

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	

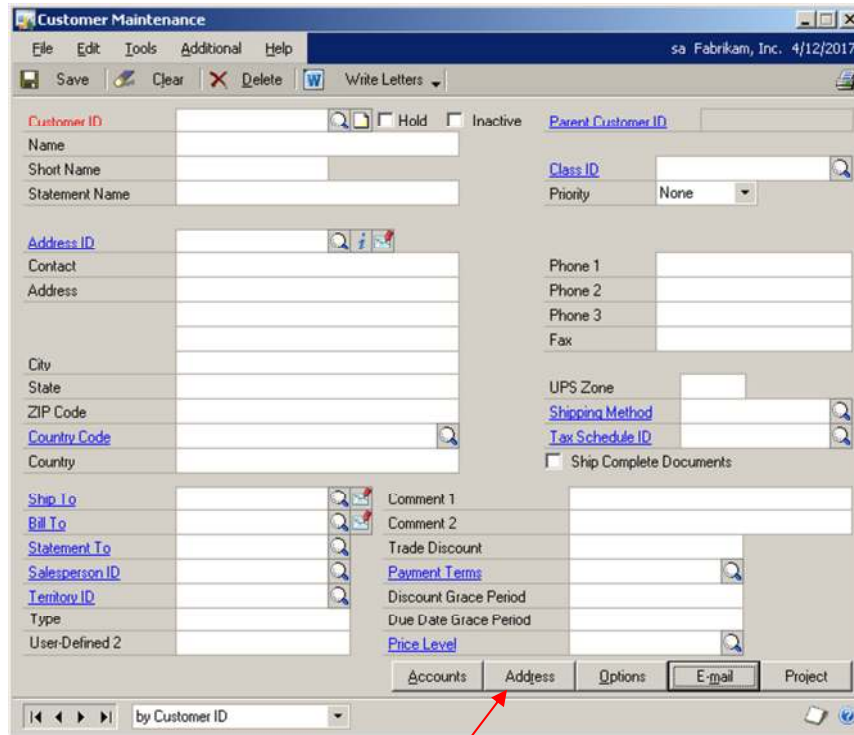
A document can be sent in either an HTML, XPS, PDF, or DOCX file format type. You also can combine multiple documents to be sent in a single e-mail.

Sending customized messages

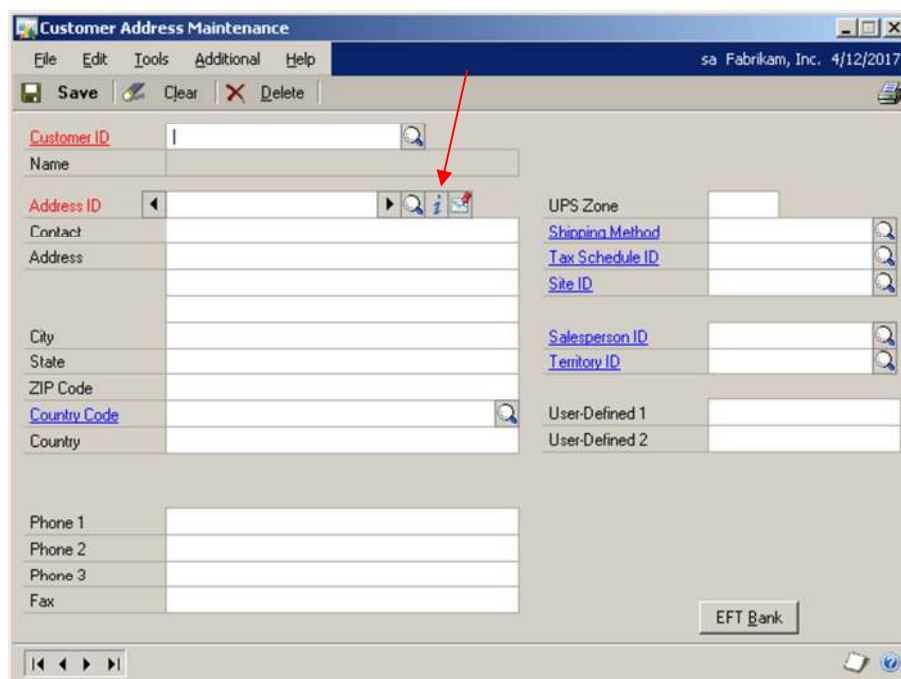
You can create predefined messages to send to your customers and vendors. These messages can be assigned to the documents that you want to send in e-mail so all customers or vendors receive the same message for selected documents. For example, you can send a promotional message to your customers when 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 in Dynamics GP. The window title is 'Internet Information' and the menu bar includes 'File', 'Edit', 'Tools', and 'Help'. The status bar shows 'sa Fabrikam, Inc. 4/12/2017'. The main area is divided into sections: 'Select Information for:' with a dropdown set to 'Customers'; 'Customer ID' with the value 'AARONFIT0001' and a search icon; 'Address ID' with the value 'PRIMARY' and a search icon; 'E-mail Addresses' with buttons for 'To...', 'Cc...', and 'Bcc...' and a text field containing 'aaron@fitzelectric.com'; and 'Internet Information' with fields for 'E-mail', 'Home Page', 'FTP Site', 'Image', 'Messenger Address', 'Login', 'Password', 'User Defined 1', and 'User Defined 2'. A red arrow points to the 'To...' button in the 'E-mail Addresses' section. At the bottom, there is an 'Additional Information' text area and navigation buttons.

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**: [Text Field] Hold Inactive
- Name**: [Text Field]
- Short Name**: [Text Field]
- Statement Name**: [Text Field]
- Parent Customer ID**: [Text Field]
- Class ID**: [Text Field]
- Priority**: [Dropdown Menu] (None)
- Address ID**: [Text Field]
- Contact**: [Text Field]
- Address**: [Text Field]
- Phone 1**: [Text Field]
- Phone 2**: [Text Field]
- Phone 3**: [Text Field]
- Fax**: [Text Field]
- City**: [Text Field]
- State**: [Text Field]
- ZIP Code**: [Text Field]
- Country Code**: [Text Field]
- Country**: [Text Field]
- UPS Zone**: [Text Field]
- Shipping Method**: [Text Field]
- Tax Schedule ID**: [Text Field]
- Ship Complete Documents
- Ship To**: [Text Field]
- Bill To**: [Text Field]
- Statement To**: [Text Field]
- Salesperson ID**: [Text Field]
- Territory ID**: [Text Field]
- Type**: [Text Field]
- User-Defined 2**: [Text Field]
- Comment 1**: [Text Field]
- Comment 2**: [Text Field]
- Trade Discount**: [Text Field]
- Payment Terms**: [Text Field]
- Discount Grace Period**: [Text Field]
- Due Date Grace Period**: [Text Field]
- Price Level**: [Text 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 left shows navigation arrows and the text '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="text"/>	<input type="text"/>
<input type="checkbox"/> Sales Order	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Sales Fulfillment Order	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Sales Invoice	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Receivables Invoice	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Receivables Return	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Receivables Debit Memo	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Receivables Credit Memo	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Receivables Finance Charge	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Receivables Service/Repairs	<input type="text"/>	<input type="text"/>
<input type="checkbox"/> Receivables Warranty	<input type="text"/>	<input type="text"/>

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.