Mail/Email Summary

The Mail/Email Summary is a utility that tracks emails sent to and received from customers. This page contains three tabs: Emails, Incoming Emails, and Outgoing Emails.   The information on each tab cannot be sent to a printer, however, it may be exported to an Excel file.

The software automatically updates this page every afternoon. Email statuses are automatically updated every day at 6:00 AM Eastern Time.

To access the Mail/Email Summary, navigate to:

- Reports > Customer > Mail/Email Summary – OR –

- Setup > Utilities > Mail/Email Summary

The Mail/Email Summary page is displayed.

Emails tab

The Emails tab displays contains information related to emails sent to a customer. Typically, the emails originated from sending an invoice, credit, statement, or proposal to an email recipient. This grid is helpful in isolating invalid email addresses for taking corrective action.

Within the grid area are several columns of information.

Emails Columns

- **Recipient** – This is the email address used to send the email.
- **Subject** – The text contained in the subject line of the sent email.
- **Status Date** – The latest status date for the email.
- **Opened** – If the recipient has opened the email for viewing, this toggle shows Yes.
- **Status** – The status indicates whether the email was successfully delivered to the recipient. Statuses displayed are:
    - Delivered – The email was successfully delivered to the recipient email address.
    - "X" – This typically indicates an invalid email address, or the recipient may have your company's domain blocked from receiving email. Contact the recipient for a resolution.
    - Queued – The email is waiting to be sent.
- **Function Buttons** – There are three possible buttons that will be displayed.
    - **Refresh** – Clicking this button refreshes the email with the most current information for the Status Date, Status, and Opened columns.
    - **View** – Clicking on the view button opens the email sent to the recipient.
    - **Docs** – If any documents were attached to the email, clicking on this button shows the documents attached.

Incoming Emails tab

The Incoming Emails tab is for future functionality.

Outgoing Emails tab

The Outgoing Emails tab displays emails with a status of Pending or Duplicate. If the email displays a Pending status, the software will attempt to deliver to the recipient every afternoon. Emails with the status of Duplicate, are for informational purposes, indicating the email was previously sent to the recipient.

Mail/Email Summary

| Emails | Incoming Emails | Outgoing Mails |

Export to Excel

Drag a column header and drop it here to group by that column

Description	Customer	Submitted Date	Status Updated	Status
Invoice 221	A Business Company - 3501	Apr 3, 2022, 4:24:12 PM	Apr 3, 2022, 8:24:12 PM	❗ Pending
Invoice 229	Jake's Garage - 3802	Apr 2, 2022, 5:32:14 PM	Apr 2, 2022, 9:32:14 PM	❗ Pending
Invoice 227	Emily Wood - 3719	Apr 1, 2022, 10:50:07 PM	Apr 2, 2022, 2:50:07 AM	❗ Pending
Invoice 227	Emily Wood - 3719	Apr 1, 2022, 10:49:17 PM	Apr 2, 2022, 2:50:07 AM	✖ Duplicate
Invoice 21351	Aaron's Rentals - 3393	Apr 1, 2022, 10:15:55 PM	Apr 2, 2022, 2:15:55 AM	❗ Pending
Statement 1033	Alan Parsons - 1033	Apr 1, 2022, 5:37:23 PM	Apr 1, 2022, 9:37:23 PM	❗ Pending
Statement 1033	Alan Parsons - 1033	Apr 1, 2022, 4:59:56 PM	Apr 1, 2022, 9:37:23 PM	✖ Duplicate
Statement 3501	A Business Company - 3501	Jan 14, 2022, 11:38:09 AM	Jan 14, 2022, 4:38:09 PM	❗ Pending
Statement 3501	A Business Company - 3501	Jan 13, 2022, 9:49:33 AM	Jan 14, 2022, 4:38:09 PM	✖ Duplicate
Statement 1030	Drew Jones - 1030	Dec 20, 2021, 4:13:27 PM	Dec 20, 2021, 9:13:27 PM	❗ Pending
Statement 1028	Travis Papay - 1028	Dec 20, 2021, 4:13:21 PM	Dec 20, 2021, 9:13:21 PM	❗ Pending
Statement 1028	Travis Papay - 1028	Dec 16, 2021, 2:58:56 PM	Dec 20, 2021, 9:13:21 PM	✖ Duplicate
Statement 1541	Bruce Kingston - 1541	Nov 12, 2021, 4:02:04 AM	Nov 12, 2021, 9:02:04 AM	❗ Pending
Statement 1140	John For - 1140	Nov 12, 2021, 4:01:57 AM	Nov 12, 2021, 9:01:57 AM	❗ Pending
Statement 1052	Josh Patterson - 1052	Nov 12, 2021, 4:01:49 AM	Nov 12, 2021, 9:01:49 AM	❗ Pending

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