Auto Email

Version 21.5.6.30

Setup and User Manual

For Microsoft Dynamics 365 Business Central

Last Update: December 25, 2023

Contents

Description

Automatically email sales and purchase documents to customers and vendors without any effort.

- Send a collection email to a customer that includes a statement and all supporting documents with one click.
- Remind customers if they have short-paid or non-paid invoices with a single click.
- Send monthly statements to all customers automatically and without user interaction.
- Review email log to see when emails were sent and by whom.
- Save hours every day having Auto Email do the hard work of collecting documents, writing email bodies, emailing, and storing evidence that emails were sent.
- Send specific and default attachments with sales and purchase documents.
- Send attachments from items and resources if they are entered on the documents.
- Email templates decide how the email experience will be for each document type.
- Email template groups allow you to set up customer email experiences depending on the customer.
- Set up custom rules for who gets which emails depending on the document type and customer group.
- Allow users to edit email settings just before email delivery.
- Documents supported: sales quotes, sales orders, sales return orders, sales invoices, sales credit memos, sales shipments, purchase orders, service invoices, service credit memos, customer statements, collection notices (statement and supporting documents), short-paid notices, reminders, and finance charge memos. Support for additional documents can be provided via extensions (from Microsoft Partners or SimCrest).
- Send documents (like pricelists, tax documents, etc.) regularly (or one-time) to customers, vendors, and contacts.
- Send multiple documents of the same type with one click.
- Send a consolidated email at the end of each day with all the sales or purchase documents.
- Auto Email is simple to use and saves you a lot of time.

Auto Email is a solution that makes it effortless to send out emails and, at the same time, release the user immediately, even when sending 1000s of emails. The solution uses an email log to place all the emails in and let Microsoft Dynamics 365 Business Central do the rest of the work. Auto Email can also be set to automatically email invoices, credit memos, shipments, reminders, and finance charge memos as they are posted or issued.

For accounts receivable, Auto Email can send customer statements and collection notices with all open and past due invoices and credit memos at a single click of a button. If a customer short-paid an invoice, Auto Email could also notify the customer.

Email Delivery

Auto Email uses an email log for the emails and the Job Queue to Email the logged documents. Auto Email has an entry log populated every time a document is submitted to be emailed. The Job Queue will check the log every X minutes, and if there are entries that have not been emailed, the system will automatically start emailing the documents until all have been emailed. The log will be updated once the document has been emailed with a status to ensure that the document is not emailed again. This means that there is nothing emailed from the client, and the user is instantly released once the document has been submitted.

Auto Email License

Auto Email can be acquired as an App in the Extension Market Place inside Dynamics 365 Business Central. Just click Free Trial to install and try out the solution. The trial will last for 30 days, and a subscription can be purchased from SimCrest or a Microsoft Partner.

Get Auto Email ready in 2 minutes!

Auto email is ready to be used right after installing the App (as long as you have your system set up for sending regular emails). That's it!

Please note the following after installation:

- We suggest that you turn on test mode, which allows all emails to be sent to an email address of your choice until you are sure emails look ok. Test mode can be enabled on the Auto Email Setup page.
- Email Templates for all supported documents are created with standard subject lines and body text. You may want to review email templates for accuracy.

Auto Email requires you to have set up Microsoft Dynamics 365 Business Central for emailing. If not set up yet, please see the following few pages on setting up Email.

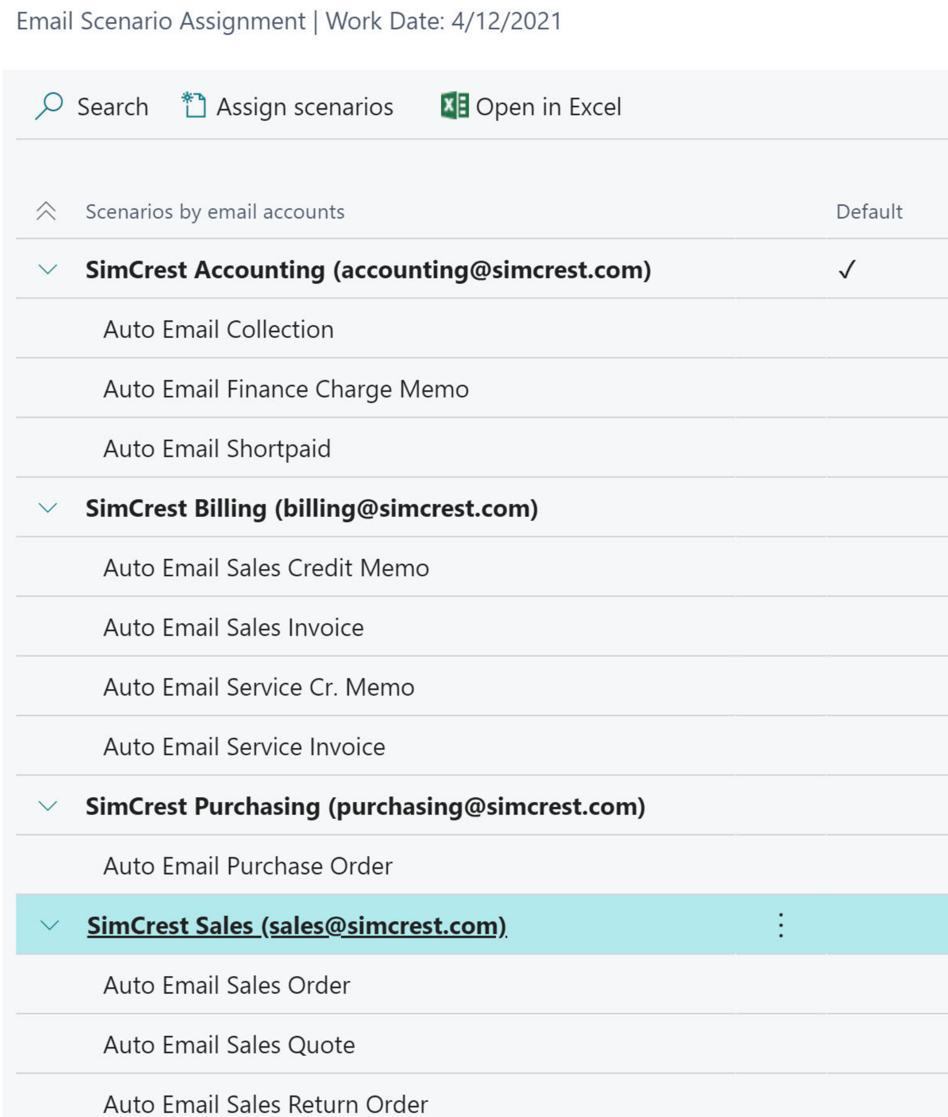
Emailing Documents

Auto Email will send emails out using the Email Accounts in the system. Make sure your email accounts are enabled in Office 365.

Email Scenario Assignment

Email Scenarios is a standard Microsoft Dynamics 365 Business Central feature that Auto Email supports. You can set up all the different Auto Email document types under each Email Account, and Auto Email will pick the email account that has been set up in the Email Scenario Assignment.

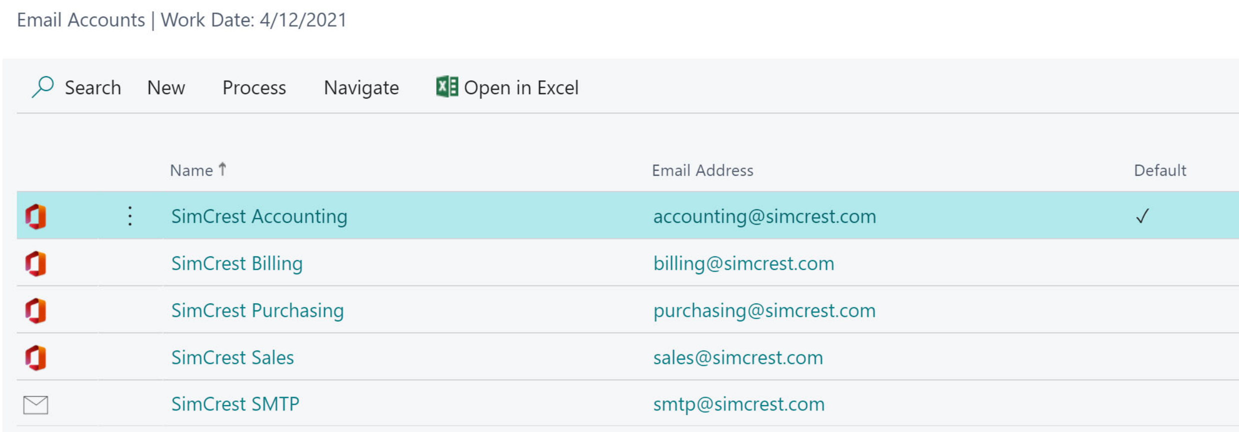
If a document is not assigned, the default Email Account is used instead. This also means that the default Email Account will also be used if no Email scenarios are assigned.



Notice that Auto Email only supports email scenarios that start with "Auto Email".
Example: Since Auto Email Sales Invoice is assigned to SimCrest Billing, it will be sent from this email account using "SimCrest Billing" and the email address "billing@simcrest.com".
If you want emails to go out via the current user, assign the scenario to the Current user and remember to check the "Email from user" in the Email template (see email templates later).

Email Accounts

Auto Email uses Email Accounts, a standard Microsoft Dynamics 365 Business Central feature.

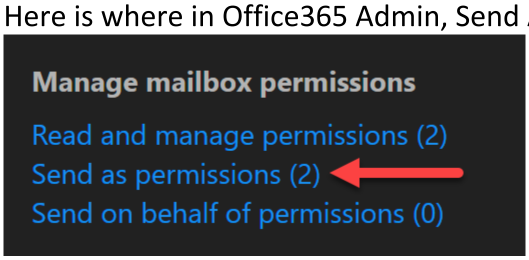


We recommend setting up Microsoft 365 shared mailboxes for Auto Email. You can also use Current user accounts, but you will need to set up email scenarios to handle the emailing. All emails sent via the current user will be logged to the email log and sent immediately and not processed by the job queue.

Auto Email supports Email Scenarios to use different email accounts to send certain documents by Email. See the next section for more information.

Here are some tips on how to make Email Accounts work for Auto Email:

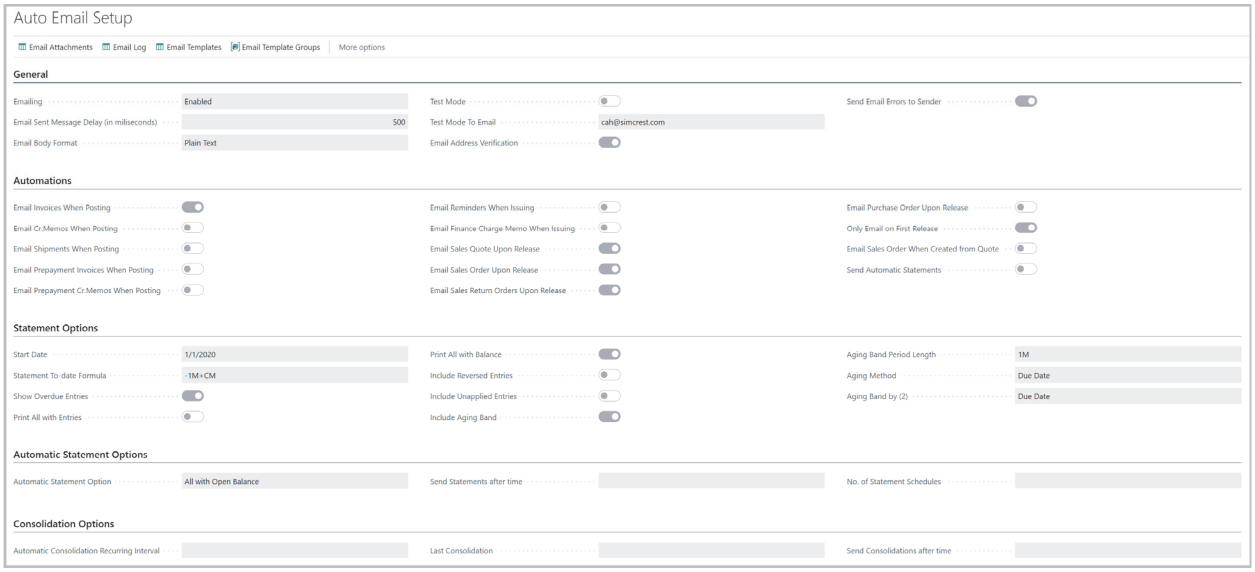
- Ensure that the Job Queue account has email rights to send through all shared mailboxes. If not, emails will not be sent. The Job Queue user is the user processing all the emails in the log.
- As long as you are using the job queue and the account that runs the job queue entry has the rights to send emails through all shared mailboxes, there should be no need to add all Auto Email users to these shared mailboxes.
  Here is where in Office365 Admin, Send As Permissions are set on Shared Accounts.

- If you use the "Process Emails" function to test email setup, make sure the account you are running, when using this function, has rights to Email through all shared mailboxes.

Auto Email Setup

You can adjust Auto Email to change the email experience. Search for "Auto Email Setup". The setup table is populated during the installation.



Here is an explanation for all the fields in the setup table:

General Tab

- Emailing
  If enabled, emails will flow to recipients if the Job Queue is running. If Disabled, emails will not flow (except for manual overrides). Email will still be logged, but they will not be emailed.
- Email Sent Message Delay (in milliseconds)
  Each time an email is sent, the system will display a message. This field displays the time (in milliseconds) where the message is displayed until it goes away. If set to 0 (zero), the message will show until the user clicks OK.
- Email Body Format
  Specify the format of the email bodies for templates. If set to “Plain Text”, new lines are converted to HTML automatically by the App (HTML is still allowed, but HTML line breaks are not needed). If set to HTML, all formats must be using HTML.
- Test Mode, Test Mode To Email
  If Test Mode is checked, all emails will be sent to the Test Mode To Email unless overwritten by document email templates (see later). This tests that emails and documents look correct before sending them to customers and vendors.
- Email Address Verification
  This validation is done when the system processes the Auto Email Log entries. If email addresses are invalid when processing, the email log entry is marked with Status=Error, and the error message will show the offending email address. The job queue will not stop due to this error but will process the rest of the entries. Turn on Log Monitoring to get an email if errors are present in the log.
  Please turn it off if valid email addresses are marked as invalid.
- Send Email Errors to Sender
  Enable this function to allow Auto Email to send an email to the sender if there is an

error with the email sent. The email will only be sent once. Auto Email Log errors can still be reported with the Log Monitoring.

Automation Tab

- Email Invoices When Posting
  If checked, invoices will be emailed automatically when they are posted. The Auto Email Template Group can override this (see later).
- Email Cr. Memos When Posting
  If checked, credit memos will be emailed automatically when they are posted. The Auto Email Template Group can override this (see later).
- Email Shipments When Posting
  If checked, shipments will be emailed automatically when they are posted. The Auto Email Template Group can override this (see later).
- Email Prepayment Invoices When Posting
  If checked, prepayment invoices will be emailed automatically when they are posted. The Auto Email Template Group can override this (see later).
- Email Prepayment Cr. Memos When Posting
  If checked, prepayment credit memos will be emailed automatically when posted. The Auto Email Template Group can override this (see later).
- Email Reminders when issued
  If checked, reminders will be emailed automatically when they are issued. The Auto Email Template Group can override this (see later).
- Email Finance Charge Memos, when issued
  If checked, finance charge memos will automatically be emailed when issued. The Auto Email Template Group can override this (see later).
- Email Sales Quote / Sales Order / Sales Return Order / Purchase Order Upon Release
  Emails the document each time the document is released.
- Only Email on First Release
  If checked, releasing a document will only email it on first release.
- Email Sales Order When Created from Quote
  Emails the resulting Sales Order created from a sales quote.
- Send Automatic Statements
  If checked, customers with Email Statements checked will receive statements based on the recurring interval under Statement Options.

Statement Options

These options are used for the two statement reports that can be used for the Statement and Collection templates. The report numbers are 70163326 (plain black and white statement) and 70163327 (colorful statement) for the online version and 93326 and 93327 for the On-Premise version. If you use your own statement report, it must be modified to set the statement options below in the report. Check the last section in this manual for more information about changing statements for use with Auto Email.

- Start Date
  This is the start date of the date filter on the statement lines.
- Statement To-date Formula
  This information is needed for the Auto Email Statement report. The formula determines if a customer has a balance due as of the date calculated using this formula with the work date. Example. Work Date = 05/05/20. If the formula is '-1M+CM', the balance as of 04/30/20 is used to determine if the customer has a balance as of this date. If so, the statement will be emailed. If not, the statement for this customer is skipped. The date formula is also used to determine the statement date. If you are using the statement report provided by the Auto Email App, the statement date on the report is calculated using this formula.
- Print All with Entries
  The statement will be printed if the customer has entries. The customer also needs to have a balance due by the To-date above.
- Print All with Balance
  The statement will be printed if the customer has a balance. The customer also needs to have a balance due by the To-date above.
- Update Statement No.
  This will update the customer's statement no. This is only applicable for reports 70163326 and 93326.
- Statement Style
  Will show Open Items or Balance only. This is only applicable for reports 70163326 and 93326.
- Aging Method
  This is used to show an aging band. Options are None, Due Date, Transaction Date, or Document Date. This is only applicable for reports 70163326 and 93326.
- Aging Method (2)
  This is used to show an aging band. Options are None, Due Date, Transaction Date, or Document Date. This is only applicable for reports 70163327 and 93327.
- Length of Aging Periods
  If the Aging Method is different from None, this will show the date formula for the aging periods.

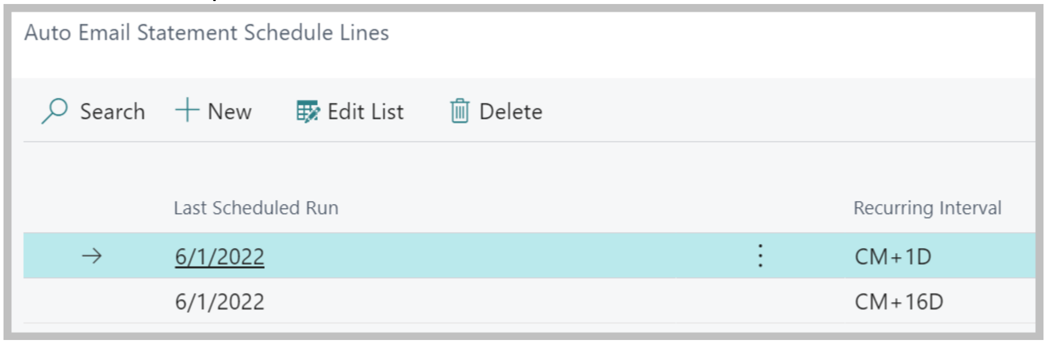
Automatic Statement Options

The options allows you to email statements automatically.

- Automatic Statement Options
  Determines when statement are being sent. Open Balance will send a statement if there are any open balances regardless of past due status. Past Due Balance will only send a statement if there is a past due balance.
- Send Statements after time
  On the day of the statements being emailed, the system will wait until after this time before statements are emailed. If left blank, the statements are emailed right after midnight. Be aware that the time of the emailed statements is determined by when the

Job Queue is run. If the Job Queue is not set to run after the time you specify here, the statements will never be emailed.

- No. of Statement Schedules
  This shows the number of statement schedules that have been defined.
  Click the field to show the schedule or search for “Statement Schedule Lines”.
  Here is an example of how these lines look:



- Recurring Interval
  This is the interval in which statements are emailed automatically to customers. We suggest using CM+1D, which would send a statement each month on the 1st of the month. If you also want to send out statements on the 15th of the month, create a new line and specify CM+16D as the recurring interval. You can have as many schedule lines as needed.
- Last Scheduled Run
  This is the date the last automatic statement line were emailed to customers with Send Statement checked. If blank, the statements will go out on the next Send Emails Job queue run.

Consolidation Options

- Automatic Consolidation Recurring Interval
  This is the interval in which consolidation emails are emailed automatically to customers. We suggest using 1D, which would send consolidation emails each day.
- Last Consolidation
  This is the date the last consolidations were emailed on. If blank, the consolidations will go out on the next Send Emails Job.
- Send Consolidations after time
  On the day of the consolidations being emailed, the system will wait until after this time before consolidations are emailed. If left blank, the consolidations are emailed right after midnight. Be aware that the time of the emailed consolidations is determined by when the Job Queue is run. If the Job Queue is not set to run after the time you specify here, the consolidation emails will never be sent.

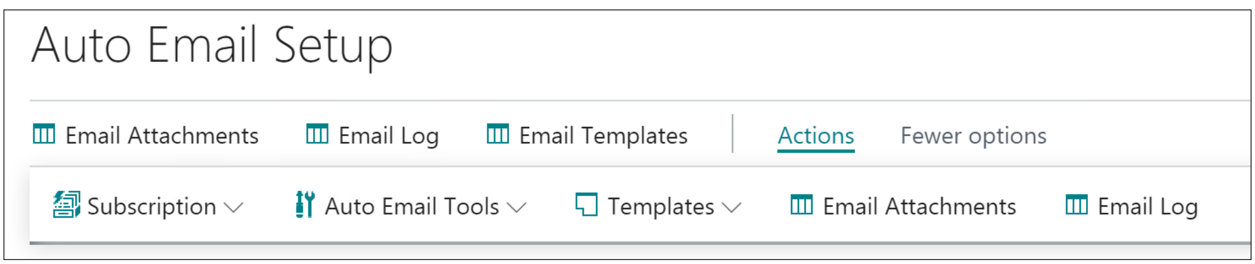
Monitoring Tab

- Log Monitoring Email
  This email address is used to send a message if ther the auto email log has errors. This email address will get a message if that happens. If not filled out, no issues will be sent. The job queue for log monitoring must be turned on for this feature to work. We suggest to have this running once per day.
- Job Queue Monitoring Email
  This email address is used to send issues with the auto email log. Some issues with the emailer can cause the Job Queue that sends emails to stop with an error. This email address will get a message if that happens. If not filled out, no issues will be sent. The job queue for log monitoring must be turned on for this feature to work.
- Logger Email Address
  This email address is used for logging all emails going out. The App will bcc all emails sent via Auto Email to this address (or addresses if more than one is entered). If a logger email is specified on the email template, it will take precedence over the logger email in the setup table.

License Tab

- Expiration Date
  This is the subscription's expiration date, and the App will stop working after this date.
- Trial Period
  You are granted a 30 days trial period upon installation of the App.
- Licensed Company Name
  This is the company name that owns the subscription, and it must be the same as the company name in the system. This field does not apply to trial versions.

Actions



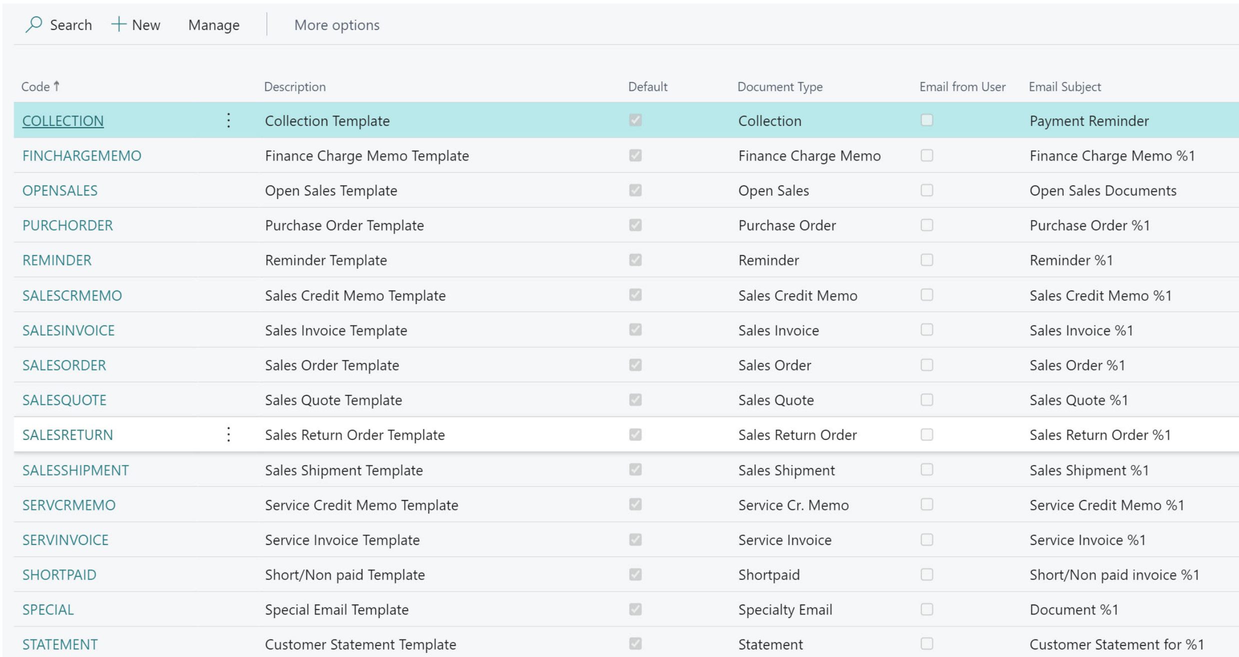
Here is an explanation for all Process Actions:

- Email Attachments
  These are standard attachments that can be assigned to a document type. See more details below.
- Email Log
  This is the email log that will show all emails sent with statuses. See more details below.
- Email Templates
  Access the Email Templates used to determine how emails are sent for each document type.

- Subscription
    - Activate Subscription
      This is used to activate or renew a subscription. See later in this document on how to activate a license.
    - Activate Multiple Subscriptions
      This is used to activate multiple subscriptions on multiple companies. It's possible to import several licenses and activate them for applicable companies in the system.
    - Initialize License and Setup
      Used when creating new companies after the App has been installed, and it makes the company ready for Auto Email.
- Auto Email Tools
    - Auto Email Setup Wizard
      This wizard is used when doing the initial setup of Auto Email but can also be used later as needed.
    - Process Emails
      When clicked, Auto Email will simulate running the job queue. This should usually only be used for testing.
    - Create Job Queue Entries
      Create the job queue entries used by Auto Email to send emails and errors automatically. You could also use the setup wizard to accomplish the same.
    - Copy emails from customers
      Transfers the Email from all customers to Auto Email. If there is an email address in Auto Email "Email To" already, it will not be overridden.
    - Delete empty email log entries
      This is used to delete log entries with no email address in the Email To field. It should only be used if instructed so by SimCrest or another Microsoft partner.
- Create Email Templates
  Default templates are created upon installation of the App. At any time after the installation, this will recreate the templates if they were accidentally deleted. Existing templates will NOT be overwritten.

Auto Email Templates

Each supported document needs a template set up for the document to be emailed. The default templates (templates flagged as Default) are used to email documents unless you have set up Auto Email Template groups (see later for more info). Search for Auto Email Templates:

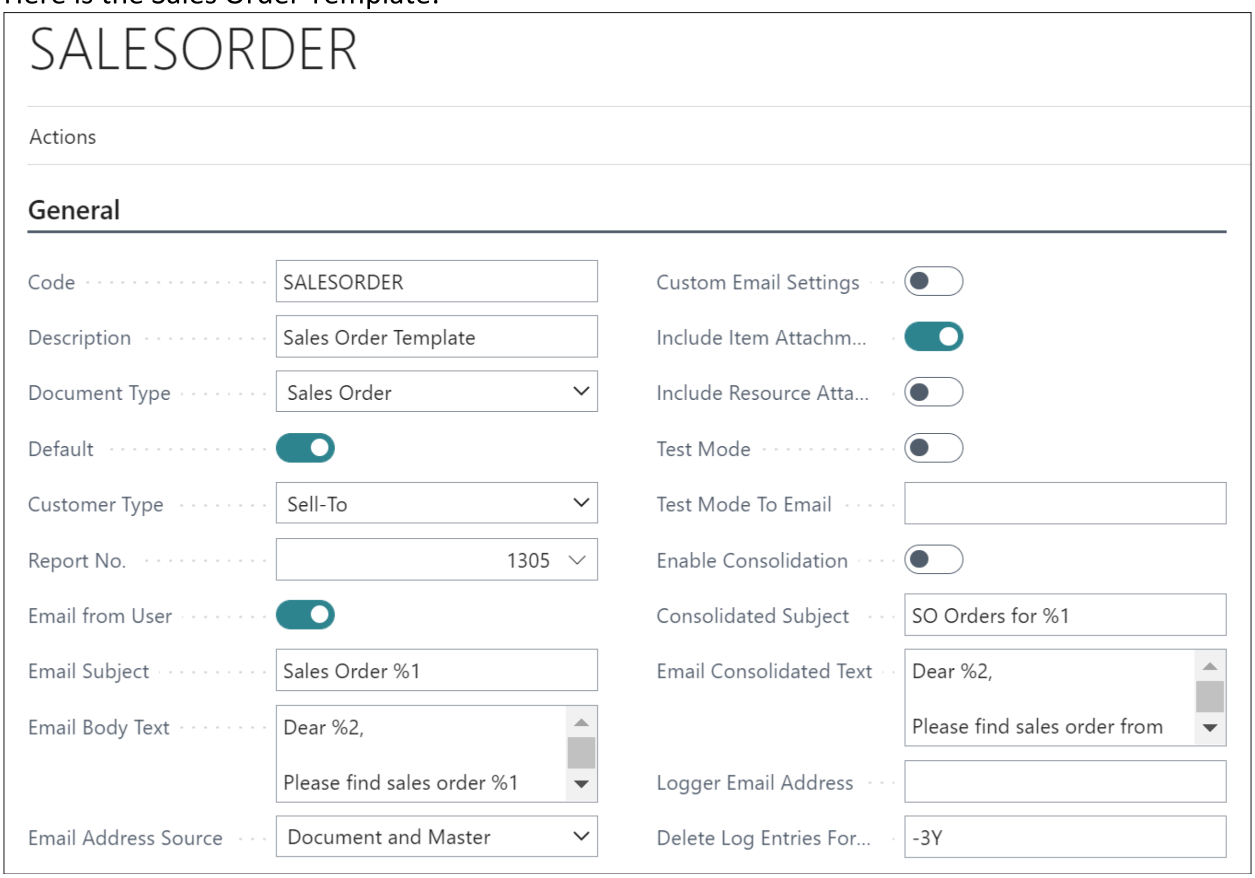


Auto Email Templates

Search | New | Manage | More options

Code ↑	Description	Default	Document Type	Email from User	Email Subject
COLLECTION	Collection Template	☑	Collection	☐	Payment Reminder
FINCHARGEMEMO	Finance Charge Memo Template	☑	Finance Charge Memo	☐	Finance Charge Memo %1
OPENSALES	Open Sales Template	☑	Open Sales	☐	Open Sales Documents
PURCHORDER	Purchase Order Template	☑	Purchase Order	☐	Purchase Order %1
REMINDER	Reminder Template	☑	Reminder	☐	Reminder %1
SALESCRMEMO	Sales Credit Memo Template	☑	Sales Credit Memo	☐	Sales Credit Memo %1
SALESINVOICE	Sales Invoice Template	☑	Sales Invoice	☐	Sales Invoice %1
SALESORDER	Sales Order Template	☑	Sales Order	☐	Sales Order %1
SALESQUOTE	Sales Quote Template	☑	Sales Quote	☐	Sales Quote %1
SALESRETURN	Sales Return Order Template	☑	Sales Return Order	☐	Sales Return Order %1
SALESSHIPMENT	Sales Shipment Template	☑	Sales Shipment	☐	Sales Shipment %1
SERVCRMEMO	Service Credit Memo Template	☑	Service Cr. Memo	☐	Service Credit Memo %1
SERVINVOICE	Service Invoice Template	☑	Service Invoice	☐	Service Invoice %1
SHORTPAID	Short/Non paid Template	☑	Shortpaid	☐	Short/Non paid invoice %1
SPECIAL	Special Email Template	☑	Specialty Email	☐	Document %1
STATEMENT	Customer Statement Template	☑	Statement	☐	Customer Statement for %1

Here is the Sales Order Template:



Here is an explanation for all the fields:

- Code
  A unique code for the template

- Description
  A description of the template
- Default
  This is the default template for this document type. You should only have ONE default template. If you have more templates for the same document type, they can only be selected if you assign an Email Template Group to the customer.
- Document Type
  This is the document type of the emailed document. You can have several templates of the same document type (if the code is different), but you should only have one default template per document type. If you have more than one default template per document type, only the first template will be used unless you use template groups (see later).
- Customer Type
  This is used to determine if the sell-to or bill-to customer is used for the emailed document type. In the above screenshot, the sales order will email the bill-to customer.
- Report No.
  Type the report number for the report you would like to use for this document type. Report numbers can be found by searching “Report Layout Selection”.
  The collection report has seven report no’s (one for each supported document type). The below three are the minimum you have to define.

Statement Report No.	70163326
Invoice Report No.	1306
Credit Memo Report No.	1307

  The report number for the statement report should be 70163326 or 70163327 (Online version) or 93326 or 93327 (On-Premise Version).
- HTML Body Text Report No.
  Specifies the report that is being converted to HTML and merged in via a special merge field. See below sections for more information.
- Email From User
  Checking this box will send using the Email Account Current User. Remember to assign the correct Email Scenario to the Current User. Emails sent via the current user will be emailed immediately and not processed through the email log, and they will still be logged, just not emailed later when the job queue runs.
- Email Subject
  Here the subject line is provided. You can merge two fields from the document into the text (use %1 and %2 to place the fields in the text). The merge fields for each document are provided in the table below.
- Email Body Text
  Here the email body is provided. You can merge two fields from the document into the text (use %1 and %2 to place the fields in the text). The merge fields are provided in the table below for each document.
- Email Address Source

Determines where the email addresses are coming from. “Master Record Only” refers to that emails are coming from the customer/vendor only. “Document Only” refers to email addresses only coming from the document associated with the template. “Master and Document” refers to the email addresses coming from both. This field only affects sales orders, quotes, invoices, credit memos, shipments, and return orders. All other document types should select “Master Only”.

- Email Ship-To Address
  If checked, the system will also send to email addresses on the Ship-To Address (if used). This can be used on sales quotes, sales orders, sales return orders, and sales shipments.
- Custom Email Settings
  This allows the user to edit the email settings before sending the email. If a document is automatically posted or issued during posting, custom email settings will not apply.
- Include Item Attachments
  If checked, specific templates will include item attachments for the document in the template. See the Item Attachments section for more information.
- Include Resource Attachments
  If checked, specific templates will include resource attachments for the document in the template. See the Resource Attachments section for more information.
- Include G/L Account Attachments
  If checked, specific templates will include G/L account attachments for the document in the template.
- Test Mode and To Email
  This works just like the same fields on the Setup page, but these two fields override the setting in the Setup table.
- Enable Consolidations
  This will enable the documents to be emailed as a consolidated email depending on the Auto Email Setup at the end of the day. All customers using this template will be affected. We suggest using Auto Email Template Groups to assign these consolidations and only make them apply to specific customers unless all customers need the consolidated emails.
- Consolidated Subject
  This is used to show the subject for consolidated emails.
- Email Consolidated Text
  This is used to show the body text for consolidated emails.
- Logger Email Address
  This email address is used for logging emails going out for this template only. The App will bcc all emails sent using this template via Auto Email to this address (or addresses if more than one is entered). If a logger email is specified on the setup table, the logger email on the template takes precedence.
- Delete Log Entries Formula
  Use a data formula to determine when auto email log entries using this template will automatically be deleted. You must use – (minus) in front of the date formula, or the date formula will be ignored. If left blank, no entries will be deleted.

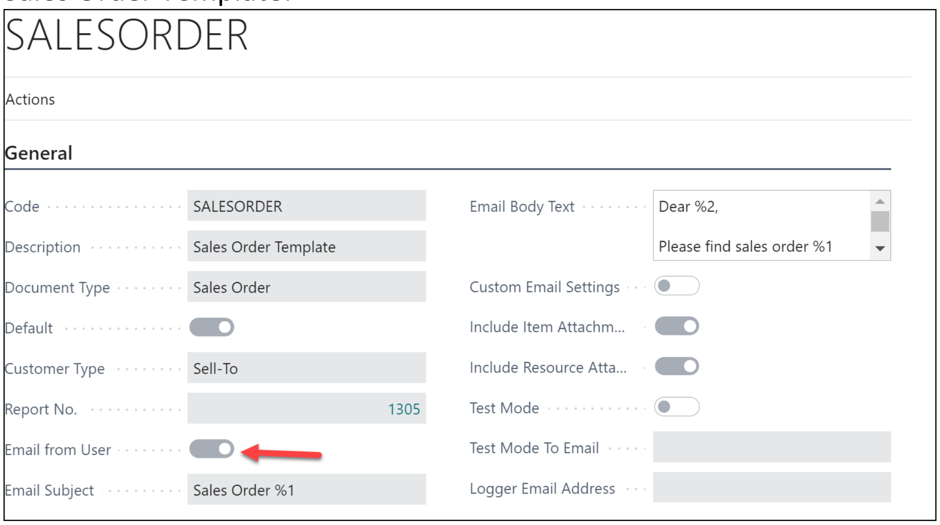
Sending Emails from the Current User

If you want the current user to email documents using their email address, you must do the following two steps:

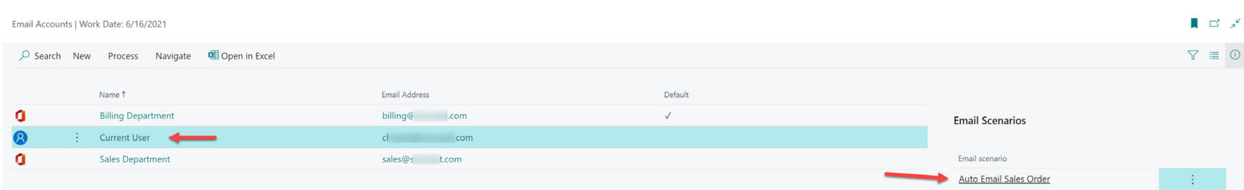
1. Check the "Email From User" on the Email template for the document type emailed from the current user.
2. Assign the correct email scenario to the Current User under email accounts.

Example. Here we enabled sales orders to be sent out via the current user:

Sales Order Template:



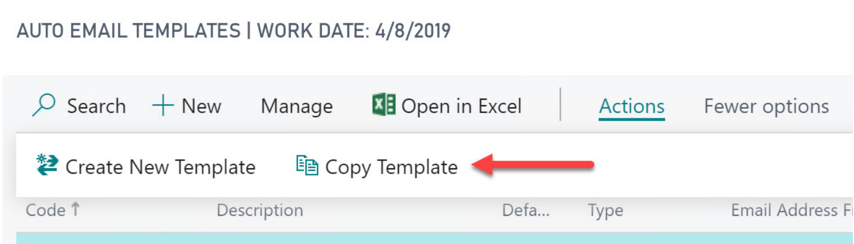
Email Accounts:



When sending emails from the current user, the Email is logged in the Auto Email Log and sent out immediately. The Job queue will not process this log entry. Notice the Email Scenario is set for the current user. If you don't assign this email scenario, the emails will *not* be sent via the current user.

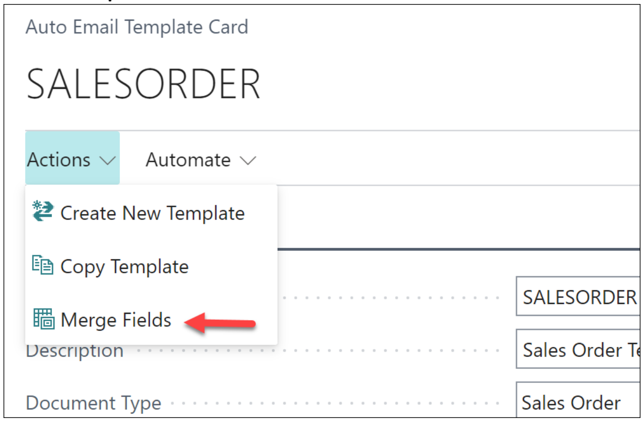
Copy Email Templates

Email templates can be copied as needed. Click Actions Copy Template.

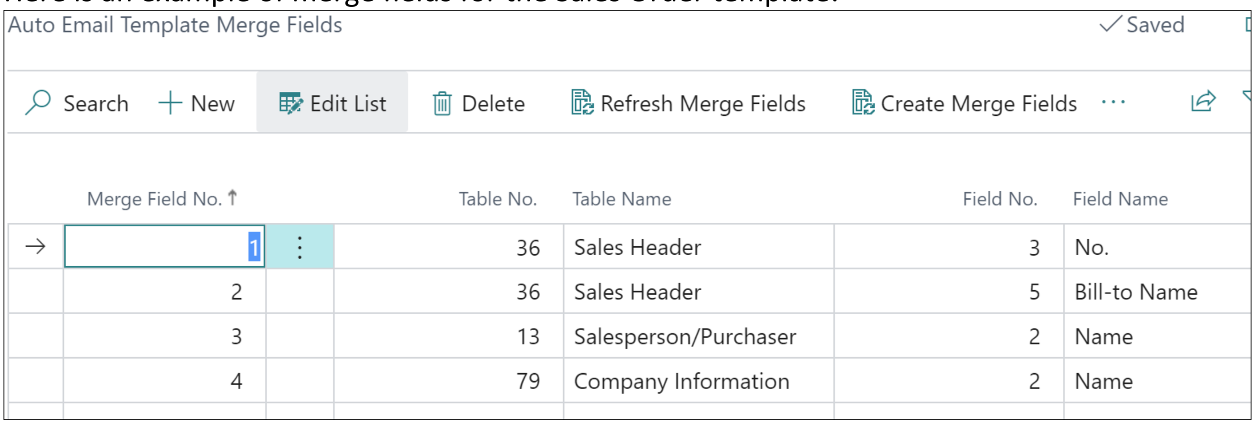


Merge Fields for Templates

Merge fields can be defined as needed to include information to email subjects and body texts from the relevant tables for all template types (except for Specialty Email).
From any email template, click Merge Fields to access the tables and fields that are available for the template:



Here is an example of merge fields for the Sales Order template:



Merge Field No.	Table No.	Table Name	Field No.	Field Name
1	36	Sales Header	3	No.
2	36	Sales Header	5	Bill-to Name
3	13	Salesperson/Purchaser	2	Name
4	79	Company Information	2	Name

Here, four fields have been defined. It’s possible to add as many fields as needed. The table number 36 is used to denote the Sales Header table. For the sales order, you can only use the table 36 if you like to get fields from the sales order. Notice that there are other tables above. Company Information is available for all templates and allows fields from the Company Information table to be added to the template’s subject and body text. The Salesperson/Purchaser table will contain the information related the salesperson on the sales order.
It’s possible to assign a format to a merge field. If the format is set to “Amount”, the field value will be formatted as an amount. If set to No Format, no format is applied.
If a field is not used in the body text or subject line on the template, the field is ignored and will never be merged. Also, some tables will be ignored if there are no relation from the main table record and the related table. For instance, if the Vendor table would be used for the sales order, it will be ignored.

You will need to know what tables are used for the different template types to create the fields correctly. Please refer to Merge Fields and Related Tables section towards the end of this document to see what tables that can be used with each email template document type.

These are the merge fields 1 and 2 that are defined as default merge fields after initial installation. You can edit as needed to obtain the desired result.

Document Type	%1	%2
Sales Quote	Quote No.	Customer Name
Sales Order	Order No.	Customer Name
Sales Return Order	Return Order No.	Customer Name
Sales/Service Invoice	Invoice No.	Customer Name
Sales/Service Credit Memo	Credit Memo No.	Customer Name
Sales Shipment	Shipment No.	Customer Name
Short Paid Notice	Invoice No.	Customer Name
Statement	Customer No.	Customer Name
Collection	Customer No.	Customer Name
Open Sales	Customer No.	Customer Name
Purchase Order	Order No.	Vendor Name
Reminder	Reminder No.	Customer Name
Finance Change Memo	Finance Charge Memo No.	Customer Name
Specialty Emails	Attachment Description	Customer/Vendor Name

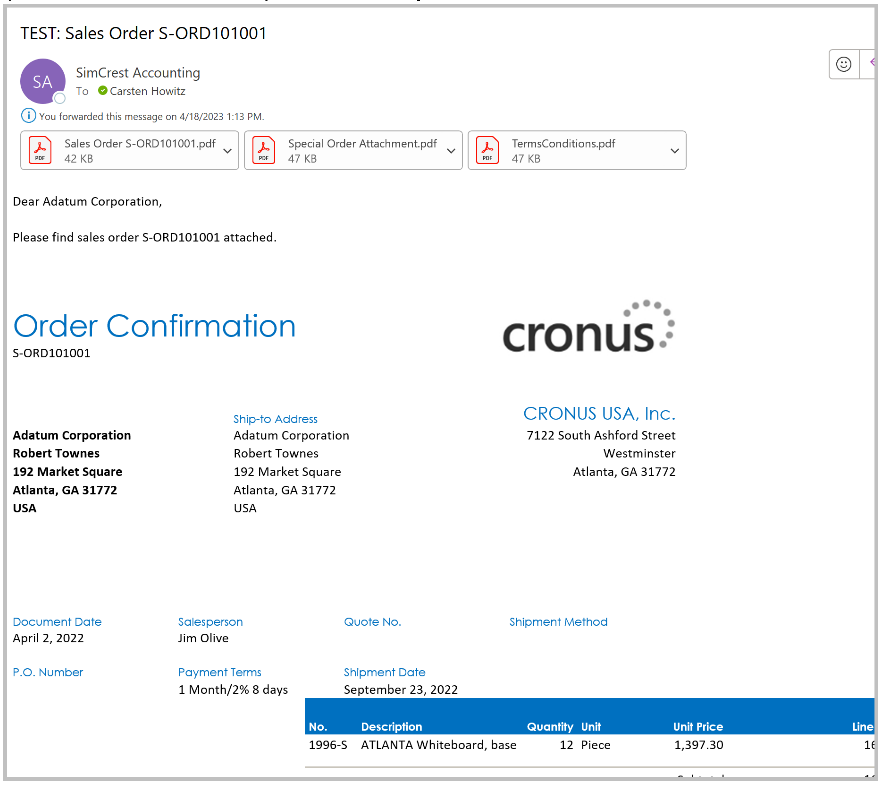
Consolidated emails use the following merge fields:

Document Type	%1	%2
Sales and Purchase documents	Current Date	Customer/Vendor name

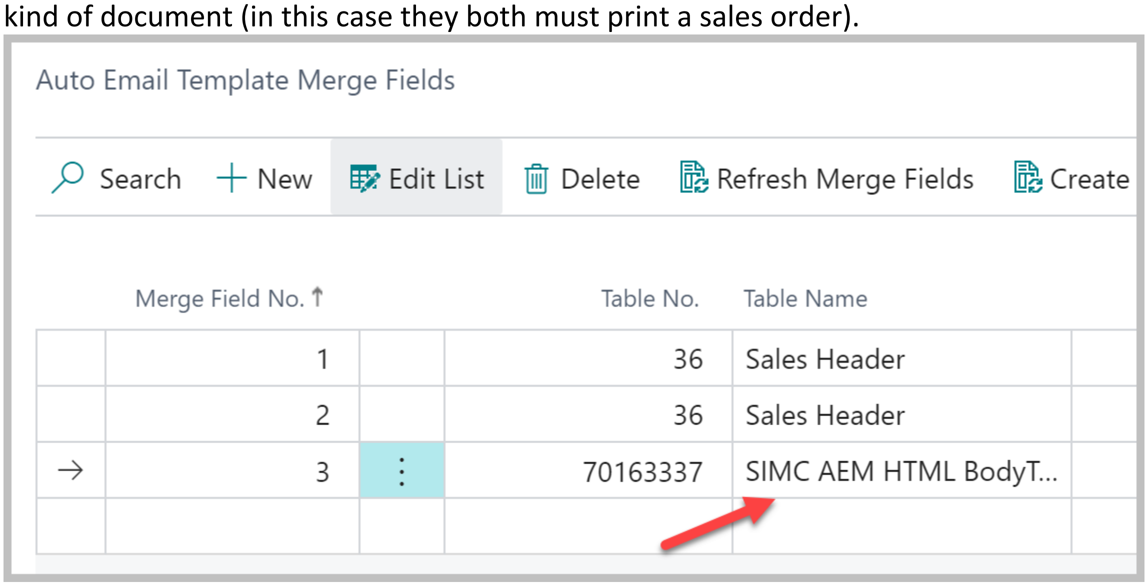
Example for a sales order: “Please find sales order %1 for customer %2 attached”.
Only certain tables are available for Auto Email. If you need additional tables and fields added, please contact your Partner or SimCrest to request them to be added.

Special Merge Field For Including Report HTML Into The Body Text

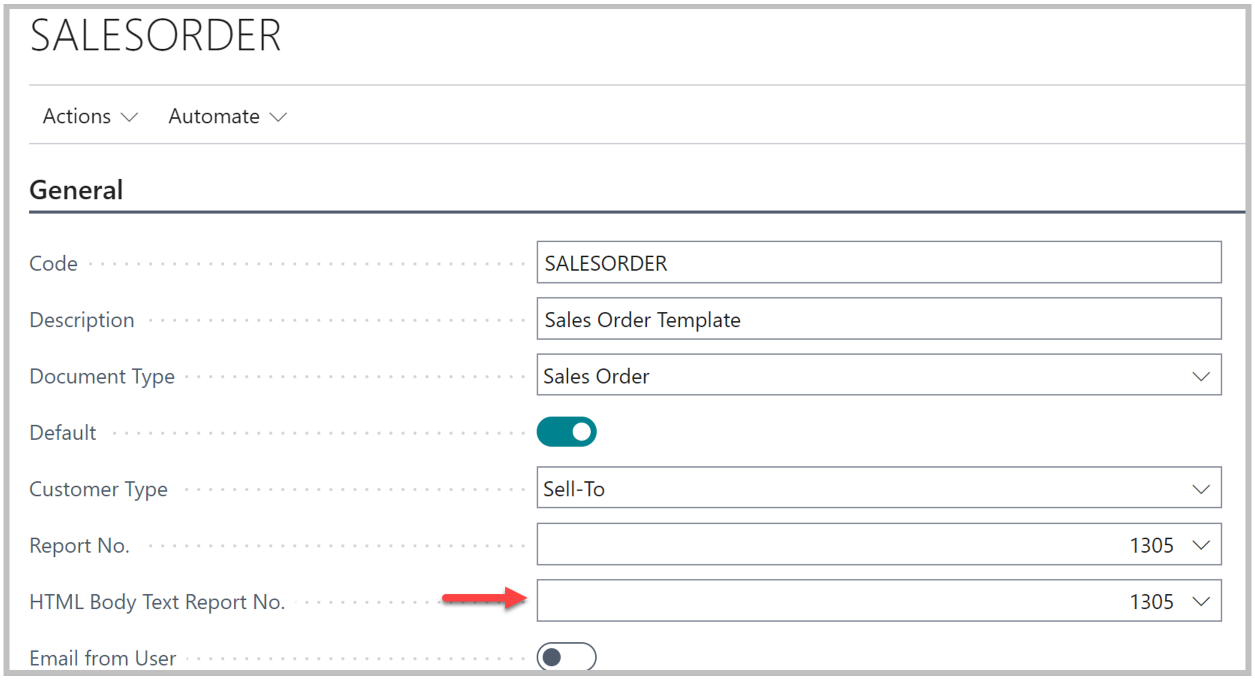
It's possible to render a report into HTML and place the HTML into the body text using a merge field. For instance, when you are emailing a sales order, you could include the printed order (converted to HTML) in the body text also.



Under Templates, you can specify the report used for this purpose. It does not have to be the same report as you print to PDF and attach to the email. But the reports must print the same kind of document (in this case they both must print a sales order).



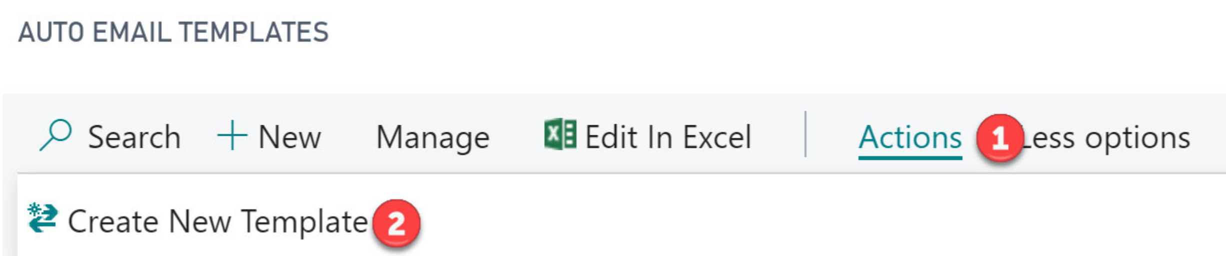
The merge field is called "SIMC AEM HTML BodyText" and will be used to merge the HTML from the report given on the template under HTML Body Text Report No.:



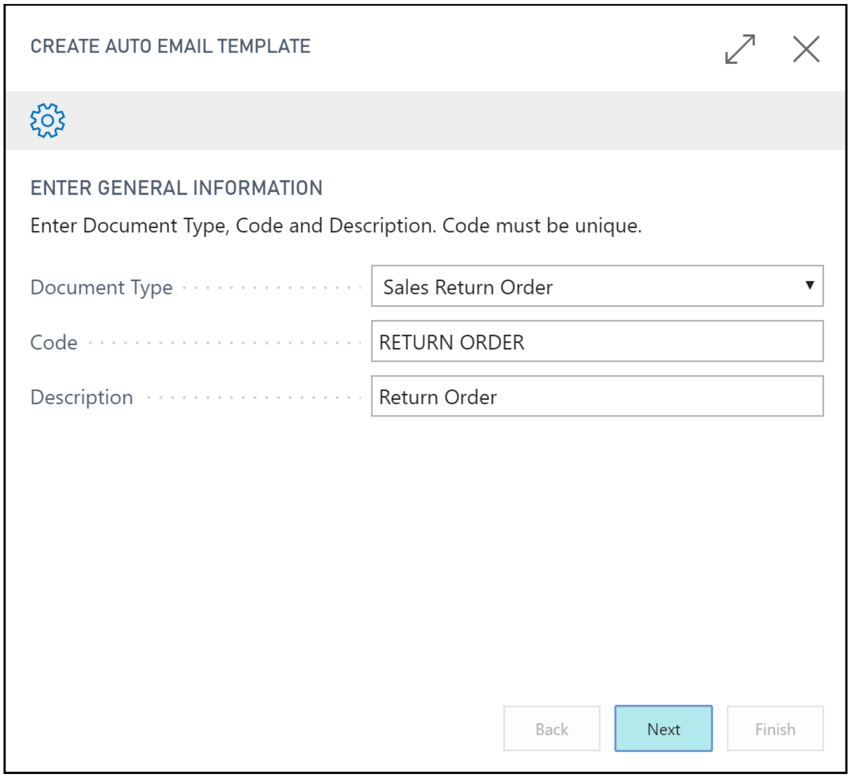
The above setup will include the report printout in the body text using merge field 3. Do not try and merge this field into the Subject line. It will cause an error.

Template Wizard

There is a template wizard that allows you to be guided through creating the templates. From the Template List, Click Actions, Create New Template:

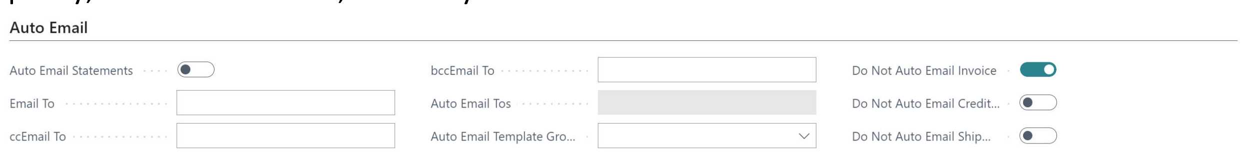


The wizard will be launched. Follow the instructions and click Next (and Back if needed) until Finished.



Customer Setup

The Auto Email information is found on the Auto Email tab on the customer. Here you will specify, for each customer, how they should have documents emailed.



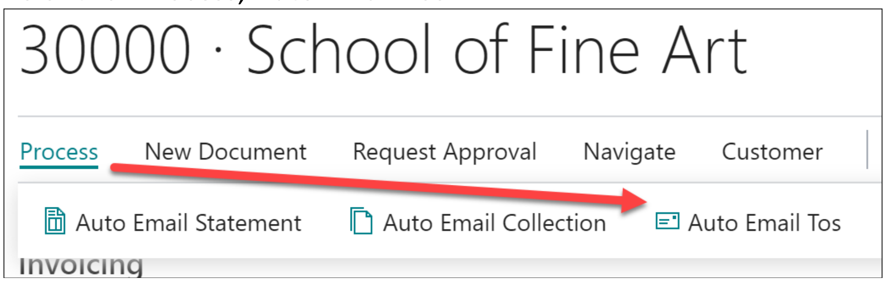
A checkmark in Auto Email Statements indicates that the customer will receive automated statements via Email rather than printed and mailed. You must have "Email To" filled out (unless you are using the Auto Email Tos functionality). The ccEmail and bccEmail fields are optional. You can specify several addresses by separating them with a semicolon (;) and no spaces.

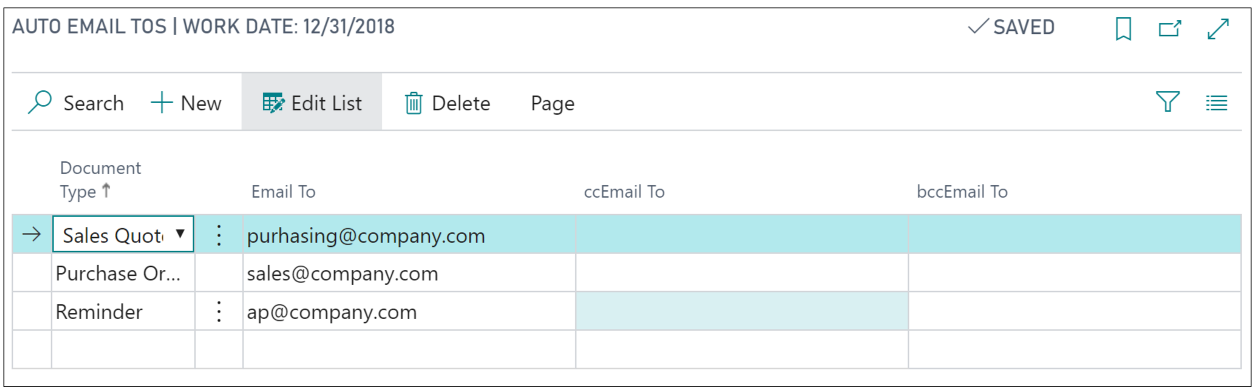
- Auto Email Tos will show how many email tos you have defined. Email To's will allow advanced per-document email addresses per customer. See below for more information.
- Auto Email Template Group is a group of templates assigned to the customer. These templates will override the default templates previously mentioned. If no group is assigned to the customer, default templates will be used instead.
- Do not Auto Email Invoice, Credit Memo, and Shipment is sent to the related document and indicates if the document will be emailed or not upon posting.

If no “Email To” is specified on the customer card or in Auto Email Tos, the system will try to use the standard email address on the customer card. If no email address is found here, an error will occur upon log creation.

Auto Email To’s

On the customer card, you can specify email addresses for all documents. This means that every document you email will be sent to this/these address(es). If you like to specify different email addresses depending on the document type being sent, you need to set up Auto Email To’s. Click Process, Auto Email Tos:

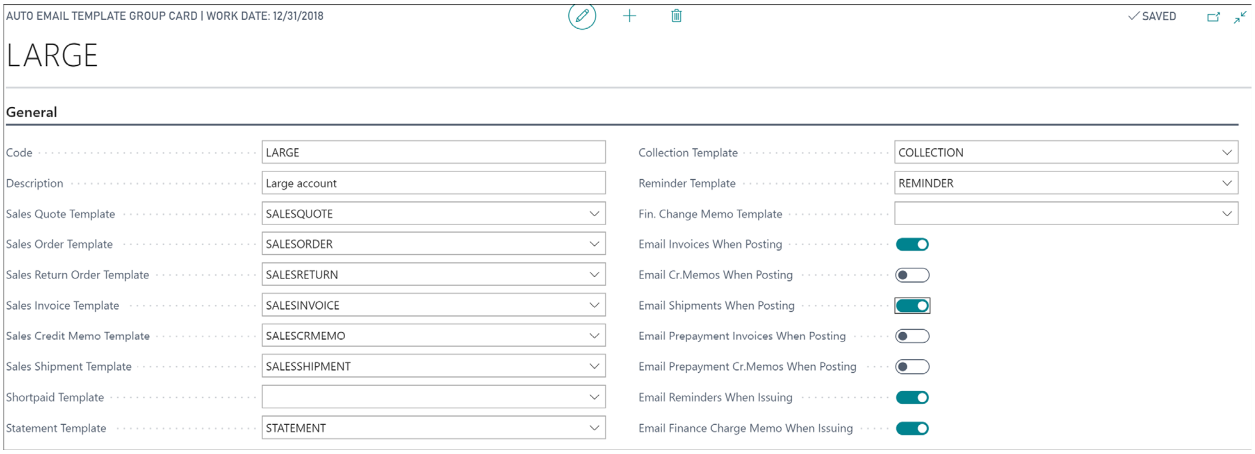




Specify document-dependent email addresses on this page. If an email for a document is not found on this page or in the customer auto email fields, the default email addresses on the customer card will be used instead. If no email is found on the customer or the primary contact, an error will be displayed or generated in the Email log.

Auto Email Template Groups

Email templates determine how an email should be generated for the customer. The default template we discussed earlier will apply to all customers; however, you can define Email Template Groups and assign them to one or several customers, to customize the email experience for each group.



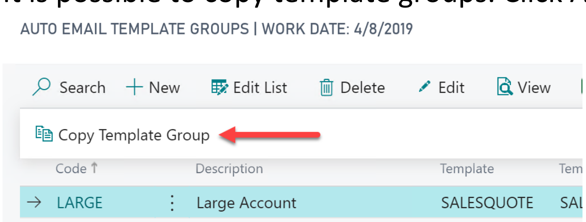
Above is an example of an email group for large account customers. Each group will have one or more templates, including if emails should be sent upon posting/issuing of documents. You can create as many groups as you like and assign them to your customers. If a customer is assigned an email group, you MUST specify templates for all applicable document types that this customer could potentially receive. If not, you will receive an error if an unsupported document is emailed.

Template Groups will follow documents created by the customer and can be changed along the way to make notable exceptions for documents if needed. For example, an order has been created, and the customer's email template group has been automatically assigned to the order. You can change the email template group and thereby change how emails are sent to the customer.

If you do not assign an email template group to the customer, the default templates will be used instead.

Copy Email Template Groups

It is possible to copy template groups. Click Actions, Copy Template Group.



Email Template Group Flow

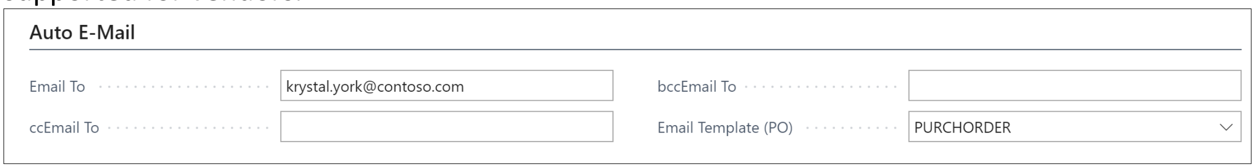
It's essential to understand how Email Templates Groups flow from the customer. Here is an example:

1. The customer is assigned an email template group called "LARGE".
2. A quote is created for the customer, and the group is set to "LARGE" inherited from the customer. If a sales quote is emailed, the system will use the Quote template from the "LARGE" group to Email it.

3. The quote is converted into an order, and the template group is inherited from the quote. If a sales order is emailed, the system will use the Sales Order template from the “LARGE” group to Email it.
4. Shipments and or invoices may be posted from the Email based on the templates and information in the “LARGE” template group.
5. At ANY time, the user can change the template group to something else, for instance, “SMALL”, and make a different email delivery based on the new group’s setup.
6. Once posted, documents will inherit the template group, but the group can no longer be edited.

Vendor Setup

The vendor has a more straightforward setup because only Purchase Orders are currently supported for vendors.

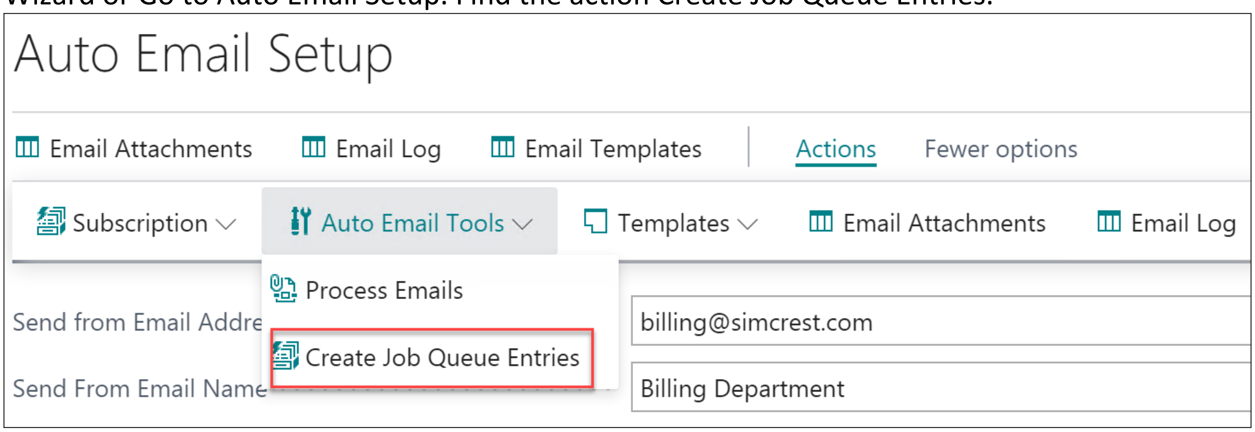


You must have “Email To” filled out; ccEmail and bccEmail are optional. You can specify several addresses by separating them with a semicolon (;) and no spaces.

- Email Template (PO). Here, you can specify the email template to send purchase orders for this vendor. If no template is specified, the default PO template is used instead.

Job Queue Setup

Job queue entries for Auto Email are set up automatically when Auto Email is installed. If needed, you can recreate them if they are accidentally deleted. Use the Auto Email Setup Wizard or Go to Auto Email Setup. Find the action Create Job Queue Entries.



Click it to create a new Job Queue Entries for Auto Email.

Now search for “Job Queue Entries”. Auto email creates four job queue entries.

1. Send Emails
   This job will send auto email log entries ready to be emailed.
2. Log Monitor

This job will monitor the auto email log for errors. If one or more errors are found, it will send an email to the “Log Monitoring Email” in the setup table. The job will send an email if errors are found every time it is run, so it’s suggested to set the “No. of Minutes between runs” to 1440 (every 24 hours).

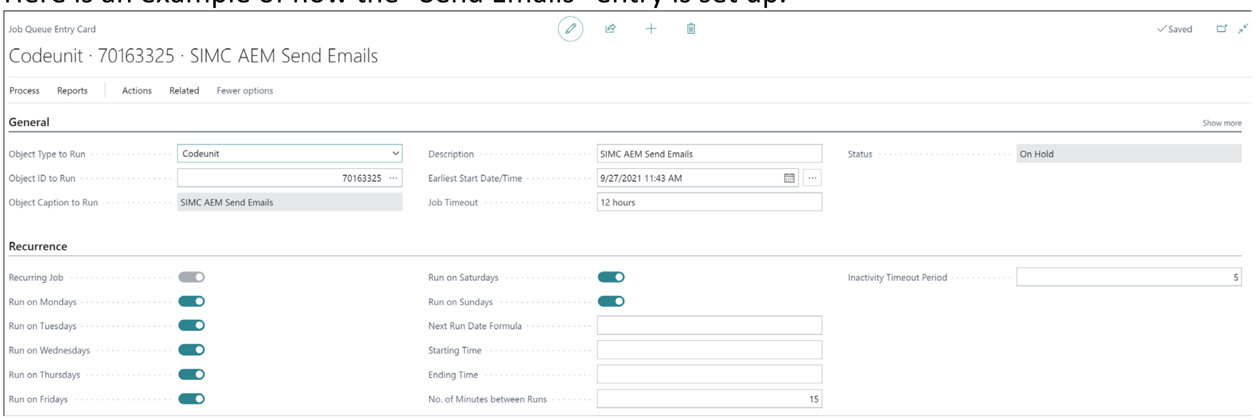
3. Job Queue Monitor
   This will monitor that the “Send Emails” entry is still running, and if not, it will send an email to the “Job Queue Monitoring Email” to warn that emails are no longer going out.
4. Email Special Docs
   This job will email and update all recurring special documents.

Here are the four job queue entries (Online version):

On Hold	Codeunit	70163325	SIMC AEM Send Emails	SIMC AEM Send Emails
On Hold	Codeunit	70163340	SIMC AEM Job Queue Monitor	SIMC AEM Job Queue Monitor
On Hold	Codeunit	70163341	SIMC AEM Log Monitor	SIMC AEM Log Monitor
On Hold	Codeunit	70163342	SIMC AEM Email Special Docs	SIMC AEM Email Special Docs

Codeunit numbers will differ for the OnPrem version (93325, 93340, 93341, and 93342).

Here is an example of how the “Send Emails” entry is set up.



Set the recurrence to your preference. We suggest emailing every 5-15 minutes, but that can be adjusted up or down and once you have tested the solution thoroughly, set Status to ready. The same goes for the monitoring job queue entries.

Please check the section Job Queue Management at the end of this document for more information.

Permissions

A Permission Set for Auto Email is created when the Extension is installed. It’s called ‘SIMC AUTO EMAIL’.

SIMC AUTO EMAIL	SimCrest Auto Email	System	Auto Email

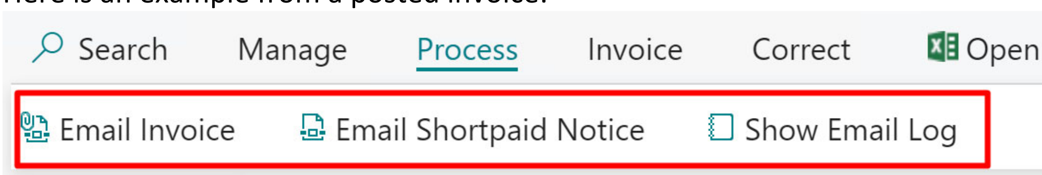
Assign this permission set to all the users that should have access to Auto Email.

User Manual

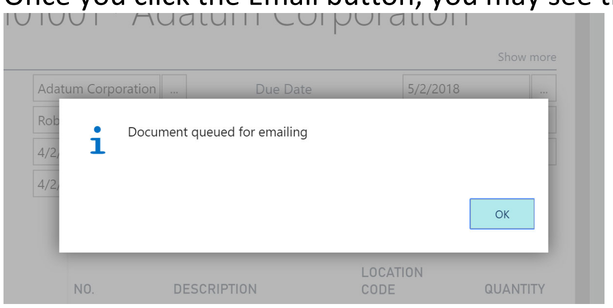
The ability to email documents has been added to several pages (cards and lists):

- Sales Quotes
- Sales Orders
- Sales Return Orders
- Posted Sales Invoices
- Posted Sales Credit Memos
- Posted Sales Shipments
- Posted Service Invoices (only available in the premium version)
- Posted Service Credit Memos (only available in premium version)
- Purchase Orders
- Reminders
- Finance Charge Memos

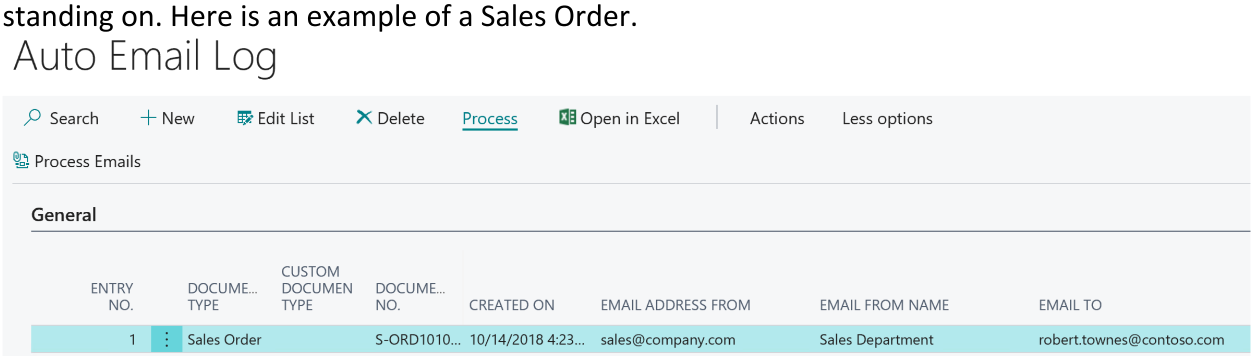
Here is an example from a posted invoice:



Once you click the Email button, you may see the queued message (depending on your setup):

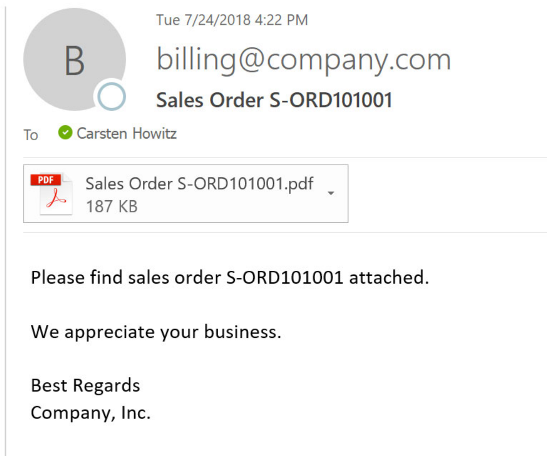


The Show Email Log button will show all the related log entries for the document you are standing on. Here is an example of a Sales Order.



The Process Emails action in the Auto Email Log can be used to force the emails to be sent if you can't wait for the Job Queue to process them. This is usually only used for testing. To run the process emails function, the user MUST have the rights to send emails on behalf of all the users needed to send the emails.

Here is an example how what a sales order would look like in the Email:

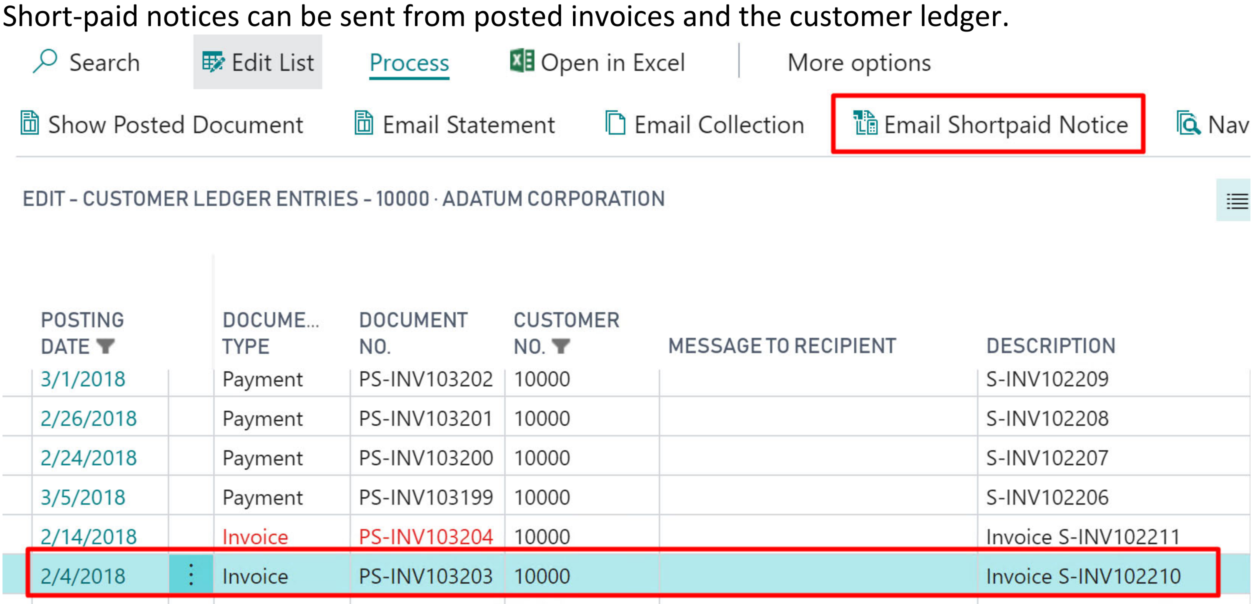


Special emails

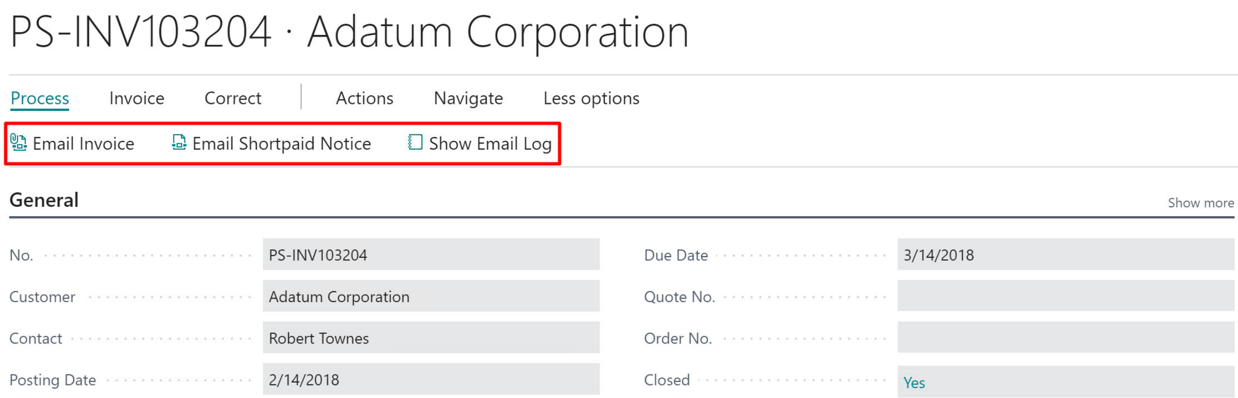
Short-paid/Non-paid invoices.

You can email a short/non-paid notice. If the invoice is past due and the original amount is the same as the past due amount, Auto Email will send a non-paid email with the invoice attached. Use the Non-Paid body text in Auto Email Setup to tell the customer whatever you like. If the invoice is partially paid, Auto Email will send a short-paid notice (with an invoice attached) using the short-paid body text in Auto Email Setup.

Short-paid notices can be sent from posted invoices and the customer ledger.

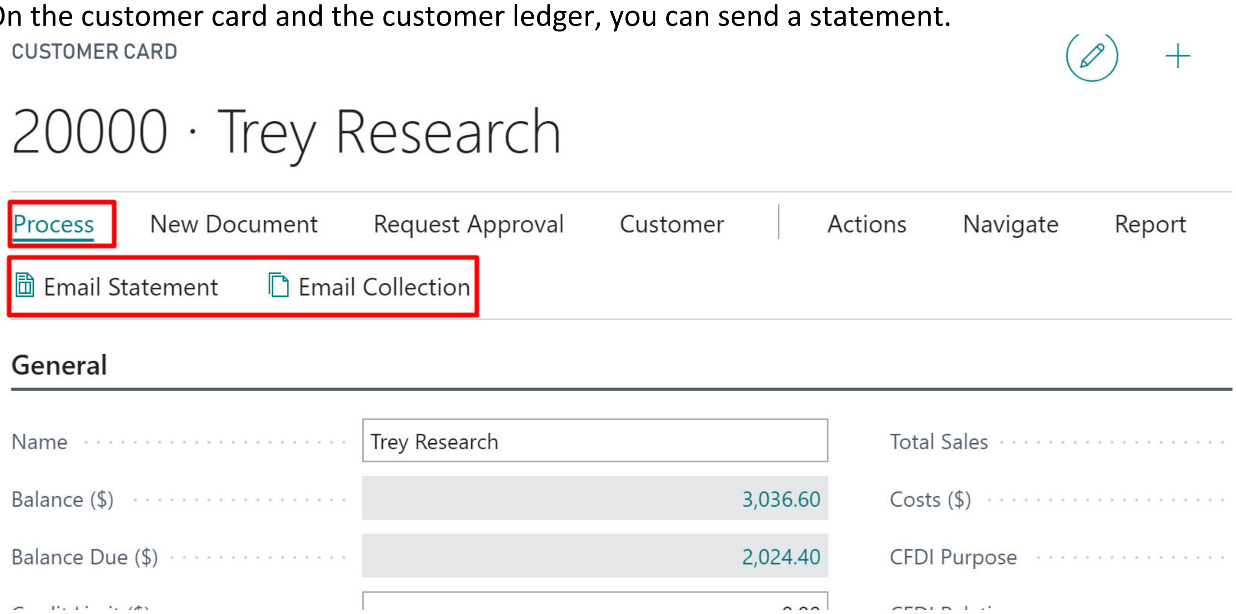


POSTING DATE	DOCUME... TYPE	DOCUMENT NO.	CUSTOMER NO.	MESSAGE TO RECIPIENT	DESCRIPTION
3/1/2018	Payment	PS-INV103202	10000		S-INV102209
2/26/2018	Payment	PS-INV103201	10000		S-INV102208
2/24/2018	Payment	PS-INV103200	10000		S-INV102207
3/5/2018	Payment	PS-INV103199	10000		S-INV102206
2/14/2018	Invoice	PS-INV103204	10000		Invoice S-INV102211
2/4/2018	Invoice	PS-INV103203	10000		Invoice S-INV102210



Email Customer Statement

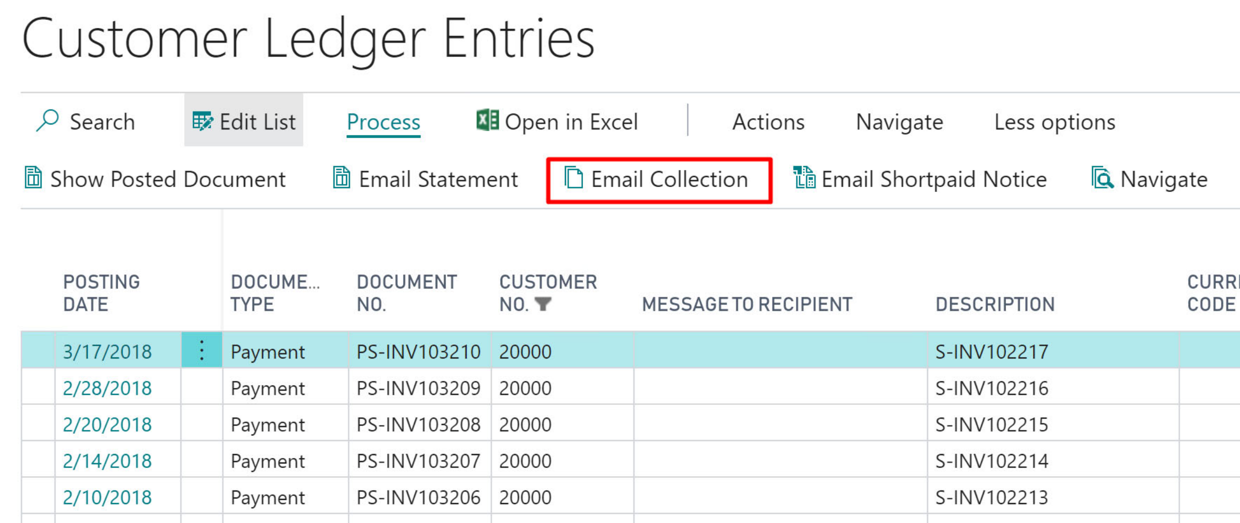
You must use the statement report that comes with the App. The number is 70163326/27 (Online version) and 93326/27 (On-Premise Version).
On the customer card and the customer ledger, you can send a statement.

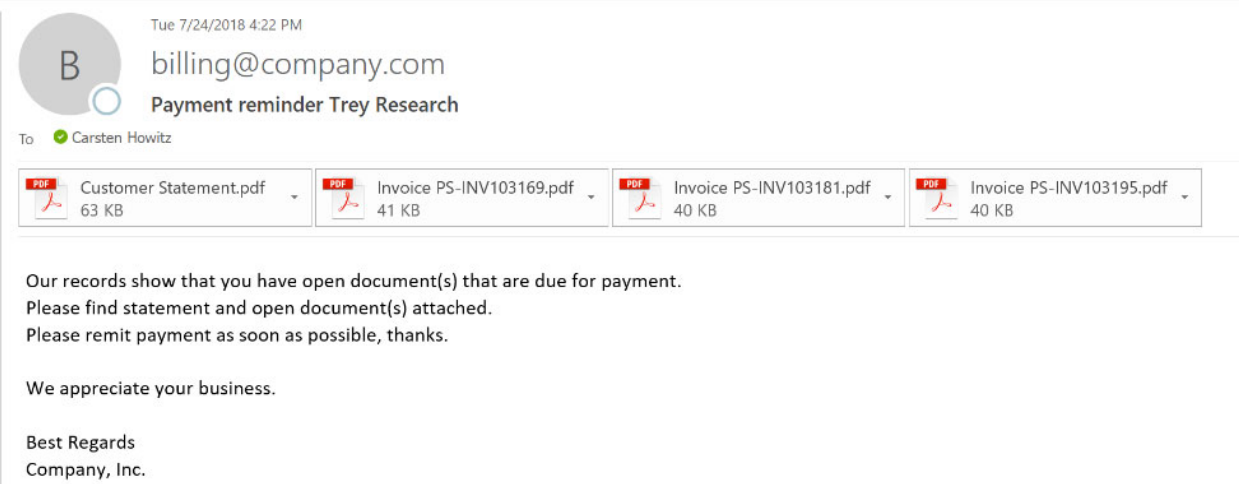


You can send statements and collections (see more about collections below). The statements will use the values from the Auto Email Setup page.

Email Collection / Email Open Sales

A collection email is a unique email that will send a statement (using the settings described above) along with all the supporting documents (invoices, credit memos, finance charge memos, and reminders).
On the customer card and the customer ledger, you can send a collection email or open a sales email.
Open sales emails will contain a statement and ALL open sales documents.



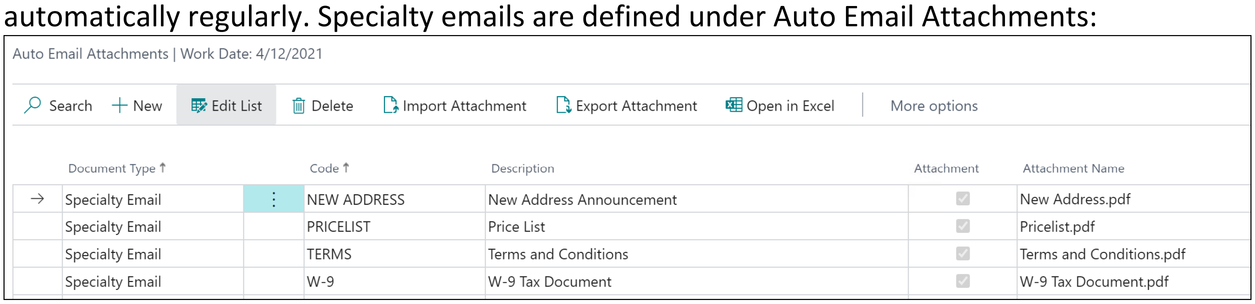


Email Outstanding Sales Order Status

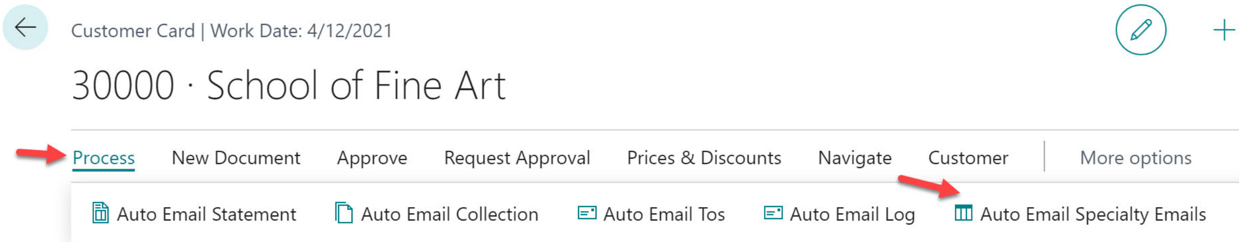
It's possible to send a sales order status to your customers. The document type will actually allow any report based on the customer record to be emailed.

Specialty Emails

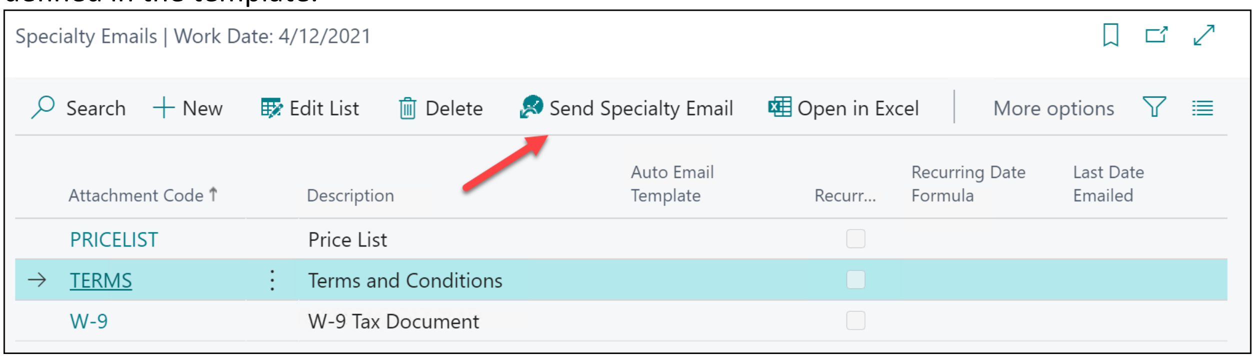
It's possible to send specialty emails to customers, vendors, and contacts either manually or automatically regularly. Specialty emails are defined under Auto Email Attachments:



These emails are only related to each email's attachment in the table with Document Type = Specialty Email. The attachment must be active for the specialty email to work. Once defined in the attachment table, you can select and email them from customers, vendors, and contacts:



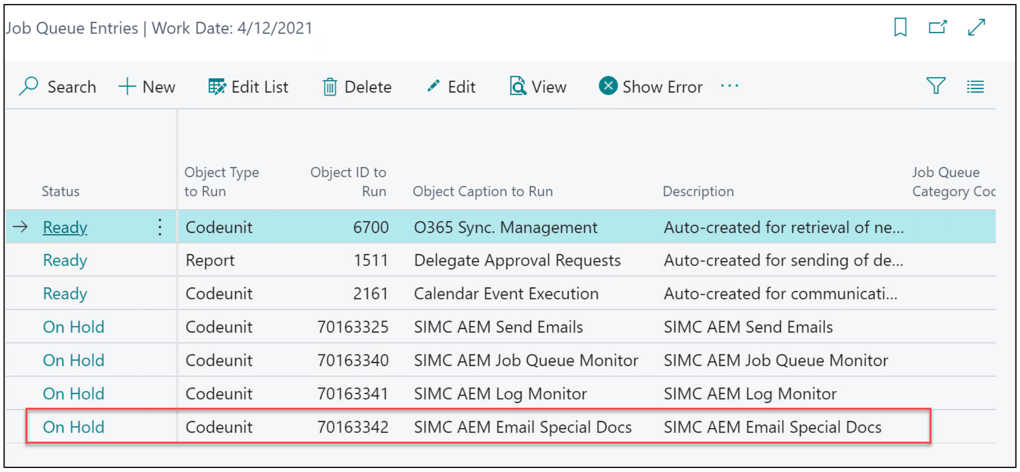
Select the line with the document you like to email and click Send Specialty email. The email template for the Specialty Email document type will be used to deliver the Email in the format defined in the template.



There are a few fields on the specialty emails:

- Auto Email Template
  Allows you to specify an email template to use for the specialty document. If left blank, Auto Email will use the default specialty template.
- Recurring
  Check this field if you want the document to be emailed regularly.
- Recurring Date Formula
  Specify how often the Email is sent. Use date formulas to set the interval.
- Last Date Emailed
  This field is updated with today's date when the Email is sent via the recurring job. If blank, the Email will be sent next time the recurring job runs.

To use the recurring functionality, make sure to turn on the job queue entry for specialty emails:


Job Queue Entries | Work Date: 4/12/2021

Search New Edit List Delete Edit View Show Error

Status	Object Type to Run	Object ID to Run	Object Caption to Run	Description	Job Queue Category Coc
Ready	Codeunit	6700	O365 Sync. Management	Auto-created for retrieval of ne...	
Ready	Report	1511	Delegate Approval Requests	Auto-created for sending of de...	
Ready	Codeunit	2161	Calendar Event Execution	Auto-created for communicati...	
On Hold	Codeunit	70163325	SIMC AEM Send Emails	SIMC AEM Send Emails	
On Hold	Codeunit	70163340	SIMC AEM Job Queue Monitor	SIMC AEM Job Queue Monitor	
On Hold	Codeunit	70163341	SIMC AEM Log Monitor	SIMC AEM Log Monitor	
On Hold	Codeunit	70163342	SIMC AEM Email Special Docs	SIMC AEM Email Special Docs	

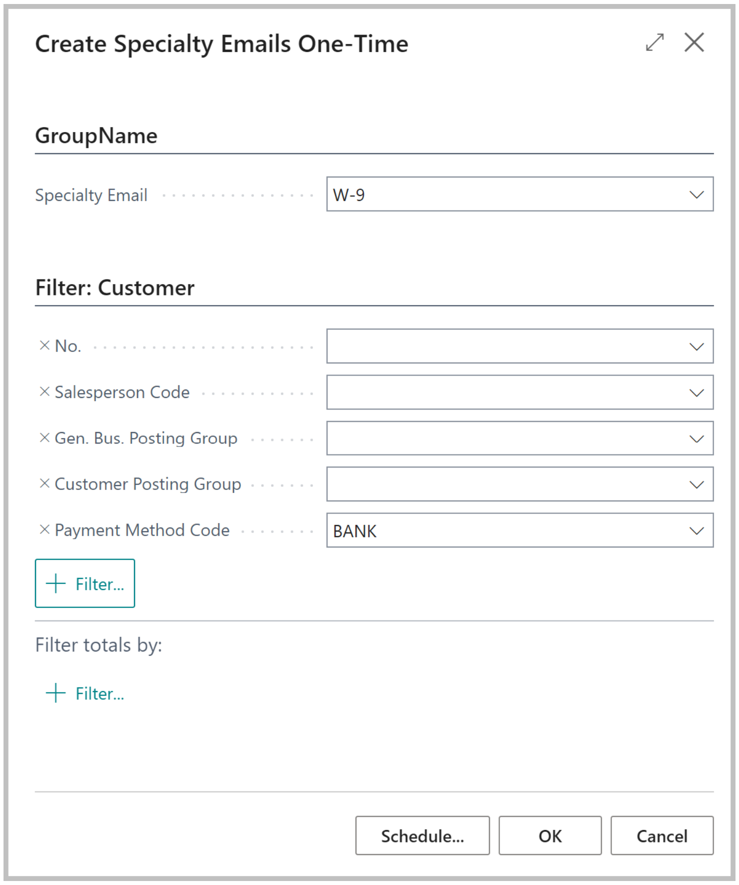
One-Time Specialty Emails

It's possible to create one-time specialty emails for customers without having to set each customer up. Instead the system will log the specialty emails based on a filter on the customer record, and only the customers that are within the filter will get the email.

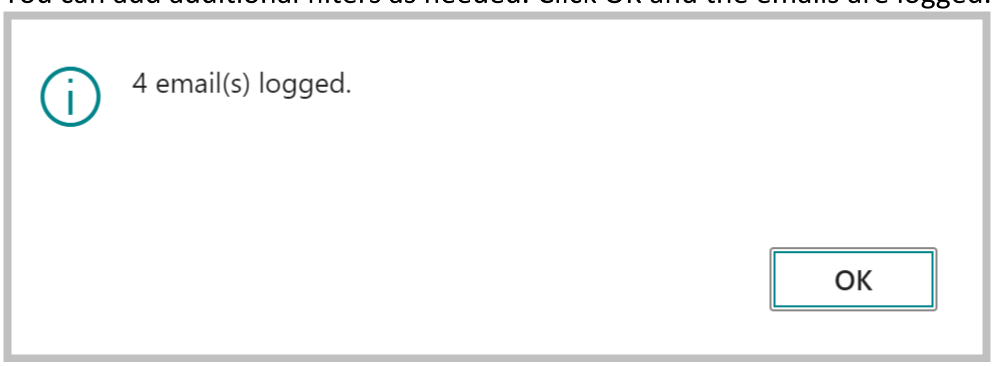
Search for "Create Special":

Click on the report that comes up.

Now fill in the specialty email you want to send and the customer filter for the customers that will receive this email.

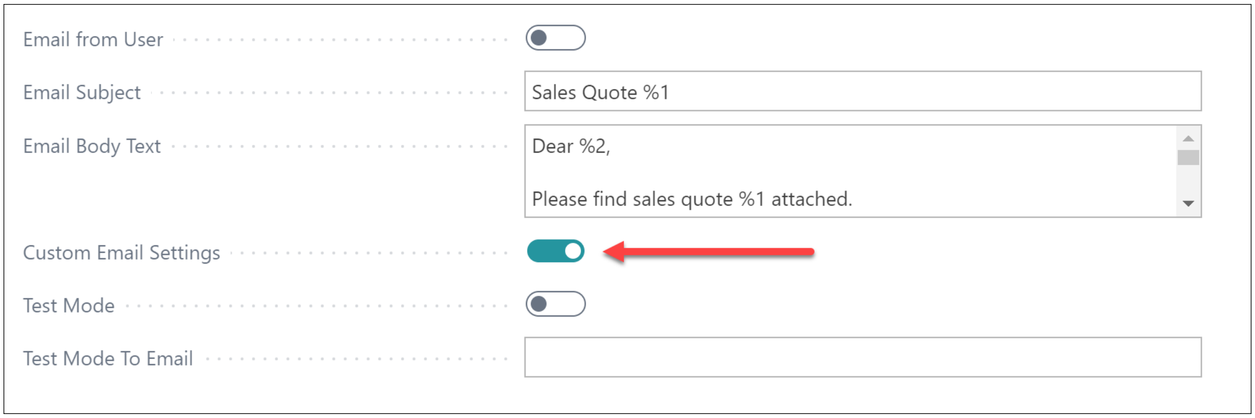


You can add additional filters as needed. Click OK and the emails are logged.

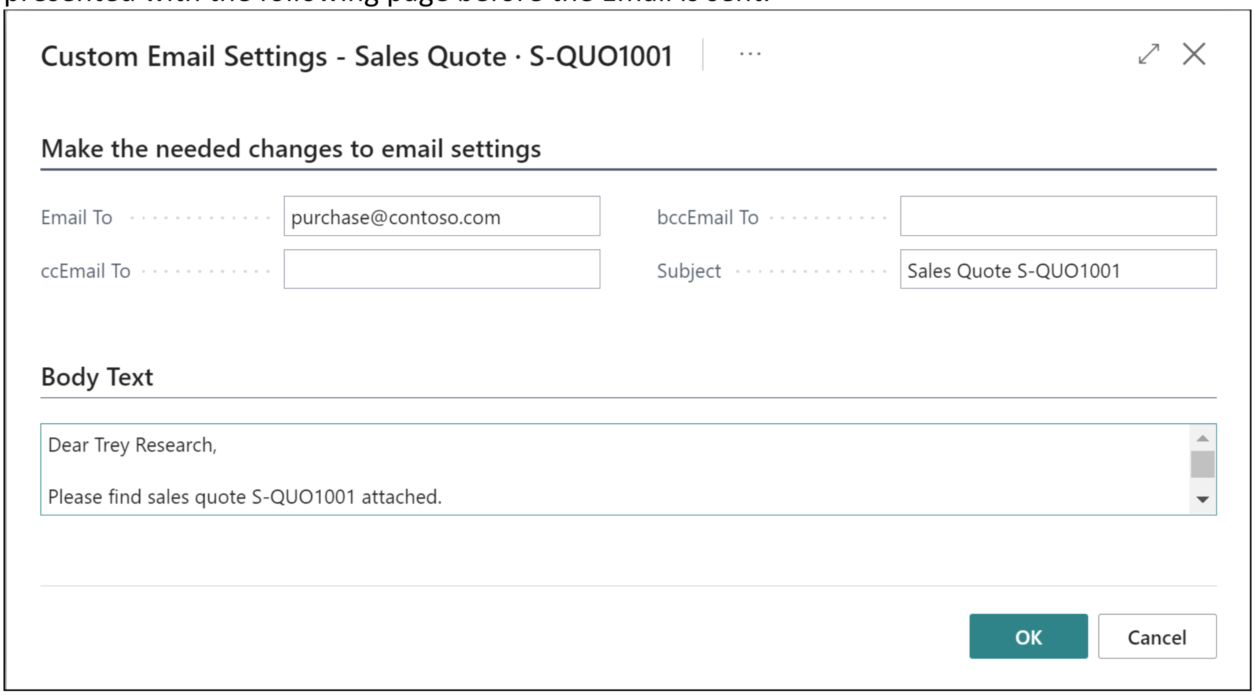


Custom Email Settings

On the email templates, the Custom Email Setting field determines if the user will be able to change email settings upon sending the Email via Auto Email.



When an email is sent using a template with custom email settings turned on, the user will be presented with the following page before the Email is sent.

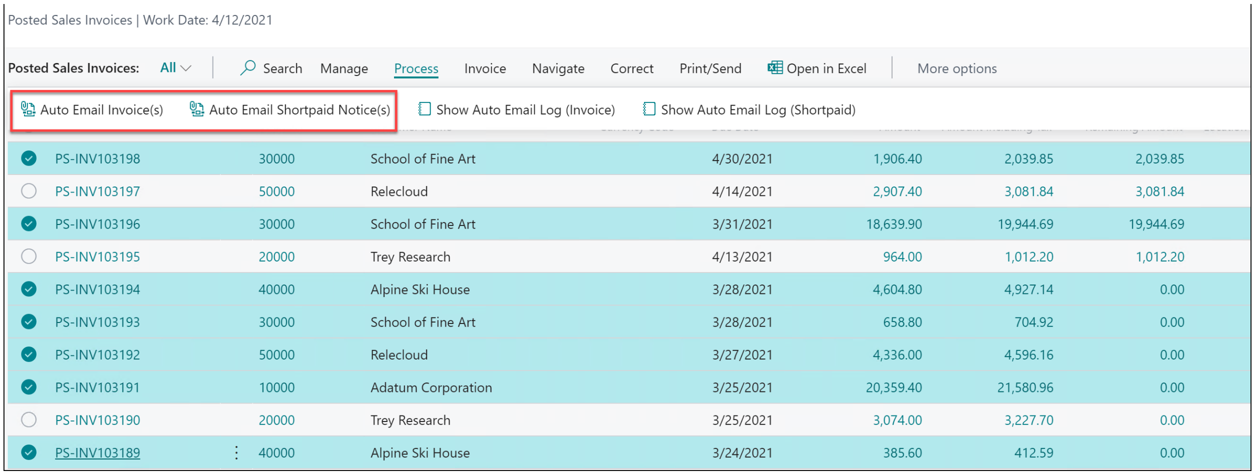


Edit all the settings needed and click OK to send the Email. If you click Cancel, the Email will not be logged and not be sent. Notice that Email-From email address and name are not included under settings. The Email Scenarios setup using Emails Accounts determines the Email sender and cannot be changed on this page.

NOTE: Custom Email Settings are ignored for documents automatically emailed when they are posted or issued. If the posted or issued document is being emailed later, the custom settings screen will show up like above.

Emailing Multiple Documents

On all lists of supported documents, it’s possible to send a select number of documents with one click. Here is an example of how to send multiple invoices with one click:
Here is a list of invoices where several have been selected:



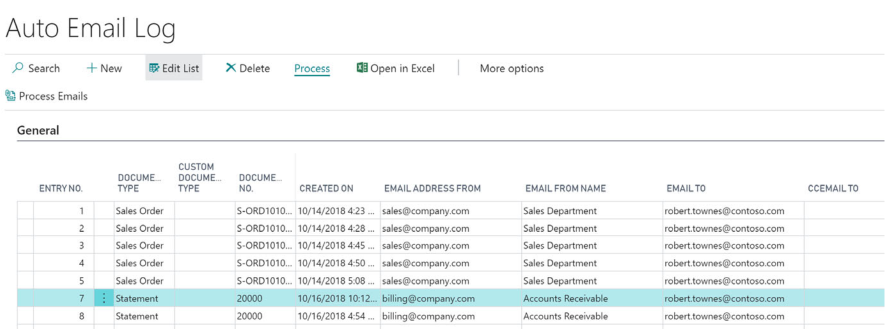
By clicking “Auto Email Invoice(s)” or “Auto Email Shortpaid Notice(s)”, the App will confirm that you want to send several invoices, and if you accept, they are all emailed. Each line will become a separate email (documents are not assembled by customer) unless consolidated emails are enabled for the email templates used to send the documents.

The following document lists are supported:

- Sales Quotes, Orders, and Return Orders
- Purchase Orders
- Posted Invoices, Posted Credit Memos, and Posted Shipments
- Posted Service Invoices, and Credit Memos (Extended version only)
- Issues Reminders and Issued Finance Charge Memos.

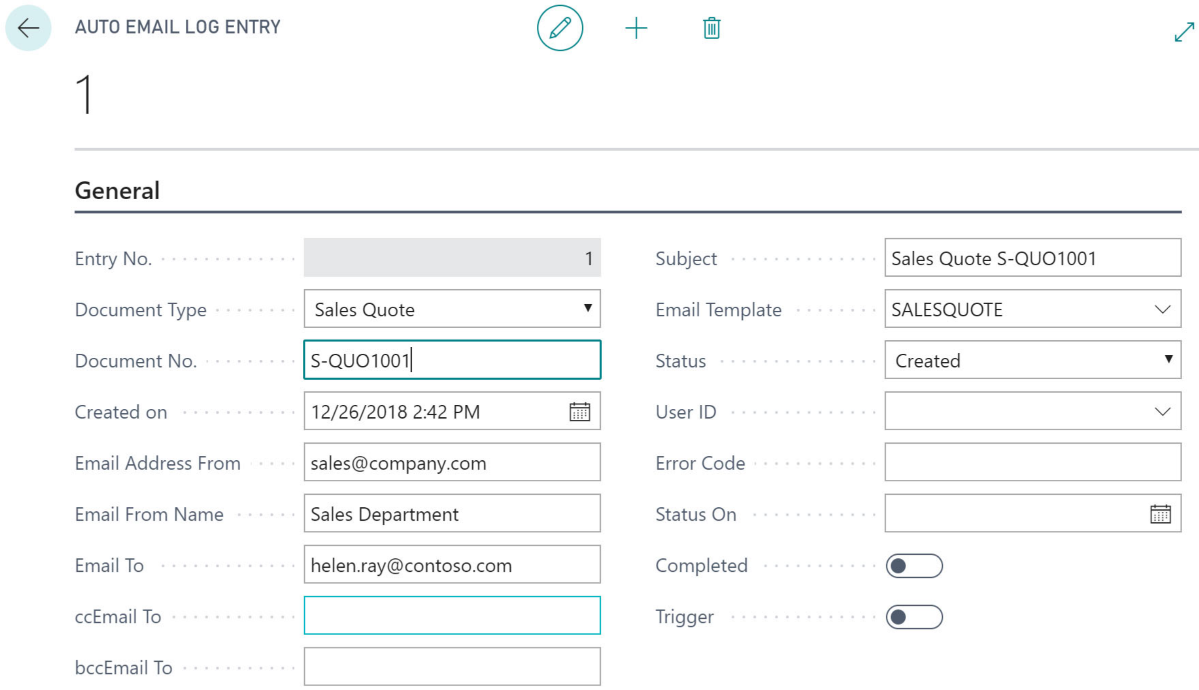
Auto Email Log

Auto Email maintains a log file that will show all the requested emails to be submitted with their status. Search for Auto Email Log.



You can use the log to find out if emails went out correctly and see if there is an error to be corrected. If there is an error, the Email did not go out, and you need to resolve this issue if the Email needs to go out. You can edit and delete entries in the log if you have permission to do that.

By clicking on Entry No., you can see the Entry Page. Here is an example of the entry page:

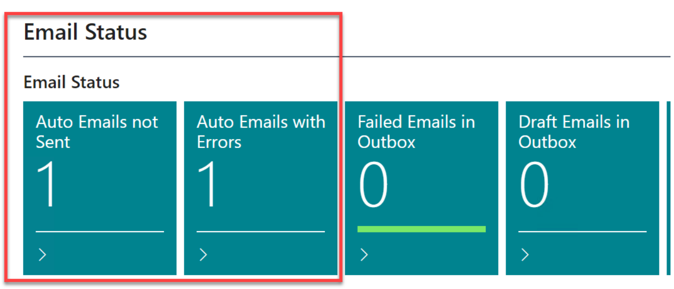


The following actions are available for the log entries:

- Reset log entry
  This will reset the entry, so it's ready to be emailed. It sets the Status to "Created" and clears the Completed flag, allowing the entry to be processed for Email. Any error code will also be cleared.
- Refresh Emails
  This will refresh the email addresses from the customer setup of emails. Use when entries are missing email addresses due to the missing setup of customers.

Auto Email Status in Role Center

Most Roles that are assigned to users will have Email Status activity tiles. Auto Email creates two tiles related to Auto Email:

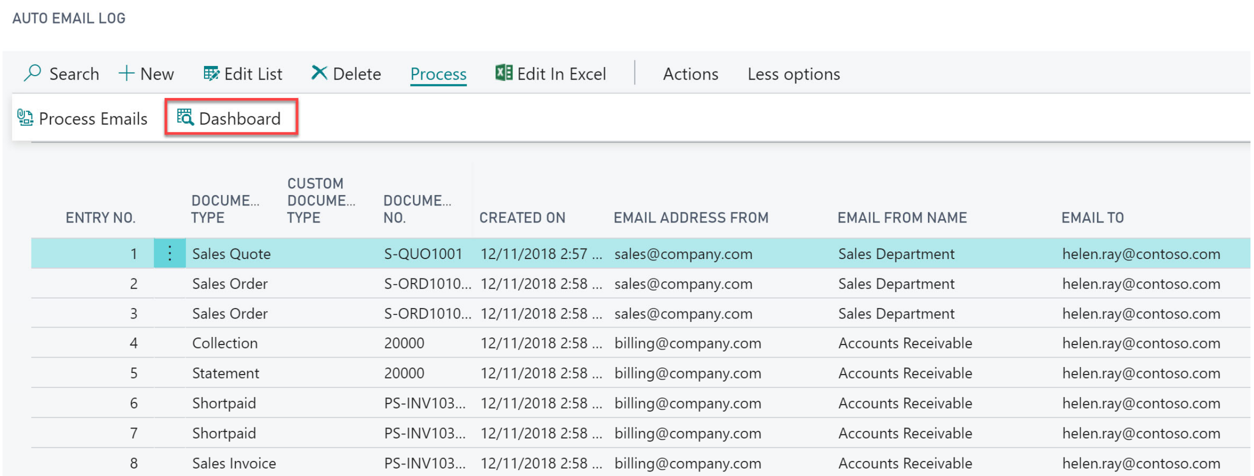


- Auto Emails not Sent
  This will show the number of emails created that have not yet been sent by the job queue. Depending on how often the job queue processes emails, this number should regularly go down to zero. Click on the Tile to see the emails not yet sent.

- Auto Emails with Errors
  This will show the number of emails that have errors. You should review these emails and fix the issues with all emails showing errors. Click on the tile to see and fix the errors.

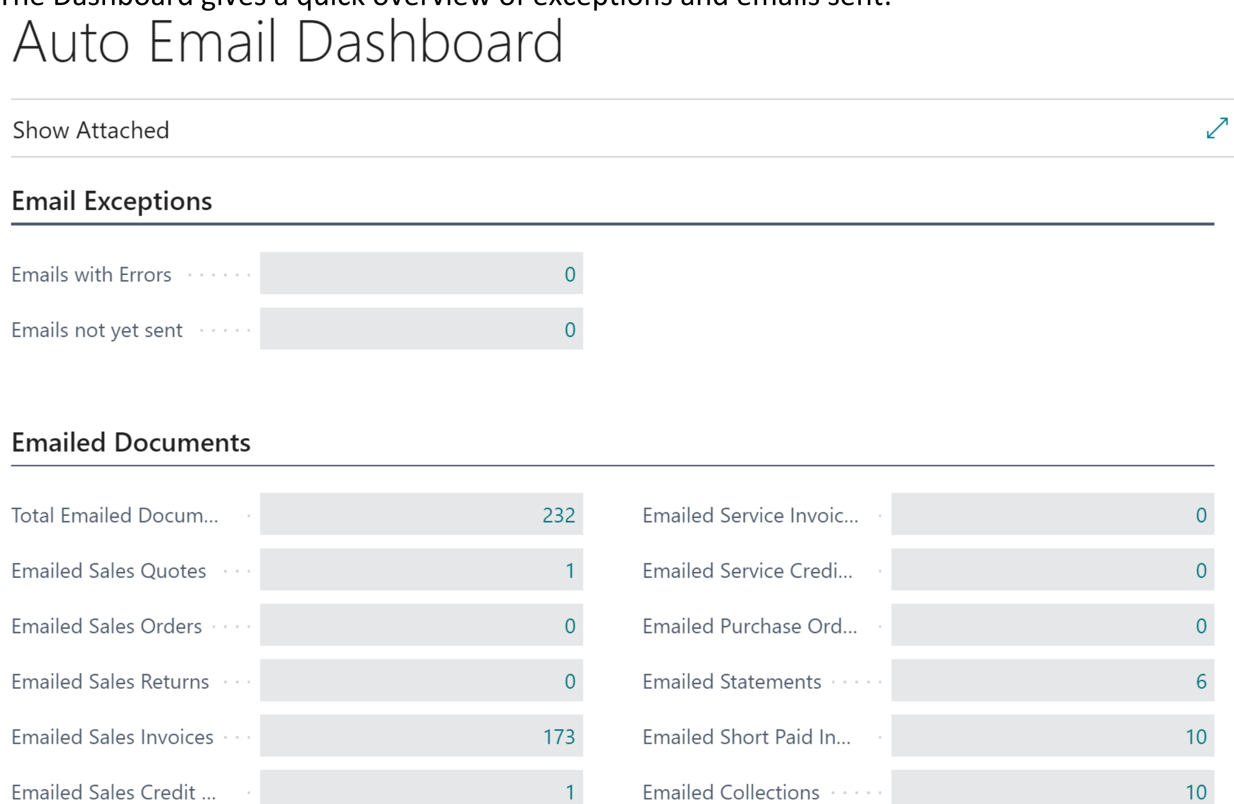
Auto Email Dashboard

If you want an overview of the email log, go to Auto Email Log and click Dashboard.



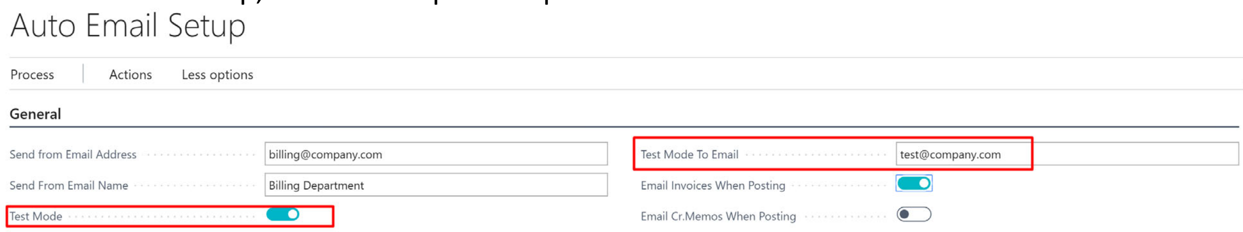
ENTRY NO.	DOCUME... TYPE	CUSTOM DOCUME... TYPE	DOCUME... NO.	CREATED ON	EMAIL ADDRESS FROM	EMAIL FROM NAME	EMAIL TO
1	Sales Quote		S-QUO1001	12/11/2018 2:57 ...	sales@company.com	Sales Department	helen.ray@contoso.com
2	Sales Order		S-ORD1010...	12/11/2018 2:58 ...	sales@company.com	Sales Department	helen.ray@contoso.com
3	Sales Order		S-ORD1010...	12/11/2018 2:58 ...	sales@company.com	Sales Department	helen.ray@contoso.com
4	Collection		20000	12/11/2018 2:58 ...	billing@company.com	Accounts Receivable	helen.ray@contoso.com
5	Statement		20000	12/11/2018 2:58 ...	billing@company.com	Accounts Receivable	helen.ray@contoso.com
6	Shortpaid		PS-INV103...	12/11/2018 2:58 ...	billing@company.com	Accounts Receivable	helen.ray@contoso.com
7	Shortpaid		PS-INV103...	12/11/2018 2:58 ...	billing@company.com	Accounts Receivable	helen.ray@contoso.com
8	Sales Invoice		PS-INV103...	12/11/2018 2:58 ...	billing@company.com	Accounts Receivable	helen.ray@contoso.com

The Dashboard gives a quick overview of exceptions and emails sent:



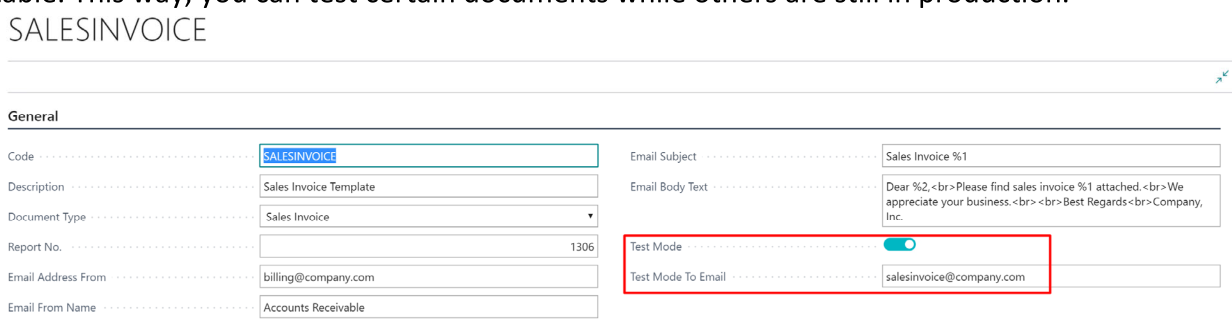
Test Mode

In Auto Email Setup, there is an option to put Auto Email in test mode.



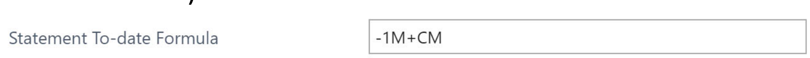
If checked, Auto Email will send all emails to the “Test Mode To Email” address instead of the actual customers/vendors. This is useful when setting up Auto Email and checking that documents are showing correctly in the emails. Just uncheck again when the system is tested and ready to go.

You can also set up test mode on the template. This setting will override the setting in the setup table. This way, you can test certain documents while others are still in production.

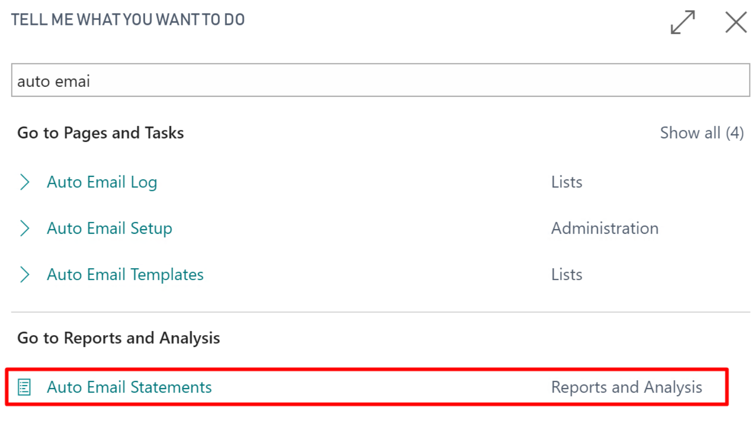


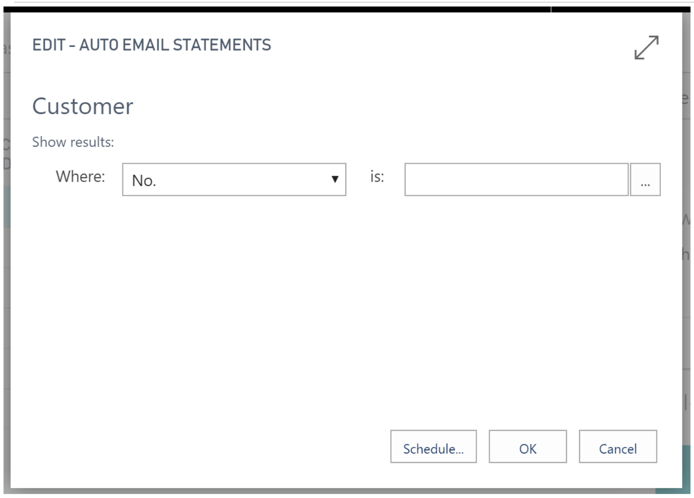
Manual Customer Statements

Auto Email can send customer statements to all customers with a balance due according to the date formula. Check the statement options for Auto Email Setup for more information. The customer must also be set up to receive statements via Email (“Auto Email Statements” on Customer Card).

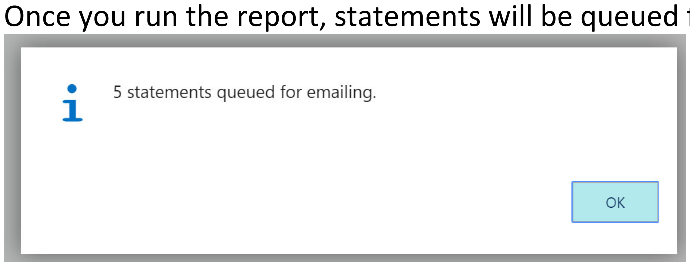


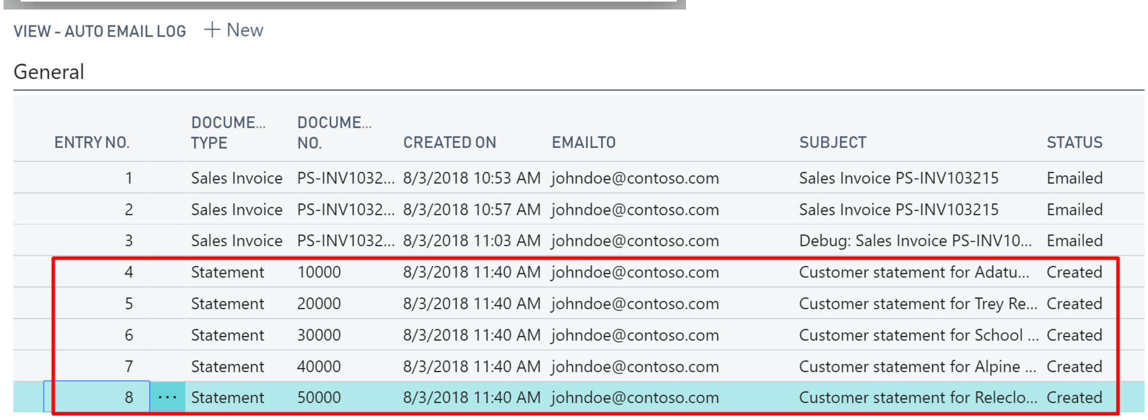
To Email the customer statement, search for Auto Email Statements and run the report. Specify any filter you like to have on the customer number.





Once you run the report, statements will be queued for emailing.




VIEW - AUTO EMAIL LOG + New

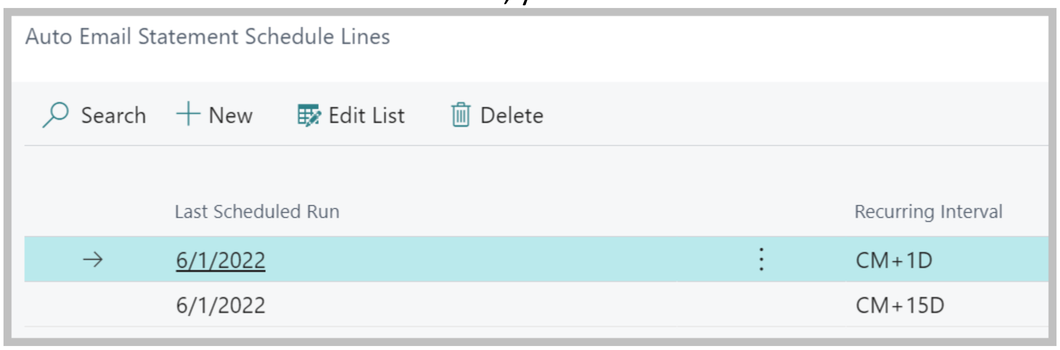
General

ENTRY NO.	DOCUME... TYPE	DOCUME... NO.	CREATED ON	EMAILTO	SUBJECT	STATUS
1	Sales Invoice	PS-INV1032...	8/3/2018 10:53 AM	johndoe@contoso.com	Sales Invoice PS-INV103215	Emailed
2	Sales Invoice	PS-INV1032...	8/3/2018 10:57 AM	johndoe@contoso.com	Sales Invoice PS-INV103215	Emailed
3	Sales Invoice	PS-INV1032...	8/3/2018 11:03 AM	johndoe@contoso.com	Debug: Sales Invoice PS-INV10...	Emailed
4	Statement	10000	8/3/2018 11:40 AM	johndoe@contoso.com	Customer statement for Adatu...	Created
5	Statement	20000	8/3/2018 11:40 AM	johndoe@contoso.com	Customer statement for Trey Re...	Created
6	Statement	30000	8/3/2018 11:40 AM	johndoe@contoso.com	Customer statement for School ...	Created
7	Statement	40000	8/3/2018 11:40 AM	johndoe@contoso.com	Customer statement for Alpine ...	Created
8	Statement	50000	8/3/2018 11:40 AM	johndoe@contoso.com	Customer statement for Releclo...	Created

Auto Email Customer Statements and Schedules

Auto Email can automatically send out Customer Statements regularly. Under Auto Email Setup, find the section called Automatic Statement Options:

Under the No. of Statement Schedules, you can define schedule lines:



The above setup will send statements on the 1st and 15th of the month (CM+1D, CM+15D) after 8:00 AM using the job queue. Above, the last auto statement was sent on 06/01/22, so the next ones will be sent on 07/01/22 and 07/15/22 after 8:00 AM. The statement options indicate that only customers with a past due balance will get a statement.
You can define as many schedule lines as needed.
For more information on the different automatic statement options fields, please refer to Auto Email Setup.

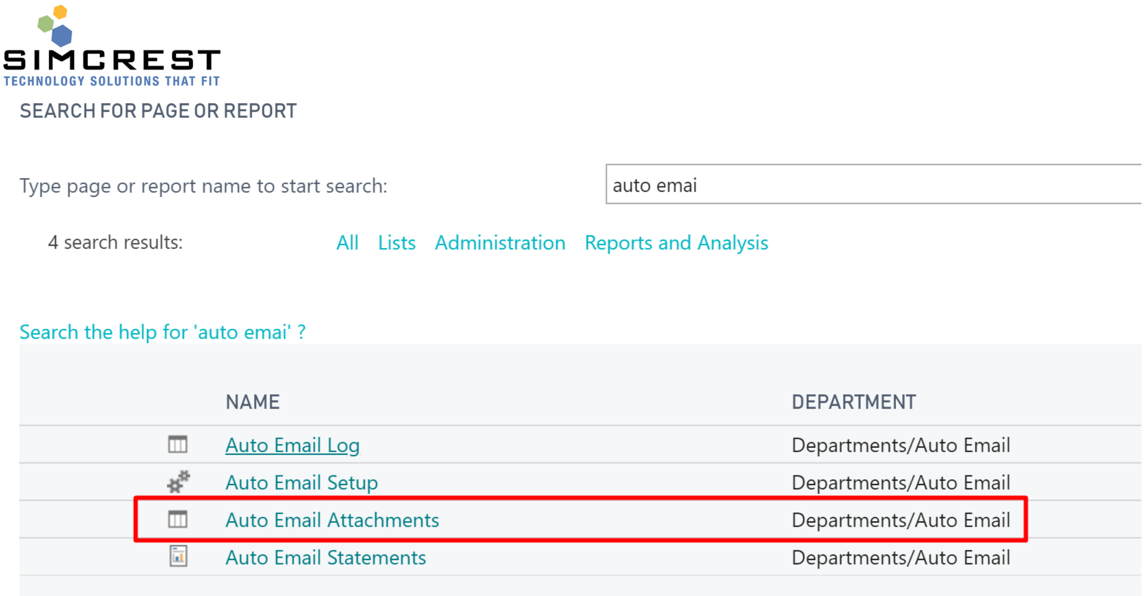
Auto Email Attachments

Auto Email allows you to send attachments with sales and purchase documents. There are three ways to send attachments:

1. Send specific attachments saved on the sales or purchase document
2. Send item attachments for the sales or purchase document for all the items on the document
3. Send general attachments related to sales or purchase document

General Attachments

General attachments can be sent with the sales and purchase documents. Let us say you like to send your “Terms and Conditions” and “Return Instructions” with all the sales the orders you are emailing.
Find the attachments page:



Here is the attachment table:

Here are the fields used on the page:

- Document Type
  Here you pick the document type you are emailing
- Code
  This is a unique code used per email type
- Description
  The description of the document
- Attachment Name
  This is the file name of the attachment. If no document is attached, you can click this field to import a new attachment.
- Attachment Date/Time
  The date and time the file was loaded.
- Active
  Click Active to include this attachment for the email type selected. If unchecked, the attachment will NOT be emailed.
- Starting Date
  Specifies the starting date the attachment is valid. If the date has not been reached, the attachment is not emailed. If no date is specified, the date is open.
- Ending Date
  Specifies the ending date the attachment is valid. If the date has passed, the attachment is not emailed. If no date is specified, the date is open.

Example:

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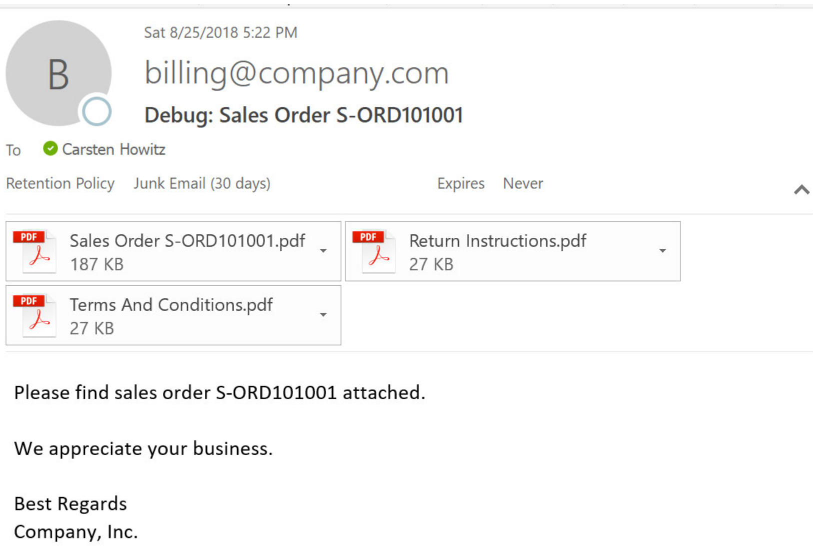
EMAIL TYPE		CODE	DESCRIPTION	ATT...	ATTACHMENT NAME	ATTACHMENT DATE/TIME	ACT...
Sales Order	···	RETURNS	Return Instructions	☑	Return Instructions.pdf	8/25/2018 5:18 PM	☑
Sales Order	···	TERMS	Terms and Conditions	☑	Terms And Conditions.pdf	8/25/2018 5:08 PM	☑
				☐			☐

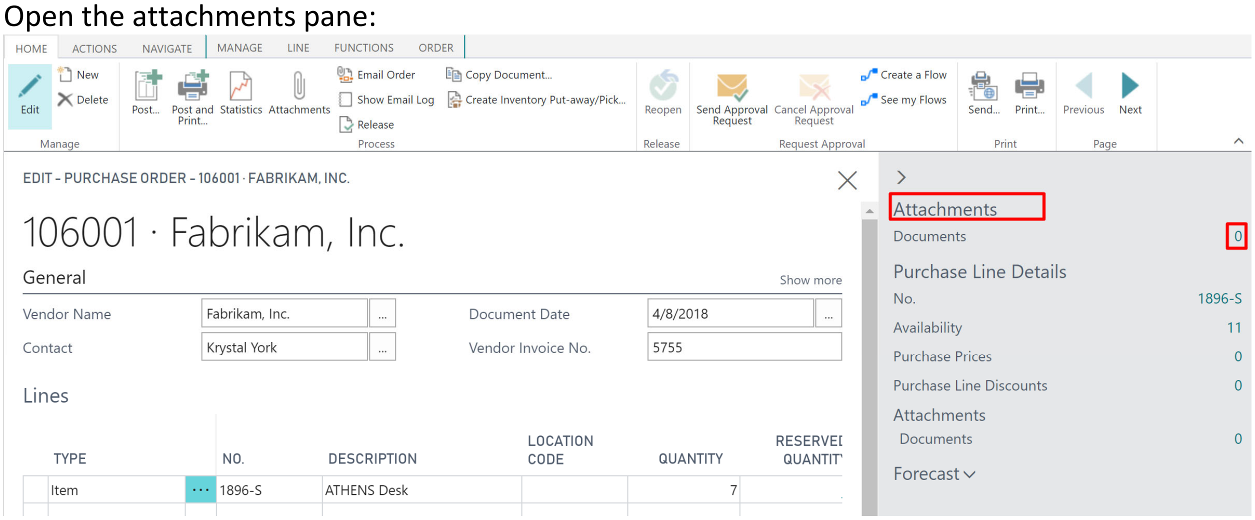
Two attachments will be sent with the sales order in the above case. Make sure Active is checked for the document to be included in emails.



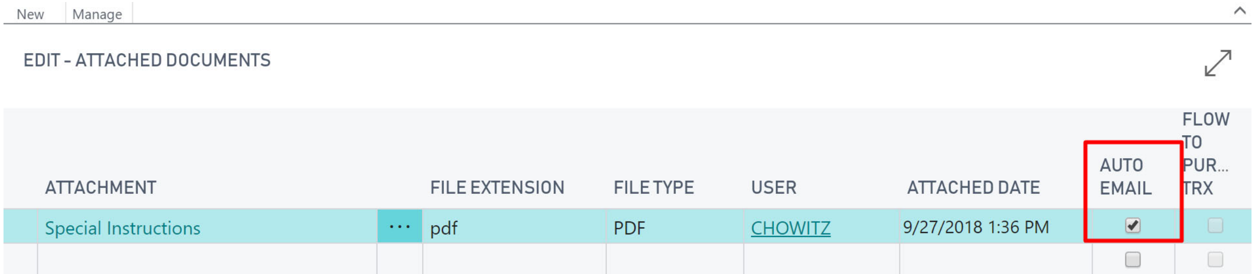
The file will be downloaded to your Downloads folder by clicking the Attachment Name. If you like to delete the attachment, delete the entire record.

Specific Attachments

Specific attachments can be sent with the sales and purchase documents. Auto Email allows you to send the attachments associated with the standard Dynamics 365 Business Central functionality available for any document. If you have a purchase order and would like to email special instructions with this particular purchase order, follow the following instructions.
Open the attachments pane:



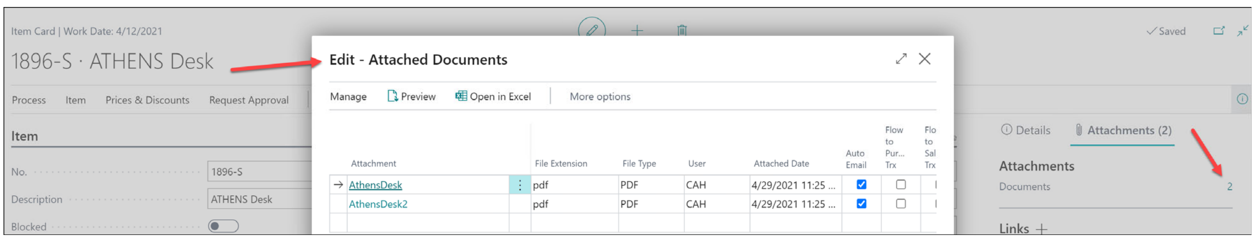
Click the number of Documents (in this case, 0) and attach the document you would like to email with this particular purchase order.



Make sure to check the Auto Email checkbox. Any document you load here will be emailed along with the purchase order if the Auto Email field is checked. If not, it will not be emailed.

Item Attachments

Item attachments work very much like specific attachments, except the attachments are added from the items:



Here two attachments have been added to the item above. If any document that is being auto emailed has an email template that has "Include Item Attachments" checked, the attachments will be included in the Email for the document if they have the item on the sales or purchase lines. For instance: if a sales order's email template has "Include Item Attachments" and the sales order contains order lines with items with attachments (checked in Auto Email), these attachments will be included in the Email.

Attachments will only be added once, even if several lines have the same item number.

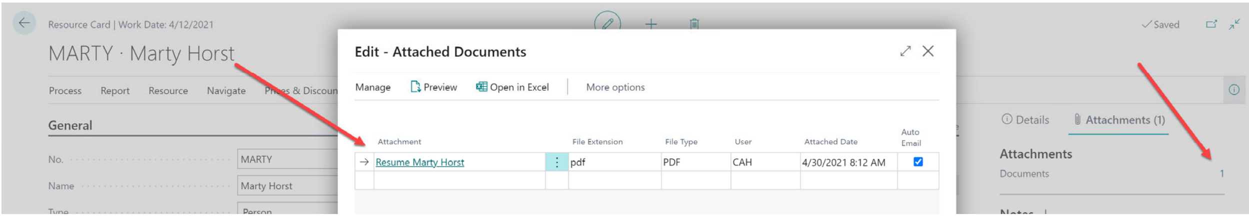
The following documents are supported for Item Attachments:

- Sales Quote
- Sales Order
- Sales Return Order
- Posted Sales Invoice
- Posted Sales Credit Memo
- Posted Sales Shipments
- Posted Service Invoice
- Posted Service Credit Memo
- Short Paid Invoice
- Purchase Order

Any other document will ignore any item attachments.

Resource Attachments

Resource attachments work like item attachments, except resources are used instead of items.



The same documents as Item attachments support resource attachments.

Consolidated emails

Auto Email supports sending one Email to customers at specific intervals or usually each day with all the documents (typically invoices) submitted during that day. The feature is turned on in the email template. Once turned on, all customers using this template will be affected and only receive one email per day with all documents attached. The following documents are supported for consolidation: Sales Quotes, Sales Orders, Purchase Orders and Posted Sales Invoices.

If you enable the default email template to send consolidated emails, all customers not having a group template will be affected. If only specific customers should have a consolidated email each day, create an email template group, assign a non-default template with consolidation enabled, and assign this template group to applicable customers.

Handling Email Exceptions

On occasion, it might be needed to override the auto emailing of documents to specific customers. It could be set up on the customer card so that they won't get any automatic emails of certain documents or specific to certain documents for this customer if you don't want a particular invoice or credit memo to be auto emailed, even though the system has been set up to auto email the document for the customer in question. Or, it could be a credit memo made internally and should not be auto emailed to the customer.

The App has implemented the handling of exceptions but will not prevent deliberate auto emailing, like emailing of collection notices with supporting documents or short paid notices. All accounts receivable functions will work as usual.

Please note that the exceptions, if not checked, will not Auto Email the documents if the customer template says explicitly not to Email the document in question.

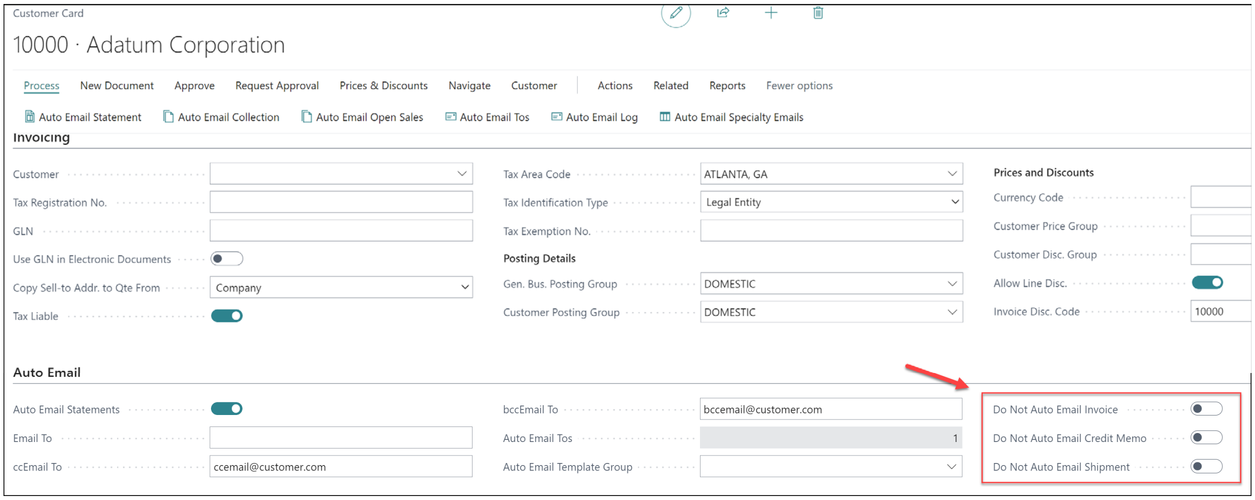
The following documents can have exceptions:

- Posted Invoices
- Posted Shipments
- Posted Credit Memos

Non-posted documents will not have exceptions, as the user can simply avoid auto-emailing them.

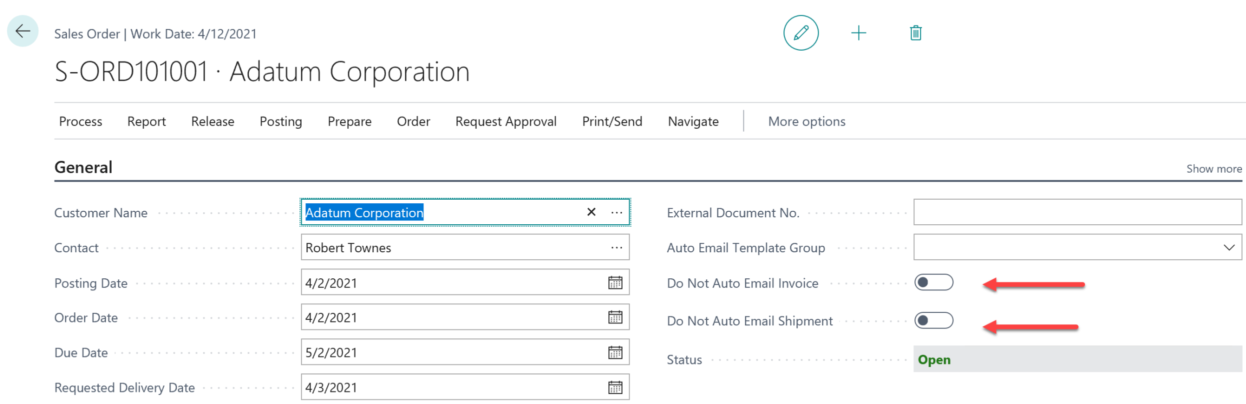
How to Make Exceptions

Here is the customer card:



In the above case, the customer doesn't have any exceptions, but this exception will transfer to each document type applicable if any were checked. If, for instance, the customer had an exception not to email the invoice automatically, any order created for this customer will have this exception also. The user can elect to turn the exception off and on as needed on the order.

Here is a sales order:



Two fields can make exceptions to auto emailing documents for this particular order:

- Do Not Auto Email Invoice
- Do Not Auto Email Shipment

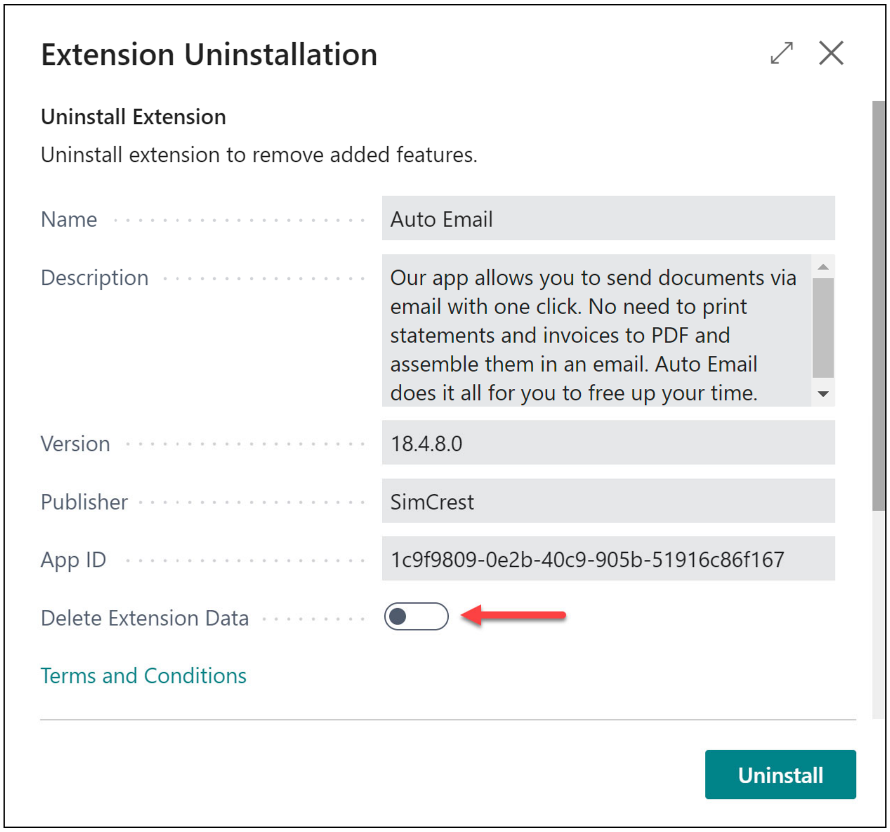
If checked, these fields will prevent auto emailing of the specific document when this order is posted. It will also warn you if you try to email the posted document later by accident. You will find similar fields on sales invoices and credit memos.

If the fields are checked, there is no auto email log generated for this document, and consequently, the document is not emailed to the customer.

Installing a newer version of Auto Email

After the initial installation of the Auto Email App, new versions are created regularly. To install a new version, you will need to uninstall your correct version and install the new version. We recommend you follow the following process to ensure a smooth upgrade:

1. Turn off the job queue entry that is running the Send Emails job
2. Go to Extensions and Click on Auto Email:



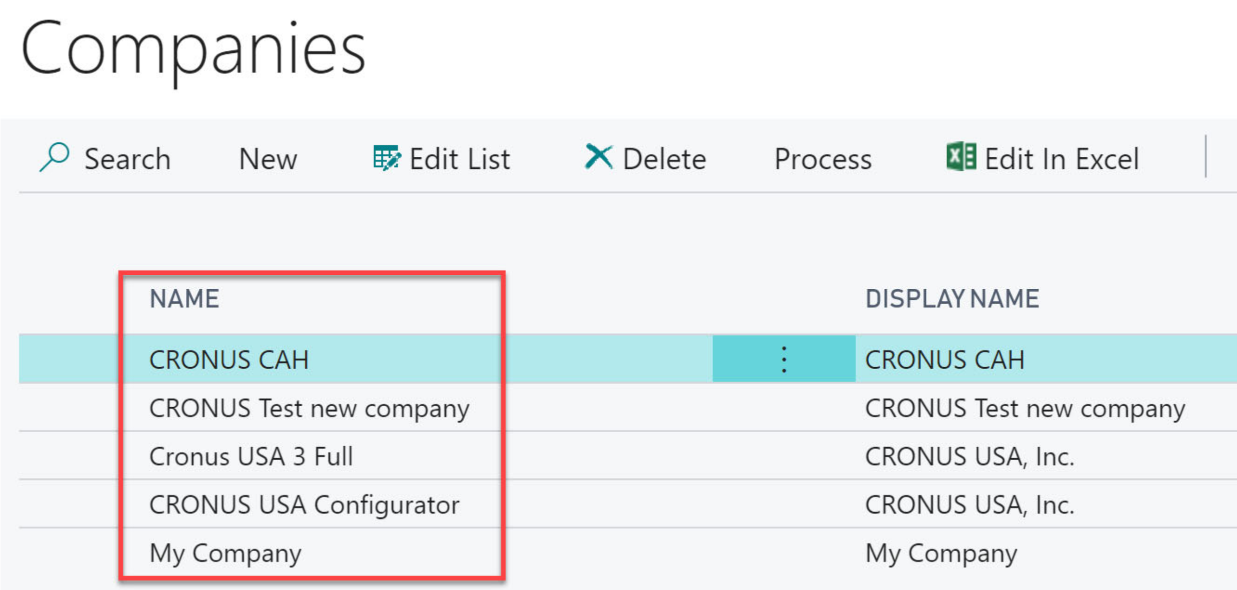
3. Make sure that the Delete Extension Data is TURNED OFF. If not, you will delete all the Auto Email setups and log.
4. Click Uninstall
5. Find Auto Email in the Extension Marketplace and click the Free Trial. Once installed, the new App will read the original license, and all data will be intact. There is no need to load a new license.
6. Restart the job queue entry that is running the Send Emails job.

Note: Sometimes, Microsoft will automatically update Auto Email when a new version of Dynamics 365 Business Central is installed. Please check after Microsoft performs any upgrade.

Trial Period and Activating/Renewing a Subscription

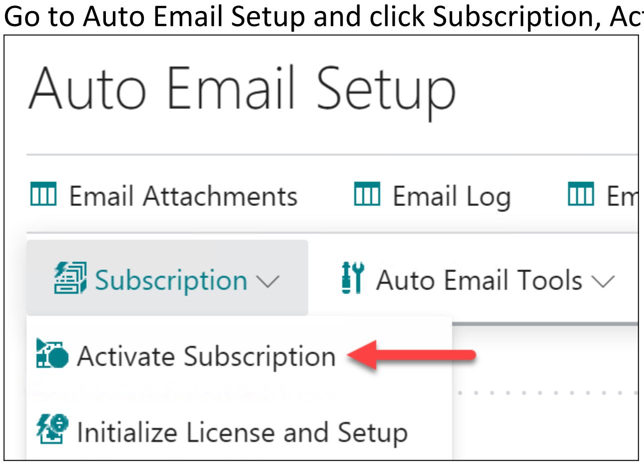
When you have installed Auto Email, it will automatically run for a trial period of 30 days in all your companies. You are free to evaluate the solution during that time, and there are no restrictions to the version running under the trial period.
Once the trial period has expired, Auto Email will no longer send emails. To avoid that, you need to subscribe to Auto Email. Contact SimCrest to purchase a subscription. You can use this link https://simcrest.com/contactus to contact us.

Auto Email is licensed per company and is tied to the company name. You can see the company name by searching for "Companies":

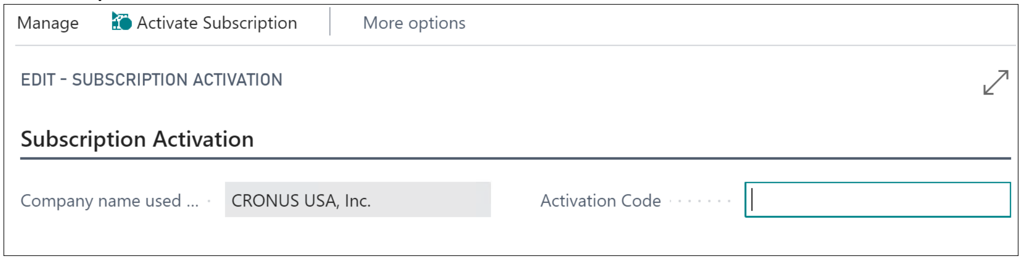


Pick the company name from the name column (not the Display Name) and send it to SimCrest together with the request for a subscription. Subscriptions usually run for one year at a time but can be customized to your specific needs.
Once purchased, SimCrest will issue you an activation code. Here is how to activate the subscription:

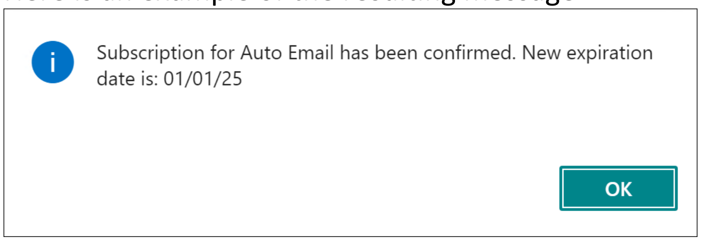
- Go to Auto Email Setup and click Subscription, Activate Subscription



- Note the Company name used for this activation. Make sure it's the same name as you provided to SimCrest. Paste the activation code into the field and click Activate Subscription



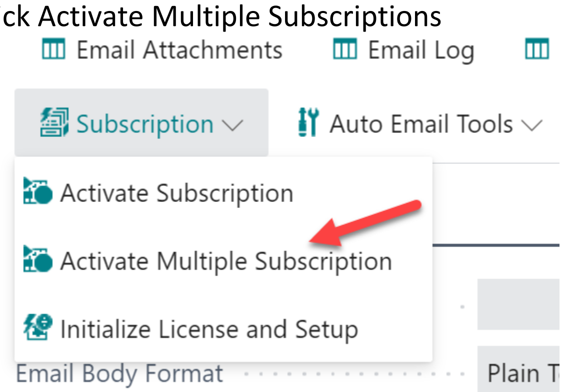
- Here is an example of the resulting message



Activating multiple companies at the same time

If you have multiple companies using Auto Email, it's possible to activate all the companies using a license import file. SimCrest will usually send these license files upon request and on each renewal. Once you receive the file, activate all licenses like this:

- Click Activate Multiple Subscriptions



- Click Import Licenses and pick the license file that was provided
- All companies that have a license will show an activation code
- Click Activate Licenses, and all eligible companies will be activated

There is no need to do this for each company. The above process only needs to run once and in any company you choose.

Customer Support and Request for new features

If you have questions about how to use Auto Email or have issues to report, we would love to hear from you. Please go to http://simcrest.com/ContactUs and send us a message. Use the same link if you like to request new features for Auto Email.

Q: Is it possible to send sales orders to one set of email addresses and sales invoices and shipments to other email addresses for the same customer?

A: Yes. Under the customer, you will set up “Auto Email Tos”. For each document type, you can specify the email addresses. If a document type has no defined email addresses, the customer card's default emails (under Auto Email) will be used instead.

Q: I like to send specific customers invoices that look different than those sent to other customers. The same goes for other document types like sales shipments. Is that possible?

A: Yes, you will need to set up several Auto Email Template Groups and assign them to the customers in question. Each group will define the templates with the different reports.

Q: Can I change the Template Group on a document and achieve a different email experience for that particular document?

A: Yes. The template group will be displayed on the General tab on each document. Just change the group, and the email experience will change to that of the new group assigned to the document. If the document is posted, the new email template will apply to this document also.

Q: I am getting the following error: “Rendering output for the report failed, and the following error occurred: The Hidden expression for the tablix ‘LinesTable’ contains an error: Input string was not in a correct format.”

A: Rendering errors occur when the document report that’s being used has errors. Ensure that all report numbers you are using are pointing to reports that work. Test the report on documents if you are not sure. If you are experiencing this when sending statements, make sure you use our statement report and fill out the statement options in the Auto Email Setup. If you are using your own statement report, you will need to contact your partner, so they can modify it to work with Auto Email.

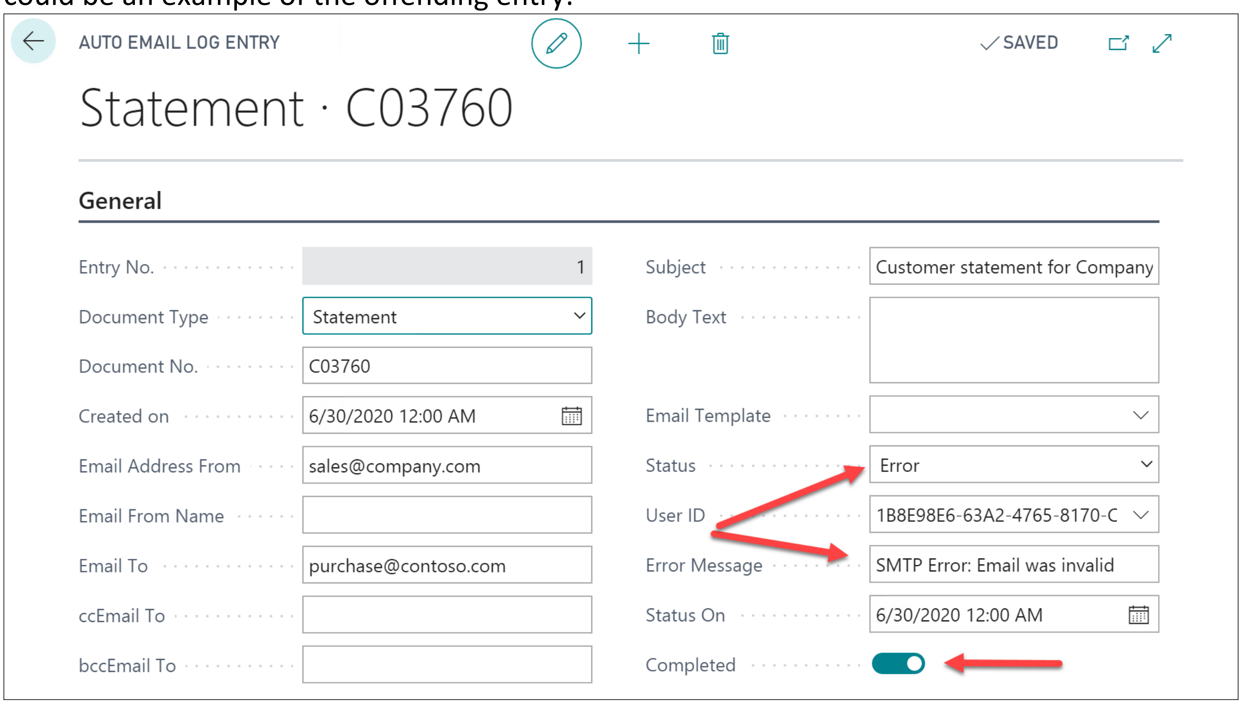
Job Queue Management

Auto Email is relying on the Job Queue to handle the following events in Microsoft Dynamics 365 Business Central:

1. Sending emails that have been logged in the auto email log.
   Auto Email uses the job queue to send emails logged in the auto email log. If an entry is ready to be submitted, it will be emailed upon the next event triggering this job. All ready entries will be emailed unless an error occurs.
   Emails sent via the current user will be emailed immediately without using the job queue. This is due to how Microsoft authenticates emails as they are being emailed.
2. Monitoring the auto email log entries for errors.
   Occasionally, email settings are incorrect or missing information is encountered in the auto email log that will make the auto email entry fail to be processed. The log entry will be marked with the status = error. In this case, an email is sent to the designated user(s) for this error.
3. Monitoring the “Sending Emails” job queue to see if it’s running or not.
   Sometimes the job queue sending the emails from the auto email log may stop due to errors. In that case, the monitoring job queue will notify the designated user(s) that an error occurred and that it needs to be resolved for emails to be sent again.
4. Sending recurring specialty documents.
   Auto Email will log recurring emails into the email log.

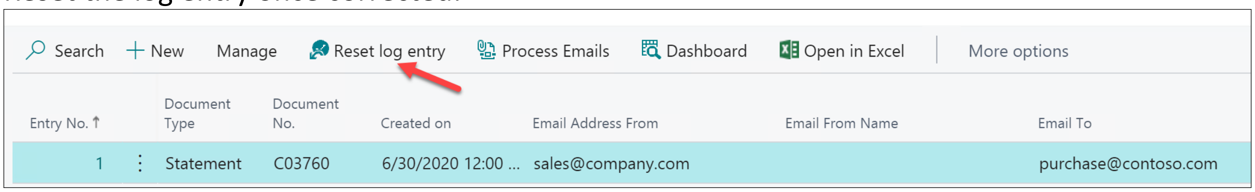
Errors in Auto Email Log

If an error is encountered during the processing in the “Send Emails” job queue event, this could be an example of the offending entry:



Notice the Status=Error and the error message. If there was an issue with the Email, correct it on this entry or delete the entry to make a new email from the customer or document in this context.
An email will be sent to the log monitoring email (several emails can be entered separated with a semicolon) in the setup table:

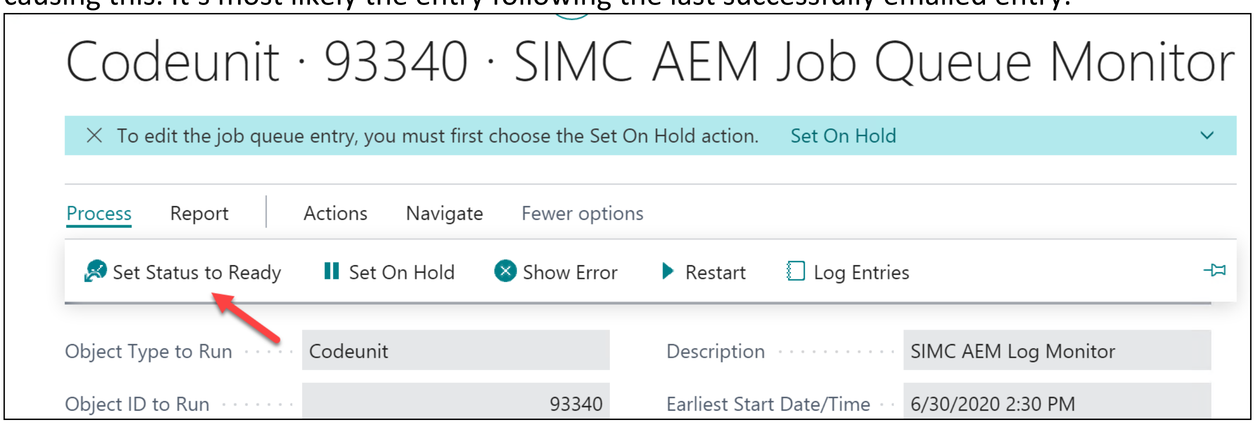
Reset the log entry once corrected:



Or delete the entry and redo the transaction to recreate the entry correctly.

Errors causing the "Send Emails" Job Queue Entry to fail

Occasionally, the job queue responsible for sending the emails stops due to more severe issues. In that case, an email is sent to the Job Queue. Usually, there is an entry in the email log that is causing this. It's most likely the entry following the last successfully emailed entry.



Once the issues are corrected, Set the status to Ready.
You can also get errors if the User that started the Job Queue doesn't have access to email as the email accounts used under Email Accounts. Make sure the user that starts the job queue has the needed permissions to send as these email accounts.

Customer Statement Modification

If you are using your own customer statement report, it must be modified to be able to run unattended. The Statement Options in Auto Email Setup are used to set the parameters to allow this. See below for an example of how we implemented it into the two different statement reports we provided with Auto Email.

Colorful Word Statement

```
trigger OnPreReport()
var
    AutoEmailSetup: Record "SIMC Auto Email Setup";
begin
    //!SIMCAEM Start
    AutoEmailSetup.Get();
    StartDate := AutoEmailSetup."Start Date";
    EndDate := CalcDate(AutoEmailSetup."Statement To-date Formula", Today());      You, a few seconds ago • Uncommitted changes
    PrintEntriesDue := AutoEmailSetup."Show Overdue Entries";
    // Include
    PrintAllHavingEntry := AutoEmailSetup."Print All with Entries";
    PrintAllHavingBal := AutoEmailSetup."Print All with Balance";
    PrintReversedEntries := AutoEmailSetup."Include Reversed Entries";
    PrintUnappliedEntries := AutoEmailSetup."Include Unapplied Entries";
    // Aging Band
    IncludeAgingBand := AutoEmailSetup."Include Aging Band";
    PeriodLength := AutoEmailSetup."Length of Aging Periods";
    DateChoice := AutoEmailSetup."Aging Method";
    LogInteraction := AutoEmailSetup."Log Interaction";
    Customer.SETRANGE("Date Filter", AutoEmailSetup."Start Date", CalcDate(AutoEmailSetup."Statement To-date Formula", WORKDATE()));
    ///!SIMCAEM End

    InitRequestPageDataInternal;
end;
```

Contact your partner to adjust the code to work with your customer statement report.

Customizing Auto Email Functionality

Auto Email is fully extendable (customizable). This means that Microsoft Partners can extend the functionality of Auto Email if there are functional areas that need to be created and/or modified. Examples:

- Adding new document types to be emailed. If there is a requirement to email documents not supported by the standard Auto Email App, they can be added and supported.
- Changing email behavior to do something else than what is supported in the standard App. For instance, supporting additional merge fields or making more extensive HTML body texts in emails.
- Changing the recipients of emails before they are logged into the email log.
- Sending emails without attachments to notify email recipients about specific events in the system. For instance, an email could be sent to a user if the credit limit of a customer is exceeded.
- Make additional checks of email message setup and content before it is emailed.

Please contact SimCrest or your partner to have them extend the functionality of the Auto Email App.

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Merge Fields and Related Tables

Here is a list of tables that each document type can access under Merge Fields for email templates. Notice that merge fields from disallowed tables will be ignored if used.

Document Type	Main Table	Allowed Tables (with Table No.)
Sales Quote, Sales Order, Sales Return Order	36	Sales Header (36)
		Payment Terms (3)
		Shipment Method (10)
		Salesperson/Purchaser (13)
		Location (14)
		Customer (18)
		Company Information (79)
		Shipping Agent (291)
		Shipping Agent Services (5790)
Purchase Order	38	Purchase Header (38)
		Payment Terms (3)
		Shipment Method (10)
		Salesperson/Purchaser (13)
		Location (14)
		Vendor (23)
		Company Information (79)
Sales Invoice, Shortpaid	112	Sales Invoice Header (112)
		Payment Terms (3)
		Shipment Method (10)
		Salesperson/Purchaser (13)
		Location (14)
		Customer (18)
		Company Information (79)
		Shipping Agent (291)
Sales Credit Memo	114	Sales Cr.Memo Header (114)
		Payment Terms (3)
		Shipment Method (10)
		Salesperson/Purchaser (13)
		Location (14)
		Customer (18)
		Company Information (79)
		Shipping Agent (291)
		Shipping Agent Services (5790)

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Sales Shipment	110	Sales Shipment Header (110)
		Payment Terms (3)
		Shipment Method (10)
		Salesperson/Purchaser (13)
		Location (14)
		Customer (18)
		Company Information (79)
		Shipping Agent (291)
		Shipping Agent Services (5790)
Service Invoice	5992	Service Invoice Header (5992)
		Payment Terms (3)
		Salesperson/Purchaser (13)
		Location (14)
		Customer (18)
		Company Information (79)
Service Credit Memo	5994	Service Cr.Memo Header (5994)
		Payment Terms (3)
		Salesperson/Purchaser (13)
		Location (14)
		Customer (18)
		Company Information (79)
Statement, Collection, Open Sales	18	Customer (18)
		Payment Terms (3)
		Shipment Method (10)
		Salesperson/Purchaser (13)
		Location (14)
		Customer (18)
		Company Information (79)
		Shipping Agent (291)
		Shipping Agent Services (5790)
Reminder	297	Issued Reminder Header (297)
		Customer (18)
		Company Information (79)
Finance Charge Memo	304	Issued Fin. Charge Memo Header (304)
		Customer (18)
		Company Information (79)
Specialty		Not supported, will use two fixed merge fields.