

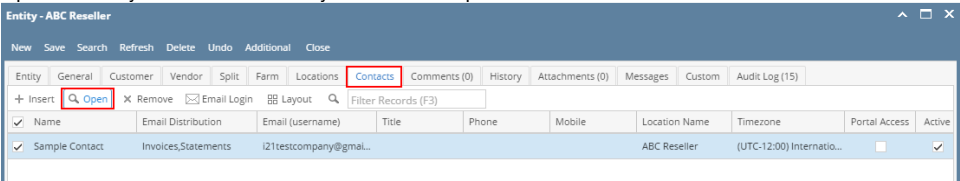
How to Setup Email Distribution

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.

 Make sure the **SMTP Email Settings** is properly configured.

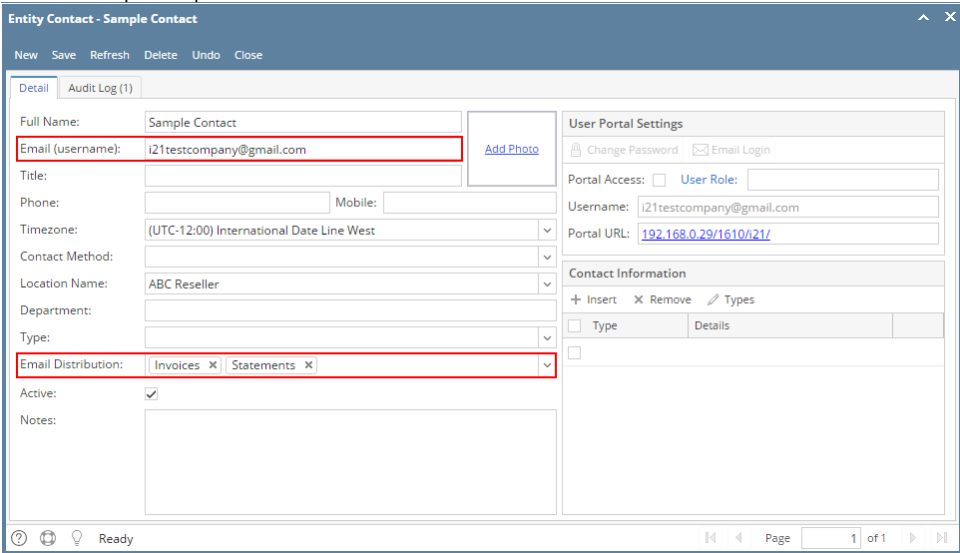
Here are the steps on setting up the email distribution.

- 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.



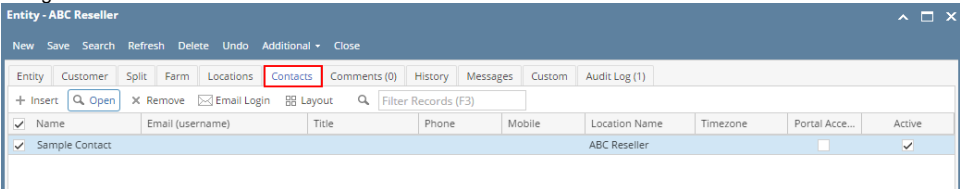
- 4. On **Entity Contact screen**, provide the following details.
 - a. Enter a valid **Email (username)**. This is the email address where the reports will be sent.
 - b. Click the **Email Distribution combo box button** and select the report/s that this contact will receive. Note that this field allows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

Here is a sample setup.



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- 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 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: Fax:

Location Name: ABC Reseller

Active: ☒ Department:

Portal Access: ☐ Timezone:

Type:

Notes:

Email Distribution: Invoices x Quotes x

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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

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		<input type="checkbox"/>	<input checked="" type="checkbox"/>

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. 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 - Sample 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

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