



## Email Audit Tabs

Megan De Freitas - 2024-11-22 - System

### Overview

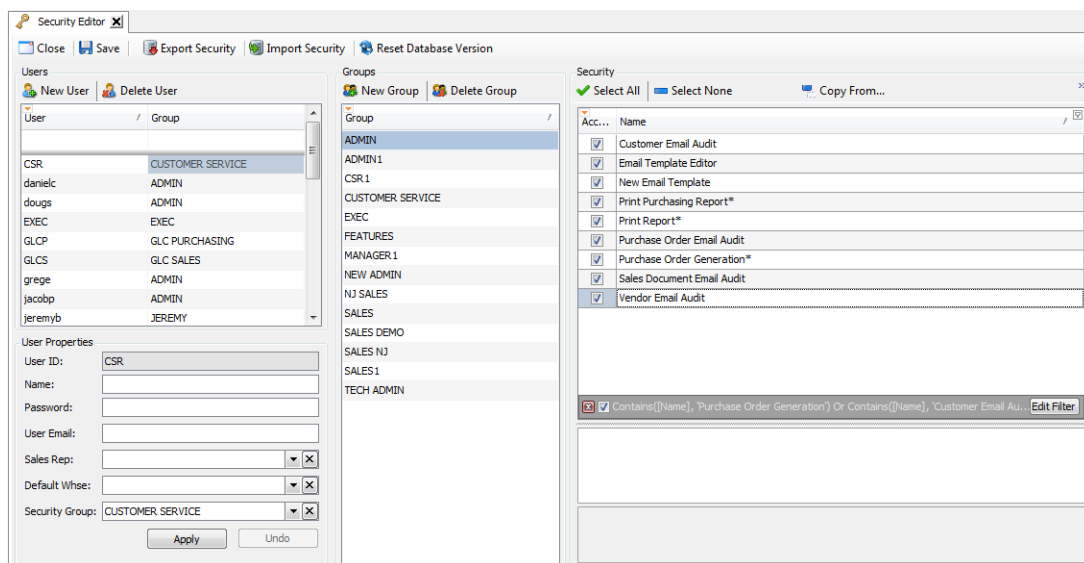
There are now Email Audit Tabs in the Customer Card, Sales Document, Vendor Card, and Purchase

Order forms in Sales Pad. The addition of these forms makes it more efficient for you to aggregate and retrieve emails and to flag business objects in various search windows if they have an associated email.

This functionality is also available in Dynamics GP 2013 .

### Security

In the Security Editor, search for " email." Enable the items *Vendor Email Audit*, *Sales Document Email Audit*, *Purchase Order Email Audit*, and *Customer Email Audit*.



### Usage

Click on **Customer Search** and open a Customer Card. Click on the Email Audit tab to see a list of emails associated with that customer. The window shows the date sent, the document associated with the

email, who sent the email, who it was sent to, and the email subject header.

Card: [AARONFIT0001] Aaron Fitz Electrical - TWO42 - SalesPad

5/23/2013 v4.2.0.3 | sa | (1 of 99 seats in-use)

Application: Sales Documents, Sales Monitor, Counter Sales, Sales Batch Processing, Inventory Lookup, Inventory Analysis, Inventory Transfers, Sales Transfers, Purchase Order Search, Vendor Search, Purchasing Advisor, Backordered Items, Receiving, Quick Reports, Sales Analysis

Customer Search: [X] Card: [AARONFIT0001] Aaron Fitz Electrical

Close Refresh Save Dynamics GP DISTRIBUTION QUOTE DISTRIBUTION ORDER DISTRIBUTION INVOICE RTN RETURN

Customer Properties: Customer: AARONFIT0001, Customer Name: Aaron Fitz Electrical, Cust Class: USA-ILMO-T1, Price Level: RETAIL, Pay Terms: NET 30, Sales Rep: Marsh, Ian, Sales Terr: TERRITORY 1, Discounts: Z-US\$, Trade Discount: 2.00 %

Primary Address Information: Tom Jones, 222 Warehouse Drive, Redmond, WA 98052-61, P1:(425) 567-9876, P2:(425) 657-4344, P3:(425) 336-7676, t1@afe.com, www.afe.com

Default Shipping Information: Method: FEDEX GROUND, Whse: WAREHOUSE, Ship Complete: [X], On Hold: [ ], Interest: B-Moderate Potential, Lead Source: Advertising, Contract Type: Time & Material

Open Sales Documents:

Type	Doc #	Doc Date	Batch	PO	Total	Req Ship
ORDER	D6205	2/18/2011	MARGIN REVIEW		0.00	2/18/2011
ORDER	D6208.1	2/22/2011	READY TO PICK		0.00	2/22/2011
ORDER	D6208.2	2/22/2011	WAITING PRODUCT		397.80	2/22/2011
ORDER	D6212	2/25/2011	PENDING ORDER		801.79	2/25/2011
ORDER	D6214	2/28/2011	WAITING PRODUCT		10.16	2/28/2011
ORDER	D6224	3/1/2011	READY TO PICK		958.80	3/1/2011
RETURN	RT1126	2/10/2011	PENDING RETURN		64.00	2/10/2011
INVOICE	INV5837	1/29/2011	READY TO POST	CASE12222	75.03	12/17/2010
INVOICE	INV5835	1/29/2011	READY TO POST		1,450.80	11/22/2010
INVOICE	INV5834	1/29/2011	READY TO POST		1,450.80	11/22/2010

CRM Note AR Item History Sales Documents CardControl Transactions User Fields Sales Graph Quick Report Recurring Sales Item Sales Special Pricing Child Accounts Equipment Contract Pricing Email Audit Default Doc Items Saved Attributes

Date	User ID	Sales Doc Num	Email From	Email To	Email Subject	Email Body
05/15/2013	sa	D6855	brian.smith@salespad.net	brian.smith@salespad.net	D6855 - Order Confirmation	
05/15/2013	sa	DC1285	brian.smith@salespad.net	brian.smith@salespad.net	DC1285 - Order Confirmation	

Click to see email

You can then click on the envelope icon in the Email Body column to open the email.

To use the Email Audit tab for sales documents, go to Sales Documents and click on a document in the Sales Doc Num column. Click the Email Audit tab to see the emails related to that document.

(ORDER) D6855 - TWO42 - SalesPad

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Customer Search: [X] Purchase Order Search: [X] Vendor Search: [X] Vendor: Advanced Office Systems [X] Card: [AARONFIT0001] Aaron Fitz Electrical [X] (ORDER) D6855 [X]

Close Save Print Profitability Attach Sales Line to PO Smart Printing Delete Copy Allocate Un Allocate Dynamics GP Ship

Document Properties: Document #: D6855, Customer #: AARONFIT0001, Cust PO: , Req Ship: 5/8/2013, Ship Method: FEDEX-OVERNIGHT, Whse: WAREHOUSE, Currency: Z-US\$

ORDER (DISTRIBUTION): Aaron Fitz Electrical, Sales Rep: IAN M., Pay Terms: NET 30, Doc Date: 5/8/2013, Created By: salespad, Approved By:

Shipping Address: Aaron Fitz Electrical, Frank Kivan, One Microsoft Way, Suite 100, Redmond, WA 98052-6399, P:(425) 567-9876 x123, F:(312) 555-0102, Ship Complete: [ ], Email Invoice: [ ]

Additional Properties: Batch/Q: ORDER, Price Level: RETAIL, Discounts: No Holds

Totals - GM: [\$350.00] [77.78%]: Misc Charge: 0.00, Discount %: 2.00 %, Discounts: 9.00, Freight: 0.00, Tax: 0.00, Total: 441.00, Payment: 0.00

Line Items Notes Addresses Holds User Fields Audit Related Documents Purchases Quick Report Tracking Numbers Email Audit FedEx Quote

Date	User ID	Email From	Email To	Email Subject	Sales Doc Num	Email Body
05/15/2013	sa	brian.smith@salesp...	brian.smith@salespad.net	D6855 - Order Conf...	D6855	

To use the Email Audit tab on the Vendor Card, go to Vendor Search and open the Vendor Card for the vendor you are interested in. Again, click on the Email Audit tab to view and open emails related to

that vendor. **Note:** You can click on the Email to open the message in the Email Body column.

Vendor: Advanced Office Systems - TWO42 - SalesPad

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Application: Sales Documents, Sales Monitor, Counter Sales, Sales Batch Processing, Inventory Lookup, Inventory Transfers, Sales Transfers, Purchase Order Search, Purchasing Advisor, Backordered Items, Receiving, Quick Reports, Sales Analysis

Customer Search, Purchase Order Search, Vendor Search, Vendor: Advanced Office Systems

Close, Refresh, Save, Create Purchase Order: Standard, Drop Ship, Vendor Return

Vendor Properties:

Vendor Name: ADVANCED0001  
 Vendor: Advanced Office Systems  
 Vendor Class: USA-US-M  
 Vendor Status: ACTIVE  
 Payment Terms: NET 30  
 Currency: Z-US\$

Primary Address Information:

Janice Berman  
 678 Sherwood Park South  
 Arlington Heights, IL  
 P1:(618) 555-0102  
 FX:(618) 555-0102  
[brian.smith@salespad.net](mailto:brian.smith@salespad.net)  
[www.aos.com](http://www.aos.com)

Default Shipping Information:

Shipping Method: GROUND  
☐ On Hold

Purchase Orders:

PO Number	PO Type	PO Date	Required Date	Total
PO2296	STANDARD	10/18/2010	10/18/2010	1,337.50
PO2298	STANDARD	10/22/2010	10/22/2010	2,675.00
PO2300	STANDARD	10/22/2010	10/22/2010	7,550.00
PO2301	STANDARD	11/1/2010	11/1/2010	39,680.00
PO2304	STANDARD	11/3/2010	11/3/2010	3,402.00

Contact Addresses, CRM, Note, Item History, Purchase Orders, User Fields, Purchases Graph, Quick Report, Special Costing, Purchase Receipts, Email Audit

Date	PO Number	User ID	Email From	Email To	Email Subject	Email Body
05/23/2013	B9046-2	sa	brian.smith@salespa...	brian.smith@salespad.net	B9046-2 - Purchase O...	
05/23/2013	B9046-2	sa	brian.smith@salespa...	brian.smith@salespad.net	B9046-2 - DC Purcha...	

To use the Email Audit tab from the "Purchase Order" screen, click on **Purchase Order Search** and use the Purch. Order # field to search for a PO. Open the document and select the Email Audit tab to view

and open emails related to that PO,

(STANDARD) B9046-2 - TWO42 - SalesPad

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Application: Sales Documents, Sales Monitor, Counter Sales, Sales Batch Processing, Inventory Lookup, Inventory Transfers, Sales Transfers, Purchase Order Search, Purchasing Advisor, Backordered Items, Receiving, Quick Reports, Sales Analysis

Customer Search, Purchase Order Search, Vendor Search, Vendor: Advanced Office Systems, (STANDARD) B9046-2

Close, Save, Print, Copy, Cancel, Dynamics GP

PO Properties:

Purch. Order #: B9046-2  
 PO Status: Released  
 PO Type: STANDARD  
 Vendor ID: ADVANCED0001  
 Vendor Name: Advanced Office Systems  
 Currency: Z-US\$

PO Dates:

PO Date: 1/7/2013  
 Required Date: 1/7/2013  
 Promised Date: 1/7/2013  
 Promised Ship: 1/7/2013

Other:

Terms: NET 30  
 Shipping Method: FEDEX GROUND  
 Buyer:  
 Confirm With:  
 Revision Number: 0  
☐ On Hold

Ship To Address:

☐ Ship to Customer  
 Edit Address  
 Fabrikam, Inc.  
 Todd McFee  
 4277 West Oak Parkway  
 Chicago, IL 60601-4277  
 P:(312) 436-2671  
 F:(312) 436-2896

Totals:

Discount: 0.00  
 Freight: 0.00  
 Misc. Charge: 0.00  
 Tax: 0.00  
 Total: 3,650.00

Line Items, Notes, Audit, Addresses, User Fields, Links, Receipts, Email Audit

Date	User ID	Email From	Email To	Email Subject	PO Number	Email Body
05/23/2013	sa	brian.smith@salespa...	brian.smith@salespad.net	B9046-2 - Purchase ...	B9046-2	
05/23/2013	sa	brian.smith@salespa...	brian.smith@salespad.net	B9046-2 - DC Purcha...	B9046-2	