

## Auto Email

Version 2.1.0.0

Countries: US, CA, AU, UK

Setup and User Manual

For Microsoft Dynamics 365 Business Central

Last Update: November 7, 2019

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## Description

Automatically email sales and purchase documents to customers and vendors without any effort.

- Send a collection email to a customer that includes a statement and all supporting documents with one click.
- Remind customers of they have short-paid or have no-paid invoices with a single click.
- Send monthly statement to all customers automatically and without user interaction.
- Review email log to see when emails were sent and by whom.
- Save hours every day having Auto Email do the hard work of collecting documents, writing email bodies, emailing and storing evidence that emails were sent.
- Send specific and default attachments with sales and purchase documents.

Auto Email is simple to use and saves you a lot of time.

Auto Email is a solution that makes it effortless to send out emails and at the same time release the user immediately even when sending 1000s of emails. The solution uses an email log to place all the emails in and let Microsoft Dynamics 365 Business Central do the rest of the work. Auto Email can also be set to automatically email invoices and credit memos as they are being posted.

For accounts receivable, Auto Email can send customer statements and collection notices with all open and past due invoices and credit memos at a single click of a button and if a customer short-paid an invoice Auto Email can send a notice to the customer about that too.

## Technical Concept

Auto Email is using an email queue to log the emails in and the Job Queue to process the emailed documents. Auto Email has an entry log that is populated every time a document is submitted to be emailed. The Job Queue will check the log every X minutes and if there are entries that have not been emailed the system will automatically start emailing the documents until all have been emailed. The log will be updated once the document has been emailed with a status to ensure that the document is not emailed again. This means that there is nothing emailed from the client and the user is instantly released on the document has been submitted.

## Auto Email License

Auto Email can be acquired as an App in the Extension Market Place inside Dynamics 365 Business Central. Just click Free trial to install and try out the solution. The trial will last for 30 days. A subscription can be purchased from SimCrest.

## Setup of Auto Email

There are a couple of steps needed in order for Auto Email to work.

Since this manual covers several country versions of Dynamics 365 Business Central, variations in the user experience and demo data may occur.

## SMTP setup

For the system to email via SMTP, you will have to specify an SMTP server. Search for SMTP Mail Setup.

### SMTP Mail Setup

[Apply Office 365...erver Settings](#) [Test Email Setup](#) | [More options](#)

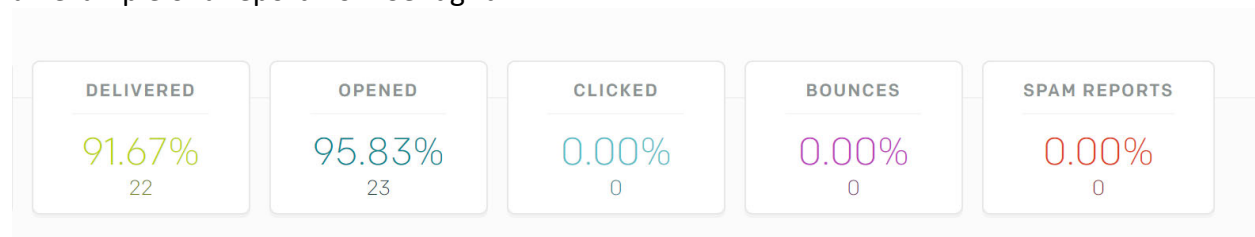
#### General

|                  |  |                          |   |
|------------------|--|--------------------------|---|
| SMTP Server      | <input type="text" value="smtp.sendgrid.net"/> | Password                 | <input type="password" value="....."/>          |
| SMTP Server Port | <input type="text" value="25"/>                | Secure Connection        | <input checked="" type="checkbox"/>             |
| Authentication   | <input type="text" value="Basic"/>             | Send As                  | <input type="text" value="sales@simcrest.com"/> |
| User ID          | <input type="text" value="apikey"/>            | Allow Sender Substitu... | <input checked="" type="checkbox"/>             |

Specify the server's IP address or name. You may have to consult with your IT administrator to get this information. Test the setup before you continue.

### Important note on SMTP services

The SMTP service is of the outmost importance. Many SMTP services may have issues sending emails consistently and securely, so we recommend getting an SMTP service from Sendgrid ([www.sendgrid.com](http://www.sendgrid.com)) or similar reliable SMTP service. They will also provide additional information about your emails, like if they were received and opened by the end user. Here is an example of a report from Sendgrid:



At the time of writing this manual, Sendgrid offers a free service with up to 12,000 emails per month. Another provider is [www.socketlabs.com](http://www.socketlabs.com) which offers a similar service.

You have to make sure the email you are sending from is within your domain that is registered on Sendgrid or SocketLabs. Typically, SMTP mailers are not allowing emails sending from outside your domain. See next section how to set this up.

## Auto Email Setup

You will also have to set up Auto Email to be able to email documents. Search for “Auto Email Setup”. The setup table is populated during the installation.

### Auto Email Setup

Subscription
Process Emails
Email Templates
Create Email Templates
Create Job Queue Entry
Email Attachments
Email Log
Actions
Fewer options

#### General

Send from Email Address

billing@company.com

Email Cr.Memos When Posting

Send From Email Name

Billing Department

Email Shipments When Posting

Test Mode

Email Prepayment Invoices When Posting

Test Mode To Email

Email Prepayment Cr.Memos When Posting

Email Invoices When Posting

#### Statement Options

Start Date

1/1/2000

Update Statement No.

Statement To-date Formula

-1M+CM

Statement Style

Open Item

Print All with Balance

Aging Method

Due Date

Print All with Entries

Length of Aging Periods

1M

#### Email Templates >

#### License

Expiration Date

12/7/2019

Licensed Company Name

Trial Period

Here is an explanation for all the fields:

### General Tab

- **Send from Email Address and Name**  
These are the email and name that will show as the sender of all emails sent via Auto Email unless a template overrides them (see templates below). Make sure it's a valid company email address inside you domain. The SMTP server will likely have an issue if the Send From Email Address is not in your company's domain.
- **Test Mode, Test Mode To Email**  
If Test Mode is checked, all emails will be send to the Test Mode To Email unless overwritten by the document template (see later). This is used for testing that email's and document's look right before you start sending to customer and vendors.
- **Email Invoices When Posting**  
If checked, invoices will be emailed automatically when they are posted. Make sure the customer is setup to receive documents via email. See Customer Card.
- **Email Cr.Memos When Posting**  
If checked, credit memos will be emailed automatically when they are posted. Make sure the customer is setup to receive documents via email. See Customer Card.
- **Email Shipments When Posting**  
If checked, shipments will be emailed automatically when they are posted. Make sure the customer is setup to receive documents via email. See Customer Card.
- **Email Prepayment Invoices When Posting**

If checked, prepayment invoices will be emailed automatically when they are posted. Make sure the customer is setup to receive documents via email. See Customer Card.

- Email Prepayment Cr.Memos When Posting

If checked, prepayment credit memos will be emailed automatically when they are posted. Make sure the customer is setup to receive documents via email. See Customer Card.

## Statement Options

This is used for the canned statement report that's used for the Statement and Collection templates. The report number is 70163326 (Online version) or 93326 (On Premise Version).

- Start Date

This is the start date of the date filter on the statement lines.

- Statement To-date Formula

This information is needed for the Auto Email Statement report. The formula is used to determine if a customer have a balance due as of the date calculated using this formula in relation to Today's date. Example. Today = 05/05/19. If the formula is '-1M+CM' the balance as of 04/30/19 is used to determine if the customer has a balance as of this date. If so, the statement will be emailed. If not, the statement for this customer is skipped. The date formula is also used to determine the statement date.

- Print All with Balance

The statement will be printed if the customer has a balance. The customer also need to have a balance due by the To-date above.

- Print All with Entries

The statement will be printed if the customer has entries. The customer also need to have a balance due by the To-date above.

- Update Statement No.

This will update the customer's statement no.

- Statement Style

Will show Open Items or Balance only.

- Aging Method

This is used to show aging. Options are: None, Due Date, Transaction Date, or Document Date.

- Length of Aging Periods

If Aging Method is different from None, this will show the date formula for the aging periods.

## Email Template Tab

- Email Templates

These templates set up how each document type supported by Auto Email is being treated upon emailing. Read about templates below.

## License Tab

- Expiration Date

This is the expiration date of the subscription. The app will stop working after this date.

- Trial Period

You are granted 30 days trial period upon installation of the app.

- Licensed Company Name

This is the company name that owns the subscription. It must be the exact same as the company name in the system.

## Actions

### Auto Email Setup

---

[Process](#) | [Actions](#) | [Less options](#)

[Subscription](#) [Process Emails](#) [Email Templates](#) [Create Email Templates](#) [Create Job Queue Entry](#) [Email Attachments](#) [Email Log](#)

Here is an explanation for all Process Actions:

- Subscription  
This is used to activate or renew a subscription. See later in this document how to do this.
- Process Emails  
When clicked, Auto Email will simulate running the job queue and should usually only be used for testing.
- Email Templates  
Access the Email Templates used to determine how emails are sent for each document type.
- Create Email Templates  
Default templates are created upon installation of the App. At any time after the installation, this will recreate the templates if they were accidentally deleted. Existing templates will NOT be overwritten.
- Create Job Queue Entry  
Create the job queue entry used to automatically send emails when submitted. See later section for more information.
- Email Attachments  
These are standard attachments that can be assigned to document type. See later for more details.
- Email Log  
This is the email log that will show all emails sent with statuses. See later for more details.

## Auto Email Templates

Each supported document needs to have a template set up in order for the document to be emailed. Search for Auto Email Templates:

| AUTO EMAIL TEMPLATES   WORK DATE: 4/8/2019   |                              |                  |                        |                       |                          |                           |
|--|------------------------------|------------------|------------------------|-----------------------|--------------------------|---------------------------|
| <div> <input type="text"/> Search           + New           Manage            Open in Excel           Actions           Fewer options         </div> |                              |                  |                        |                       |                          |                           |
| Code ↑   | Description                  | Document Type    | Email From             | Email From Name       | Email from User          | Email Subject             |
| <b>COLLECTION</b>  | Collection Template          | Collection       | billing@company.com    | Accounts Receivable   | <input type="checkbox"/> | Payment Reminder          |
| PURCHORDER   | Purchase Order Template      | Purchase Order   | purchasing@company.com | Purchasing Department | <input type="checkbox"/> | Purchase Order %1         |
| SALESCRMEMO  | Sales Credit Memo Template   | Sales Credit ... | billing@company.com    | Accounts Receivable   | <input type="checkbox"/> | Sales Credit Memo %1      |
| SALESINVOICE   | Sales Invoice Template       | Sales Invoice    | billing@company.com    | Accounts Receivable   | <input type="checkbox"/> | Sales Invoice %1          |
| SALESORDER   | Sales Order Template         | Sales Order      | sales@company.com      | Sales Department      | <input type="checkbox"/> | Sales Order %1            |
| SALESQUOTE   | Sales Quote Template         | Sales Quote      | sales@company.com      | Sales Department      | <input type="checkbox"/> | Sales Quote %1            |
| SALESRETURN  | Sales Return Order Template  | Sales Return ... | sales@company.com      | Sales Department      | <input type="checkbox"/> | Sales Return Order %1     |
| SALESSHIPM...  | Sales Shipment Template      | Sales Shipment   | billing@company.com    | Shipping Dept         | <input type="checkbox"/> | Sales Shipment %1         |
| SERVCRMEMO   | Service Credit Memo Template | Service Cr. M... | billing@company.com    | Accounts Receivable   | <input type="checkbox"/> | Service Credit Memo %1    |
| SERVINVOICE  | Service Invoice Template     | Service Invoice  | billing@company.com    | Accounts Receivable   | <input type="checkbox"/> | Service Invoice %1        |
| SHORTPAID  | Short/Non paid Template      | Shortpaid        | billing@company.com    | Accounts Receivable   | <input type="checkbox"/> | Short/Non paid invoice %1 |
| STATEMENT  | Customer Statement Template  | Statement        | billing@company.com    | Accounts Receivable   | <input type="checkbox"/> | Customer Statement for %1 |

Here is the Sales Order Template:

| General            |   |
|--------------------|---|
| Code               | SALESORDER  |
| Description        | Sales Order Template  |
| Document Type      | Sales Order   |
| Report No.         | 10075   |
| Email Address From | sales@company.com   |
| Email From Name    | Sales Department  |
| Email from User    | <input type="checkbox"/>  |
| Email Subject      | Sales Order %1  |
| Email Body Text    | Dear %2,<br>Please find sales order %1 attached.<br>We appreciate your business.<br>Best Regards<br>Company, Inc. |
| Test Mode          | <input type="checkbox"/>  |
| Test Mode To Email |   |

Here is an explanation for all the fields:

- **Code**  
A unique code for the template
- **Description**  
A description of the template
- **Document Type**  
Here is the document type of the documents. You can have several templates of the same document type (if the code is different), but you can only have one active template per document type. The active template is provided in the Auto Email Setup page.
- **Report No.**  
Type the report number for the report you like to use for this document type. Report numbers can be found by searching "Report Layout Selection".  
The collection report has three report no's:



|                             |          |
|-----------------------------|----------|
| Statement Report No. ....   | 70163326 |
| Invoice Report No. ....     | 1306     |
| Credit Memo Report No. .... | 1307     |

The report number for the statement report should be 70163326 (Online version) or 93326 (On Premise Version).

- Email Address From and Name

These are the email and name that will show as the sender of all emails sent via this template. Make sure it's a valid company email address inside you domain. The SMTP server will likely have an issue if the Send From Email Address is not in your company's domain.

- Email From User

When checked, the Auto Email Name and Email in the User Setup table are used as the email from. This overrides all other settings for Email From.

| USER ID  | SALES<br>RESP. CTR.<br>FILTER | PURCHASE<br>RESP. CTR.<br>FILTER | TIME<br>SH...<br>AD...   | AUTO EMAIL NAME | E-MAIL              |
|----------|-------------------------------|----------------------------------|--------------------------|-----------------|---------------------|
| BCUS\CAH | ...                           |                                  | <input type="checkbox"/> | John Doe        | johndoe@company.com |

- Email Subject

Here the subject line is provided. You can merge one field from the document into the text (use %1 place the fields in the text). The merge fields for each document are provided in a table below.

- Email Body Text

Here the email body is provided. You can merge two fields from the document into the text (use %1 and %2 to place the fields in the text). The merge fields are provided in a table below for each document.

- Test Mode and To Email

This works just like the same fields in the Setup page, but these two fields override the setting in the Setup table.

## Merge Fields for Templates

Merge fields are used to substitute %1 in the subject line %1 and %2 in the body text. Here are the fields for each document type:

| Document Type                    | %1               | %2            |
|----------------------------------|------------------|---------------|
| <b>Sales Quote</b>               | Quote No.        | Customer Name |
| <b>Sales Order</b>               | Order No.        | Customer Name |
| <b>Sales Return Order</b>        | Return Order No. | Customer Name |
| <b>Sales/Service Invoice</b>     | Invoice No.      | Customer Name |
| <b>Sales/Service Credit Memo</b> | Credit Memo No.  | Customer Name |
| <b>Sales Shipment</b>            | Shipment No.     | Customer Name |
| <b>Short Paid Notice</b>         | Invoice No.      | Customer Name |
| <b>Statement</b>                 | Customer No.     | Customer Name |

| Collection     | Customer No. | Customer Name |
|----------------|--------------|---------------|
| Purchase Order | Order No.    | Vendor Name   |

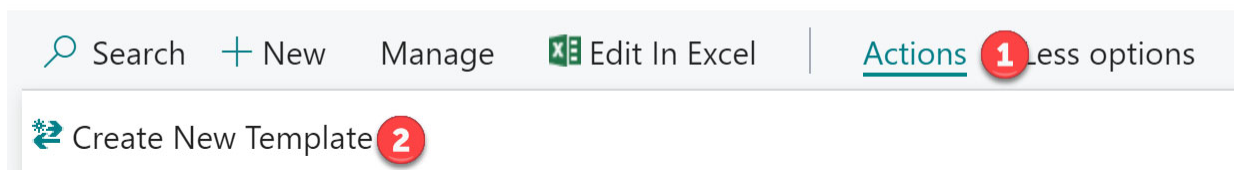
Example for a sales order: "Please find sales order %1 for customer %2 attached".

There is a document type called Custom. It's only used for extension development for partners that want to extend their own solution by providing their own document types to the Auto Email App.

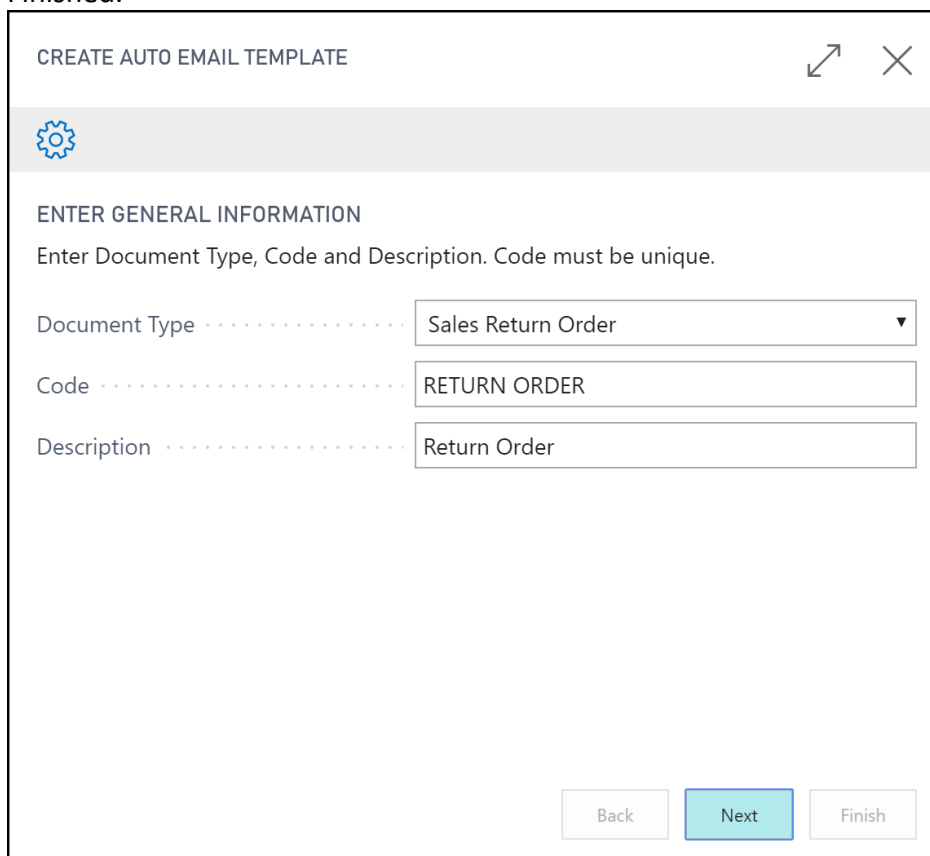
## Template Wizard

There is a template wizard that allows you to be guided through the process of creating the templates. From the Template List, Click Actions, Create New Template:

### AUTO EMAIL TEMPLATES



The wizard will be launched. Follow the instructions and click Next (and Back if needed) until Finished.



## Customer/Vendor Setup

On the customer/vendor card, the Auto Email information is found on the Auto Email tab. Here you will specify, for each customer/vendor, if they should have documents emailed or not.

Invoicing

Show more

|                                |                                     |                         |          |
|--------------------------------|-------------------------------------|-------------------------|----------|
| Copy Sell-to Addr. to Qte From | Company                             | POSTING DETAILS         |          |
| Tax Liabile                    | <input checked="" type="checkbox"/> | Gen. Bus. Posting Group | DOMESTIC |
| Tax Area Code                  | CHICAGO, IL                         | Customer Posting Group  | DOMESTIC |
| Tax Identification Type        | Legal Entity                        | PRICES AND DISCOUNTS    |          |
| Tax Exemption No.              |                                     | Customer Price Group    |          |
|                                |                                     | Customer Disc. Group    |          |

**Auto-Email**

|                 |                                     |             |  |
|-----------------|-------------------------------------|-------------|--|
| Email Documents | <input checked="" type="checkbox"/> | ccEmail To  |  |
| Email To        | helen.ray@contoso.com               | bccEmail To |  |

A check mark in Email Documents is used to indicate that the customer/vendor will receive documents via email rather than printed and mailed. You have to have Email To filled out. ccEmail and bccEmail are optional. You can specify several addresses by separating them with semicolon (;) and no spaces.

## Job Queue Setup

You will have to set up the Job Queue. Auto Email has a way to set it up quickly. Go to Auto Email Setup. Find the action Create Job Queue Entry.

### Auto Email Setup

Process | Actions | Less options

[Subscription](#)
[Process Emails](#)
[Email Templates](#)
[Create Email Templates](#)
[Create Job Queue Entry](#)
[Email Attachments](#)
[Email Log](#)

Click it to create a new Job Queue Entry for Auto Email (only run it once).

Now search for "Job Queue Entries".

JOB QUEUE ENTRY CARD



Codeunit · 70163325 · SIMC AEM Send Emails

Process | Report | Actions | Navigate | Less options

**General**

|                       |                      |                          |                      |
|-----------------------|----------------------|--------------------------|----------------------|
| Object Type to Run    | Codeunit             | Description              | SIMC AEM Send Emails |
| Object ID to Run      | 70163325             | Earliest Start Date/Time |                      |
| Object Caption to Run | SIMC AEM Send Emails | Status                   | On Hold              |

**Recurrence**

|                   |                                     |                             |                                     |
|-------------------|-------------------------------------|-----------------------------|-------------------------------------|
| Recurring Job     | <input checked="" type="checkbox"/> | Run on Saturdays            | <input checked="" type="checkbox"/> |
| Run on Mondays    | <input checked="" type="checkbox"/> | Run on Sundays              | <input type="checkbox"/>            |
| Run on Tuesdays   | <input checked="" type="checkbox"/> | Starting Time               | 7:00:00 AM                          |
| Run on Wednesdays | <input checked="" type="checkbox"/> | Ending Time                 | 9:00:00 PM                          |
| Run on Thursdays  | <input checked="" type="checkbox"/> | No. of Minutes between Runs | 5                                   |
| Run on Fridays    | <input checked="" type="checkbox"/> | Inactivity Timeout Period   | 0                                   |

Set the recurrence to your preference. We suggest emailing every 5 minutes, but that can be adjusted up or down as needed. Once you have tested the solution thoroughly, Set Status to ready.

## Permissions

A permission set for Auto Email is created when the Extension is installed. It's called 'SIMCREST AUTOEMAIL'.

| PERMISSION SETS   WORK DATE: 4/8/2019   |   |                     |           |                |
|---|---|---------------------|-----------|----------------|
| <div> <input type="text" value="Simc"/> <span>×</span> <span>+</span> New           <span>⚙</span> Edit List           <span>🗑</span> Delete           <span>🔑</span> Permissions           <span>👤</span> User Groups           <span>📄</span> Copy Permission Set...           <span>📄</span> In         </div> |   |                     |           |                |
| Permission Set ↑  |   | Name                | Type ↑    | Extension Name |
| → SIMCREST AUTOEMAIL  | ⋮ | SimCrest Auto Email | Extension | Auto Email     |

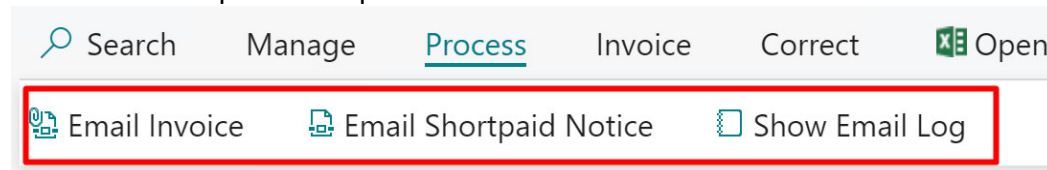
Assign this permission set to all the users that should have access to Auto Email.

## User Manual

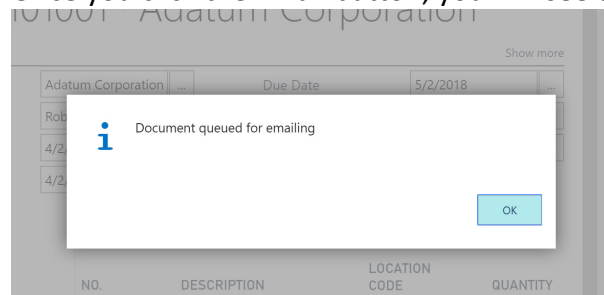
The ability to email documents has been added to several pages (cards and lists):

- Sales Quotes
- Sales Orders
- Sales Return Orders
- Posted Sales Invoices
- Posted Sales Credit Memos
- Posted Sales Shipments
- Posted Service Invoices (only available in premium version)
- Posted Service Credit Memos (only available in premium version)
- Purchase Orders

Here is an example from a posted invoice:



Once you click the Email button, you will see the queued message:



The Show Email Log button, will show all the related log entries for the document you are standing on. Here is an example for a Sales Order.

### Auto Email Log

Search

+

New

Edit List

Delete

Process

Open in Excel

Actions

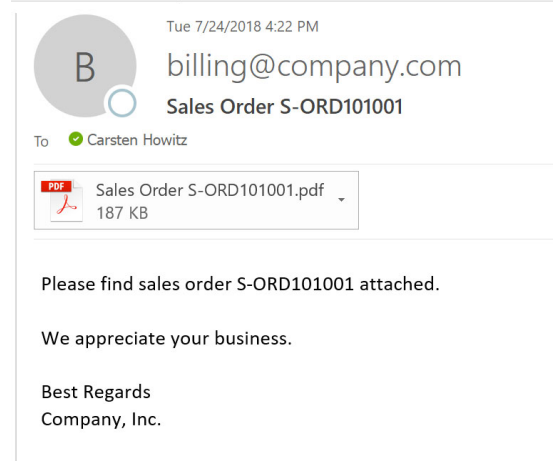
Less options

Process Emails

General

| ENTRY NO. | DOCUME... TYPE | CUSTOM DOCUMENT TYPE | DOCUME... NO. | CREATED ON         | EMAIL ADDRESS FROM | EMAIL FROM NAME  | EMAIL TO                  |
|-----------|----------------|----------------------|---------------|--------------------|--------------------|------------------|---------------------------|
| 1         | Sales Order    |                      | S-ORD1010...  | 10/14/2018 4:23... | sales@company.com  | Sales Department | robert.townes@contoso.com |

The Process Emails action in the Auto Email Log can be used to force the emails to be sent, if you can't wait for the Job Queue to process them. This is usually only used for testing. Here is an example how a sales order would look like in the email:



## Special emails

### Short-paid/Non-paid invoices.

You can email a short/non-paid notice. If the invoice is past due and the original amount is the same as the past due amount, Auto Email will send a non-paid email with the invoice attached. Use the Non-Paid body text in Auto Email Setup to tell the customer whatever you like. If the invoice is partially paid, Auto Email will send a short-paid notice (also with invoice attached) using the short-paid body text in Auto Email Setup for this purpose.

Short-paid notices can be sent from posted invoices and the customer ledger.

Search Edit List Process Open in Excel More options

Show Posted Document Email Statement Email Collection **Email Shortpaid Notice** Nav

EDIT - CUSTOMER LEDGER ENTRIES - 10000 - ADATUM CORPORATION

| POSTING DATE ▼ | DOCUME... TYPE | DOCUMENT NO. | CUSTOMER NO. ▼ | MESSAGE TO RECIPIENT | DESCRIPTION         |
|----------------|----------------|--------------|----------------|----------------------|---------------------|
| 3/1/2018       | Payment        | PS-INV103202 | 10000          |                      | S-INV102209         |
| 2/26/2018      | Payment        | PS-INV103201 | 10000          |                      | S-INV102208         |
| 2/24/2018      | Payment        | PS-INV103200 | 10000          |                      | S-INV102207         |
| 3/5/2018       | Payment        | PS-INV103199 | 10000          |                      | S-INV102206         |
| 2/14/2018      | Invoice        | PS-INV103204 | 10000          |                      | Invoice S-INV102211 |
| 2/4/2018       | Invoice        | PS-INV103203 | 10000          |                      | Invoice S-INV102210 |
| 1/25/2018      | Invoice        | PS-INV103202 | 10000          |                      | Invoice S-INV102209 |

## PS-INV103204 · Adatum Corporation

[Process](#) | [Invoice](#) | [Correct](#) | [Actions](#) | [Navigate](#) | [Less options](#)

[Email Invoice](#) [Email Shortpaid Notice](#) [Show Email Log](#)

### General

[Show more](#)

|                   |                    |                |           |
|-------------------|--------------------|----------------|-----------|
| No. ....          | PS-INV103204       | Due Date ....  | 3/14/2018 |
| Customer ....     | Adatum Corporation | Quote No. .... |           |
| Contact ....      | Robert Townes      | Order No. .... |           |
| Posting Date .... | 2/14/2018          | Closed ....    | Yes       |

## Email Customer Statement

You must use the statement report that comes with the App. The number is 70163326 (Online version) and 93326 (On Premise Version).

On the customer card and the customer ledger you have the option to send a statement.

CUSTOMER CARD



## 20000 · Trey Research

[Process](#) | [New Document](#) | [Request Approval](#) | [Customer](#) | [Actions](#) | [Navigate](#) | [Report](#)

[Email Statement](#) [Email Collection](#)

### General

|                        |               |                    |  |
|------------------------|---------------|--------------------|--|
| Name .....             | Trey Research | Total Sales .....  |  |
| Balance (\$) .....     | 3,036.60      | Costs (\$) .....   |  |
| Balance Due (\$) ..... | 2,024.40      | CFDI Purpose ..... |  |

You can send statements and collections (see more about collections below). The statements will use the values from the Auto Email Setup page.

## Email Collection

A collection email is a special email that will send a statement (using the setting as described above) along with all the supporting documents (invoices and credit memos).

On the customer card and the customer ledger you have the option to send a collection email.

# Customer Ledger Entries

[Search](#)
[Edit List](#)
[Process](#)
[Open in Excel](#)
[Actions](#)
[Navigate](#)
[Less options](#)

[Show Posted Document](#)
[Email Statement](#)
[Email Collection](#)
[Email Shortpaid Notice](#)
[Navigate](#)

| POSTING DATE | DOCUME... TYPE | DOCUMENT NO. | CUSTOMER NO. ▼ | MESSAGE TO RECIPIENT | DESCRIPTION | CURRE CODE |
|--------------|----------------|--------------|----------------|----------------------|-------------|------------|
| 3/17/2018    | Payment        | PS-INV103210 | 20000          |                      | S-INV102217 |            |
| 2/28/2018    | Payment        | PS-INV103209 | 20000          |                      | S-INV102216 |            |
| 2/20/2018    | Payment        | PS-INV103208 | 20000          |                      | S-INV102215 |            |
| 2/14/2018    | Payment        | PS-INV103207 | 20000          |                      | S-INV102214 |            |
| 2/10/2018    | Payment        | PS-INV103206 | 20000          |                      | S-INV102213 |            |

Tue 7/24/2018 4:22 PM

**B** billing@company.com  
Payment reminder Trey Research

To: Carsten Howitz

[Customer Statement.pdf](#) 63 KB
 [Invoice PS-INV103169.pdf](#) 41 KB
 [Invoice PS-INV103181.pdf](#) 40 KB
 [Invoice PS-INV103195.pdf](#) 40 KB

Our records show that you have open document(s) that are due for payment.  
Please find statement and open document(s) attached.  
Please remit payment as soon as possible, thanks.

We appreciate your business.

Best Regards  
Company, Inc.

## Auto Email Log File

Auto Email maintains a log file that will show all the emails that was requested to be submitted with their status. Search for 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 |            |



You can use the log to find out if emails went out correctly and see if there is an error to be corrected. If there is an error, you typically must resolve the error. You can also check if the job queue has stopped due to an error. If it has stopped, you must resolve the error before you start the job queue again. You can edit and delete entries in the log if you have the permission to do that.



By clicking on the Entry No., you can see the Entry Page. Here is an example of the entry page:

← AUTO EMAIL LOG ENTRY  +  

1

---




**General**



|                          |  |                      |   |
|--------------------------|--|----------------------|---|
| Entry No. ....           | 1  | Subject .....        | Sales Quote S-QUO1001   |
| Document Type .....      | Sales Quote ▼  | Email Template ..... | SALESQUOTE ▼  |
| Document No. ....        | S-QUO1001  | Status .....         | Created ▼   |
| Created on .....         | 12/26/2018 2:42 PM  | User ID .....        | ▼   |
| Email Address From ..... | sales@company.com  | Error Code .....     |   |
| Email From Name .....    | Sales Department   | Status On .....      |  |
| Email To .....           | helen.ray@contoso.com  | Completed .....      | <input checked="" type="checkbox"/>   |
| ccEmail To .....         |  | Trigger .....        | <input checked="" type="checkbox"/>   |
| bccEmail To .....        |  |                      |   |

## Auto Email Dashboard

If you like to see an overview of the email log, go to Auto Email Log and click Dashboard.

AUTO EMAIL LOG

Search + New  Edit List  Delete Process  Edit In Excel | Actions Less options

 Process Emails  **Dashboard**

| ENTRY NO. | DOCUME...<br>TYPE | CUSTOM<br>DOCUME...<br>TYPE | DOCUME...<br>NO. | CREATED ON          | EMAIL ADDRESS FROM  | EMAIL FROM NAME     | EMAIL TO              |
|-----------|-------------------|-----------------------------|------------------|---------------------|---------------------|---------------------|-----------------------|
| 1         | Sales Quote       |                             | S-QUO1001        | 12/11/2018 2:57 ... | sales@company.com   | Sales Department    | helen.ray@contoso.com |
| 2         | Sales Order       |                             | S-ORD1010...     | 12/11/2018 2:58 ... | sales@company.com   | Sales Department    | helen.ray@contoso.com |
| 3         | Sales Order       |                             | S-ORD1010...     | 12/11/2018 2:58 ... | sales@company.com   | Sales Department    | helen.ray@contoso.com |
| 4         | Collection        |                             | 20000            | 12/11/2018 2:58 ... | billing@company.com | Accounts Receivable | helen.ray@contoso.com |
| 5         | Statement         |                             | 20000            | 12/11/2018 2:58 ... | billing@company.com | Accounts Receivable | helen.ray@contoso.com |
| 6         | Shortpaid         |                             | PS-INV103...     | 12/11/2018 2:58 ... | billing@company.com | Accounts Receivable | helen.ray@contoso.com |
| 7         | Shortpaid         |                             | PS-INV103...     | 12/11/2018 2:58 ... | billing@company.com | Accounts Receivable | helen.ray@contoso.com |
| 8         | Sales Invoice     |                             | PS-INV103...     | 12/11/2018 2:58 ... | billing@company.com | Accounts Receivable | helen.ray@contoso.com |

The Dashboard gives a quick overview of exceptions and emails sent:

# Auto Email Dashboard

Show Attached 

## Email Exceptions

|                     |   |
|---------------------|---|
| Emails with Errors  | 0 |
| Emails not yet sent | 0 |

## Emailed Documents

|                          |     |                           |    |
|--------------------------|-----|---------------------------|----|
| Total Emailed Docum...   | 232 | Emailed Service Invoic... | 0  |
| Emailed Sales Quotes     | 1   | Emailed Service Credi...  | 0  |
| Emailed Sales Orders     | 0   | Emailed Purchase Ord...   | 0  |
| Emailed Sales Returns    | 0   | Emailed Statements        | 6  |
| Emailed Sales Invoices   | 173 | Emailed Short Paid In...  | 10 |
| Emailed Sales Credit ... | 1   | Emailed Collections       | 10 |

## Test Mode

In Auto Email Setup there is an option to put Auto Email in test mode.

### Auto Email Setup

Process | Actions | Less options

---

**General**

|                         |                                     |                             |                                     |
|-------------------------|-------------------------------------|-----------------------------|-------------------------------------|
| Send from Email Address | billing@company.com                 | Test Mode To Email          | test@company.com                    |
| Send From Email Name    | Billing Department                  | Email Invoices When Posting | <input checked="" type="checkbox"/> |
| Test Mode               | <input checked="" type="checkbox"/> | Email Cr.Memos When Posting | <input type="checkbox"/>            |

If checked, Auto Email, will send all emails to the “Test Mode To Email” address instead of the actual customers/vendors. This is useful when setting up Auto Email and checking that documents are showing up correctly in the emails. Just uncheck again when the system is tested and ready to go.

You can also set up test mode on the template. This setting will override the setting on the setup file.

#### General

|                    |                        |                    |   |
|--------------------|------------------------|--------------------|---|
| Code               | SALESINVOICE           | Email Subject      | Sales Invoice %1  |
| Description        | Sales Invoice Template | Email Body Text    | Dear %2.<br>Please find sales invoice %1 attached.<br>We appreciate your business.<br><br>Best Regards<br>Company, Inc. |
| Document Type      | Sales Invoice          | Test Mode          | <input checked="" type="checkbox"/>   |
| Report No.         | 1306                   | Test Mode To Email | salesinvoice@company.com  |
| Email Address From | billing@company.com    |                    |   |
| Email From Name    | Accounts Receivable    |                    |   |

## Auto Email Customer Statements

Auto Email can send customer statements to all customers that have a balance due according to the date formula. Check the documentation for Auto Email Setup for more information. The customer must also be setup to receive documents via email ("Email Documents" on Customer Card).

Statement To-date Formula

To email the customer statement search for Auto Email Statements and run the report. Specify any filter you like to have on the customer number.

TELL ME WHAT YOU WANT TO DO



auto emai

Go to Pages and Tasks

Show all (4)

- > Auto Email Log Lists
- > Auto Email Setup Administration
- > Auto Email Templates Lists

Go to Reports and Analysis

**Auto Email Statements** Reports and Analysis

EDIT - AUTO EMAIL STATEMENTS

Customer

Show results:

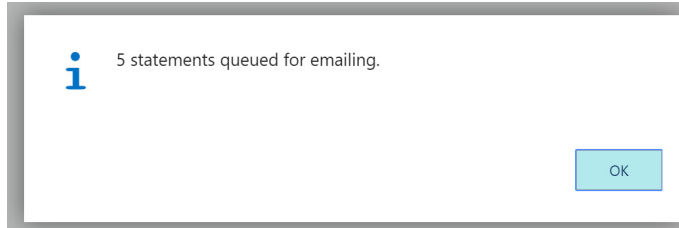
Where: No. is: ...

Schedule...

OK

Cancel

Once you run the report, statements will be queue for emailing.



VIEW - AUTO EMAIL LOG + New

#### General

| ENTRY NO. | DOCUME...<br>TYPE | DOCUME...<br>NO. | CREATED ON        | EMAILTO             | SUBJECT                           | STATUS  |
|-----------|-------------------|------------------|-------------------|---------------------|-----------------------------------|---------|
| 1         | Sales Invoice     | PS-INV1032...    | 8/3/2018 10:53 AM | johndoe@contoso.com | Sales Invoice PS-INV103215        | Emailed |
| 2         | Sales Invoice     | PS-INV1032...    | 8/3/2018 10:57 AM | johndoe@contoso.com | Sales Invoice PS-INV103215        | Emailed |
| 3         | Sales Invoice     | PS-INV1032...    | 8/3/2018 11:03 AM | johndoe@contoso.com | Debug: Sales Invoice PS-INV10...  | Emailed |
| 4         | Statement         | 10000            | 8/3/2018 11:40 AM | johndoe@contoso.com | Customer statement for Adatu...   | Created |
| 5         | Statement         | 20000            | 8/3/2018 11:40 AM | johndoe@contoso.com | Customer statement for Trey Re... | Created |
| 6         | Statement         | 30000            | 8/3/2018 11:40 AM | johndoe@contoso.com | Customer statement for School ... | Created |
| 7         | Statement         | 40000            | 8/3/2018 11:40 AM | johndoe@contoso.com | Customer statement for Alpine ... | Created |
| 8         | ...               | Statement 50000  | 8/3/2018 11:40 AM | johndoe@contoso.com | Customer statement for Releclo... | Created |

## Auto Email Attachments

Auto Email allows you to send attachments to sales and purchase documents. There are two ways to send attachments:

1. Send specific attachments saved on the sales or purchase document
2. Send general attachments related to sales or purchase document

## General Attachments

General attachments can be sent with the sales and purchase documents. Let's say you like to send you "Terms and Conditions" and "Return Instructions" with all sales orders you email.

Find the attachments page:

SEARCH FOR PAGE OR REPORT

Type page or report name to start search:

auto email







4 search results:

[All](#) [Lists](#) [Administration](#) [Reports and Analysis](#)





Search the help for 'auto email' ?

| NAME                                   | DEPARTMENT             |
|--|------------------------|
| <a href="#">Auto Email Log</a>         | Departments/Auto Email |
| <a href="#">Auto Email Setup</a>       | Departments/Auto Email |
| <a href="#">Auto Email Attachments</a> | Departments/Auto Email |
| <a href="#">Auto Email Statements</a>  | Departments/Auto Email |





Here is the attachment table:

| HOME  |   | ACTIONS   |   |   |   |  |  |
|---|---|---|---|---|---|--|--|
|  |  |  |  |  |  |  |  |
| New   | Delete  | Edit List   | Import Attachment   | Export Attachment   | Edit In Excel   |  |  |
| New   |   | Manage  | Process   |   | Page  |  |  |

|                                    |  |  |  |  |  |   |   |   |   |
|------------------------------------|--|--|--|--|--|---|---|---|---|
| NEW - AUTO EMAIL ATTACHMENTS + New |  |  |  |  |  |  |  |  |  |
|------------------------------------|--|--|--|--|--|---|---|---|---|







| General     |           |                      |                                     |                          |                      |   |   |
|-------------|-----------|----------------------|-------------------------------------|--------------------------|----------------------|---|---|
| EMAIL TYPE  | CODE      | DESCRIPTION          | ATT...                              | ATTACHMENT NAME          | ATTACHMENT DATE/TIME | ACT...  |   |
| Sales Order | ... TERMS | Terms and Conditions | <input checked="" type="checkbox"/> | Terms And Conditions.pdf | 8/25/2018 5:08 PM    |  |  |
|             |           |                      | <input type="checkbox"/>            |                          |                      |  |  |

Here are the fields used on the page:

- **Email Type**  
Here you pick the document type you are emailing
- **Code**  
This is a unique code used per email type
- **Description**  
The description of the document
- **Attachment**  
This will be checked if there is an attachment imported
- **Attachment Name**  
This is the file name of the attachment. Make sure you include the extension (pdf, docx, xlsx, etc.). Do NOT include the full file path, only the name and extension.
- **Attachment Date/Time**  
The date and time the file was loaded.
- **Active**  
Click active to include this attachment for the email type selected. If unchecked, the attachment will NOT be emailed.

## Load Attachment

Create and new attachment:

|   |   |   |   |   |   |
|---|---|---|---|---|---|
|  |  |  |  |  |  |
| New   | Delete  | Edit List   | Import Attachment   | Export Attachment   | Edit In Excel   |
| New   | Manage  |   | Process   |   | Page  |

Pick the Email Type and enter the code and description. Click Import attachment on the line just entered.

NAME ACTIONS

New Delete Edit List **Import Attachment** Export Attachment Edit In Excel

New Manage Process Page

NEW - AUTO EMAIL ATTACHMENTS + New

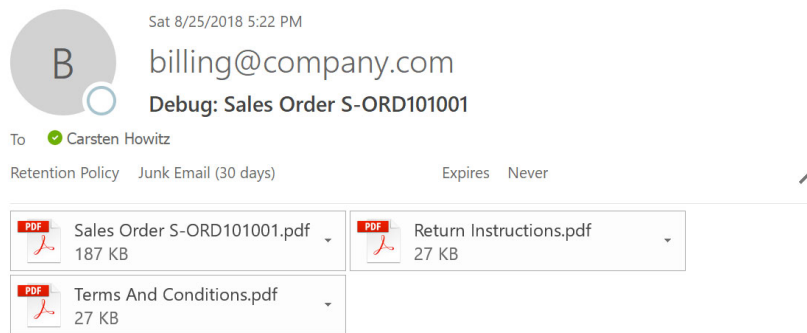
General

| EMAIL TYPE  | CODE | DESCRIPTION | ATT...                              | ATTACHMENT NAME          | ATTACHMENT DATE/TIME |
|-------------|------|-------------|-------------------------------------|--------------------------|----------------------|
| Sales Order | ...  | RETURNS     |                                     |                          |                      |
| Sales Order | ...  | TERMS       | <input checked="" type="checkbox"/> | Terms And Conditions.pdf | 8/25/2018 5:08 PM    |
|             |      |             | <input type="checkbox"/>            |                          |                      |

Pick the file and it loads into record we are entering. Make sure to enter the attachment name exactly like you want the customer to see the attachment. Do NOT include any file path.

| EMAIL TYPE  | CODE | DESCRIPTION | ATT...                              | ATTACHMENT NAME          | ATTACHMENT DATE/TIME | ACT...                              |
|-------------|------|-------------|-------------------------------------|--------------------------|----------------------|-------------------------------------|
| Sales Order | ...  | RETURNS     | <input checked="" type="checkbox"/> | Return Instructions.pdf  | 8/25/2018 5:18 PM    | <input checked="" type="checkbox"/> |
| Sales Order | ...  | TERMS       | <input checked="" type="checkbox"/> | Terms And Conditions.pdf | 8/25/2018 5:08 PM    | <input checked="" type="checkbox"/> |
|             |      |             | <input type="checkbox"/>            |                          |                      | <input type="checkbox"/>            |

In the above case, two attachments will be sent with the sales order.



Please find sales order S-ORD101001 attached.

We appreciate your business.

Best Regards  
Company, Inc.

If you use the Export attachment, the file will be downloaded to your Downloads folder.  
If you like to delete the attachment, delete the entire record.

## Specific Attachments

Specific attachments can be sent with the sales and purchase documents. Auto Email allows you to send the attachments that are associated with the standard Dynamics 365 Business Central functionality available for any document. Let's say you have a purchase order and you like to email special instructions with the purchase order.

Open the attachments pane:

HOME ACTIONS NAVIGATE MANAGE LINE FUNCTIONS ORDER

Edit New Delete Post... Post and Print... Statistics Attachments Email Order Copy Document... Show Email Log Create Inventory Put-away/Pick... Release Process Reopen Send Approval Request Cancel Approval Request Create a Flow See my Flows Send... Print... Previous Next

EDIT - PURCHASE ORDER - 106001 - FABRIKAM, INC.

106001 · Fabrikam, Inc.

General Show more

Vendor Name Fabrikam, Inc. Document Date 4/8/2018

Contact Krystal York Vendor Invoice No. 5755

Lines

| TYPE | NO.    | DESCRIPTION | LOCATION CODE | QUANTITY | RESERVE QUANTIT |
|------|--------|-------------|---------------|----------|-----------------|
| Item | 1896-S | ATHENS Desk |               | 7        |                 |

Click the number of Documents (in this case 0) and attach the document you like to email with this particular purchase order.

New Manage

EDIT - ATTACHED DOCUMENTS

| ATTACHMENT           | FILE EXTENSION | FILE TYPE | USER    | ATTACHED DATE     | AUTO EMAIL                          | FLOW TO PUR... TRX       |
|----------------------|----------------|-----------|---------|-------------------|-------------------------------------|--------------------------|
| Special Instructions | pdf            | PDF       | CHOWITZ | 9/27/2018 1:36 PM | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Make sure to check the Auto Email checkbox. Any document you load here will be emailed along with the purchase order if the Auto Email is checked. If not, it will not be emailed.

## Trial Period and Activating/Renewing a Subscription

When you have installed Auto Email, it will automatically run for a trial period of 30 days. During that time, you are free to evaluate the solution and there are no restrictions to the version running under the trial period.

Once the trial period has expired, Auto Email will no longer send emails. To avoid that, you need to subscribe to Auto Email. Contact SimCrest to purchase a subscription. You can use this link <http://simcrest.com/ContactUs> to contact us.

Auto Email is licensed per company and is tied to the company name. You can see the company name by searching for "Companies":

## Companies

| NAME                    | DISPLAY NAME            |
|-------------------------|-------------------------|
| CRONUS CAH              | CRONUS CAH              |
| CRONUS Test new company | CRONUS Test new company |
| Cronus USA 3 Full       | CRONUS USA, Inc.        |
| CRONUS USA Configurator | CRONUS USA, Inc.        |
| My Company              | My Company              |

Pick the company name from the name column (not the Display Name) and send it to SimCrest together with the request for a subscription. Subscriptions usually run for 1 year at a time but can be customized to your specific needs.

Once purchased, SimCrest will issue you an activation code. Here is how to activate the subscription:

- Go to Auto Email Setup and click Subscription

## Auto Email Setup

|                |                |                        |
|----------------|----------------|------------------------|
| <u>Process</u> | Actions        | Less options           |
| Subscription   | Process Emails | Email Templates        |
|                |                | Create Email Templates |

|                         |  |
|-------------------------|--|
| Send from Email Address | <input type="text" value="billing@company.com"/> |
| Send From Email Name    | <input type="text" value="Billing Department"/>  |
| Test Mode               | <input checked="" type="checkbox"/>              |



- Note the Company name used for this activation. Make sure it's the same name as you provided to SimCrest. Paste the activation code into the field and click Activate Subscription

Manage
Activate Subscription
More options

EDIT - SUBSCRIPTION ACTIVATION

Subscription Activation

Company name used ... CRONUS USA, Inc.
Activation Code .....

- Here is an example of the resulting message

*i*
Subscription for Auto Email has been confirmed. New expiration date is: 01/01/25

OK

## Customer Support and Request for new features

If you have questions how to use Auto Email or have issues to report, we would love to hear from you. Please go to <http://simcrest.com/ContactUs> and send us a message. Use the same link if you like to request new features for Auto Email.