

Mail/Email Summary

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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.

The screenshot shows the 'Mail/Email Summary' interface. At the top, there are three tabs: 'Emails', 'Incoming Emails', and 'Outgoing Mails'. Below the tabs is an 'Export to Excel' button and a 'Show rejected' toggle. A table displays a list of email records. The table has columns for Recipient, Subject, Status Date, Opened, and Status. Each row includes a 'Refresh' button, a 'View' button, and a 'Docs' button. The 'Status' column shows 'NO' for all records, and the 'Opened' column shows 'NO' for all records. The 'Status' column also shows a red 'X' icon for all records. The table is paginated, showing 1-100 of 9254 items.

Recipient	Subject	Status Date	Opened	Status	
johnd@boldgroup.com	test proposal	Apr 15, 2022, 4:37:55 PM	NO	X	Refresh View
steven.fetherston@boldgroup.com	New Purchase Order #1065 for Best Security - ADI	Apr 14, 2022, 4:32:59 PM	NO	X	Refresh View Docs
theresa.scalia@boldgroup.com	Rejected Payment Alert	Apr 14, 2022, 2:20:55 PM	NO	X	Refresh View
stephen.fisher@boldgroup.com	New Purchase Order #1063 for Best Security - Corner Hardware&Electric	Apr 12, 2022, 5:53:43 PM	NO	X	Refresh View Docs
steven.fetherston@boldgroup.com	Work Order #2605 : Completed Appointment - Completed for Dave	Apr 8, 2022, 10:16:37 PM	NO	X	Refresh View Docs
steven.fetherston@boldgroup.com	Work Order #2605 : John is on the Way!	Apr 8, 2022, 10:15:37 PM	NO	X	Refresh View Docs
steven.fetherston@boldgroup.com	Work Order #2604 : Completed Appointment - Completed for Dave	Apr 8, 2022, 9:36:12 PM	NO	X	Refresh View Docs
abcus@test.com	Work Order #2600 : Completed Appointment - Completed for AB Customer 1	Apr 8, 2022, 5:53:05 PM	NO	X	Refresh View Docs
carolynj@boldgroup.com	New Purchase Order #1060 for Best Security - Tri-Ed	Apr 5, 2022, 3:10:02 PM	NO	X	Refresh View Docs
johnd@boldgroup.com	Work Order #2566 : Completed Appointment - Completed for Jake's Garage	Apr 2, 2022, 9:28:50 PM	NO	X	Refresh View Docs

Emails tab

The Emails tab displays 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.

Mail/Email Summary

Export to Excel NO Show rejected

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

Recipient	Subject	Status Date	Opened	Status	
justind@perennialssoftware.com	New Proposal from BestSecurity	Mar 30, 2016, 6:17:47 PM	<input type="radio"/> NO	Delivered	Refresh View
travis@perennialssoftware.com		Apr 6, 2016, 5:05:11 PM	<input checked="" type="radio"/> YES	Delivered	Refresh View
brads@perennialssoftware.com		Apr 6, 2016, 6:12:17 PM	<input checked="" type="radio"/> YES	Delivered	Refresh View
jacobs@perennialssoftware.com		Apr 6, 2016, 6:28:30 PM	<input type="radio"/> NO	Delivered	Refresh View
travis@perennialssoftware.com		Apr 6, 2016, 6:28:31 PM	<input checked="" type="radio"/> YES	Delivered	Refresh View
justind@perennialssoftware.com	justind@perennialssoftware.com	Apr 18, 2016, 1:44:26 PM	<input type="radio"/> NO	Delivered	Refresh View
timj@perennialssoftware.com	justind@perennialssoftware.com	Apr 18, 2016, 1:44:28 PM	<input checked="" type="radio"/> YES	Delivered	Refresh View
papayt@gmail.com	Time Attendance Review Request From Travis	May 17, 2016, 2:04:38 PM	<input type="radio"/> NO	Delivered	Refresh View
papayt@gmail.com	Work Order #37 - Updated Appointment - Scheduled for Travis	Jul 15, 2016, 12:44:48 PM	<input type="radio"/> NO	Delivered	Refresh View
RobertM@perennialssoftware.com	Work Order #37 - Updated Appointment - Scheduled for Robert	Jul 15, 2016, 12:44:51 PM	<input type="radio"/> NO	Delivered	Refresh View
papayt@gmail.com	New Invoice from AlarmBillr	Jul 15, 2016, 12:58:51 PM	<input type="radio"/> NO	Delivered	Refresh View

1 - 100 of 9254 items Refresh

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 - 5395	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

1 - 100 of 736 items |
 [Refresh](#)