

Date Quote Number
11/27/2018 ES 10014

Test Alpha Integration

Page 1 of 1

Bill To:

Cash Customer
Test

Phone: 321-564-9870 Cell: - -
E-Mail: test@cash.solutions Fax: - -

Ship To:

Ship Method: Pick Up

Terms Sales Rep
Require Deposit House Account

Style	Description	Colors / Stitches	Size	Qty	Rate	Amount
-------	-------------	-------------------	------	-----	------	--------

Email Documents

Send X Cancel | Attach | Help

From: FM Helpdesk

To: test@cash.solutions

CC: +

BCC: +

☒ Request Read Receipt

Attach: C:\Users\Vastmanager\AppData\Local\JCWSoftwareLLC\Document 10014.pdf

☐ Enter Own Content ☐ Use Email Acc Content ☒ Use Document Content

Subject: Document 10014

Body:

If your own email is not selected immediately by default, make sure you have linked your User account to the correct email account

Go to Edit → Email accounts to create the email account



- See: [Setting up email](#)

Then go to Edit → Users to link the email account to your Username.

- See: [Adding Users](#)

Click on Send to send the email, it may take a minute, you will see a confirmation message once the message is sent.

Email Subject Setup

In your email account setup, you can configure a Default subject + message for yourself. However, on the Print Preview screen you can also setup specific overrides when sending a particular document.



The email subject setup on the Print Preview screen will override the setup that comes from the [email account setup: Defaults tab](#)

Click on Email Subject Setup:

Print preview.... Quotation Number # 10014

80

Quotation

Date	Quote Number
11/27/2018	ES 10014

Test Alpha Integration

Page 1 of 1

Bill To:

Cash Customer
Test

Phone: 321-564-9870 Cell: - -
E-Mail: test@cash.solutions Fax: - -

Ship To:

Ship Method: Pick Up


Terms Sales Rep
Require Deposit House Account

Style	Description	Colors / Stitches	Size	Qty	Rate	Amount
-------	-------------	-------------------	------	-----	------	--------

Select the document to setup an override for from the drop-down selector:

Print preview.... Quotation Number # 10014

80



JCW Software
Phone: Fax:
E-Mail:

Quotation

Date	Quote Number
11/27/2018	ES 10014

Test Alpha Integration


Page 1 of 1

Bill To:

Cash Customer
Test

Phone: 321-564-9870 Cell: - -
E-Mail: test@cash.solutions Fax: - -

Sales Order Email Defaults

Document: 

Subject:

Message:

Use [DocNumber] to specify where to insert the order number.

Ship Method: Pick Up

Terms	Sales Rep
Require Deposit	House Account

Style	Description	Colors / Stitches	Size	Qty	Rate	Amount
-------	-------------	-------------------	------	-----	------	--------



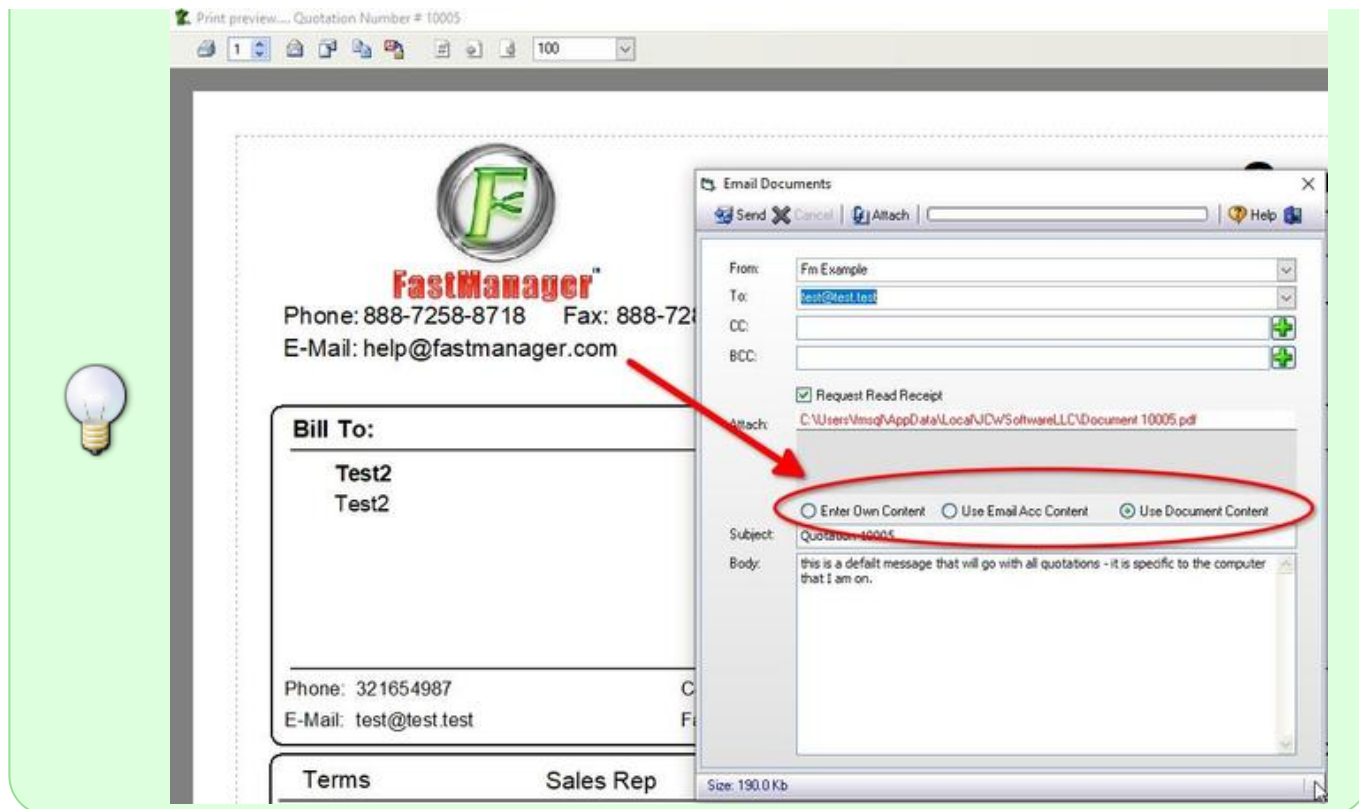
Use [DocNumber] to dynamically insert the document number



You will have to close the Print Preview and reopen it in order for the changes to take effect



Since Revision 2017.76 there is a new option to toggle between the 'Document Content' (what you have entered into the Email Subject Setup of the Print Preview screen) and the 'Account Content' (what you have entered on the Defaults tab at Edit → Email Accounts)



Troubleshooting

If you see the message:

Error while sending message - message not sent!

it most likely means that there is something wrong in your email account setup.

Go back to Edit -> Email Accounts and double-check the settings for the account you are trying to send through.

← [Sales: Overview](#)

[The Sales Screen: Features](#)

⇒

From:
<https://docs.fastmanager.com/> - **FastManager Help Manual**

Permanent link:
<https://docs.fastmanager.com/sales/print>

Last update: **2020/04/16 17:08**



