

# Connector 365 Mail Attachment Plus

User guide for the Mail Attachment Plus App

Version 1.0.0.0. for

Microsoft Dynamics 365 Business Central

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## Introduction

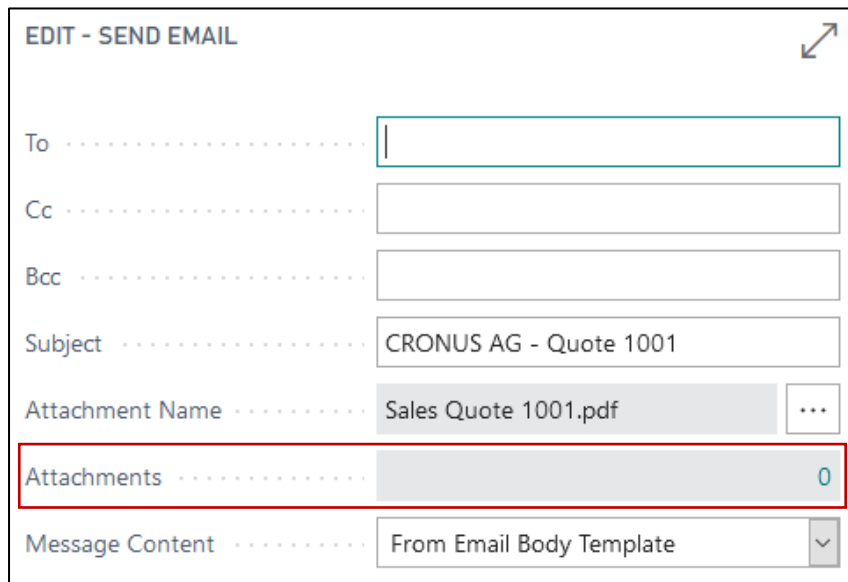
The Connector 365 Mail Attachment Plus gives you an easy way of controlling your attachments when mailing in Microsoft Dynamics 365 Business Central. It offers you simple attachments directly in the mail dialog but also the possibility to add default attachments that will be automatically attached. In this user guide we will show you how everything works.

Should you have questions that are not answered in this user guide, feel free to contact us directly at [support@belware.de](mailto:support@belware.de). We are always happy to help.

## Attachments in the default dialog

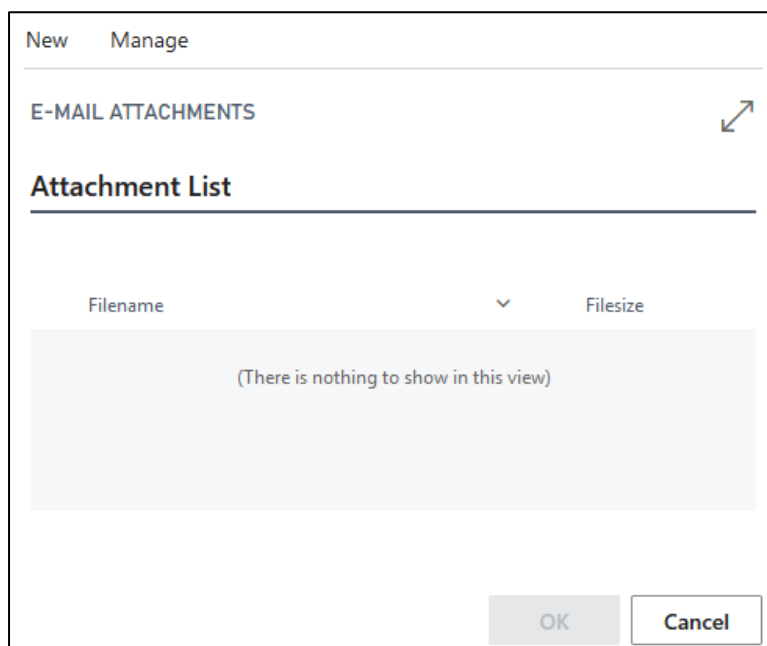
The easiest way to attach your files can be found directly in the default mail dialog, where we added a new field that lets you attach your files.

Pick the report you want to send out and use the „Send by Email“ function.



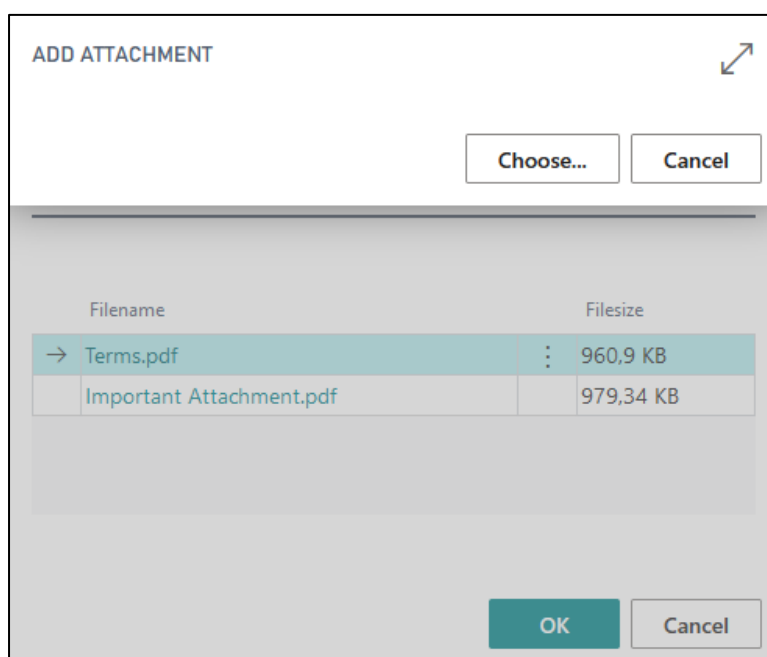
The default mail dialog, the newly added attachments field is marked.

To add your files, click on the “0”. In the case that this is not the first time that the function is used and default attachments are already in use this number might be different. A new window will open. This is the attachment overview, which shows you all attachments for this process, usually the overview will be empty.



Attachment overview

To add your first attachment, click the “New” button at the top left and then “Add Attachment” this will open a window which allows the selection of your file. Simply select the file you want to use, any filetype is fine and confirm it. Repeat this process until all the desired attachments have been added.



Attachment overview with open file selection dialog

If you accidentally add the wrong file, you can always just delete the file. The function to do that can be found under “Manage” and then “Delete”. You can preview all added attachments by clicking on their respective file name.

After you are done adding your attachments, just hit OK, you will notice that the number in the attachment field has changed from a 0 to the number of files added. You can now continue to send your email as usual.

## Adding default attachments per report

Default attachments are a great way of saving time when adding files to your mails. If you find yourself using the same attachment in every mail, just add it as a default and it will automatically be attached to every mail.

Start by opening the report selection of the desired report, in this example we will use sales and invoices. If you are unsure where to find the report selection, you can always use the Dynamics 365 Business Central search function.

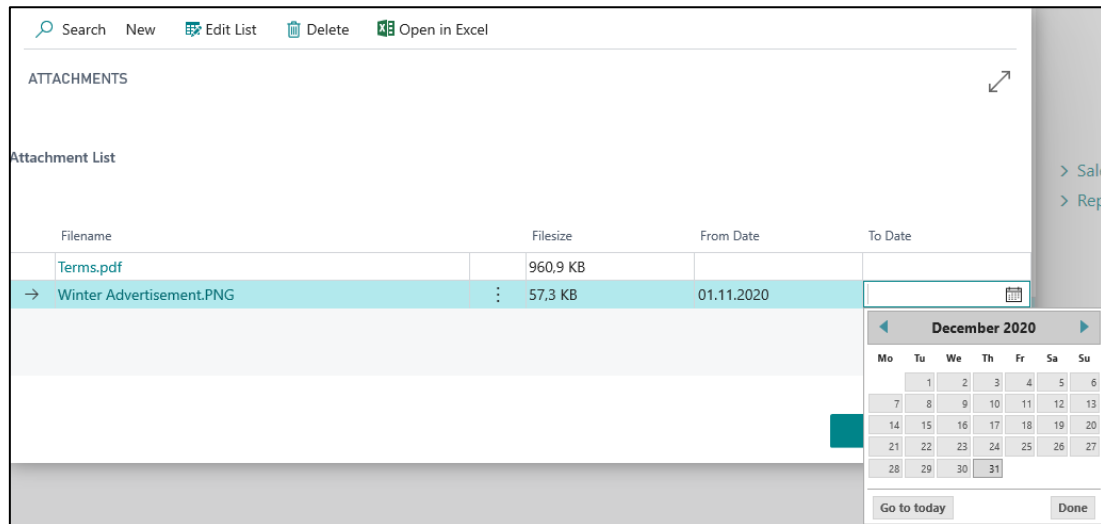
Sequence ↑	Report ID	Report Caption	Use for Email Body	Use for Email Attachments	Email Body Layout Description	Attachments
→ 1	1306	Sales - Invoice	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Standard – E-Mail-Text	0
3	1	Chart of Accounts	<input type="checkbox"/>	<input checked="" type="checkbox"/>	–	0

Report selection – Sales for invoices

As you can see in the screenshot above, there is also a new attachments field in this window. The process of adding new default attachments works like adding attachments to your regular mail. Start by clicking on the 0 to open the attachment dialog and add your files via “New” and “Add Attachment”.

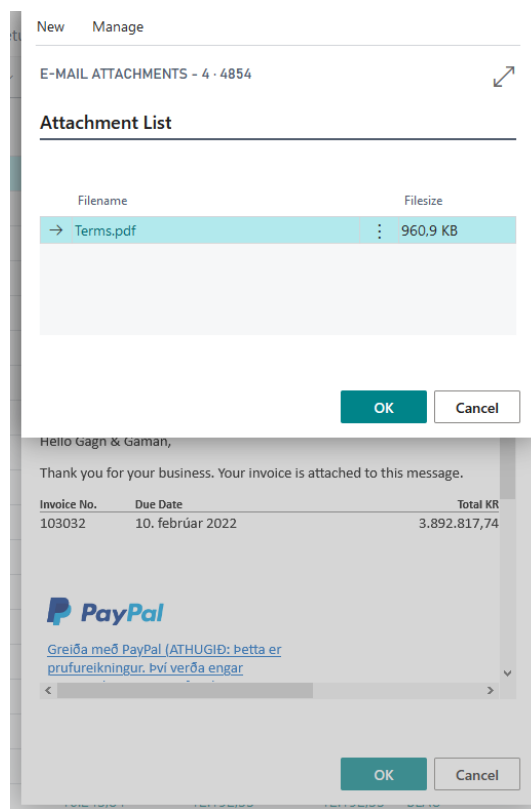
After adding the file(s) you might have noticed the “From Date” and “To Date” fields which are not in the Mail dialog. These two fields allow you to set a default attachment only for a certain amount of time. This can be used for example, to add an advertisement to your mails which is only valid for a certain amount of time. Before setting the date you first must click “Edit List” in the menu, otherwise the date fields cannot be edited.

**Note:** The date set for the attachment does not use the system date to determine the day, it uses the work date of your Business Central environment.



**Setting up dates for a default attachment in the attachment dialog**

This concludes adding defaults for your attachments, close the window and you are done. Next time you are sending an e-mail using the report that was set up, in this case invoices, you will notice that the attachment number is now set to the number of defaults you have set and the files will be visible in the attachment dialog. If a certain default attachment does not fit your current mail, you can simply delete it in the dialog, this only deletes the attachment for this process and not as a default.



**Mail dialog with default attachment, note that the advertisement was not added because of the date**

## Setting defaults per customer and report

The final way to add attachments is adding them as defaults for customers, for example when there are terms that only apply to one specific customer.

Open up the customer that you want to add defaults to and expand the options in the menu via “More options”, click on “Navigate” and select “Document Layouts”

Where to find document layouts

Select the report for which you want to add defaults, we will again use invoices in this example. As before you will notice the new “Attachments” field and same as before you can open the attachment dialog by clicking on the zero.

Usage	Report ID	Report Caption	Custom Layout Description	Attachments	Attach Default
→ Invoice	1306	Sales - Invoice		0	<input type="checkbox"/>

Document layouts with marked “Attachments” field.

The rest of the process works the same as adding defaults to reports without making them customer specific. You can use the same options as before including the date range. After adding your defaults close the attachment dialog.

An important thing to note for defaults set on a customer basis is that they overwrite the regular defaults. In the case that this is not desired ticking the box in the “Attach Default” field will add the customer specific attachments in addition to the default attachments.

Once the attachments have been set, a mail can be sent as usual depending on your setup all defaults including the customer defaults are added. As before you can still remove or further add attachments once you are in the dialog.

The screenshot shows the CRONUS AG software interface. On the left, a table lists 'Posted Sales Invoices' with columns: No., Customer No., Customer Name, Currency Code, and Due Date. The table contains 20 rows of invoice data. On the right, a 'Mail dialog' is open, titled 'E-MAIL ATTACHMENTS - 6 · 4854'. It shows an 'Attachment List' with one entry: 'Attachment Gagn & Gaman.pdf' (960.9 KB). Below the list, there are 'OK' and 'Cancel' buttons. The dialog also displays a preview of the email content, including a greeting 'Hello Gagn & Gaman,' and a table of invoice details.

No.	Customer No.	Customer Name	Currency Code	Due Date
103032	35451236	Gagn & Gaman	ISK	10.02.2022
103027	35451236	Gagn & Gaman	ISK	02.02.2022
103026	35963852	Heimilispryði	ISK	31.01.2022
103025	47563218	Klubben	NOK	04.02.2022
103024	20000	Blütenhaus GmbH		31.01.2022
103023	01445544	Progressive Home Furnishings	USD	05.02.2022
103003	30000	Gilde Jupiter Versicherungs AG		31.01.2022
103002	20000	Blütenhaus GmbH		07.02.2022
103001	10000	Möbel-Meller KG		24.02.2022
103022	46897889	Englunds Kontormöbler AB	SEK	31.01.2022
103021	49633663	Autohaus Mielberg KG		29.01.2022
103028	10000	Möbel-Meller KG		19.02.2022
103020	32656565	Antarcticopy		24.01.2022
103019	20000	Blütenhaus GmbH		30.01.2022
103031	30000	Gilde Jupiter Versicherungs AG		31.01.2022
103018	20000	Blütenhaus GmbH		26.01.2022
103017	43687129	Designstudio Gmunden		14.02.2022
103016	42147258	BYT-KOMPLET s.r.o.	CZK	14.02.2022
103015	10000	Möbel-Meller KG		06.02.2022

**Mail dialog content:**

Attachment List:

Filename	Filesize
→ Attachment Gagn & Gaman.pdf	960.9 KB

Buttons: OK, Cancel

Preview:

Hello Gagn & Gaman,  
Thank you for your business. Your invoice is attached to this message.

Invoice No.	Due Date	Total KR
103032	10. febrúar 2022	3.892.817,74

Buttons: OK, Cancel

**Mail dialog with customer specific attachment which was added via defaults**



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**BELWARE GmbH**