SIMCREST
TECHNOLOGY SOLUTIONS THAT FIT

Auto Email

Version 19.5.3.4

Quick Start Guide
Get up and running in 10 minutes or less!

For Microsoft Dynamics 365 Business Central

Last Update: March 17, 2022

Get Auto Email ready in 2 minutes!

Auto email is ready to be used right after the installation of 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 next few pages on how to set up email.

Now, Let's Email Some Documents!

- Try to Auto Email a Sales Quote or Sales Order. You will find all Auto Email actions under "Process".
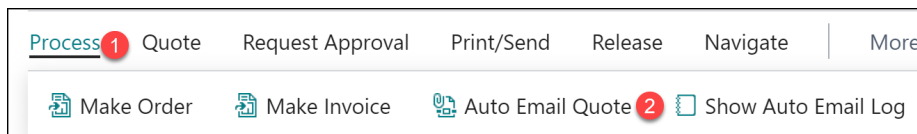
- Go to a customer with a past due balance and Auto Email Collection. Check the email.
- Make sure Auto Email Setup has Email when posting Invoice checked. Post an invoice and check out the resulting email.
- Read about attachments. Attach some documents and enjoy attachments sent with emails.
- Change the body text or subject in a couple of Auto Email templates and see how emails are changing.
- The options are endless. Enjoy Auto Email!

What's Next?

We suggest that you review the Auto Email Manual for detailed descriptions of all the many features Auto Email has to offer.

Thanks for choosing Auto Email.

Test Mode

We suggest that you enable Test Mode before you send real documents to customers and vendors. Test mode allows you to specify an email account that gets ALL emails sent by Auto Email. Test mode is set up in Auto Email Setup:

Test Mode · ◯

Test Mode To Email · · · · · · · · · · · · · · · · · [   ]

Email Invoices When Posting · · · · · · · · · · · · ⬤

Once you confirm all emails look good, turn Test Mode off and emails will now start to go to your customers and vendors.

Email Templates

Email templates are created upon installation of the App:

Auto Email Templates | Work Date: 4/12/2021

🔍 Search + New   Manage   📊 Open in Excel   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
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

All templates will work out-of-the-box, but you may want to review and edit them for accuracy and personal preference.

Emailing Documents

Auto Email will send emails via Email Accounts.

Email Accounts

Auto Email is using Email Accounts, which is a standard feature of Microsoft Dynamics 365 Business Central. If you already have set email accounts up, please skip this section.

		Name ↑	Email Address	Default
⬡	⋮	SimCrest Accounting	accounting@simcrest.com	✓
⬡		SimCrest Billing	billing@simcrest.com	
⬡		SimCrest Purchasing	purchasing@simcrest.com	
⬡		SimCrest Sales	sales@simcrest.com	
✉		SimCrest SMTP	smtp@simcrest.com	

We recommend setting up Microsoft 365 shared mailboxes for Auto Email. Notice that if you had an SMTP account it might have been converted to an Email Account.
Auto Email supports Email Scenarios to use different email accounts to send certain documents by email. See the next section for more information.

Email Scenario Assignment (optional)

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 if no Emails are assigned, the default Email Account will also be used.

🔍 Search 🗂 Assign scenarios 📊 Open in Excel	

Scenarios by email accounts	Default
⌃	
⌄ **SimCrest Accounting (accounting@simcrest.com)**	✓
Auto Email Collection	
Auto Email Finance Charge Memo	
Auto Email Shortpaid	
⌄ **SimCrest Billing (billing@simcrest.com)**	
Auto Email Sales Credit Memo	
Auto Email Sales Invoice	
Auto Email Service Cr. Memo	
Auto Email Service Invoice	
⌄ **SimCrest Purchasing (purchasing@simcrest.com)**	
Auto Email Purchase Order	
⌄ **SimCrest Sales (sales@simcrest.com)**	⋮
Auto Email Sales Order	
Auto Email Sales Quote	
Auto Email Sales Return Order	

Notice that Auto Email only supports documents 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 the name "SimCrest Billing" and using the email address "billing@simcrest.com".

Specify the server's name or IP address along with the other fields as needed by your SMTP provider. You may have to consult with your IT administrator to get this information. Test the setup before you continue.

Auto Email Log

Once you have completed the initial setup, you can start sending sales and purchase documents. All documents that are being Auto Emailed will be logged in the Auto Email log.

Auto Email Log

Search + New Edit List ✕ Delete Process Open in Excel More options

Process Emails

General

ENTRY NO.	DOCUME... TYPE	CUSTOM DOCUME... TYPE	DOCUME... NO.	CREATED ON	EMAIL ADDRESS FROM	EMAIL FROM NAME	EMAIL TO	CCEMAIL TO
1	Sales Order		S-ORD1010...	10/14/2018 4:23 ...	sales@company.com	Sales Department	robert.townes@contoso.com	
2	Sales Order		S-ORD1010...	10/14/2018 4:28 ...	sales@company.com	Sales Department	robert.townes@contoso.com	
3	Sales Order		S-ORD1010...	10/14/2018 4:45 ...	sales@company.com	Sales Department	robert.townes@contoso.com	
4	Sales Order		S-ORD1010...	10/14/2018 4:50 ...	sales@company.com	Sales Department	robert.townes@contoso.com	
5	Sales Order		S-ORD1010...	10/14/2018 5:08 ...	sales@company.com	Sales Department	robert.townes@contoso.com	
7	Statement		20000	10/16/2018 10:12...	billing@company.com	Accounts Receivable	robert.townes@contoso.com	
8	Statement		20000	10/16/2018 4:54 ...	billing@company.com	Accounts Receivable	robert.townes@contoso.com	

Regularly (as determined by the Job Queue Entry Send Emails), the emails in the log will be assembled and emailed automatically to the recipients. If you like to force this process to happen, you can always click Process Emails from the email log. It starts the email process instantly.