

Connector 365 Mail Sender Plus

User guide for the Mail Sender Plus app

Version 1.0.0.1 for Microsoft Dynamics 365
Business Central

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Introduction

The Connector 365 Mail Sender Plus APP allows you to control and use multiple mail sender addresses via an extended mail setup. By default, it is only possible to use a single SMTP sender address per company. The Mail Sender Plus APP offers a priority-controlled setup for various scenarios within the sender addresses. It is possible to simply change the address in the dialog or set an address as default per report or customer/vendor. With that it is for example possible to set a global address for the sending of invoices. With our APP you can make your mails more personal.

The priority system

As mentioned in the introduction, the addresses that will be used are controlled by a priority system. The priority system works as follows, lowest to highest:

- 1 Default
- 2 An address per user
- 3 An address per report
- 4 An address per customer

This documentation will go into detail how to set up each layer to your wishes.

Expanding the mail setup & setting up addresses per user

First the setup has to be filled with additional addresses that the system can use. The setup can be reached via the search function. You will see an empty table that you have to fill with your additional addresses.

MAIL SENDER PLUS WORK DATE: 13.05.2018		
Email Sender	Email Address ↑	Password
→ ACCOUNTING	accounting@belware.de	●●●●●●●●
GENERAL INFO	info@belware.de	●●●●●●●●
JULIAN.MAAS	julian.maas@belware.de	●●●●●●●●
SUPPORT	support@belware.de	●●●●●●●●

The following fields have to be filled

<p>Email Sender</p>	<p>You can search for a user or select them directly. It is also possible to enter EMail Sender that are not bound to a user.</p>
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E-Mail Address	This is where you add the address that the user will be the default for the user.
Password	In this field you add the password for the mail account. Once it had been entered it will be blotted out and cannot be read again.

Proceed to fill in as many addresses as you need/have licensed. In the trial version only a single address is included. Space for additional addresses must be licensed separately - 0,90,-€ / month / address.

The dialog

Once the desired sender addresses have been set up, it is possible to start sending mail. Open a report and send it per mail.

The screenshot shows a dialog box titled "EDIT - SEND EMAIL". It contains several input fields:

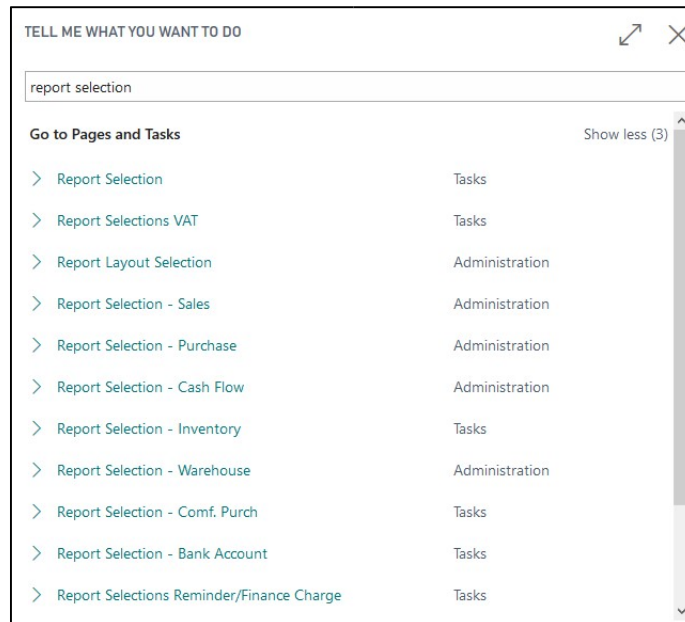
- Email Sender:** A dropdown menu with "info@belware.de" selected. This field is highlighted with a red rectangular box.
- To:** A text field containing "meagan.bond@contoso.com".
- Cc:** An empty text field.
- Bcc:** An empty text field.
- Subject:** A text field containing "[string] - Invoice 103219".
- Attachment Name:** A text field containing "Sales Invoice 103219.pdf".
- Message Content:** A dropdown menu with "From Email Body Template" selected.

You will notice a new Email Sender field once the dialog opens. From there it is possible to access the list that you have just filled and manually select an address. After selecting the desired sender, confirm with OK to start the process as usual.

If it is desired it is also possible to set a permanent default via report selection or in the document layouts per customer/vendor. The priority system will then set the correct address for you by default.

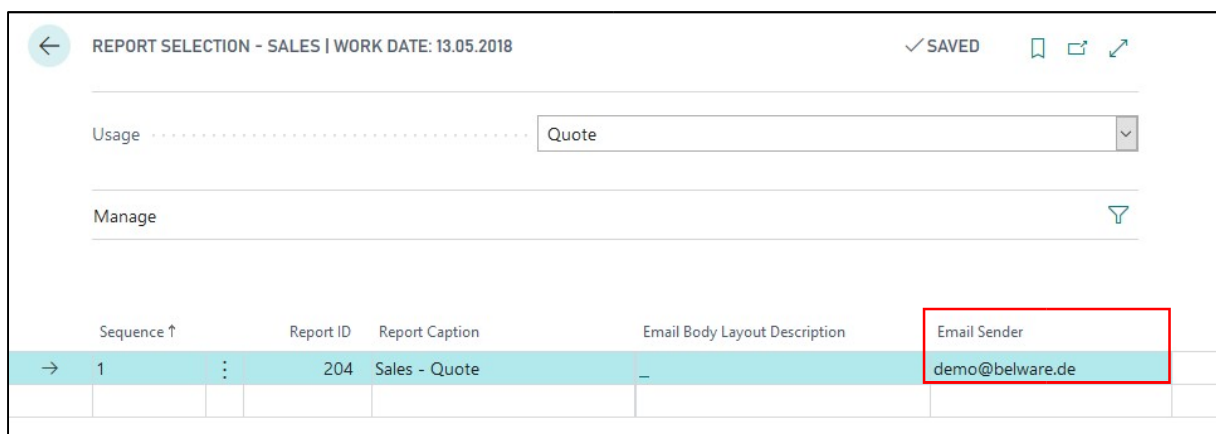
Setting up addresses per report in the report selection

To set up addresses in the report selection you first need to open the search function and search for "report selection". You will now see a list of all possible report selections and their departments. Open the report selection for the desired department.



Afterwards you can enter the desired address into the "Email Sender" field. You can either fill the field manually or select an address from the setup. Manually entered addresses have to be set up in the original setup. The priority of this layer is below that of addresses that have been set up per customer.

When sending the desired report per mail the correct sender address will now be pre-selected.



Setting up addresses per customer

It is also possible to set addresses per customer/vendor, this is controlled by the document layouts. This option has the highest priority. To make changes you need to open the page of customer/vendor that you want to set up. Now expand the options, click on navigate and then customer, finally select document layouts.

The screenshot shows the SAP Customer Card for '30000 · School of Fine Art'. The top navigation bar includes 'New Document', 'Request Approval', 'Navigate', 'Customer', 'Actions', 'Navigate', 'Report', and 'Fewer options'. The 'Customer' menu is expanded, showing options like 'Dimensions', 'Bank Accounts', 'Direct Debit Mandates', 'Ship-to Addresses', 'Contact', 'Cross References', 'Comments', 'Approvals', 'Attachments', and 'Document Layouts' (highlighted with a red box). The main content area displays financial data and a 'Customer Picture' section.

The most important fields here are “Usage”, “Report ID” and our newly added field “EMail Sender”. Select the desired usage and report, now either type or select the address which should be used.

Regardless of what address you define; it is important that the address also exists in the original setup.

The screenshot shows the 'EDIT - DOCUMENT LAYOUTS' table for customer '30000 · SCHOOL OF FINE ART'. The table has the following columns: Usage, Report ID, Report Caption, Custom Layout Description, and Email Sender. The 'Email Sender' column is highlighted with a red box.

Usage	Report ID	Report Caption	Custom Layout Description	Email Sender
→ Quote	0			

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