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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 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

With AFE since 1988

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

Customer Maintenance - TWO (sa)

Save

Clear

Delete

Write Letters

Attach

All-in-One View

File

Print

Tools

Help

Add Note

Actions

File

Help

Customer ID	AARONFIT0001		<input type="checkbox"/> Hold	<input type="checkbox"/> Inactive	Parent Customer ID	
Name	Aaron Fitz Electrical					
Short Name	Aaron Fitz Elec					
Statement Name	Aaron Fitz Electrical					
Class ID	USA-ILMD-T1					
Priority	None					
Address ID	PRIMARY					
Contact	Bob Fitz					
Address	One Microsoft Way					
City	Redmond					
State	WA					
ZIP Code	98052-6399					
Country Code	US					
Country	United States					
Phone 1	(425) 555-0101 Ext. 0000					
Phone 2	(000) 000-0000 Ext. 0000					
Phone 3	(000) 000-0000 Ext. 0000					
Fax	(312) 555-0101 Ext. 0000					
UPS Zone						
Shipping Method	LOCAL DELIVERY					
Tax Schedule ID	USASTCITY-6*					
<input type="checkbox"/> Ship Complete Documents						
Ship To	PRIMARY					
Bill To	PRIMARY					
Statement To	PRIMARY					
Salesperson ID	PAUL W.					
Territory ID	TERRITORY 1					
Type	Retail					
User-Defined 2						
Comment 1						
Comment 2						
Trade Discount	0.00%					
Payment Terms	CREDIT CARD					
Discount Grace Period	0					
Due Date Grace Period	0					
Price Level						

Accounts

Address

Options

E-mail

by Customer ID