

E-mail functionality

By using the e-mail functionality in Microsoft Dynamics GP, you can embed documents into the body of an e-mail message or send documents as attachments. You can send a single document, batches of documents, or send multiple documents using lists. When setting up the e-mail functionality, you can select which documents you can send and which customers and vendors should receive their documents in e-mail.

You can send the following documents in e-mail.

Documents	
Sales quote	Receivables finance charges
Sales order	Receivables warranty
Sales fulfillment order	Receivables service/repair
Sales invoice	Standard purchase order
Receivables invoice	Blanket purchase order
Receivables return	Drop-ship purchase order
Receivables debit memo	Vendor remittances
Receivables credit memo	

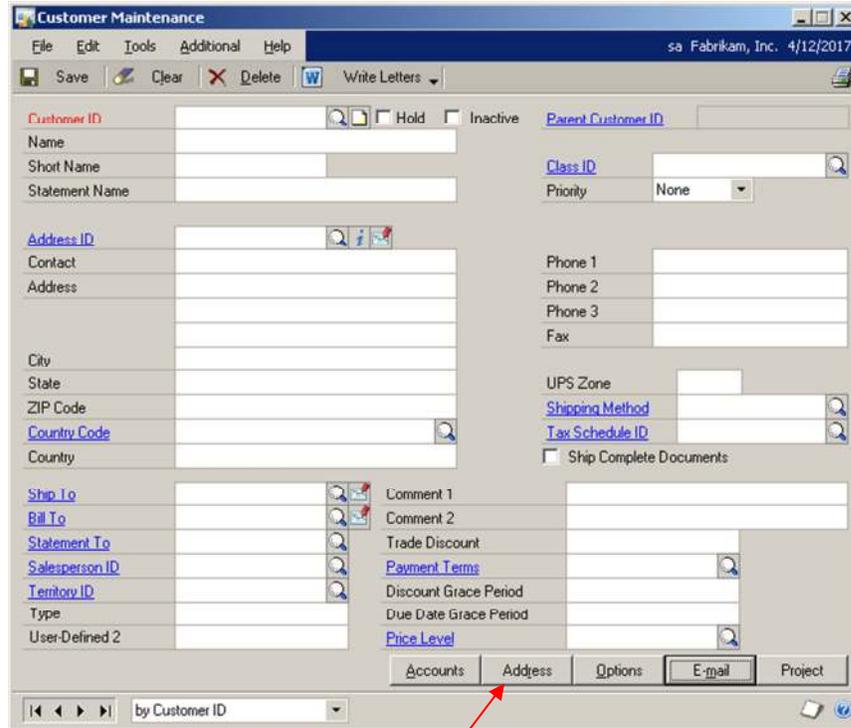
A document can be sent in either an HTML, XPS, PDF, or DOCX file format type. You also can combine multiple documents to be sent in a single e-mail.

Sending customized messages

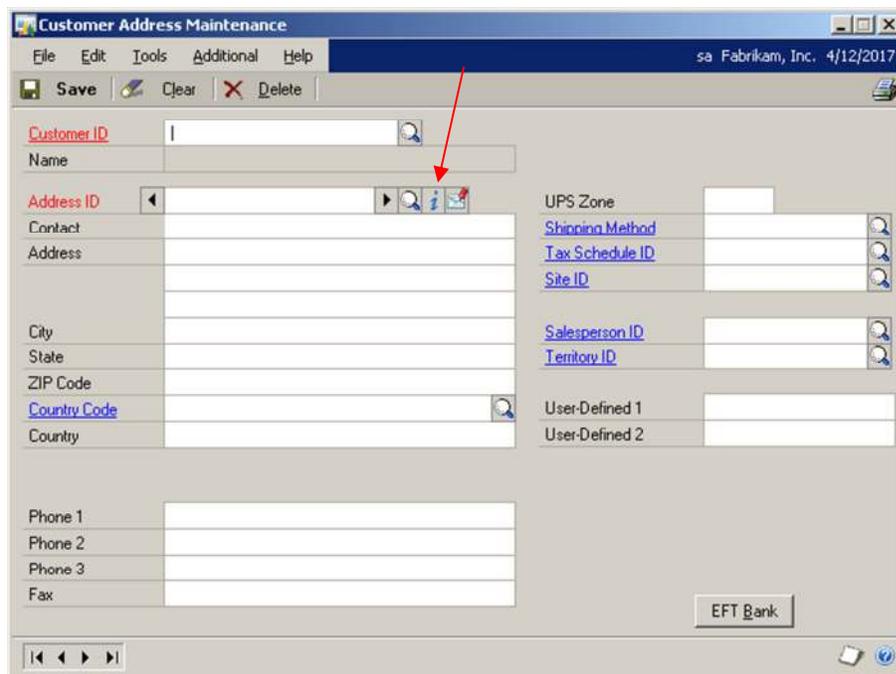
You can create predefined messages to send to your customers and vendors. These messages can be assigned to the documents that you want to send in e-mail so all customers or vendors receive the same message for selected documents. For example, you can send a promotional message to your customers when sending sales quotes in e-mail. You also can assign a specific message to an individual customer or vendor. For example, you can send a holiday greeting message to a customer. When you create a message, you can enter an e-mail address so your customer or vendor can reply to your e-mail.

Setup Customer Emails

1. Open the Customer Maintenance screen
(Cards>>Sales>>Customer)



2. Click on the Address button
3. Select your customer ID and Address ID



4. Click on the Internet Button

The screenshot shows the 'Internet Information' window with the following details:

- Menu: File, Edit, Tools, Help
- Status: sa Fabrikam, Inc. 4/12/2017
- Buttons: Save, Clear, Delete
- Select Information for: Customers
- Customer ID: AARONFIT0001 (Aaron Fitz Electrical)
- Address ID: PRIMARY (One Microsoft Way)
- E-mail Addresses:
 - To: aaron@fitzelectric.com
 - Cc: (empty)
 - Bcc: (empty)
- Internet Information:
 - E-mail: (empty)
 - Home Page: (empty)
 - FTP Site: (empty)
 - Image: (empty)
 - Messenger Address: (empty)
 - Login: (empty)
 - Password: (empty)
 - User Defined 1: (empty)
 - User Defined 2: (empty)
- Additional Information: (empty text area)

5. Enter the email address for this Customer/Address combination
6. Click Save to save your changes.

Setup Customer Email Preferences

1. Open the Customer Maintenance screen
(Cards>>Sales>>Customer)

The screenshot shows the 'Customer Maintenance' window with the following fields and tabs:

- Customer ID:** [Field] Hold Inactive
- Name:** [Field]
- Short Name:** [Field]
- Statement Name:** [Field]
- Parent Customer ID:** [Field]
- Class ID:** [Field]
- Priority:** None
- Address ID:** [Field]
- Contact:** [Field]
- Address:** [Field]
- Phone 1:** [Field]
- Phone 2:** [Field]
- Phone 3:** [Field]
- Fax:** [Field]
- City:** [Field]
- State:** [Field]
- ZIP Code:** [Field]
- Country Code:** [Field]
- Country:** [Field]
- UPS Zone:** [Field]
- Shipping Method:** [Field]
- Tax Schedule ID:** [Field]
- Ship Complete Documents
- Ship To:** [Field]
- Bill To:** [Field]
- Statement To:** [Field]
- Salesperson ID:** [Field]
- Territory ID:** [Field]
- Type:** [Field]
- User-Defined 2:** [Field]
- Comment 1:** [Field]
- Comment 2:** [Field]
- Trade Discount:** [Field]
- Payment Terms:** [Field]
- Discount Grace Period:** [Field]
- Due Date Grace Period:** [Field]
- Price Level:** [Field]

At the bottom, there are tabs for **Accounts**, **Address**, **Options**, **E-mail** (highlighted with a red arrow), and **Project**. The status bar at the bottom shows navigation arrows and 'by Customer ID'.

7. Select your customer and click on the E-Mail button

Customer ID: _____ Name: _____

Select Document Options

Send Documents as Attachments Embed Document in Message Body

Attachment Options

Multiple Attachments per E-mail

Set Maximum File Size _____ Megabytes

Send Forms as E-mail

Enable	Message ID	Format
<input type="checkbox"/> Sales Quote	_____	_____
<input type="checkbox"/> Sales Order	_____	_____
<input type="checkbox"/> Sales Fulfillment Order	_____	_____
<input type="checkbox"/> Sales Invoice	_____	_____
<input type="checkbox"/> Receivables Invoice	_____	_____
<input type="checkbox"/> Receivables Return	_____	_____
<input type="checkbox"/> Receivables Debit Memo	_____	_____
<input type="checkbox"/> Receivables Credit Memo	_____	_____
<input type="checkbox"/> Receivables Finance Charge	_____	_____
<input type="checkbox"/> Receivables Service/Repairs	_____	_____
<input type="checkbox"/> Receivables Warranty	_____	_____

OK Cancel

8. Select the options for this customer, including a Message ID and Format for the Form you enable

9. Select OK to save your changes.

You can follow similar steps on the Vendor Maintenance window.