

(Contacts) Accounts - 'Email to Contact' to Include Contact's Title and Label (16804, 16818)

Last Modified on 06/03/2024 8:53 am EDT

When emailing out things such as statements and invoices, the 'Email to Contact' field has been updated to include the contact's title (if one exists) and their billing contact label if they are a billing contact.

The screenshot displays the 'AR HISTORY' interface. At the top, there is a summary table with columns for 'CURRENT', '1-30 DAYS', '31-60 DAYS', '61-90 DAYS', '91-120 DAYS', '120+ DAYS', and 'TOTAL'. Below this is a filter bar with options like 'Limit to open items', 'STATEMENT', 'INVOICE', 'AUTO APPLY', 'BALANCE WRITE OFF', and 'WALLET (2)'. The main table lists items with columns for 'DATE', 'DUE DATE', 'PERIOD', 'SITE ID', 'TYPE', 'REFERENCE NO', 'AMOUNT', 'APPLIED AMOUNT', and 'BALANCE'. An 'EMAIL STATEMENT' modal is open, showing a dropdown menu for 'EMAIL TO CONTACT' with three options: 'Natalie (Sales Rep) - Billing Contact', 'SIERRA GREEN - Billing Contact', and 'Aliena - Account Contact'. A 'SEND EMAIL' button is at the bottom of the modal.

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
05/30/24	06/09/24	2024-05	41902001	Invoice	000160	2,095.03		2,095.03
10/01/23	10/11/23	2023-10				314.59		314.59
09/14/23	09/24/23	2023-09				105.74		105.74
08/10/23	08/20/23	2023-08				107.60		107.60

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