How to Setup Email Distribution

The **Email Distribution setup** is essential when sending reports via **Invoice screen | Email Invoice button** and **Batch Printing screen**. Only the contacts with complete email distribution setup can receive emailed reports.



Here are the steps on setting up the email distribution.

- 1. Open the Customer record from menu, Sales | Customers.
- 2. Navigate to Contacts tab.
- 3. Open the Entity Contact record that you want to setup the Email Distribution.

Entity - ABC Reseller										
New Save Search Re	efresh Delete Undo Ac	lditional Close								
Entity General Cust	omer Vendor Split	Farm Locations Con	tacts Comments	(0) History	Attachments (0)	Messages Cu	ustom	Audit Log (15)		
+ Insert 🔍 Open 🗡	Remove 🖂 Email Login	맘 Layout Q Filter	r Records (F3)							
✓ Name	Email Distribution	Email (username)	Title	Phone	Mobile	Location Na	me	Timezone	Portal Access	Active
Sample Contact	Invoices,Statements	i21testcompany@gmai				ABC Reselle	r	(UTC-12:00) Internatio		~

- 4. On Entity Contact screen, provide the following details.
 - a. Enter a valid **Email (username)**. This is the email address where the reports will be sent.
 - b. Click the **Email Distribution combo box button** and select the report/s that this contact will receive. Note that this field allows multiple selection.
 - c. Save the changes. This contact is now ready to receive reports via email.
 - Here is a sample setup.

New Save Refresh	Delete Undo Close							
Detail Audit Log (1)								
Full Name:	Sample Contact		User Portal Settings					
Email (username):	i21testcompany@gmail.com	Add Photo	Change Password 🖂 B	mail Login				
Title:			Portal Access: User F	ole:				
Phone:	Mobile:		Username: i21testcompa	ny@gmail.com				
Timezone:	(UTC-12:00) International Date Line West	~	Portal URL: 192.168.0.29	1610/i21/				
Contact Method:		~						
Location Name:	on Name: ABC Reseller 🗸			Contact Information				
Department:			+ Insert × Remove	' Types				
Type:		~	Type Deta	ils				
Email Distribution:	Invoices × Statements ×	~						
Active:	7							
Notes:								
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Here are the steps on setting up the email distribution.

1. Open the Customer record from menu, Sales | Customers.

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Ne	w Save Search I	Refresh Dele	ete Undo A	dditional +	Close								
Er	ntity Customer S	plit Farm	Locations	Contacts	Comments (0)	History	Message	Custom	Audit Log (1)				
+	Insert Q Open	× Remove	Email Login	88 Layo	ut Q. Filter	Records ((F3)						
~	Name	Email (use	rname)	Ti	tle	Phone	1	Nobile	Location Name	Timezone	Portal Acce	Activ	ve
~	Sample Contact								ABC Reseller			~	

- 3. Open the Entity Contact record that you want to setup the Email Distribution.
- 4. On Entity Contact screen, provide the following details.
 - a. Enter a valid Email (username). This is the email address where the reports will be sent.
 - b. Click the **Email Distribution combo box button** and select the report/s that this contact will receive. Note that this field allows multiple selection.
 - c. Save the changes. This contact is now ready to receive reports via email.

Here is a sample setup	•	
Entity Contact - Sample	e Contact	×
New Save Refresh	Delete Undo Close	
Detail Audit Log (3)		
Full Name:	Sample Contact	
Email (username): 🖂	i21testcompany@gmail.com Add Photo	
Title:		
Phone:	Mobile:	
Alt Phone:	Alt Email:	
Contact Method:	V Fax:	
Location Name:	ABC Reseller	\sim
Active:	✓ Department:	
Portal Access:	Timezone:	\sim
Туре:		~
Notes:		
Email Distribution:	Invoices X Quotes X	~
⑦ ① ② Ready	II	

The Email Distribution setup is essential when sending reports via Invoice screen | Email Invoice button. Only the contacts with complete email distribution setup can receive emailed reports.

Here are the steps on setting up the email distribution.

1. Open the Customer record from menu, Sales | Customers. 2.

Navigate to Contacts tab.			
🗊 Entity - ABC Reseller			* 🗆 X
New Save Search Refresh Delete Undo Additional Close			
Entity Customer Split Farm Locations Contacts Notes History Attachments Messages	Custom Audit Log		
🔇 Insert 🔍 View 🤤 Remove 🚯 Email Login 👬 Layout 🔹 🍸 Filter Records (F3)			
🕅 Name Email (username) Title Phone Mobile	Location Name Timezone	Portal Access	Active
Sample Contact	ABC Reseller		V

- Open the Entity Contact record that you want to setup the Email Distribution.
 On Entity Contact screen, provide the following details.
 - - a. Enter a valid Email (username). This is the email address where the reports will be sent.
 - b. Check the Receive Sales Email check box button.
 - c. Click the Email Distribution combo box button and select the report/s that this contact will receive. Note that this field allows multiple selection.
 - d. Save the changes. This contact is now ready to receive reports via email.

Here is a sample setup.					
🗊 Entity Contact - Samp	le Contact				× ×
New Save Refresh	Delete Undo	Close			
Detail Audit Log					
Full Name:	Sample Contact				
Email (username): 😥	i21testcompany@	gmail.com			Add Photo
Title:					
Phone:			Mobile:		
Alt Phone:			Alt Email:		
Contact Method:		*	Fax:		
Location Name:	ABC Reseller				~
Active:	Department:				
Portal Access:	Timezone:				~
Receive Sales Email:	✓ Type:				~
Notes:					
Email Distribution:	Invoices 🙁				Y
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