

Summary

There is a new feature in the most recent platform upgrade, which is used to associate certain Contact Persons within a Business Partner to an E-mail Group.

This feature will allow you to specify the recipients within the Business Partner's organization that will receive certain e-mails. In this way, the E-mail Group will act as a distribution list. For example, this feature allows you to send A/R Invoices created for different customers to their respective accountants.

Step-by-Step Guide

- 1. Go to Administration->Setup->Business Partners->E-Mail Group
- 2. Add the 'Email Group Code and Group Name in the next available row and click Update

| E Administration | A | 100 | | | |
|-----------------------------|----------|-----|-----|--------------------|-------------------|
| Choose Company | | Ξ | E-N | 1ail Group - Setup | |
| Exchange Rates and Indexes | | E | # | E-Mail Group Code | E-Mail Group Name |
| 🛅 System Initialization | | CAL | 1 | BeechWood | BW |
| 🗁 Setup | | | 2 | | |
| General | | | | | |
| Financials | | | | | |
| Dpportunities | | | - | | |
| Purchasing | | | | | |
| Business Partners | | | | | |
| Countries | | L | | | |
| Address Formats | | T | | | |
| Customer Groups | | - | | MON 38 | |
| Uendor Groups | | | ι | Ipdate Cancel | |
| Business Partner Properties | | | | | 2 |
| Business Partner Priorities | | | P | | 3 4 |
| Dunning Terms | | | | | 5 |
| Payment Terms | | | | | 6 |
| Payment Blocks | | - | | | 8 |
| Target Group | 6 | | | | 2 |
| E-Mail Group | | | | | <u> </u> |

- 3. Bring up the Business Partner in the Business Partner Master Data that you would like to create a distribution list for
- 4. Switch to the 'Contact Persons' tab



5. Assign each applicable contact person to the E-mail Group(s) you just created

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| | | 15. | | | | | | |
| Ge <u>n</u> eral Conta | t Persons <u>A</u> ddres | ises Payn | nent Terms | Payment Run | Accounting | Properties | Remar <u>k</u> s | Attachments |
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| | | | E-Mail Group | | BeechWood 💌 | | | |
| | | | Pager | | | | | |
| | | | Passwo | rd | BeechWood | | 10 | |
| | | | | | Define New | | | |

Now, whenever you want to e-mail certain documents, such as a Customer Statement, you may receive this prompt:

| E-Mail Options | | _ × |
|-------------------------------|--------------------------------|-----|
| Send Customer Statement Repor | to Respective Business Partner | |
| Use E-Mail Group | BeechWood | |
| OK Cancel | | |

Once you make your selections and choose, 'Okay' you'll see that the system has added all the contacts associated with the E-mail Group onto the window to be sent.

Version 4.5.1.0