Article Outline	E-mailing different recipients between customer/supplier statements/remittance advices and customer/supplier source documents
Article Date	2021/10/19
Knowledge Type	Enquiry: General How to
Knowledge Activity	E-Mailing
Primary Module	E-mailing Issues
Secondary Module	E-mailing Issues
Knowledge Source	Incoming Customer Query

Description of Enquiry

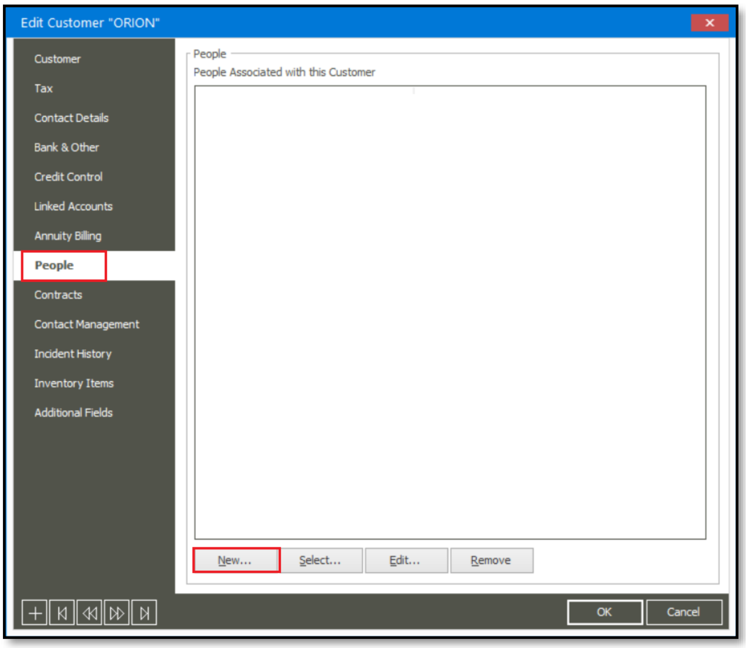
This article explains how to e-mail different recipients so that a specific person receives the Customer Statements / Supplier Remittance Advices, and another person at the same company (customer/supplier) receives the Customer / Supplier source documents e.g. Invoices.

Details / Solution

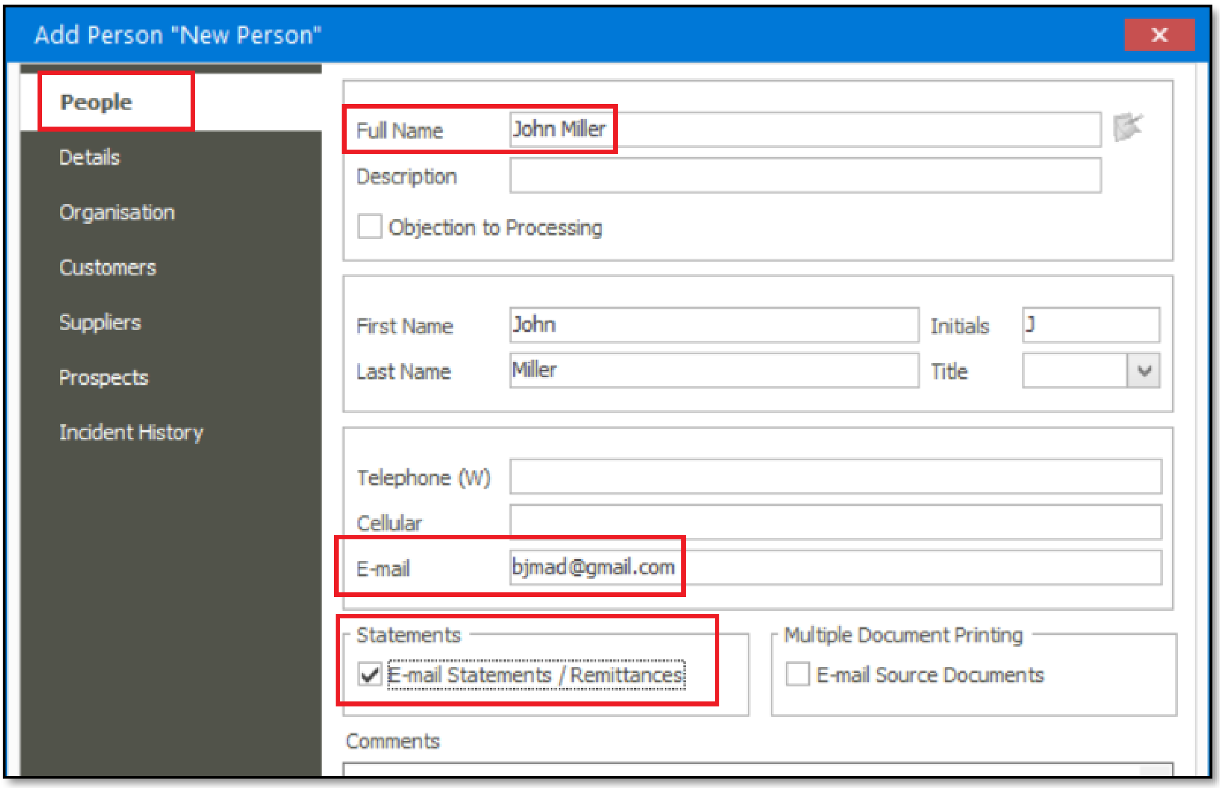
First Note: To explain further we'll specifically make use of **Customer** source documents e.g., Invoices, as well as Statements. The same setup principles also apply to e-mailing Supplier source documents and Remittance Advises.

Apply the following steps to achieve the above outcome:

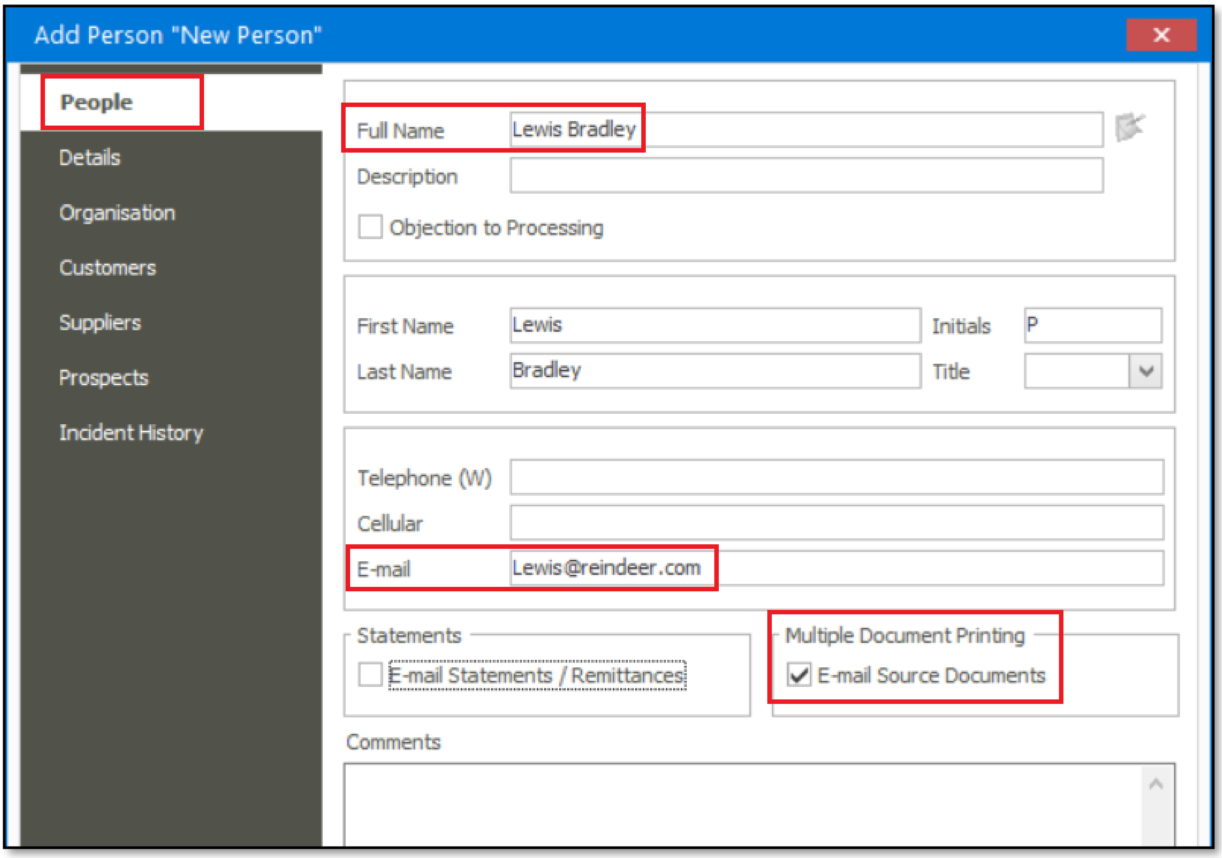
1. Go to Customers/Sales | Maintenance | Customers, find and open/edit the relevant customer where the above needs to be setup on.
2. Open the **People** tab and click the **New..** button at the bottom.



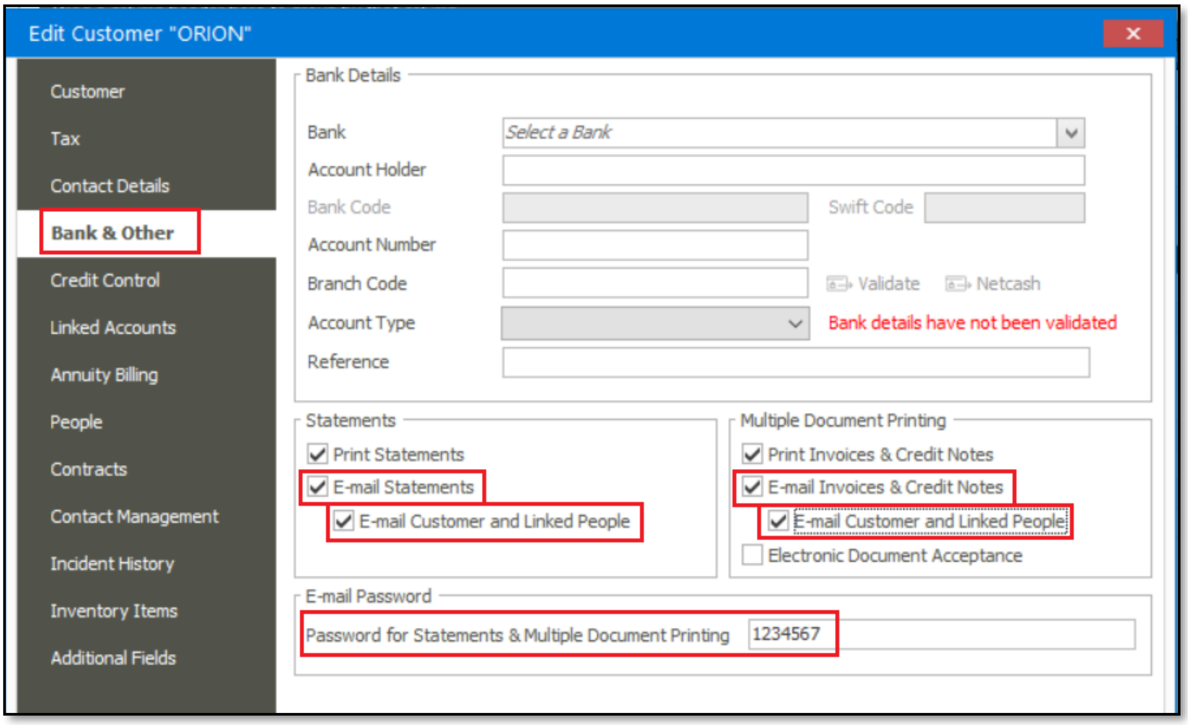
3. Capture the relevant details of the recipient who will be receiving the Customer Statements and select the option marked below.



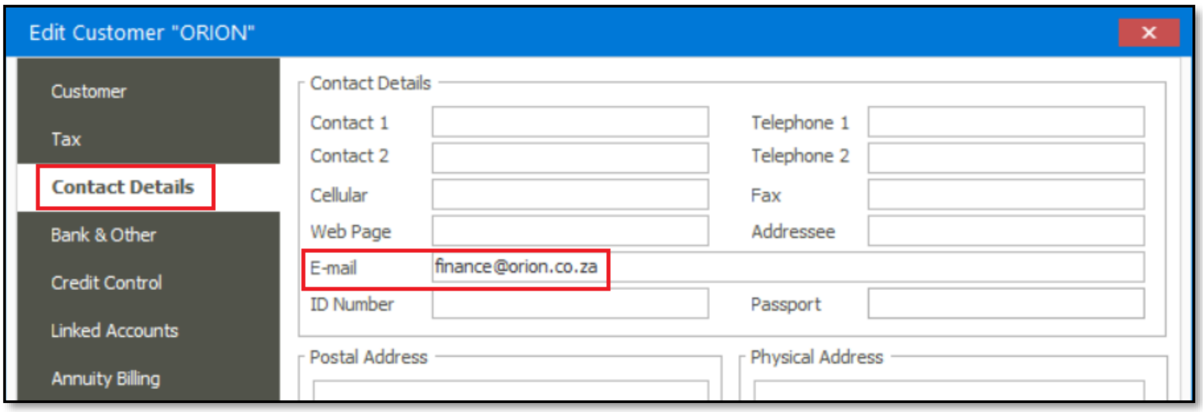
4. Create another **People** record for the specific recipient of source documents e.g., invoices and select the option marked below.



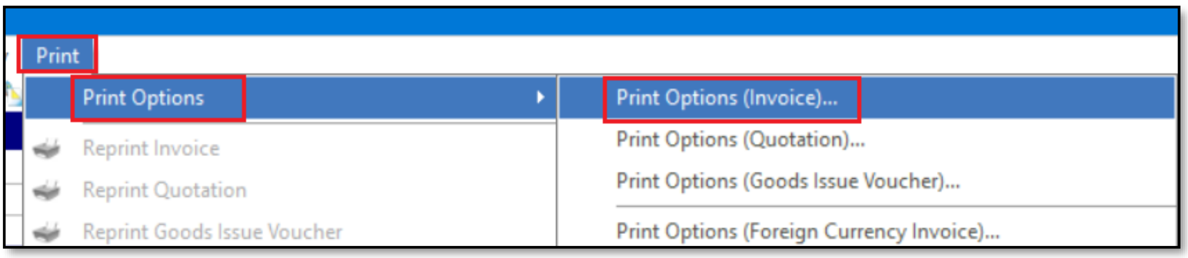
5. On the **Bank & Other** tab select the options marked below. It's also wise to enter a password on the field marked below to secure e-mailing security. This specific password needs to be shared with the specific recipient/s of the customer.



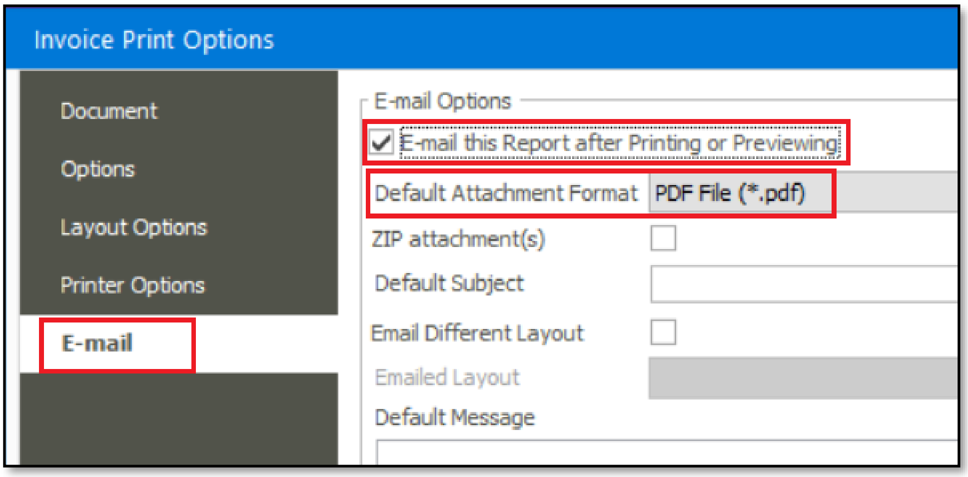
6. On the **Contact Details** tab, enter the E-mail address for the alternative recipient who also need to receive source documents and customer Statements. This field is not compulsory and can be left blank if you don't want to specific an alternative recipient.



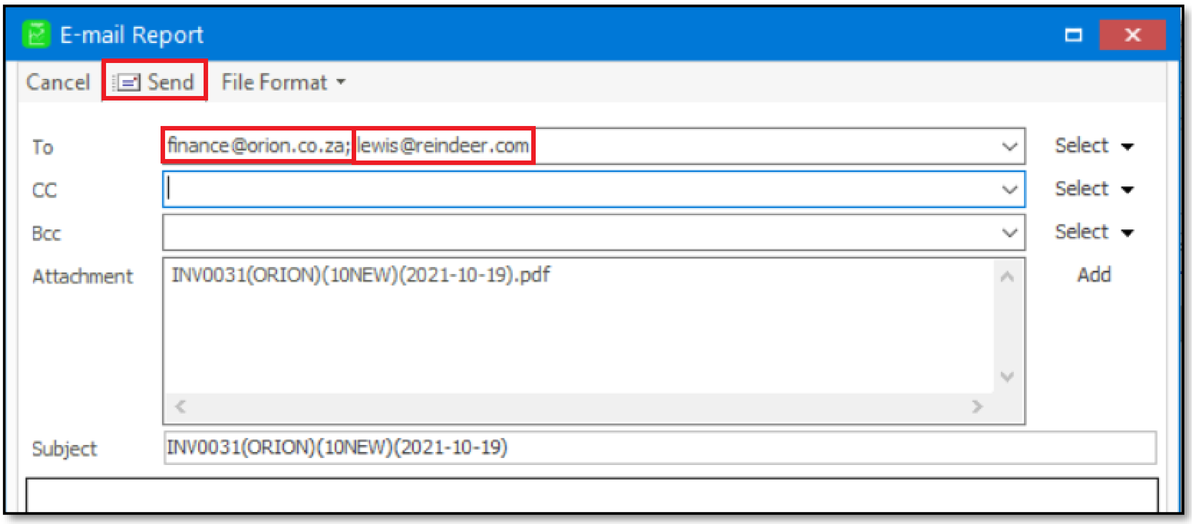
7. Click **OK** to save your changes when done.
8. Now go to the relevant source document screen e.g., Inventory | Transactions | Invoices
9. Go to **Print | Print options | Print Options (Invoices).**



10. On the E-Mail tab, select the options below.

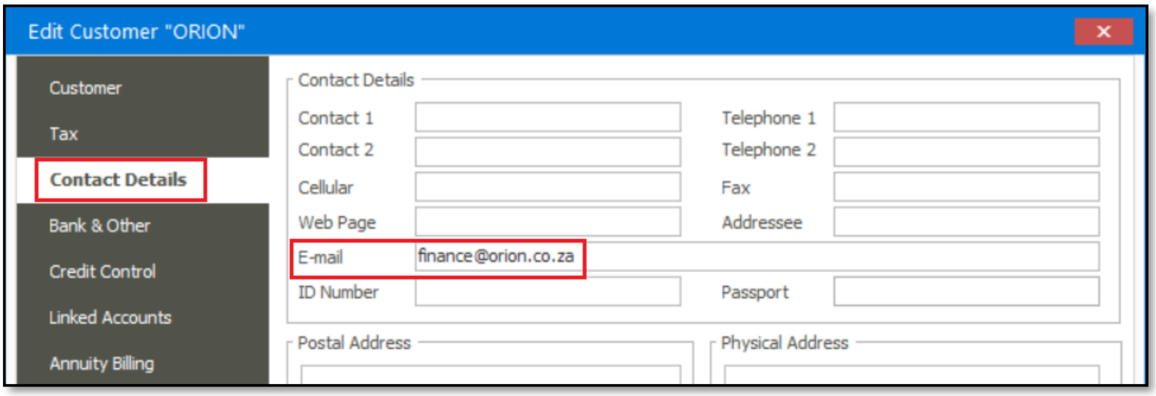


11. When you now process and print a new invoice, or reprint an existing archived invoice and then close the print preview, the following screen should open and the e-mail addresses populating automatically.

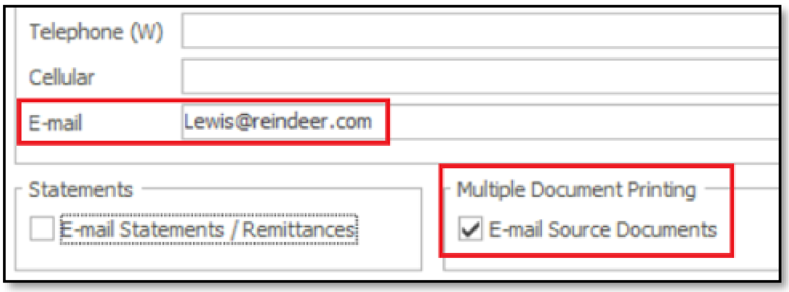


12. From the above, notice the following:

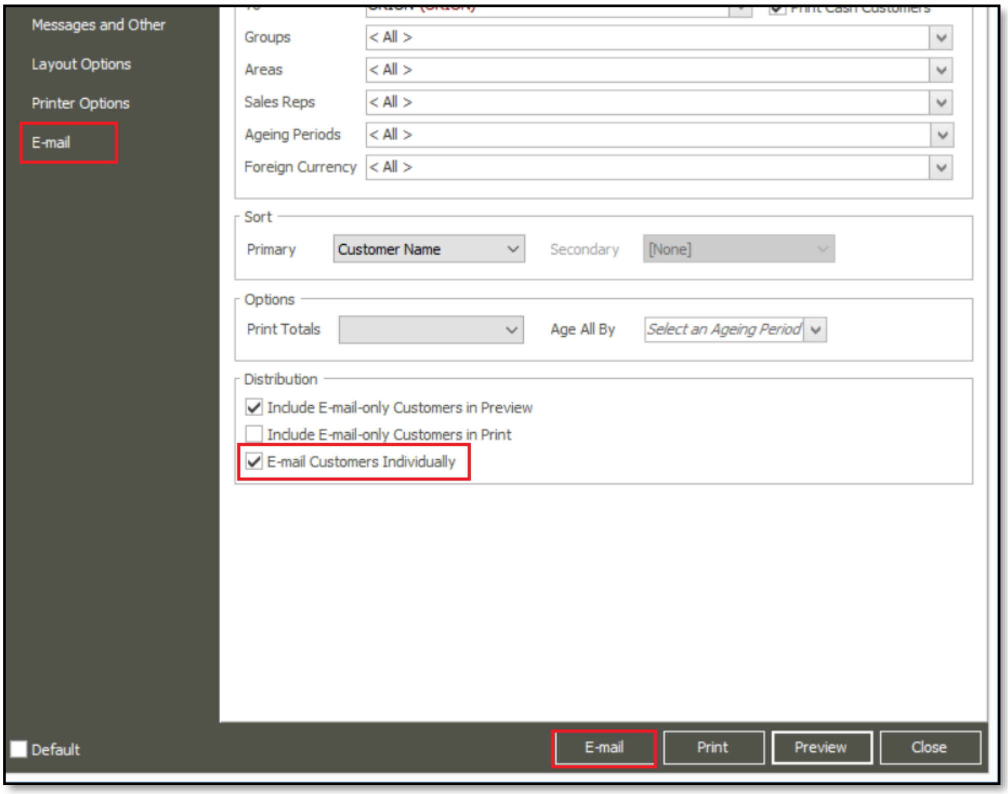
- The **finance@orion.co.za** e-mail address is the alternative recipient and is automatically populating from the **Contact Details** screen in step 6 above. If needed, you can delete this e-mail address on the **above screen** if this alternative recipient should not receive the invoice at this time.



- The second e-mail address lewis@reindeer.co.za is the one setup on the Peoples record in step 4 above.

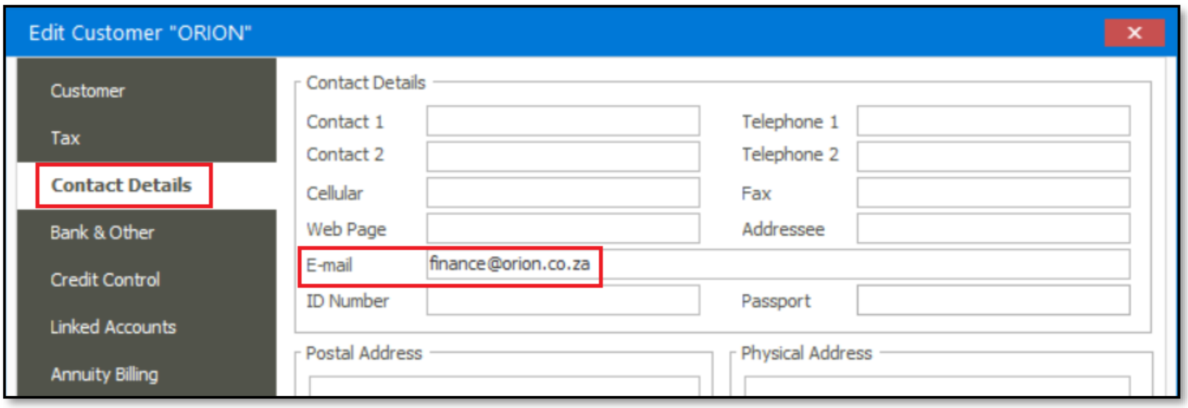


13. Finally, also note that when you e-mail Customer Statements,

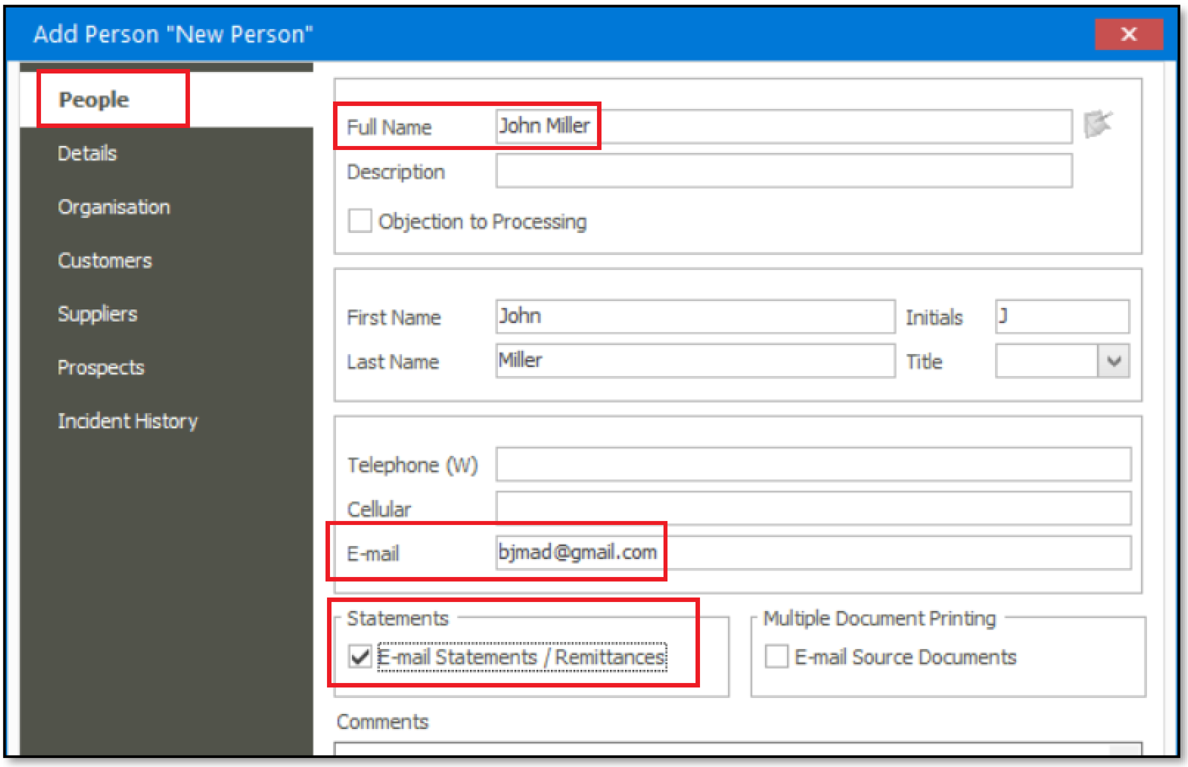


the following recipients will receive the statement per customer:

a) The recipient's e-mail address entered on the Customer's Contact Details screen, and



b) the recipient’s e-mail address entered on the Peoples record in step 3 above.



14. Note that you can now even add more recipients of Customer Statements and source documents by adding more People records and entering the required recipient details accordingly.
15. Finally, also note that you can even include multiple e-mail addresses on the same E-mail address field of the Contact Details screen or relevant Peoples record, if required. Simply separate each e-mail address with a **;** symbol

    For instance:

16. When, for instance a Source Document is e-mailed, you should notice all relevant recipients’ e-mail addresses populating on the screen below.