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EmailTo, EmailCC, and EmailBCC on Customer and Vendor Address Cards

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Overview

In the Customer and Vendor Cards in Sales Pad, there are now separate “Email To,” “Email CC,” and “Email Blind CC (BCC)” fields. These fields correspond to the “Email Addresses” fields found in the Internet Information window in Microsoft Dynamics GP.

Usage

Click on Customer Search and open a Customer Card. Click on the Contact Addresses tab to display contact information for all contacts at that customer. The following fields are then displayed:

The screenshot shows the Sales Pad interface for a Customer Card. The top bar includes tabs for Customer Search, Card: [AARONFIT0001] Aaron Fitz Electrical, and Contact: TOM JONES/Tom Jones. Below the tabs are buttons for Close and Save. The main form is divided into several sections:

- Customer:** Customer ID: AARONFIT0001, Customer Name: Aaron Fitz Electrical.
- Address:** Code: TOM JONES, Alt Comp. Name: Aaron Fitz Electrical, Contact Name: Tom Jones, Address: 222 Warehouse Drive, Zip: 98052-6399, City: Redmond, State: WA, Country Code: US.
- Contact Information:** Contact Type: (dropdown), Phone 1: (425) 567-9876, Phone 2: (425) 657-4344, Phone 3: (425) 336-7876, Fax: (425) 876-9988, Email: tj@afe.com, Email To: (empty), Email CC: (empty), Email BCC: (empty), Web Site: www.afe.com.
- Other Address Info:** Warehouse: WAREHOUSE, Sales Rep: IAN M., Sales Territory: Illinois and Missouri, Ship Method: FEDEX-OVERNIGHT, Tax Code: USASTCITY-6*, UPS Zone: (empty), File Location 1: (empty), File Location 2: (empty).
- Comments:** With AFE since 1988.
- Contact User Fields:** Contact Source: Advertisement, Title: Warehouse Operations, Contact Type: (dropdown), Referred By: Frank Kwan.

The “Email To,” “Email CC,” and “Email BCC” fields are all displayed under “Contact Information.”

This is a close-up of the Contact Information section from the screenshot. It shows the following fields:

- Contact Type:** (dropdown menu)
- Phone 1:** (425) 567-9876
- Phone 2:** (425) 657-4344
- Phone 3:** (425) 336-7876
- Fax:** (425) 876-9988
- Email:** tj@afe.com
- Email To:** (empty)
- Email CC:** (empty)
- Email BCC:** (empty)
- Web Site:** www.afe.com

These fields map to the "Email Addresses" fields in the "Internet Information" window found on the Address ID Contact Record in Dynamics GP.

Internet Information

File Edit Tools Help sa Fabrikam, Inc. 4/12/2017

Save Clear Delete

Select Information for: Customers

Customer ID: AARONFIT0001 Aaron Fitz Electrical

Address ID: TOM JONES 222 Warehouse Drive

E-mail Addresses

To... Cc... Bcc...

Internet Information

E-mail: tj@afe.com

Home Page: www.afe.com

FTP Site

Image

Messenger Address

Login

Password

User Defined 1

User Defined 2

Additional Information

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The Address ID Contact Record can be found in the Customer Maintenance window in Dynamics GP.

Customer Maintenance

File Edit Tools Additional Help

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Save Clear Delete Write Letters

Customer ID

AARONFIT0001

Hold

Inactive

Parent Customer ID

100221

Name

Aaron Fitz Electrical

Short Name

Aaron Fitz Elec

Statement Name

Aaron Fitz Electrical

Class ID

USA-ILMD-T1

Priority

None

Address ID

TOM JONES

Contact

Tom Jones

Address

222 Warehouse Drive

City

Redmond

State

WA

ZIP Code

98052-6399

Country Code

US

Country

US

Phone 1

(425) 567-9876 Ext. 0000

Phone 2

(425) 657-4344 Ext. 0000

Phone 3

(425) 336-7876 Ext. 0000

Fax

(425) 876-9988 Ext. 0000

UPS Zone

Shipping Method

FEDEX-OVERNIGHT

Tax Schedule ID

USASTCITY-6*

Ship Complete Documents

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Ship To

WAREHOUSE

Bill To

PRIMARY

Statement To

T HAMMOND

Salesperson ID

IAN M.

Territory ID

TERRITORY 1

Type

Retail

Rating

B-Moderate Potential

Comment 1

Comment 2

Trade Discount

2.00%

Payment Terms

NET 30

Discount Grace Period

Due Date Grace Period

Price Level

RETAIL

Accounts

Address

Options

E-mail

by Customer ID