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.

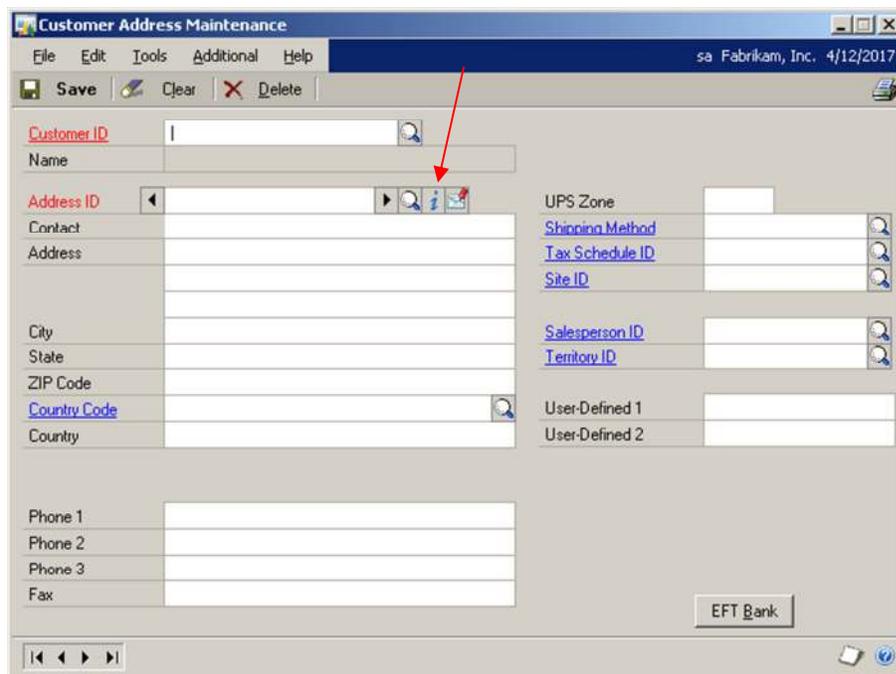## Sending customized messages

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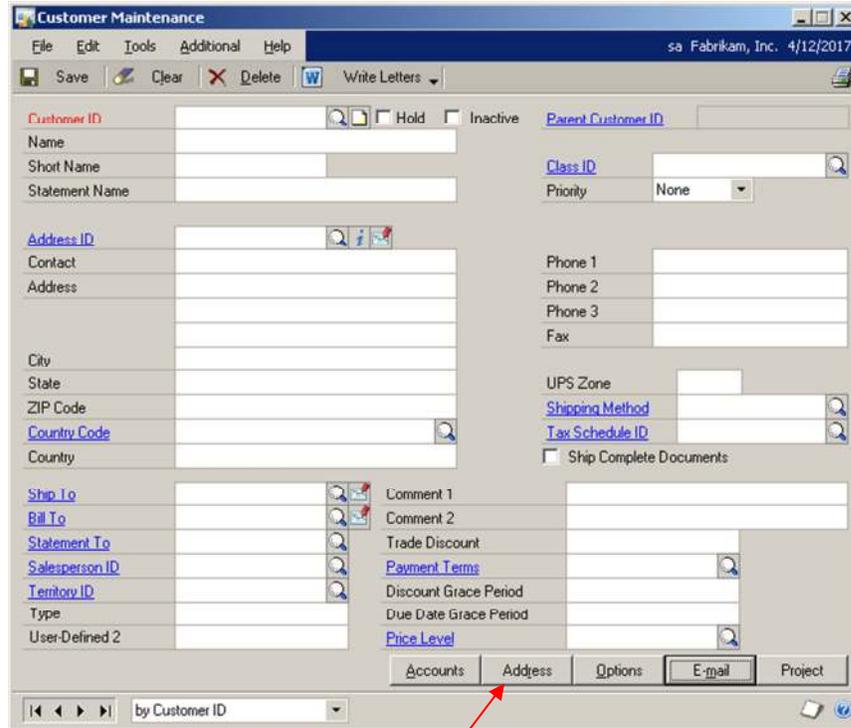
2. Click on the Address button
3. Select your customer ID and Address ID

4. Click on the Internet Button

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)

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

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.