

# ANAPTIS MAILPLUS DOCUMENTATION

**Microsoft Dynamics 365 Business Central Extension**

**anaptis GmbH**

## INHALT

<b>1</b>	<b>INTRODUCTION</b>	<b>2</b>
<b>2</b>	<b>INSTALLATION</b>	<b>2</b>
<b>3</b>	<b>FIRST BASIC SETUP</b>	<b>3</b>
<b>4</b>	<b>DETAILED DESCRIPTION OF THE HIERARCHY FUNCTIONALITY</b>	<b>5</b>
<b>5</b>	<b>GLOBAL INSTALLATION</b>	<b>6</b>
5.1	NOTICE ON E-MAIL ADDRESS SETUP .....	6
<b>6</b>	<b>RECEIPT-CONTROLLED SETUP</b>	<b>7</b>
<b>7</b>	<b>DEBTOR SETUP</b>	<b>8</b>
<b>8</b>	<b>KREDITOREN-EINRICHTUNG</b>	<b>9</b>
<b>9</b>	<b>USERS/VIEWS</b>	<b>10</b>
9.1	SEND SALES OFFERS .....	10
9.2	SALES ORDER SETUP.....	10
9.3	BOOKING AND SENDING THE SALES INVOICE.....	10
9.4	BOOKING AND SENDING A SALES COMPLAINT.....	11
9.5	BOOKING AND SENDING A CREDIT VOUCHER .....	11
9.6	SEND WARNING BY E-MAIL .....	11
9.7	SEND ORDER.....	11
<b>10</b>	<b>TEST-TOOL – AUTOMATIC TESTS</b>	<b>12</b>
<b>11</b>	<b>SYSTEM REQUIREMENTS</b>	<b>14</b>

# 1 INTRODUCTION

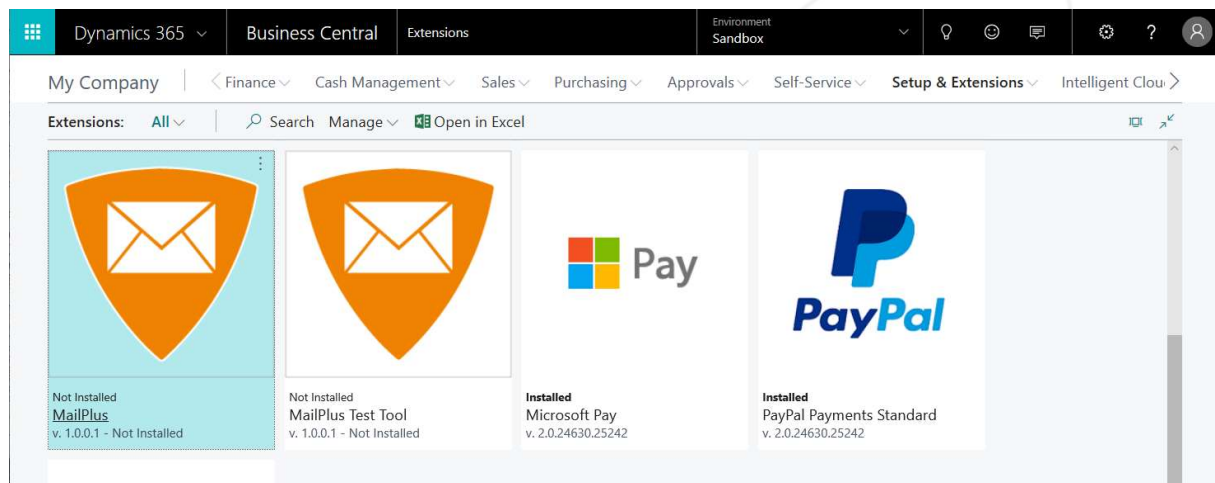
anaptis MailPlus (hereafter referred to as MailPlus) is an extension for Microsoft Dynamics 365 Business Central. MailPlus gives the user the possibility to extend the Dynamics 365 Business Central Standard, so that he can change the e-mail as required.

In detail, the extension currently has the following features:

- Presetting different mail addresses (An, CC, BCC) on the customer per document type
- Default of a new subject, as well as the name of the attachment
- Hierarchical setup from a global facility for all e-mails via a document-type-driven facility (for example, send all orders to a specific BCC) to fine definition at the customer/vendor
- This extension can be used in purchasing and sales

# 2 INSTALLATION

After downloading the application from the AppSource, you can install the app as usual under "Extensions".



If you have read and accepted the license agreement, MailPlus will be installed. MailPlus is available in English (United States) and German.

### 3 FIRST BASIC SETUP

It is assumed that the Dynamics 365 Business Central SMTP facility has been fully set up. This is the default setup for e-mailing from Dynamics 365 Business Central. This can be found by searching for the term "SMTP device".

Before MailPlus can be used, the setup must be completed successfully. You can find a Setup Assistant in "Supported Facilities" in your Dynamics 365 Business Central.

Dynamics 365		Business Central		Assisted Setup											
My Company		< Sales		Purchasing		Approvals		Self-Service		Setup & Extensions		>			
Assisted Setup:		Alle		Suchen		Seite		Aktionen		Weniger anzeigen					
NAME						STATUS									
Migrate business data						Not Completed									
Set up cash flow forecast						Not Completed									
Set up approval workflows						Not Completed									
Set up a customer approval workflow						Not Completed									
Set up email						Completed									
Set up email logging						Not Completed									
Set up your Business Inbox in Outlook						Not Completed									
Set up reporting data						Not Completed									
Set up an item approval workflow						Not Completed									
Set up a payment approval workflow						Not Completed									
Set up Dynamics 365 for Sales connection						Not Completed									
Set up VAT						Not Completed									
Invite External Accountant						Not Completed									
Set up consolidation reporting						Not Completed									
Setup Mail Plus						...				Not Completed					

If you set up the extension for the first time, you can use the app for 30 days for free.

The screenshot shows the Dynamics 365 Business Central interface with the 'Assisted Setup' pane open. A modal window titled 'MAIL PLUS EINRICHTUNGSSASSISTENT' is displayed. It contains a 'REGISTRATION' section with the instruction 'Tragen Sie die Registrierungsdetails ein.' (Enter the registration details). Below this are three input fields: 'Registrierung E-Mail Adresse' (demo@anaptis.com), 'Registrierungsschlüssel' (30D-TRIALKEY), and 'Ablaufdatum' (04.10.2018 10:45). At the bottom of the modal are four buttons: 'Standardwerte setzen', 'Zurück', 'Weiter' (highlighted in blue), and 'Fertig'. The background shows a list of setup tasks under 'Assisted Setup', with 'Set up email' being the current step.

Afterwards you can purchase a registration key in our anaptis shop.

The screenshot shows the Dynamics 365 Business Central interface with the 'Assisted Setup' pane open. A modal window titled 'MAILPLUS SETUP WIZARD' is displayed, indicating completion with a blue checkmark. The text inside says: 'We suggest that you refresh the data in MailPlus tables before finishing this wizard. You can come back here any time to refresh the data again.' followed by 'THATS IT!' and 'To enable MailPlus features for your company, choose Finish.' At the bottom are four buttons: 'Set Defaults', 'Back', 'Next', and 'Finish' (highlighted in blue). The background shows the 'Assisted Setup' list, with 'Set up email' being the current step.

As soon as you click on "Done", the device is ready.

## 4 DETAILED DESCRIPTION OF THE HIERARCHY FUNTIONALITY

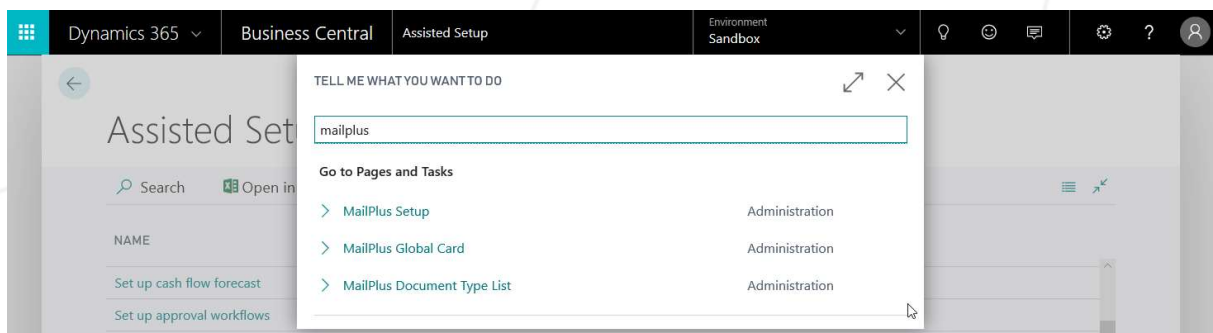
For the configuration of the outgoing e-mail, there are different setup levels (global, document type, and customer/vendor) that have different priorities. This means that the "To" e-mail address can come from the global institution, if the field is not filled in the document type-controlled system. If it is entered there, the "On" field of the global device is ignored and the document type controlled is used. If this field is then even in the e.g. Defined debtors, this is used as a last resort.

Here is the order of priority in detail:

**Global Settings < Typed Settings < Customer/Vendor Settings**

This means that customer/vendor settings have the highest priority per field and thus override the global configuration. It does not use the entire installation.

- Global Settings
  - For all outgoing emails
    - to be found under „MailPlus Global Card“
- Typed settings
  - For all outgoing sales orders, offers, credits, reminder, ...
    - to be found under „MailPlus Document Type List“
- Debtor settings
  - Personalized settings for individual debtors
    - to be found in the debtors list and debtors card
- Vendor settings
  - Personalized settings for individual vendors
    - to be found in the vendor list and vendor card



## 5 GLOBAL INSTALLATION

This is the top level of facilities and intervenes, when the fields are not filled by the other two levels. This level does not have to be filled.

EMAIL	ADD MAIL TO	ADD MAIL CC	ADD MAIL BCC
demo@contonso.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
musterman@contonso.com	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. Here the subject can be pre-assigned.
2. Specify the e-mail addresses to which the e-mail should be sent. By clicking it can be decided whether to send to this address or to insert it as Cc or Bcc.

### 5.1 NOTICE ON E-MAIL ADDRESS SETUP

In order to prevent incorrect entries, an address list is stored in MailPlus each time an e-mail address is entered. Only these can be used in MailPlus to select the addresses.

TYPE	CODE	EMAIL
(There is nothing to show in this view)		

Via the facilities (global, document-driven and customer/vendor), the e-mail addresses can be managed in the "Addressing" area, in the "EMAIL" field via "New".

## 6 RECEIPT-CONTROLLED SETUP

You can define facilities for the following document types:

- Offer for sale
- Sales order
- Sales invoice
- Sales complaints
- Sales credit
- Warning
- Order

MAILPLUS DOCUMENT TYPE CARD

S.Quote

1 Type

Mail Settings

2 Subject Attachment Name

3 Addressing Manage

EMAIL	ADD MAIL TO	ADD MAIL CC	ADD MAIL BCC
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. Under "General" you determine for which outgoing document (for example, invoice, sales order, sales offer, ...) this device applies.
2. Define the subject, as well as the name of the PDF attachment.
3. Define the addressing. Add more recipients, Cc's and Bcc's.



## 7 DEBTOR SETUP

MAILPLUS CUSTOMER CARD

S.Quote · Customer · 1000

**General**

1 Type ..... S.Quote  
S.Order  
S.Invoice  
S.Credit Memo  
S.Ret.Rcpt.  
Reminder

**Mail Settings**

2 Subject ..... Attachment Name .....

**3 Addressing** | Manage

EMAIL	ADD MAIL TO	ADD MAIL CC	ADD MAIL BCC
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. Under "General" you determine for which outgoing document (for example, invoice, sales order, sales offer, ...) this device applies.
2. Define the subject, as well as the name of the PDF attachment.
3. Define the addressing. Add more recipients, Cc's and Bcc's.

## 8 KREDITOREN-EINRICHTUNG

MAILPLUS VENDOR CARD

S.Quote · Vendor · 1000

**General**

1 Type ..... P.Order

**Mail Settings**

2 Subject ..... Attachment Name .....

3 Addressing | Manage

EMAIL		ADD MAIL TO	ADD MAIL CC	ADD MAIL BCC
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. Under "General" you determine for which outgoing document (for example, invoice, sales order, sales offer, ...) this device applies.
2. Define the subject, as well as the name of the PDF attachment.
3. Define the addressing. Add more recipients, Cc's and Bcc's.

## 9 USERS/VIEWS

The functionality of MailPlus is triggered by the following actions:

### 9.1 SEND SALES OFFERS

**SALES QUOTE**  
1001 · Trey Research

Process | Quote | Request Approval | Actions | Navigate | Less options

**Send by Email** | Make Order | Make Invoice

Customer Name: Trey Research | Due Date: 4/16/2018  
Contact: Brigitte Werner | Requested Deliver...

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
Item	1936-S	BERLIN Gästestuhl, gelb		10

Subtotal Excl. VAT (...): 1,937.00 | Total Excl. VAT (EUR):

**Sell-to Customer Sales History**

1	0	0
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
51	51	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts

### 9.2 SALES ORDER SETUP

**SALES ORDER**  
101003 · School of Fine Art

Process | Posting | Request Approval | Actions | Navigate | Less options

**Email Confirmation...** | Statistics

Release | Attachments | Reopen | Create Inventory...t-away/Pick... | Print Confirmation...

Contact: Meagan Bond | Requested Deliver...: 4/23/2018  
Posting Date: 4/22/2018 | External Document...  
Order Date: 4/22/2018

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
Item	1920-S	ANTWERP Conference Table		8

**Sell-to Customer Sales History**

0	0	1
Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
60	60	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
0		

### 9.3 BOOKING AND SENDING THE SALES INVOICE

**SALES INVOICE**  
102199 · Adatum Corporation

Posting | Prepare | Invoice | Release | Request Approval | Actions | Navigate | Less options

**Post and Send...** | Test Report...

Post | Post and New...

Customer Name: Adatum Corporation | Posting Date: 4/4/2018  
Contact: Jakob Otto | Due Date: 4/18/2018

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT
Item	1968-S	MEXICO Bürostuhl, schwarz		5	STU
Item	1996-S	ATLANTA Whiteboard, Basis		7	STU
Comment		Vielen Dank für die Bestellung			

**Customer Details**

Customer No.: 10000  
Phone No.:  
Email: jakob.otto@contoso.com  
Fax No.:  
Credit Limit (LCY): 0.00  
Available Credit (L...): 0.00  
Payment Terms Co...: 14 TAGE  
Contact: Jakob Otto

**Item Details - Invoicing**

## 9.4 BOOKING AND SENDING A SALES COMPLAINT

The screenshot shows the 'Sales Return Orders' page in Dynamics 365 Business Central. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Sales Return Orders'. The main header area displays 'Sales Return Orders' with a search bar and several action buttons: 'New', 'Manage', 'Process', 'Request Approval', 'Release', 'Open in Excel', 'Actions', 'Navigate', and a 'Post and Email...' button which is highlighted with a red box. Below the header, there is a table with columns: NO., NO., SELL-TO CUSTOMER NAME, NO., CODE, USER ID, and STATUS. A single row is visible with values: 1001, 20000, Trey Research, and an 'Open' status. To the right of the table, the 'Customer Statistics' section shows 'Customer No.' as 20000 and 'Balance (LCY)' as 15,155.96.

## 9.5 BOOKING AND SENDING A CREDIT VOUCHER

The screenshot displays the 'Sales Credit Memos' page for '1001 · Trey Research'. The top navigation bar shows 'Dynamics 365', 'Business Central', and 'Sales Credit Memos'. The main header area includes '1001 · Trey Research' and a search bar. The action bar contains buttons for 'Release', 'Posting', 'Prepare', 'Credit Memo', 'Request Approval', 'Actions', 'Navigate', and 'Less options'. The 'Posting' button is highlighted with a red box. Below the header, there are fields for 'Customer Name' (Trey Research), 'Posting Date' (5/1/2018), 'Contact' (Brigitte Werner), and 'Due Date' (5/1/2018). A 'Lines' table is visible with columns: TYPE, DESCRIPTION, LOCATION CODE, QUANTITY, and UNIT OF MEASURE CODE. The first line is an 'Item' with description 'LONDON Schreibtischstuhl, blau', quantity 2, and unit 'STÜCK'. To the right, the 'Customer Statistics' section shows 'Customer No.' as 20000, 'Balance (LCY)' as 15,155.96, and a 'SALES' section with 'Outstanding Order...' at 0.00, 'Shipped Not Invd...' at 0.00, and 'Outstanding Invo...' at 1,196.90. The 'Total (LCY)' is 16,352.86.

## 9.6 SEND WARNING BY E-MAIL

The screenshot shows the 'Issued Reminders' page in Dynamics 365 Business Central. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Issued Reminders'. The main header area displays 'Issued Reminders' with a search bar and several action buttons: 'Manage', 'Process', 'Report', 'Open in Excel', 'Actions', 'Navigate', 'Report', and 'Less options'. Below the header, there is a table with columns: NO., NO., SELL-TO CUSTOMER NAME, NO., CODE, USER ID, and STATUS. A single row is visible with values: 1001, 20000, Trey Research, and an 'Open' status. To the right of the table, the 'Customer Statistics' section shows 'Customer No.' as 20000 and 'Balance (LCY)' as 15,155.96.

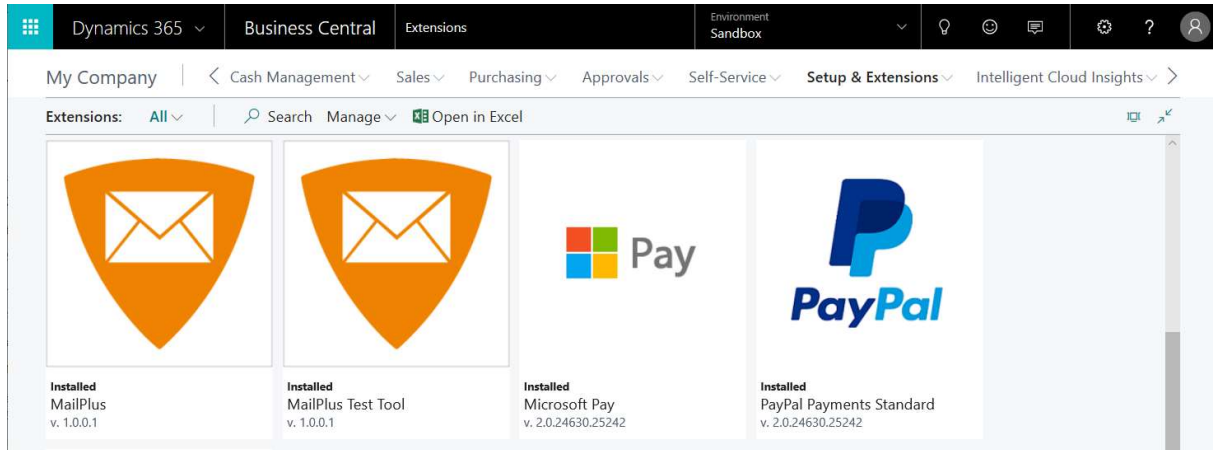
## 9.7 SEND ORDER

The screenshot displays the 'Purchase Orders' page for '106003 · Wide World Importers'. The top navigation bar shows 'Dynamics 365', 'Business Central', and 'Purchase Orders'. The main header area includes '106003 · Wide World Importers' and a search bar. The action bar contains buttons for 'Process', 'Release', 'Request Approval', 'Print', 'Actions', 'Navigate', and 'Less options'. The 'Send...' button is highlighted with a red box. Below the header, there are fields for 'Vendor Name' (Wide World Importers), 'Vendor Invoice No.' (D-304), 'Contact' (Han Carstens), 'Vendor Shipment ...', and 'Document Date' (4/13/2018). A 'Lines' table is visible with columns: TYPE, NO., DESCRIPTION, LOCATION CODE, and QUANTITY. The first line is an 'Item' with description 'PARIS Gästestuhl, schwarz', quantity 8, and unit 'STÜCK'. To the right, the 'Vendor Statistics' section shows 'Vendor No.' as 40000, 'Balance (LCY)' as 20,526.66, 'Outstanding Order...' as 13,071.91, 'Amt. Rcd. Not Invd...' as 0.00, 'Outstanding Invo...' as 0.00, 'Total (LCY)' as 33,598.57, 'Overdue Amounts...' as 20,526.66, and 'Invoiced Prepaym...' as 0.00. The 'Buy-from Vendor History' section is also visible.

## 10 TEST TOOL – AUTIMATIC TESTS

This area is very technical and is used for testing purposes only.

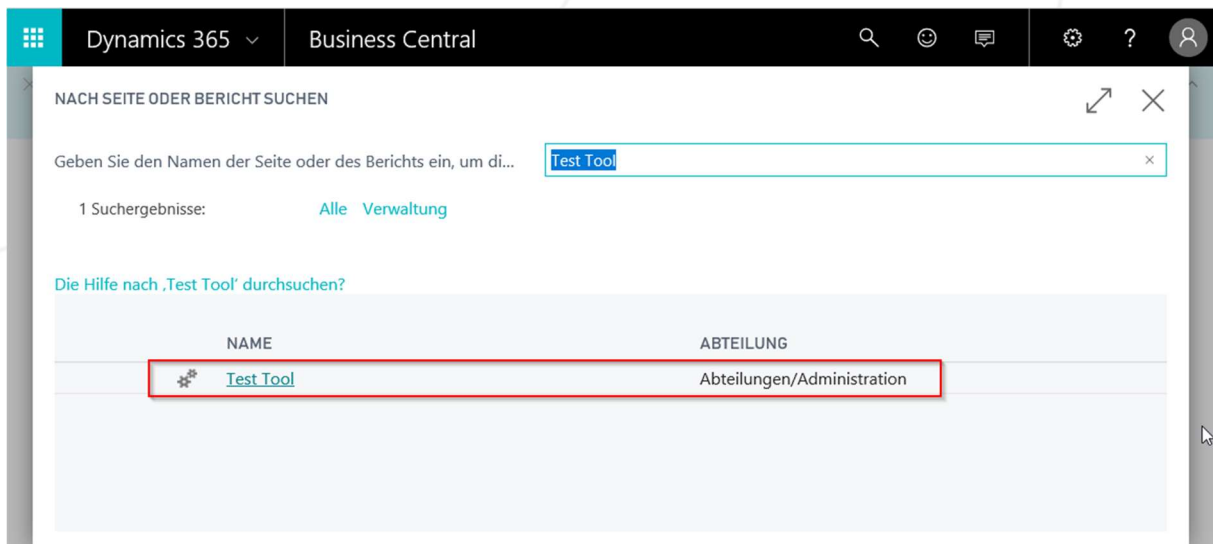
To ensure the functionality of the app, we offer a test tool. You can install the test tool separately from the app, but it requires the Microsoft Dynamics 365 Business Central Test Tool Framework.



The test tool allows you to check all the functionality using the Microsoft Dynamics 365 test tool. Do the following:

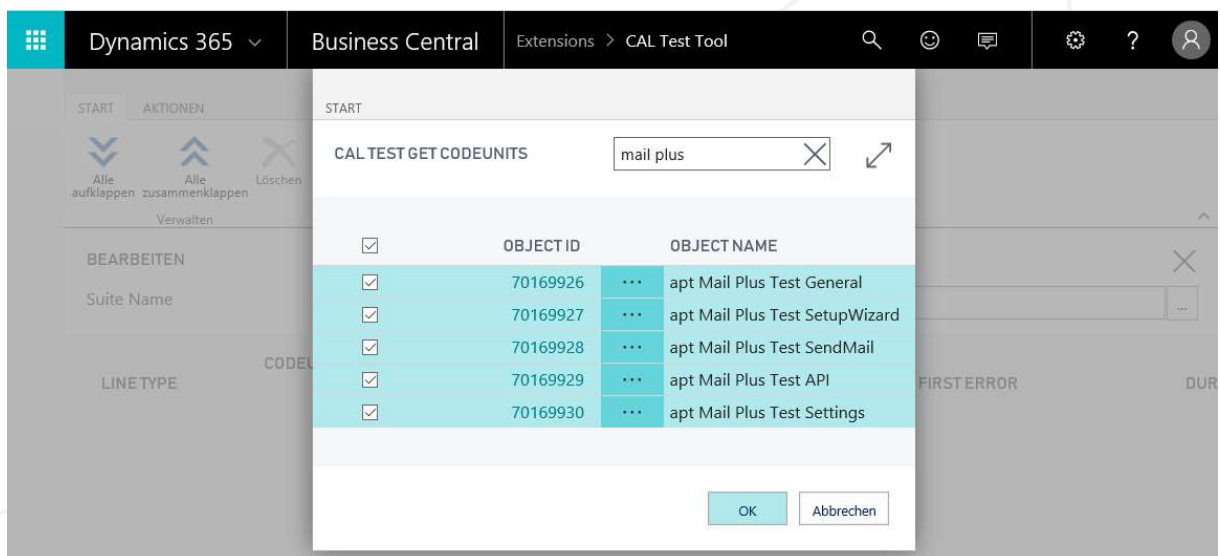
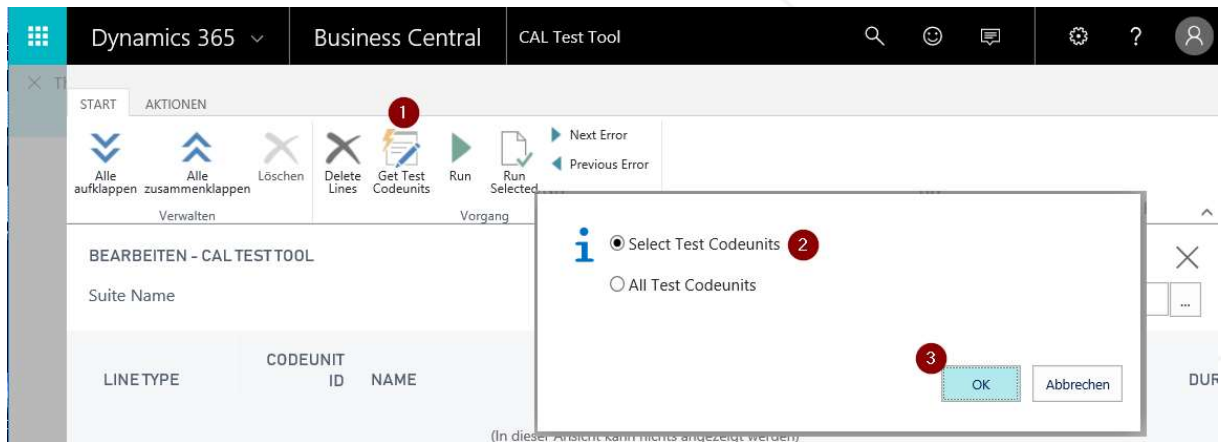
### 1st step

Start the standard Test Tool



## 2nd step

In the Test Tool of Microsoft Dynamics 365 Business Central, you can add the pre-built test processes to the Test Tool. Here you select the tests shown for MailPlus.



3rd step

Run the tests.

**Dynamics 365 Business Central**

**BEARBEITEN - CAL TEST TOOL - DEFAULT**

Suite Name:

LINE TYPE	CODEUNIT ID	NAME	HIT OBJECTS	RUN	RESULT	FIRST ERROR	DUR.
<b>Codeunit</b>	<b>70169926</b>	<b>apt Mail Plus Test General</b>	-	<input checked="" type="checkbox"/>		-	47
Function	70169926	MailPlusSetupCreation	-	<input checked="" type="checkbox"/>		-	
Function	70169926	MailPlusResourceCreation	-	<input checked="" type="checkbox"/>		-	
Function	70169926	MailPlusHelpResource	-	<input checked="" type="checkbox"/>		-	
Function	70169926	MailPlusLineCreation	-	<input checked="" type="checkbox"/>		-	
Function	70169926	MailPlusHeaderCreation	-	<input checked="" type="checkbox"/>		-	
Function	70169926	MailPlusAddressRepository	-	<input checked="" type="checkbox"/>		-	
<b>Codeunit</b>	<b>70169927</b>	<b>apt Mail Plus Test Setup</b>	-	<input checked="" type="checkbox"/>		-	46
Function	70169927	TestPressActionDefault	-	<input checked="" type="checkbox"/>		-	
Function	70169927	TestQuickSetup	-	<input checked="" type="checkbox"/>		-	
Function	70169927	TestLeavingPageWithoutFinishi...	-	<input checked="" type="checkbox"/>		-	
Function	70169927	TestLandingPage	-	<input checked="" type="checkbox"/>		-	

Successful Tests: 0      Skipped Tests: 0  
Failed Tests: 0      Tests not Executed: 41

Note: To complete all tests, the SMTP setup should be complete.

## 11 SYSTEM REQUIREMENTS

Supported version of Microsoft Dynamics 365 Business Central

- 12.3.23590.23730-W1,-DE
- 12.3.23590.23945-W1,-DE
- 13.0.24630.25242-W1,-DE