

Product Fact Sheet DXC Smart Business Form Email Manager

for Microsoft Dynamics 365 for Finance and Operations

September 12, 2019



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Overview

DXC Smart Business Form Email Manager for Microsoft Dynamics 365 Finance and Operations is a simple and smart solution for automated emailing of business forms and other reports to your customers and vendors. The solution automates distribution of business forms and reports based on contact preferences using rich format email templates. The following are example business forms processes that can be streamlined using the DXC Smart Business Form Email Manager solution:

- Customer
 - Sales quotation
 - Sales order confirmation
 - Sales delivery note
 - Sales invoice
 - Free text invoice
 - Project invoice
 - Customer account statement
- Vendor
 - Purchase order
 - Payment Advice

Email Distribution

Business forms are sent automatically using email templates and are directed to recipients based on contact information setup on the customer account.

- Email distribution may be controlled with the ability to hold and release documents before they are sent with the capability to fix and resend emails with incorrect addresses.
- Email content is authored using placeholder tags which dynamically looks information up from the business form or report to include in the email subject or body.
- Email can include the business form as well as additional file attachments associated with the business form or report.

Save to Azure Storage

DXC Smart Business Form Email Manager can also save copies of the emailed/printed business forms or reports into Azure storage. This allows for an archive of the actual business forms produced and sent. File location and file name can utilize placeholder tags which dynamically looks information up from the business form or report to include in the file name and define the Azure Storage location. Any fixed list placeholder tags are stored as metadata against the file in the Azure Storage.

Extendable

While out of the box functionality is for the business forms listed above, the solution can be extended on further business forms or reports, and technical guide is provided or alternatively upon request can be evaluated for product enhancements.

DXC Smart Business Form Email Manager for Microsoft Dynamics 365 Finance and Operations is simple to deploy, setup, and configure. Using the Microsoft Dynamics 365 extension framework you can deploy continuous updates for your Microsoft Dynamics 365 installation while maintaining compatibility with the add-on without taking a new release or merging code¹.

¹ Major updates to the underlying Microsoft Dynamics 365 solution may require a new version of the add-on solution to remain compatible with Microsoft Dynamics 365. Best practices in extension based development are used to maintain maximum compatibility with future versions of Microsoft Dynamics 365. Most incremental Microsoft Dynamics 365 updates should not require a new version of the add-on solution, but testing should always be performed before deploying to a production environment.



Features

Automatic routing to multiple email addresses:

Run processes such as invoicing or EFT payments once and automatically send business forms, reports and attached documents to appropriate parties using configured email addresses. Supported reports for automated routing:

- Customer
 - Sales quotation
 - Sales order confirmation
 - Sales delivery note
 - Sales invoice
 - Free text invoice
 - Project invoice
 - Customer account statement
- Vendor
 - Purchase order
 - Payment Advice
- Extendable to other business forms and reports for automated routing using included extension points

Email addresses are configured on customer and vendor contact information as well as customer and vendor contacts. Recipients can be assigned for single or multiple business forms and reports based on user definable address contact information purposes.

Email Templates

- Embed document details directly in the body of the email for professional and contextual emails
- Create unique email templates for each process or report
- Send **any** report using a rich format email template

Email management

- Emails can be held before sending
- Email send errors can be fixed and re-sent.
- Customer/Vendor accounts missing email addresses can be printed or routed to an alternative email account.
- Attach other recipients dynamically including the current system user as a To: Cc: or Bcc: recipient.



Re-Send Business Forms

- Ability to resend reports to individual recipients directly from the user interface. Supported forms:
 - Sales confirmation journal
 - Free text invoice
 - Sales invoice journal
 - Sales packing slip journal
 - Sales quotation journal
 - Project invoice journal
 - Project invoice list
 - Purchase order journal
 - Vendor payment history
 - Payment journal

Email Attached Documents

- Automatically attach additional documents saved with the business form source record

Auto Archive to Azure Storage

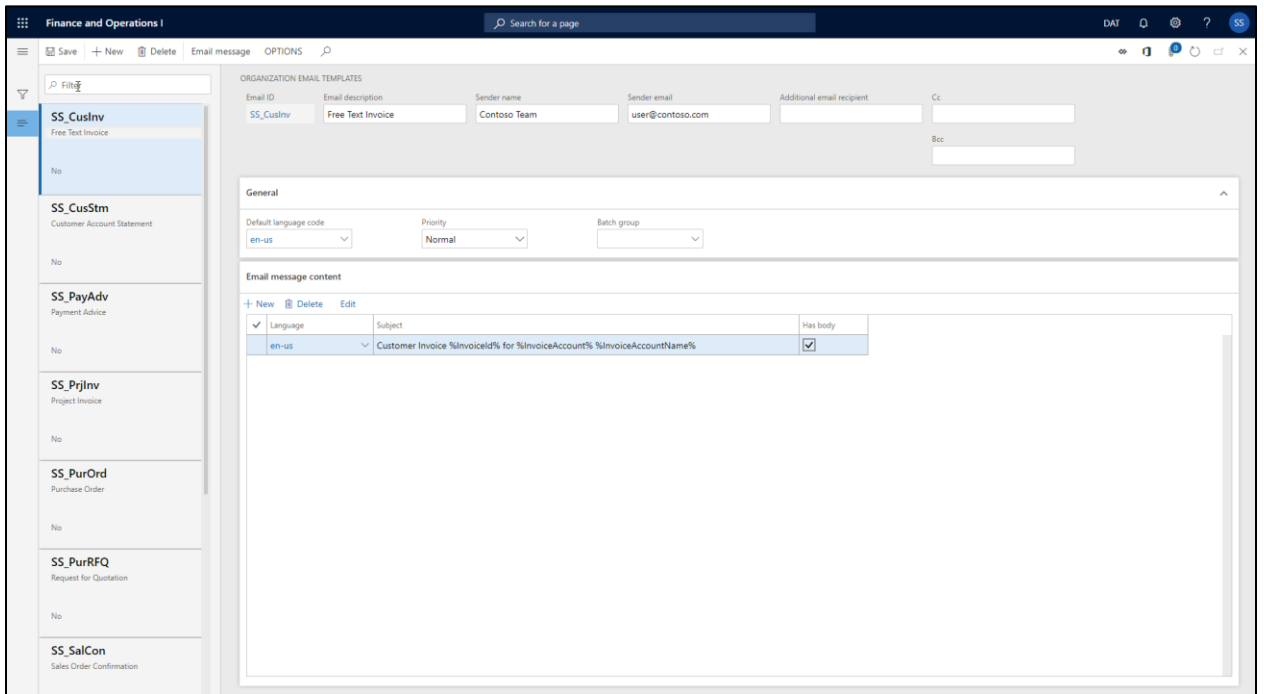
- Auto archive reports to Azure blob storage with configurable and dynamic file names, directory locations
- Auto archive reports to Azure blob storage with meta data tags to support integration scenarios

Other Features

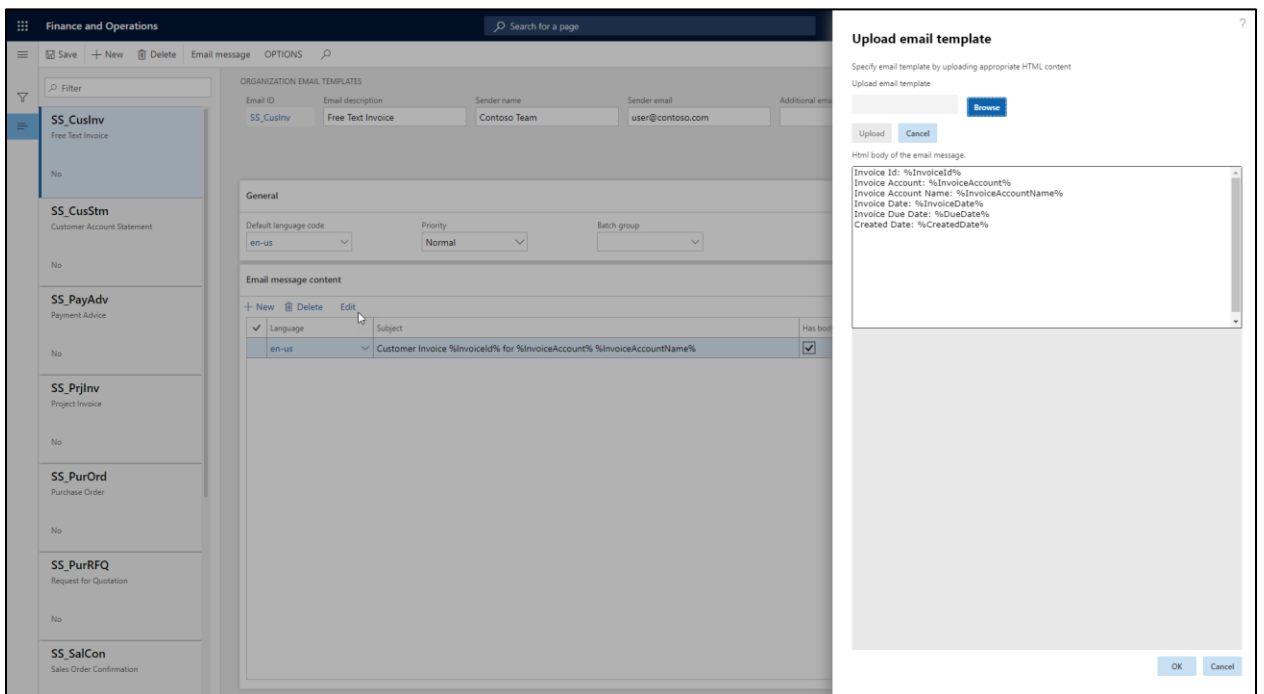
- Quick setup using data entity for uploading contact information. May also be used for continuous updates.
- Fully integrated with Print management setup within Dynamics 365 Finance and Operations



Screenshots



Screenshot 1. Email templates including fixed and dynamic placeholder tokens



Screenshot 2. Email template body including fixed and dynamic placeholder tokens



Product Fact Sheet – DXC Smart Business Form Email Manager

Smart Send reports

✓	Default	Report	Report format	Description	Email ID	File name	Recipient	Include account contacts	Hold e-mail in the queue	Purpos
✓		Customer account statement	CustAccountStatement...	Customer Account S...	SS_CusStm	Customer Account Statement %AccountNu...	Account	✓	<input type="checkbox"/>	SS Cu
✓		Purchase order	PurchPurchaseOrder.R...	Purchase Order	SS_PurOrd	Purchase Order %PurchaseOrderId%	Specific	✓	<input type="checkbox"/>	SS Pu
✓		Sales Invoice	SalesInvoice.Report	Sales Invoice	SS_SalInv	Sales Invoice %InvoiceId%	Both	✓	<input type="checkbox"/>	SS Sal
✓		Free text invoice	FreeTextInvoice.Report	Free Text Invoice	SS_CusInv	Customer Invoice %InvoiceId%	Account	<input type="checkbox"/>	<input type="checkbox"/>	SS Cu
✓		Sales quotation	SalesQuotation.Report	Sales Quotation	SS_SalQuo	Sales Quotation %QuotationId%	Account	<input type="checkbox"/>	<input type="checkbox"/>	SS Sal
✓		Project invoice	PSAProjectInvoice.Report	Project Invoice	SS_PjInv	Project Invoice %InvoiceId%	Account	<input type="checkbox"/>	<input type="checkbox"/>	SS Prc
✓		Sales order confirmation	SalesConfirm.Report	Sales Order Confirm...	SS_SalCon	Sales Order Confirmation %ConfirmationId%	Account	<input type="checkbox"/>	<input type="checkbox"/>	SS Sal

General

Test azure blob storage connection

ADDITIONAL ATTACHMENTS
Document handling file type: File

ALTERNATE EMAIL
Send to alternate email: Yes

AZURE BLOB STORAGE SETUP
Storage options: All
Blob container: smartsend
Folder name: SalInv
Blob connection string: https://d365contoso.blob.core...
Overwrite: No

SENDING USER
Email sending user: Cc

Email destination defaults

✓	Document type	Report format	Email ID	File name
	Customer invoice	SalesInvoice.Report	SalInv	Sales Invoice %InvoiceId%
	Sales order confirmation	SalesConfirm.Report	SalCon	Sales Order Confirmation %ConfirmationId%

Screenshot 3. Email parameters defining the business form, email template, recipients, and Azure storage settings

CUSTOMERS
US-009 : Owl Wholesales

General 10 | -- v

Addresses v

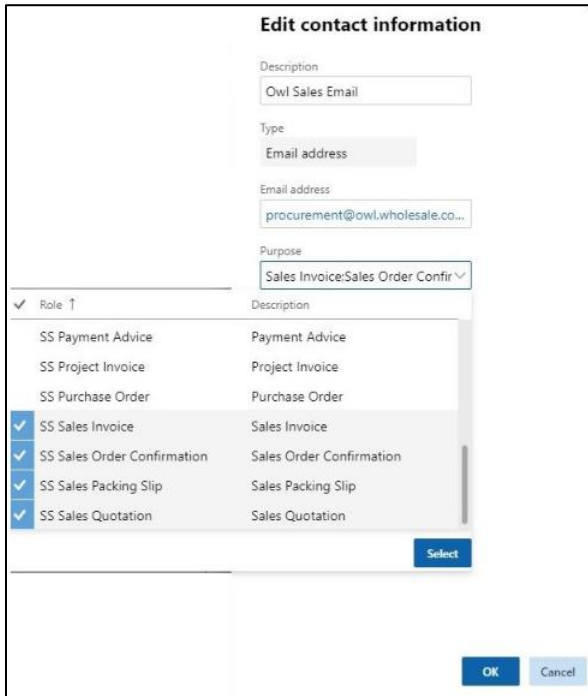
Contact information ^

+ Add Remove Advanced

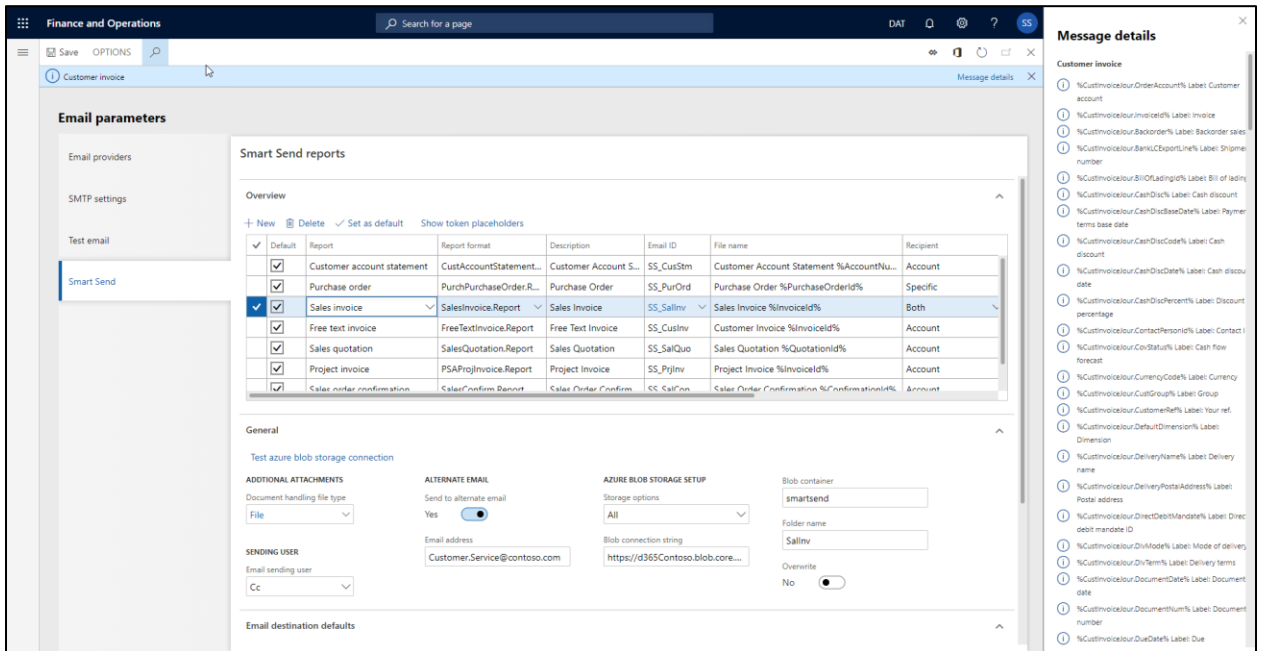
Description	Type	Contact number/address	Extension	Primary ↓	
Owl Wholesales Phone	Phone	123-555-0164		<input checked="" type="checkbox"/>	📞
Owl Accounts Payable	Email address	accounts.payable@owl.wholesale.com		<input type="checkbox"/>	✉
Owl Sales Email	Email address	procurement@owl.wholesale.com		<input checked="" type="checkbox"/>	✉

Screenshot 4. Customer/Vendor Contact information record.





Screenshot 5. Assign 'Purpose,' to contact information on account or account contact person



Screenshot 6. Dynamic token placeholders provided to users setting email content & file names



Product Fact Sheet – DXC Smart Business Form Email Manager

Email description	User ID	Sender email	Email recipients	Company	Reference name	Reference number	Created date and time	Latest status change date time	Status
Sales Invoice	Admin	user@contoso.com	[REDACTED]	USMF	Sales invoice	CIV-00000716	8/26/2019 01:47:15 AM	8/26/2019 01:47:14 AM	Waiting (I)
Sales Invoice	Admin	user@contoso.com	[REDACTED]	USMF	Sales invoice	CIV-00000716	8/26/2019 01:49:00 AM	8/26/2019 01:49:00 AM	Waiting (I)
Sales Invoice	Admin	user@contoso.com	[REDACTED]	USMF	Sales invoice	CIV-00000716	8/26/2019 01:49:53 AM	8/26/2019 01:49:53 AM	Waiting (I)
Sales Invoice	Admin	user@contoso.com	[REDACTED]	USMF	Sales invoice	CIV-00000716	8/26/2019 01:50:10 AM	8/26/2019 01:50:10 AM	Waiting (I)
Sales Invoice	Admin	user@contoso.com	[REDACTED]	USMF	Sales invoice	CIV-00000716	8/26/2019 01:57:53 AM	8/26/2019 01:57:53 AM	Waiting (I)
Sales Invoice	Admin	user@contoso.com	[REDACTED]	USMF	Sales invoice	CIV-00000716	8/26/2019 02:01:59 AM	8/26/2019 02:01:59 AM	Waiting (I)
Sales Invoice	Admin	user@contoso.com	[REDACTED]	USMF	Sales invoice	CIV-00000716	8/26/2019 02:07:22 AM	8/26/2019 02:07:22 AM	Waiting (I)
Sales Invoice	Admin	user@contoso.com	[REDACTED]	USMF	Sales invoice	CIV-00000716	8/26/2019 02:17:44 AM	8/26/2019 02:17:44 AM	Waiting (I)
Sales Invoice	Admin	user@contoso.com	[REDACTED]	USMF	Sales invoice	CIV-00000716	8/26/2019 05:52:59 AM	8/26/2019 05:52:59 AM	Waiting (I)
Sales Invoice	Admin	user@contoso.com	[REDACTED]	USMF	Sales invoice	CIV-0000031	9/3/2019 12:57:06 AM	9/3/2019 12:57:06 AM	Waiting (I)
Sales Invoice	Admin	user@contoso.com	[REDACTED]	USMF	Sales invoice	CIV-0000031	9/3/2019 12:57:39 AM	9/3/2019 12:57:39 AM	Waiting (I)

Screenshot 7 Email send status form.



About DXC Technology

DXC Technology (DXC: NYSE) is the world's leading independent, end-to-end IT services company, helping clients harness the power of innovation to thrive on change. DXC Technology serves nearly 6,000 private and public sector clients across 70 countries. The company's technology independence, global talent and extensive partner network combine to deliver powerful next-generation IT services and solutions. DXC Technology is recognized among the best corporate citizens globally. For more information, visit www.dxc.technology.