

ANAPTIS MAILPLUS DOCUMENTATION

Microsoft Dynamics 365 Business Central Extension

anaptis GmbH

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1 INTRODUCTION

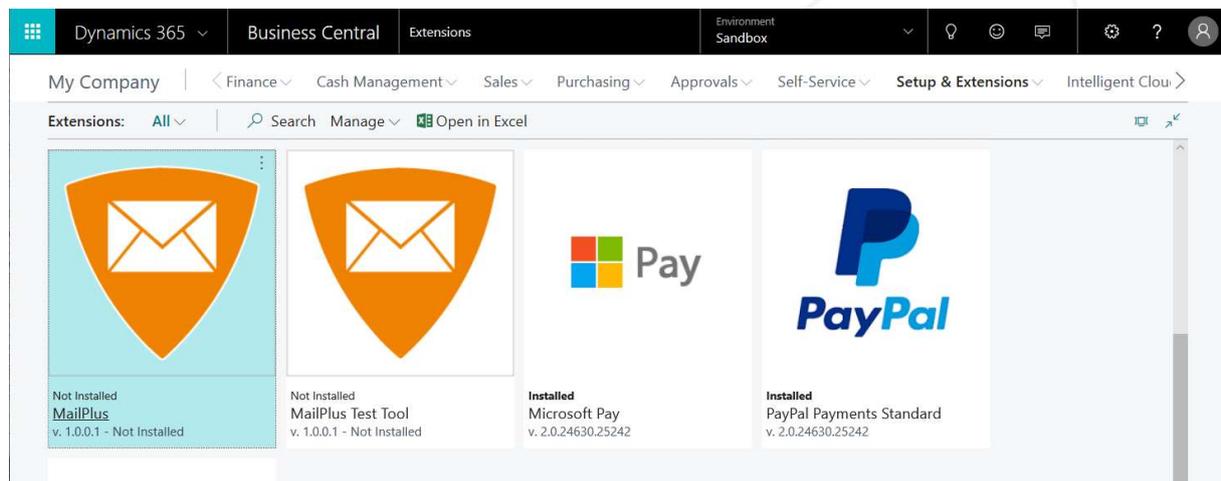
anaptis MailPlus (hereafter referred to as MailPlus) is an extension for Microsoft Dynamics 365 Business Central. MailPlus gives the user the possibility to extend the Dynamics 365 Business Central Standard, so that he can change the e-mail as required.

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

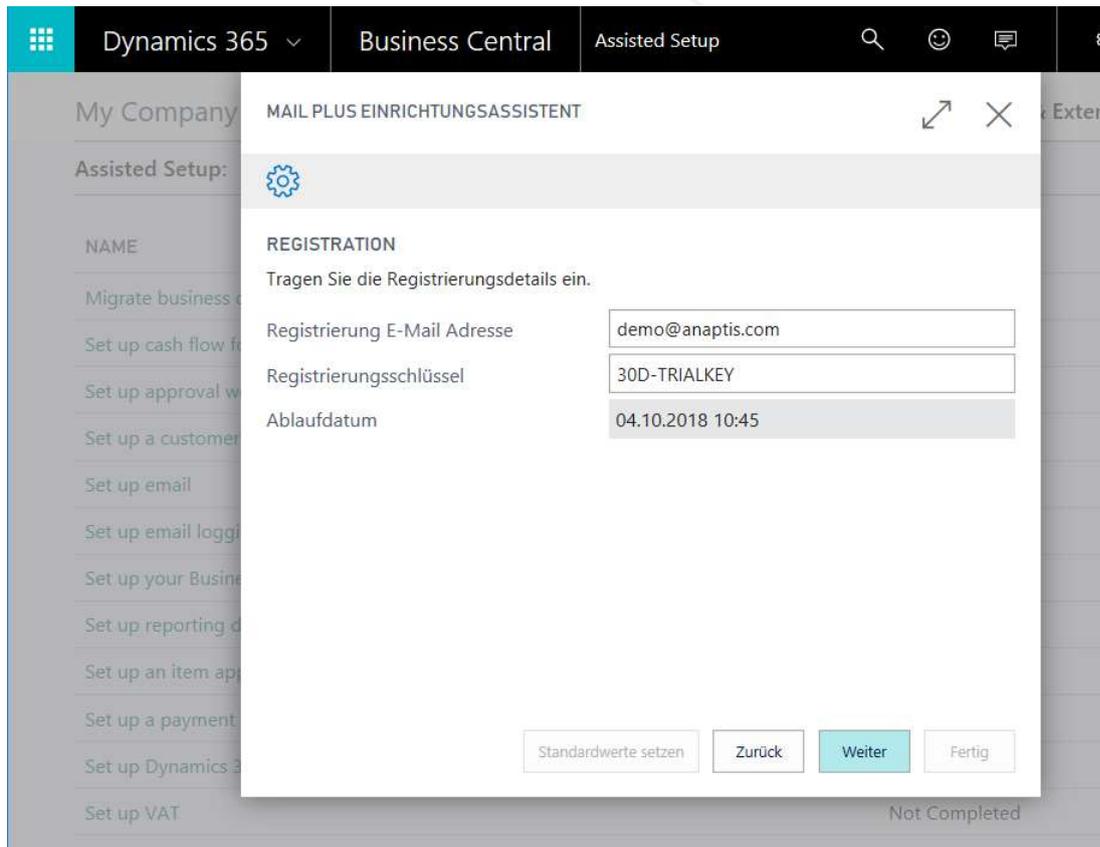
It is assumed that the Dynamics 365 Business Central SMTP facility has been fully set up. This is the default setup for e-mailing from Dynamics 365 Business Central. This can be found by searching for the term "SMTP device".

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.

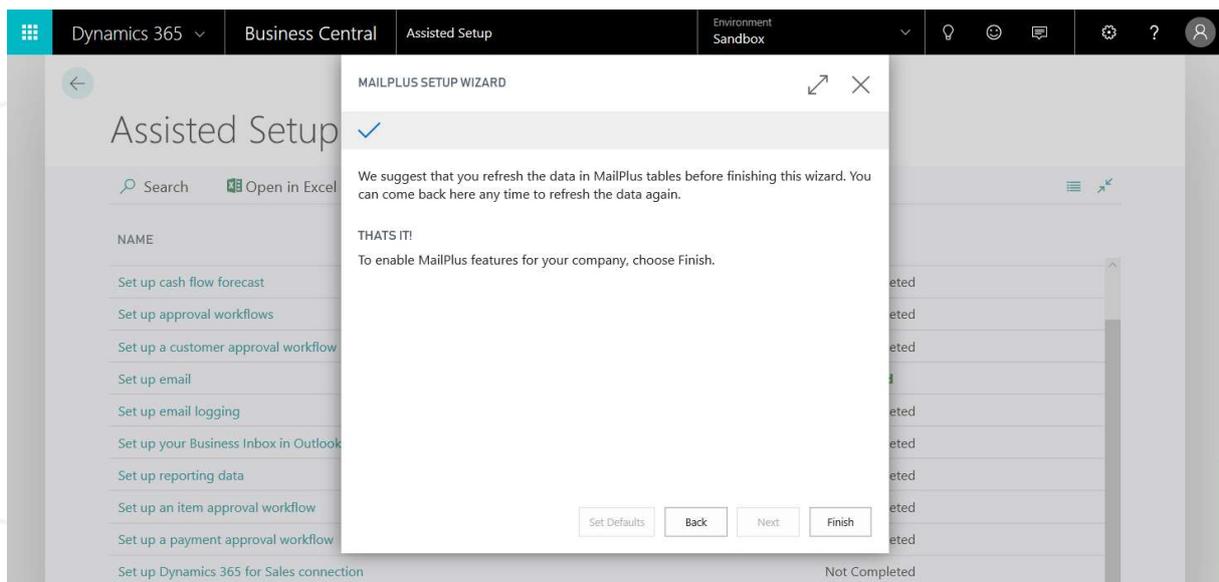
The screenshot shows the Dynamics 365 Business Central interface. The top navigation bar includes 'Dynamics 365', 'Business Central', and 'Assisted Setup'. Below this, there are navigation options for 'My Company', 'Sales', 'Purchasing', 'Approvals', 'Self-Service', and 'Setup & Extensions'. The main content area is titled 'Assisted Setup: Alle' and contains a table of setup tasks.

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.



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



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

4 DETAILED DESCRIPTION OF THE HIERARCHY FUNCTIONALITY

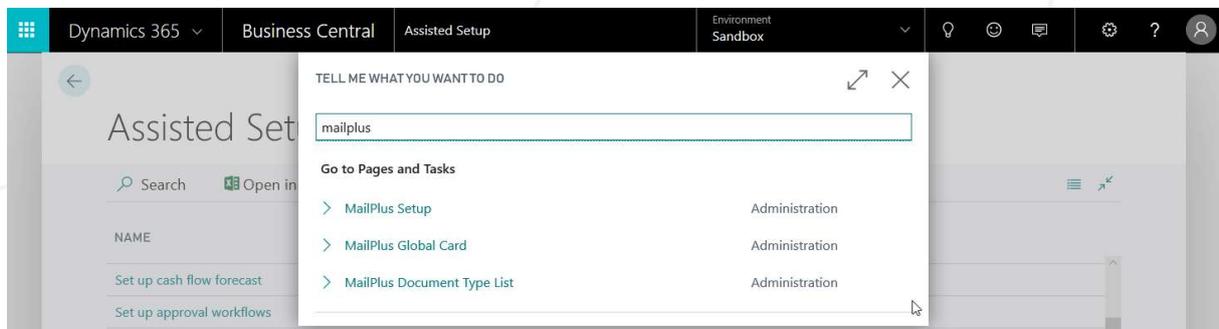
For the configuration of the outgoing e-mail, there are different setup levels (global, document type, and customer/vendor) that have different priorities. This means that the "To" e-mail address can come from the global institution, if the field is not filled in the document type-controlled system. 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.

The screenshot shows the Dynamics 365 Business Central interface for the 'Global' card. The page title is 'MAILPLUS GLOBAL CARD' and the main heading is 'Global'. Under 'Mail Settings', the 'Subject' field is pre-filled with 'You recieved Mail'. Below this is the 'Addressing' section with a 'Manage' link. A table lists email addresses with checkboxes for 'ADD MAIL TO', 'ADD MAIL CC', and 'ADD MAIL BCC'. A red circle '1' points to the subject field, and a red circle '2' points to the table.

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.

The close-up shows the 'Addressing' section with a dropdown menu for 'EMAIL'. The dropdown is open, showing a table with columns 'TYPE', 'CODE', and 'EMAIL'. The table is empty, with the message '(There is nothing to show in this view)'. A red circle '1' points to the '+ New' button at the bottom left of the dropdown, and the text 'Select from full list' is at the bottom right.

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 S.Order
S.Quote
S.Invoice
S.Credit Memo
S.Ret.Rcpt.
P.Order
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.

7 DEBTOR SETUP

The screenshot shows the Dynamics 365 MailPlus Customer Card configuration for 'S.Quote · Customer · 1000'. The interface is divided into three main sections:

- General:** A dropdown menu for 'Type' is open, showing options: S.Quote (selected), S.Order, S.Invoice, S.Credit Memo, S.Ret.Rcpt., and Reminder.
- Mail Settings:** Fields for 'Subject' and 'Attachment Name' are visible.
- Addressing:** A table with columns for 'EMAIL', 'ADD MAIL TO', 'ADD MAIL CC', and 'ADD MAIL BCC'. The first row has a highlighted cell under 'ADD MAIL TO'.

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

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

The screenshot shows the 'SALES QUOTE' interface for '1001 · Trey Research'. The 'Process' menu is open, and the 'Send by Email' action is highlighted with a red box. The interface includes fields for Customer Name (Trey Research), Contact (Brigitte Werner), and Due Date (4/16/2018). A table of lines is visible with one item: '1936-S BERLIN Gästestuhl, gelb' with a quantity of 10. A 'Sell-to Customer Sales History' panel on the right shows various sales metrics.

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

9.2 SALES ORDER SETUP

The screenshot shows the 'SALES ORDER' interface for '101003 · School of Fine Art'. The 'Process' menu is open, and the 'Email Confirmation...' action is highlighted with a red box. The interface includes fields for Contact (Meagan Bond), Posting Date (4/22/2018), and Order Date (4/22/2018). A table of lines is visible with one item: '1920-S ANTWERP Conference Table' with a quantity of 8. A 'Sell-to Customer Sales History' panel on the right shows various sales metrics.

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

9.3 BOOKING AND SENDING THE SALES INVOICE

The screenshot shows the 'SALES INVOICE' interface for '102199 · Adatum Corporation'. The 'Posting' menu is open, and the 'Post and Send...' action is highlighted with a red box. The interface includes fields for Customer Name (Adatum Corporation), Posting Date (4/4/2018), and Due Date (4/18/2018). A table of lines is visible with two items: '1968-S MEXICO Bürostuhl, schwarz' (quantity 5) and '1996-S ATLANTA Whiteboard, Basis' (quantity 7). A 'Customer Details' panel on the right shows contact information for Jakob Otto.

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

9.4 BOOKING AND SENDING A SALES COMPLAINT

Dynamics 365 Business Central Sales Return Orders

Search + New Manage Process Request Approval Release Open in Excel Actions Navigate

Post... Post and Print... Statistics Print... Get Posted Docu...s to Reverse... **Post and Email...** Post Batch...

NO.	NO.	SELL-TO CUSTOMER NAME	NO.	CODE	USER ID	STATU
1001	20000	Trey Research				Open

Customer Statistics

Customer No.	20000
Balance (LCY)	15,155.96

9.5 BOOKING AND SENDING A CREDIT VOUCHER

Dynamics 365 Business Central Sales Credit Memos 1001 - Trey Research

1001 · Trey Research

Release Posting Prepare Credit Memo Request Approval Actions Navigate Less options

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

Customer Name: Trey Research Posting Date: 5/1/2018
 Contact: Brigitte Werner Due Date: 5/1/2018

TYPE	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE CODE	U
Item	LONDON Schreibtischstuhl, blau		2	STÜCK	

Customer Statistics

Customer No.	20000
Balance (LCY)	15,155.96
SALES	
Outstanding Orde...	0.00
Shipped Not Invd...	0.00
Outstanding Invoi...	1,196.90
Total (LCY)	16,352.86
Credit Limit (LCY)	0.00
Overdue Amounts...	15,155.96
Total Sales (LCY)	21,590.20
Revised Process...	0.00

9.6 SEND WARNING BY E-MAIL

Dynamics 365 Business Central Issued Reminders

Search Manage Process Report Open in Excel Actions Navigate Report Less options

Print... **Send by Email** Navigate Statistics

9.7 SEND ORDER

Dynamics 365 Business Central Purchase Orders 106003 - Wide World Importers

PURCHASE ORDER 106003 · Wide World Importers

Process Release Request Approval Print Actions Navigate Less options

Send... Print...

Vendor Name: Wide World Importers Vendor Invoice No.: D-304
 Contact: Han Carstens Vendor Shipment: ...
 Document Date: 4/13/2018

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
Item	1900-S	PARIS Gästestuhl, schwarz		8
Item	1908-S	LONDON Schreibtischstuhl, ...		20
Item	1906-S	ATHENS Schubladenelement		20

Vendor Statistics

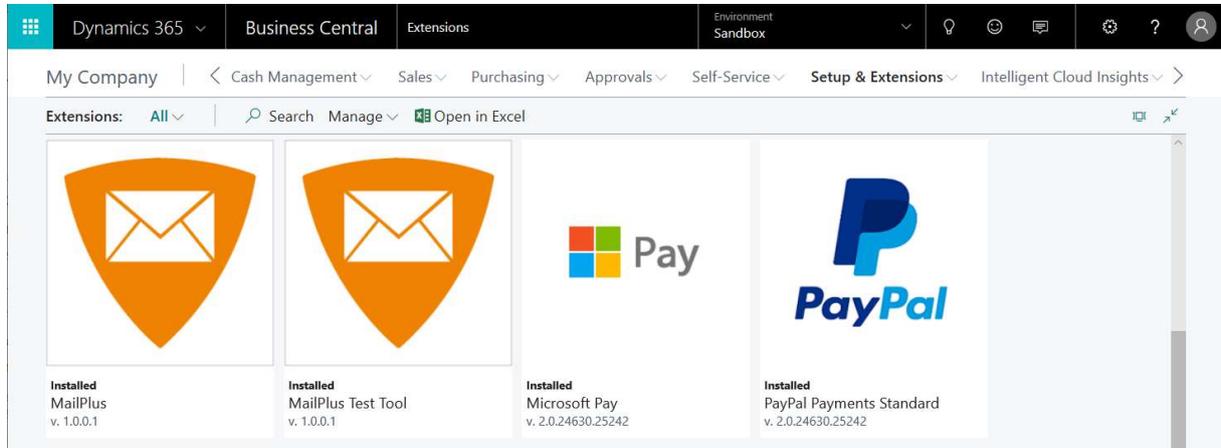
Vendor No.	40000
Balance (LCY)	20,526.66
Outstanding Orde...	13,071.91
Amt. Rcd. Not Inv...	0.00
Outstanding Invoi...	0.00
Total (LCY)	33,598.57
Overdue Amounts...	20,526.66
Invoiced Prepaym...	0.00

Buy-from Vendor History

10 TEST TOOL – AUTIMATIC TESTS

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

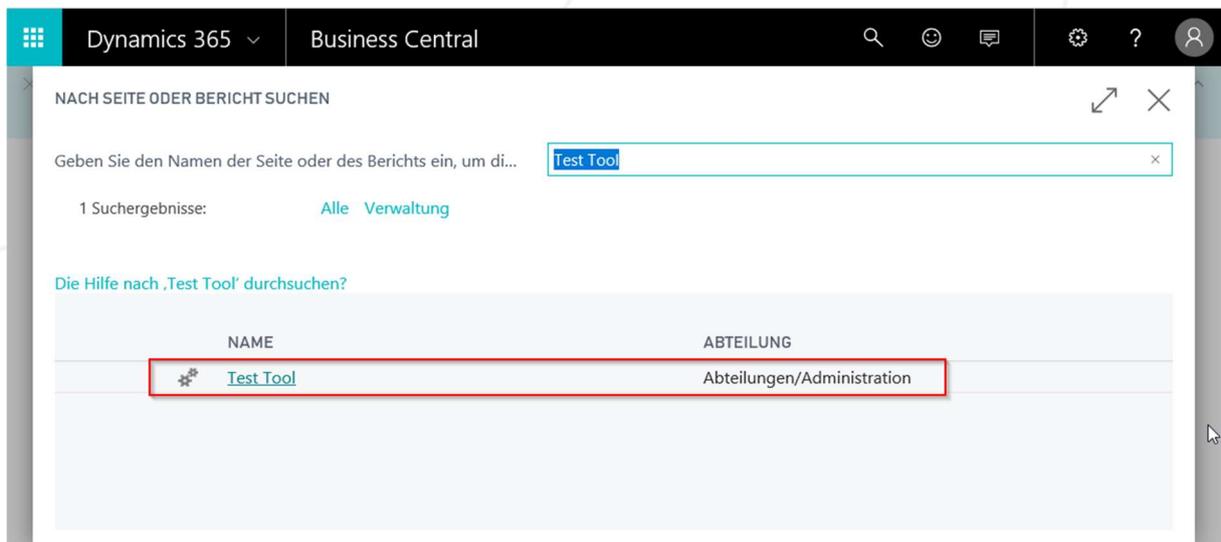
To ensure the functionality of the app, we offer a test tool. You can install the test tool separately from the app, but it requires the Microsoft Dynamics 365 Business Central Test Tool Framework.



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

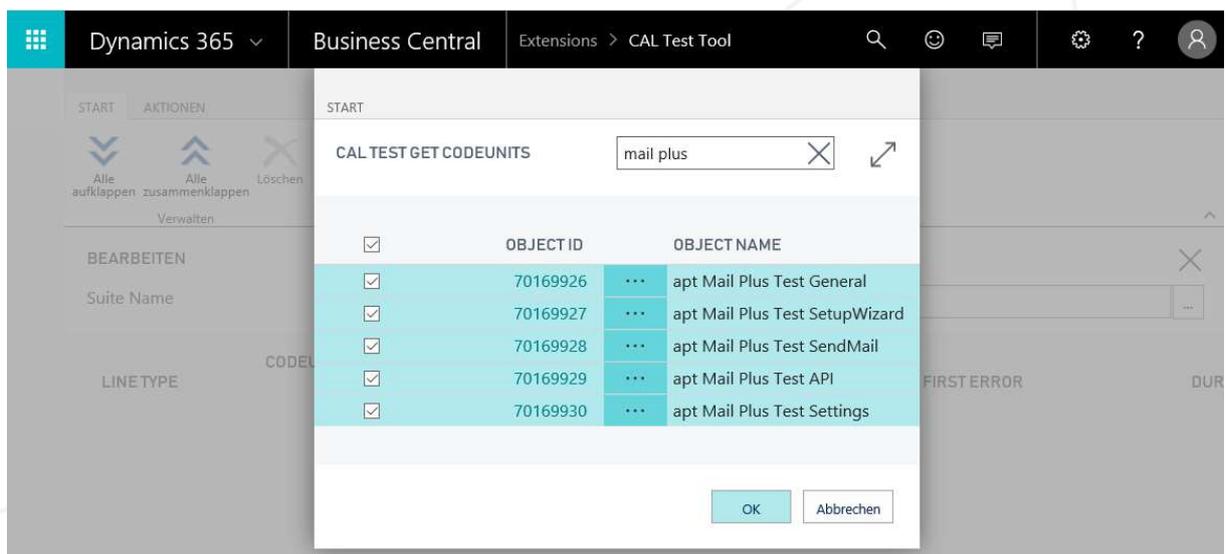
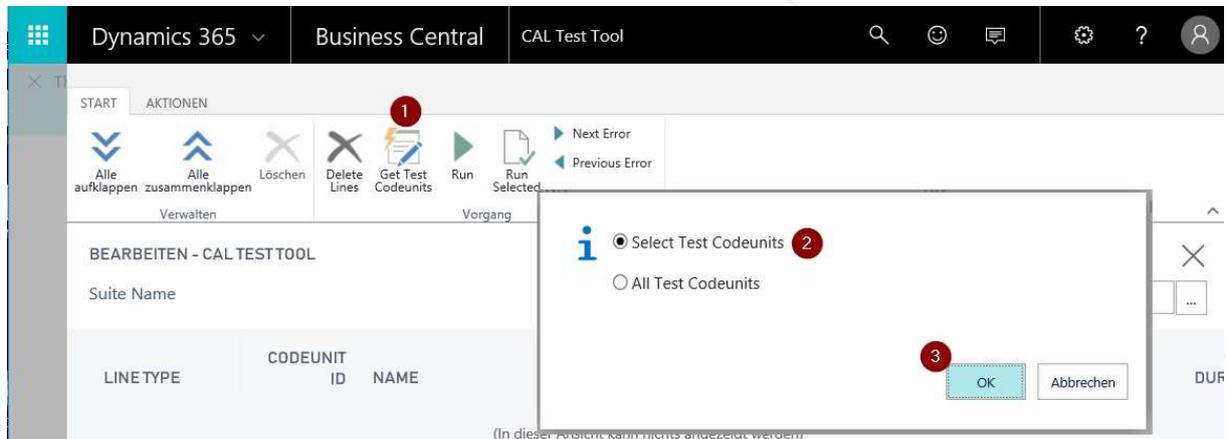
1st step

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.

START AKTIONEN

Alle aufklappen Alle zusammenklappen Löschen Delete Lines Get Test Codeunits Run Run Selected

Verwalten Vorgang

Next Error Previous Error

BEARBEITEN - CAL TEST TOOL - DEFAULT

Suite Name: DEFAULT

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