

Article Outline	E-mailing different recipients between customer/supplier statements/remittance advices and customer/supplier source documents
Article Date	2021/10/19
Knowledge Type	Enquiry: General How to
Knowledge Activity	E-Mailing
Primary Module	E-mailing Issues
Secondary Module	E-mailing Issues
Knowledge Source	Incoming Customer Query

Description of Enquiry

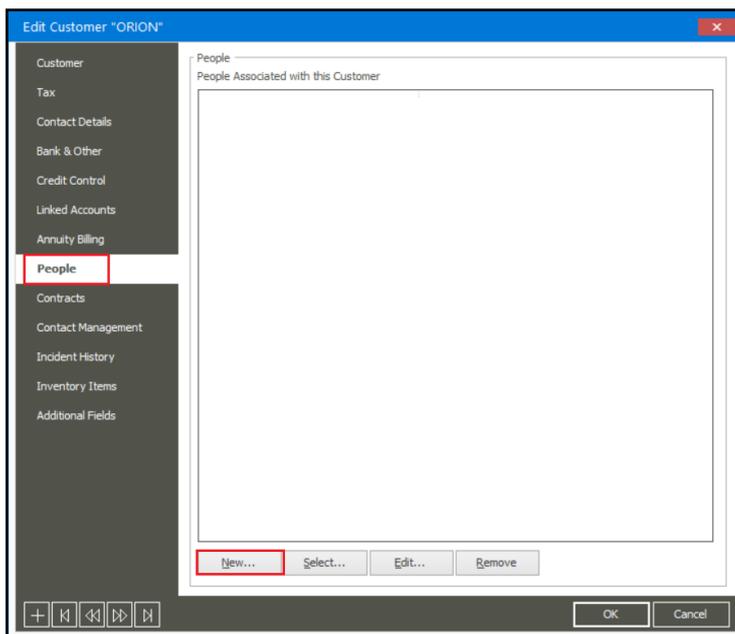
This article explains how to e-mail different recipients so that a specific person receives the Customer Statements / Supplier Remittance Advices, and another person at the same company (customer/supplier) receives the Customer / Supplier source documents e.g. Invoices.

Details / Solution

First Note: To explain further we'll specifically make use of **Customer** source documents e.g., Invoices, as well as Statements. The same setup principles also apply to e-mailing Supplier source documents and Remittance Advises.

Apply the following steps to achieve the above outcome:

1. Go to Customers/Sales | Maintenance | Customers, find and open/edit the relevant customer where the above needs to be setup on.
2. Open the **People** tab and click the **New..** button at the bottom.



3. Capture the relevant details of the recipient who will be receiving the Customer Statements and select the option marked below.

Add Person "New Person"

People

Details
Organisation
Customers
Suppliers
Prospects
Incident History

Full Name: John Miller

Description: [Empty]

Objection to Processing

First Name: John Initials: J

Last Name: Miller Title: [Dropdown]

Telephone (W): [Empty]

Cellular: [Empty]

E-mail: bjmad@gmail.com

Statements

E-mail Statements / Remittances

Multiple Document Printing

E-mail Source Documents

Comments: [Empty]

4. Create another **People** record for the specific recipient of source documents e.g., invoices and select the option marked below.

Add Person "New Person"

People

Details
Organisation
Customers
Suppliers
Prospects
Incident History

Full Name: Lewis Bradley

Description: [Empty]

Objection to Processing

First Name: Lewis Initials: P

Last Name: Bradley Title: [Dropdown]

Telephone (W): [Empty]

Cellular: [Empty]

E-mail: Lewis@reindeer.com

Statements

E-mail Statements / Remittances

Multiple Document Printing

E-mail Source Documents

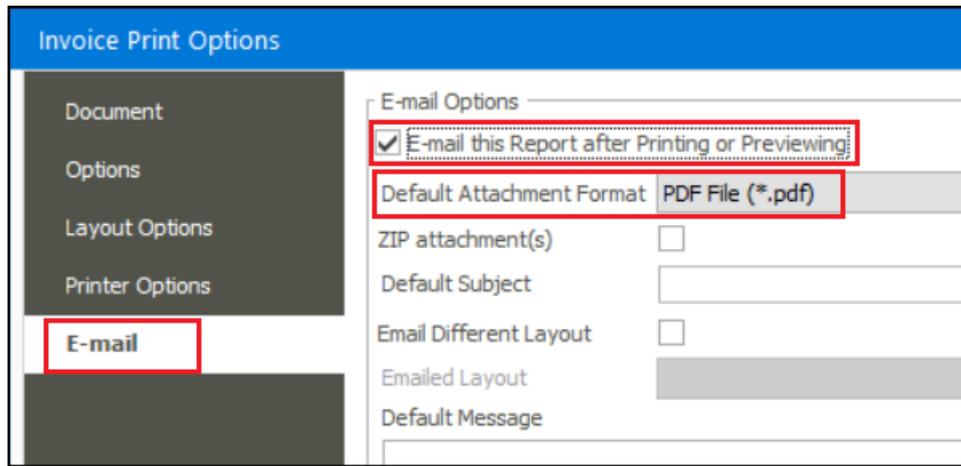
Comments: [Empty]

- On the **Bank & Other** tab select the options marked below. It's also wise to enter a password on the field marked below to secure e-mailing security. This specific password needs to be shared with the specific recipient/s of the customer.

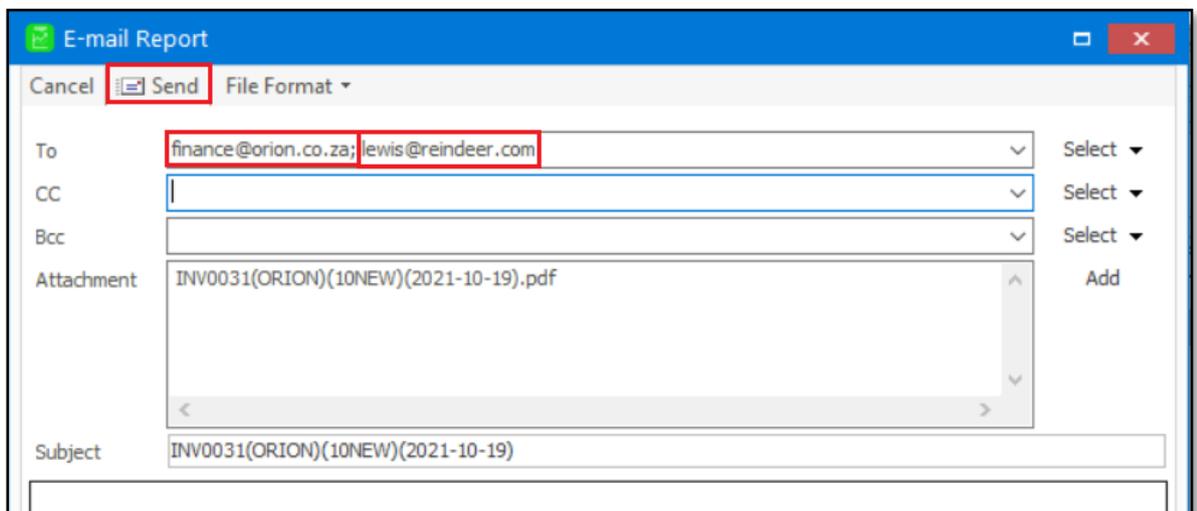
- On the **Contact Details** tab, enter the E-mail address for the alternative recipient who also need to receive source documents and customer Statements. This field is not compulsory and can be left blank if you don't want to specific an alternative recipient.

- Click **OK** to save your changes when done.
- Now go to the relevant source document screen e.g., Inventory | Transactions | Invoices
- Go to **Print | Print options | Print Options (Invoices)**.

10. On the E-Mail tab, select the options below.

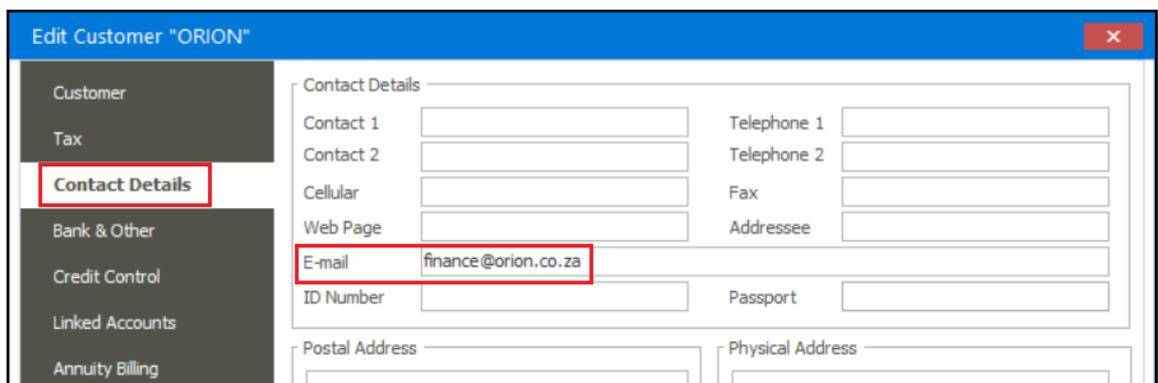


11. When you now process and print a new invoice, or reprint an existing archived invoice and then close the print preview, the following screen should open and the e-mail addresses populating automatically.



12. From the above, notice the following:

- The **finance@orion.co.za** e-mail address is the alternative recipient and is automatically populating from the **Contact Details** screen in step 6 above. If needed, you can delete this e-mail address on the **above screen** if this alternative recipient should not receive the invoice at this time.



- The second e-mail address lewis@reindeer.co.za is the one setup on the Peoples record in step 4 above.

Telephone (W)

Cellular

E-mail

Statements

E-mail Statements / Remittances

Multiple Document Printing

E-mail Source Documents

13. Finally, also note that when you e-mail Customer Statements,

Messages and Other

Layout Options

Printer Options

E-mail

Groups

Areas

Sales Reps

Ageing Periods

Foreign Currency

Sort

Primary Secondary

Options

Print Totals Age All By

Distribution

Include E-mail-only Customers in Preview

Include E-mail-only Customers in Print

E-mail Customers Individually

Default

E-mail Print Preview Close

the following recipients will receive the statement per customer:

- a) The recipient's e-mail address entered on the Customer's Contact Details screen, and

Edit Customer "ORION"

Customer

Tax

Contact Details

Bank & Other

Credit Control

Linked Accounts

Annuity Billing

Contact Details

Contact 1 Telephone 1

Contact 2 Telephone 2

Cellular Fax

Web Page Addressee

E-mail

ID Number Passport

Postal Address Physical Address

b) the recipient's e-mail address entered on the Peoples record in step 3 above.

The screenshot shows a software window titled "Add Person - New Person". On the left is a sidebar with a "People" tab highlighted. The main form area contains several input fields: "Full Name" (John Miller), "Description", "Objection to Processing" (checkbox), "First Name" (John), "Last Name" (Miller), "Initials" (J), and "Title" (dropdown). Below these are "Telephone (W)", "Cellular", and "E-mail" (bjmad@gmail.com) fields. A "Statements" section includes a checked checkbox for "E-mail Statements / Remittances" and an unchecked checkbox for "E-mail Source Documents". A "Comments" field is at the bottom.

- Note that you can now even add more recipients of Customer Statements and source documents by adding more People records and entering the required recipient details accordingly.
- Finally, also note that you can even include multiple e-mail addresses on the same E-mail address field of the Contact Details screen or relevant Peoples record, if required. Simply separate each e-mail address with a ; symbol

For instance:

The screenshot shows an "E-mail" field with the text "lewis@reindeer.com; johnwalker@reindeer.com". A red box surrounds the entire text, and a red circle highlights the semicolon separator between the two email addresses.

- When, for instance a Source Document is e-mailed, you should notice all relevant recipients' e-mail addresses populating on the screen below.

The screenshot shows an "E-mail Report" dialog box. At the top are buttons for "Cancel", "Send", and "File Format". The "To" field contains the email addresses "finance@orion.co.za; lewis@reindeer.com; johnwalker@reindeer.com". The "CC" and "Bcc" fields are empty. The "Attachment" field shows "INV0031(ORION)(10NEW)(2021-10-19).pdf". The "Subject" field contains "INV0031(ORION)(10NEW)(2021-10-19)".