Auto Email

Version 15.2.3.0

Setup and User Manual

For Microsoft Dynamics 365 Business Central

Last Update: January 16, 2020

Contents

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 statements 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.
- Email template groups allow you to set up customer email experiences depending on the customer.
- Setup custom rules who gets which emails depending on the document type.
- Documents supported: sales quotes, sales orders, sales return orders, sales invoices, sales credit memos, sales shipments, purchase orders, service invoices, service credit memos, customer statements, collection notices (statement and supporting documents), short-paid notices, reminders, and finance charge memos. Support for additional documents can be provided via extensions (from partners or SimCrest).
- 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, credit memos, reminder, and finance charge memos as they are being posted or issued.
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.

Email Delivery

Auto Email is using an email queue to log the emails 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 once the document has been submitted.

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Auto Email License

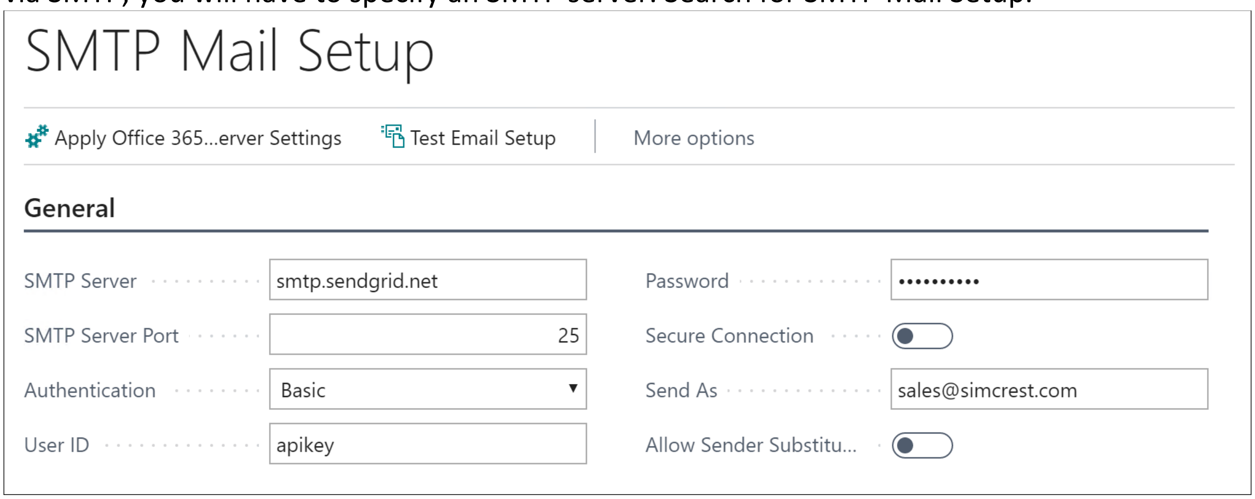
Auto Email can be acquired as an App in the Extension Market Place inside Dynamics 365 Business Central. Just click Free trial to install and try out the solution. The trial will last for 30 days. A subscription can be purchased from SimCrest.

Setup of Auto Email

There are a couple of steps needed 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

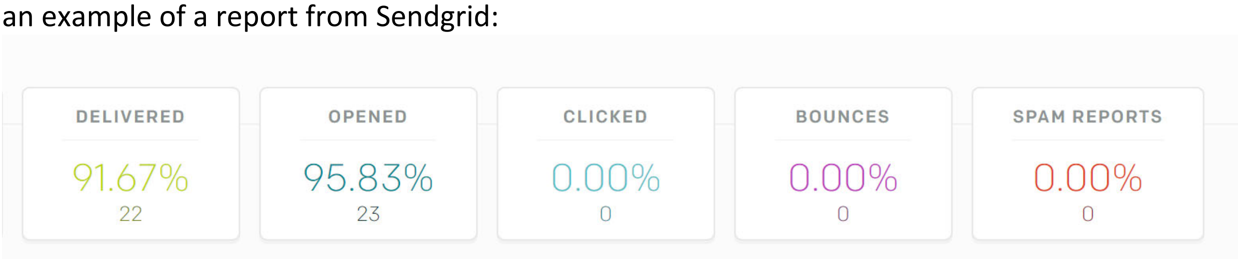
Auto Email is using Business Central's SMTP mail service to send emails. For the system to email via SMTP, you will have to specify an SMTP server. Search for SMTP Mail Setup.



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

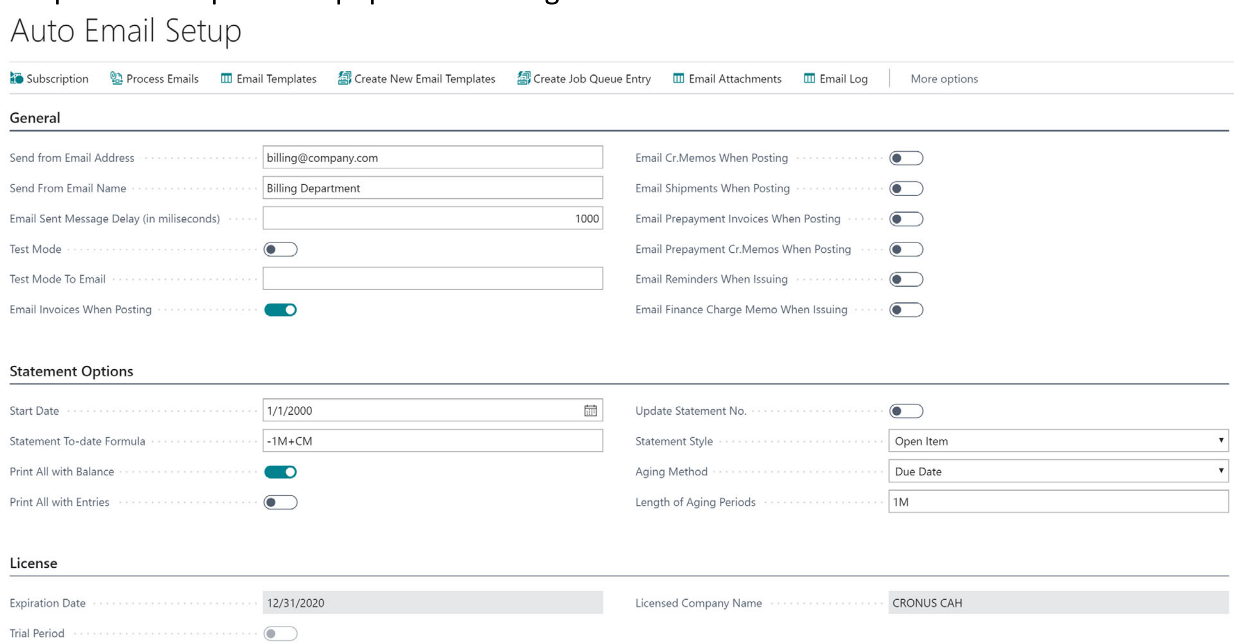
The SMTP service is of the utmost importance. Many SMTP services may have issues sending emails consistently and securely, so we recommend getting an SMTP service from Sendgrid (www.sendgrid.com) or similar reliable SMTP service. They will also provide additional information about your emails, like if 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 which offers a similar service.
You have to make sure the email address 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.

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.



Here is an explanation for all the fields:

General Tab

- Send from Email Address and Name
  These are the email address and name that will show as the sender of all emails sent via Auto Email unless an email template overrides them (see templates below). Make sure it's a valid company email address inside your domain. The SMTP server will likely have an issue if the Send From Email Address is not in your company's domain.
- Email Sent Message Delay (in milliseconds)
  Each time an email is sent, the system will display a message. This field displays the time (in milliseconds) where the message is displayed until it goes away. If set to 0 (zero), the message will show until the user clicks OK.
- Test Mode, Test Mode To Email
  If Test Mode is checked, all emails will be sent 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. This can be overridden by the Auto Email Template Group (see later).

- Email Cr.Memos When Posting
  If checked, credit memos will be emailed automatically when they are posted. This can be overridden by the Auto Email Template Group (see later).
- Email Shipments When Posting
  If checked, shipments will be emailed automatically when they are posted. This can be overridden by the Auto Email Template Group (see later).
- Email Prepayment Invoices When Posting
  If checked, prepayment invoices will be emailed automatically when they are posted. This can be overridden by the Auto Email Template Group (see later).
- Email Prepayment Cr.Memos When Posting
  If checked, prepayment credit memos will be emailed automatically when they are posted. This can be overridden by the Auto Email Template Group (see later).
- Email Reminders when issued
  If checked, reminders will be emailed automatically when they are issued. This can be overridden by the Auto Email Template Group (see later).
- Email Finance Charge Memos when issued
  If checked, finance charge memos will be emailed automatically when they are issued. This can be overridden by the Auto Email Template Group (see later).

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).

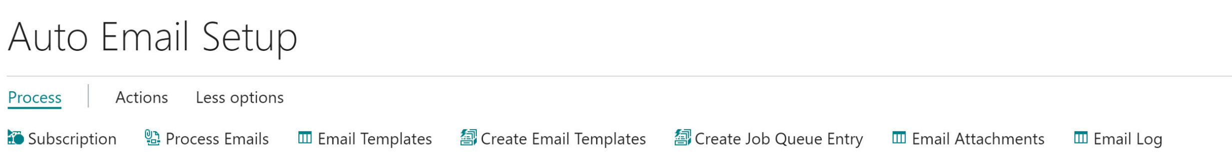
- Start Date
  This is the start date of the date filter on the statement lines.
- Statement To-date Formula
  This information is needed for the Auto Email Statement report. The formula is used to determine if a customer has a balance due as of the date calculated using this formula in relation to Today's 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 needs 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 needs 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 an aging band. 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.

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



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 a 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 for the document to be emailed. The default templates (templates flagged as “Default) are used to email documents unless you have set up Auto Email Template groups (see later for more info). Search for Auto Email Templates:

AUTO EMAIL TEMPLATES | WORK DATE: 12/31/2018

Search | New | Manage | Page | More options

Code ↑	Description	Defa...	Document Type	Email From	Email From Name	Email from User	Email Subject	Test Mode	Test Mode To Email
COLLECTION	Collection Template	☑	Collection	billing@company.com	Accounts Receivable	☐	Payment Reminder	☐	
FINCHARGE...	Finance Charge Memo Templ...	☑	Finance Char...	billing@company.com	Accounts Receivable	☐	Finance Charge Memo %1	☐	
PURCHORDER	Purchase Order Template	☑	Purchase Or...	purchasing@company.com	Purchasing Department	☐	Purchase Order %1	☐	
REMINDER	Reminder Template	☑	Reminder	billing@company.com	Accounts Receivable	☐	Reminder %1	☐	
SALESCRME...	Sales Credit Memo Template	☑	Sales Credit ...	billing@company.com	Accounts Receivable	☐	Sales Credit Memo %1	☐	
SALESINVOICE	Sales Invoice Template	☑	Sales Invoice	billing@company.com	Accounts Receivable	☐	Sales Invoice %1	☐	
SALESORDER	Sales Order Template	☑	Sales Order	sales@company.com	Sales Department	☐	Sales Order %1	☐	
SALESQUOTE	Sales Quote Template	☑	Sales Quote	sales@company.com	Sales Department	☐	Sales Quote %1	☐	
SALESRETURN	Sales Return Order Template	☑	Sales Return ...	sales@company.com	Sales Department	☐	Sales Return Order %1	☐	
SALESSHIPM...	Sales Shipment Template	☑	Sales Shipme...	billing@company.com	Shipping Dept	☐	Sales Shipment %1	☐	
SERVCRMEMO	Service Credit Memo Template	☑	Service Cr. M...	billing@company.com	Accounts Receivable	☐	Service Credit Memo %1	☐	
SERVINVOICE	Service Invoice Template	☑	Service Invoice	billing@company.com	Accounts Receivable	☐	Service Invoice %1	☐	
SHORTPAID	Short/Non paid Template	☑	Shortpaid	billing@company.com	Accounts Receivable	☐	Short/Non paid invoice %1	☐	
STATEMENT	Customer Statement Template	☑	Statement	billing@company.com	Accounts Receivable	☐	Customer Statement for %1	☐	

Here is the Sales Order Template:

General

Code	SALESORDER	Email From Name	Sales Department
Description	Sales Order Template	Email from User	Off
Default	On	Email Subject	Sales Order %1
Document Type	Sales Order	Email Body Text	Dear %2, Please find sales order %1 attached. We appreciate your business. Best Regards Company, Inc.
Customer Type	Bill-To		
Report No.	1305	Test Mode	Off
Email Address From	sales@company.com	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
- Default
  This is the default template for this document type. You should only have ONE default template. If you have more templates for the same document type, they can only be selected if you assign an Email Template Group to the customer.
- Document Type
  This is the document type of the emailed document. You can have several templates of the same document type (if the code is different), but you should only have one default

template per document type. If you have more than one default template per document type, only the first template will be used unless you use template groups (see later).

- Customer Type
  This is used to determine if the sell-to or bill-to customer is used for the document type being emailed. In the above screen shot, the sales order will email the bill-to customer.
- Report No.
  Type the report number for the report you would like to use for this document type. Report numbers can be found by searching "Report Layout Selection".
  The collection report has seven report no's (one for each supported document type). The below 3 are the minimum you have to define.

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

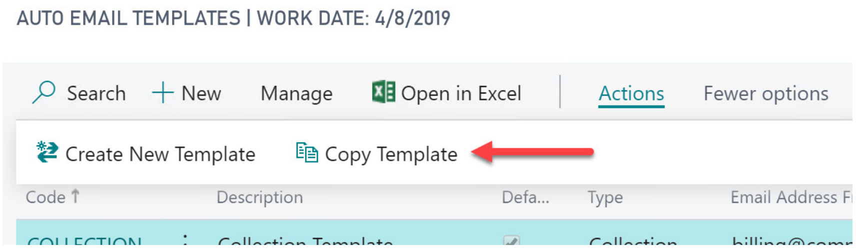
  The report number for the statement report should be 70163326 (Online version) or 93326 (On Premise Version).
- Email Address From and Name
  These are the email and name that will show as the sender of all emails sent via this template. Make sure it's a valid company email address inside you domain. 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 RESP. CTR. FILTER	PURCHASE RESP. CTR. FILTER	TIME SH... AD...	AUTO EMAIL NAME	E-MAIL
BCUS\CAH			☐	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.

Copy Email Templates

Email templates can be copied as needed. Click Actions Copy Template.



Merge Fields for Templates

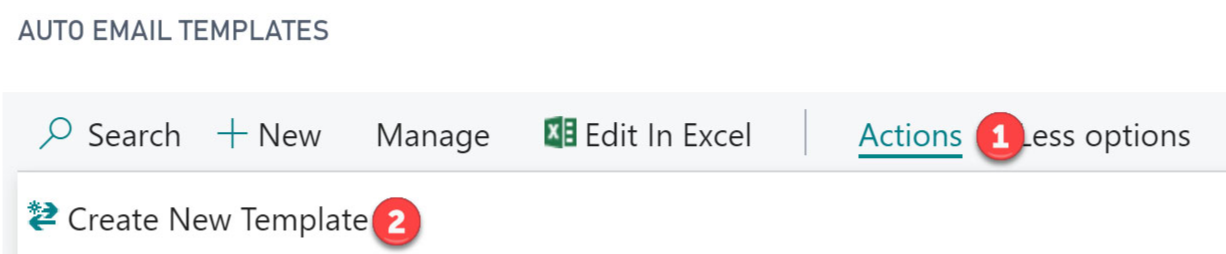
Merge fields are used to substitute %1 in the subject line %1 and %2 in the body text. Here are the fields for each document type:

Document Type	%1	%2
Sales Quote	Quote No.	Customer Name
Sales Order	Order No.	Customer Name
Sales Return Order	Return Order No.	Customer Name
Sales/Service Invoice	Invoice No.	Customer Name
Sales/Service Credit Memo	Credit Memo No.	Customer Name
Sales Shipment	Shipment No.	Customer Name
Short Paid Notice	Invoice No.	Customer Name
Statement	Customer No.	Customer Name
Collection	Customer No.	Customer Name
Purchase Order	Order No.	Vendor Name
Reminder	Reminder No.	Customer Name
Finance Change Memo	Finance Charge Memo No.	Customer Name

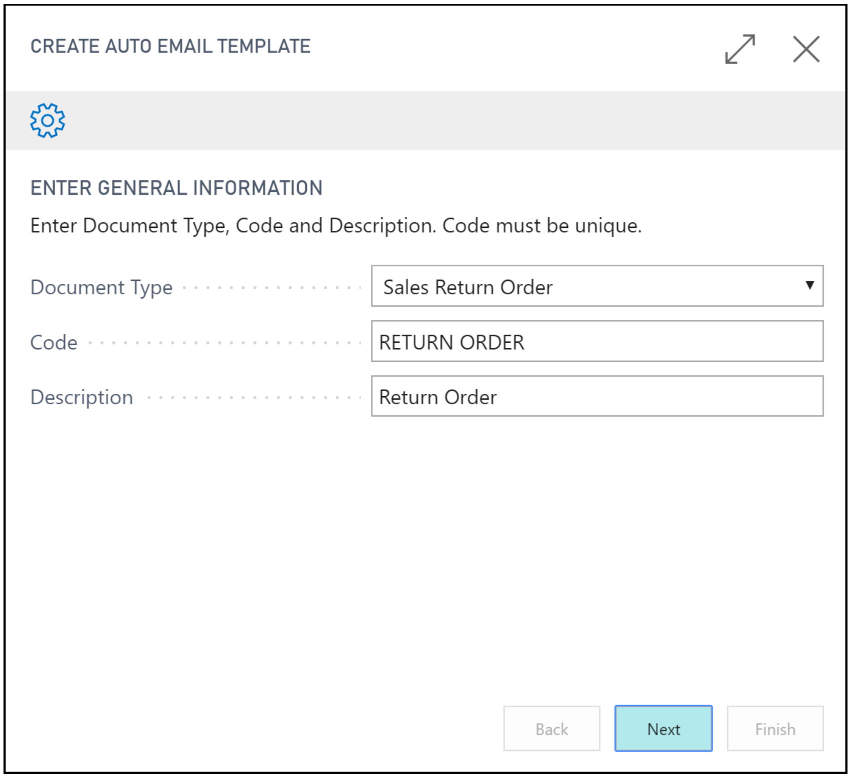
Example for a sales order: “Please find sales order %1 for customer %2 attached”.

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:

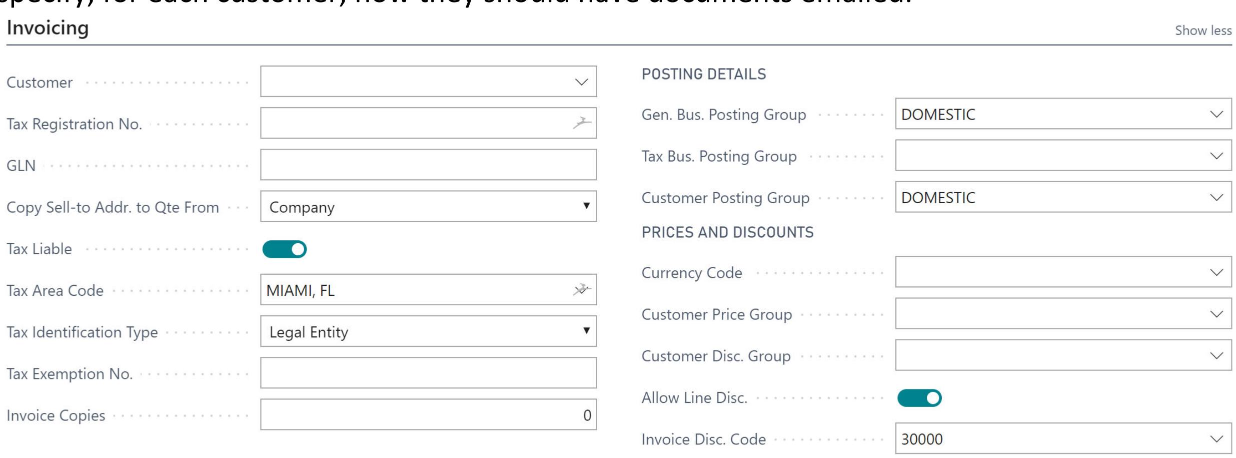


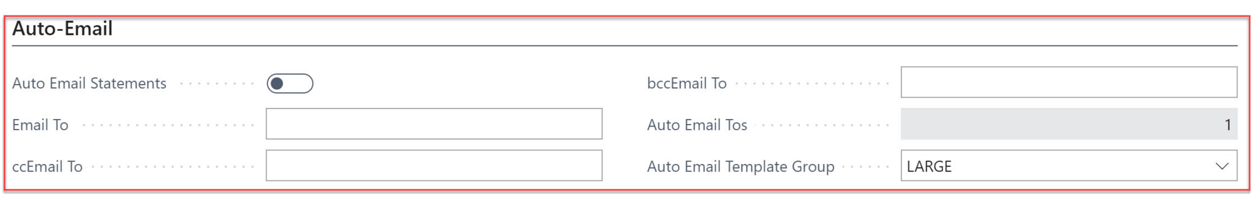
The wizard will be launched. Follow the instructions and click Next (and Back if needed) until Finished.



Customer Setup

On the customer, the Auto Email information is found on the Auto Email tab. Here you will specify, for each customer, how they should have documents emailed.



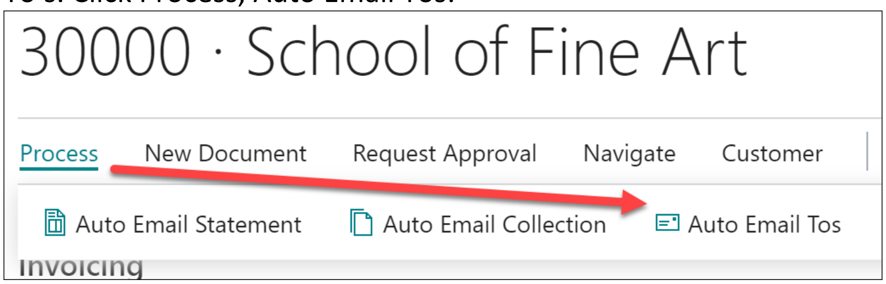


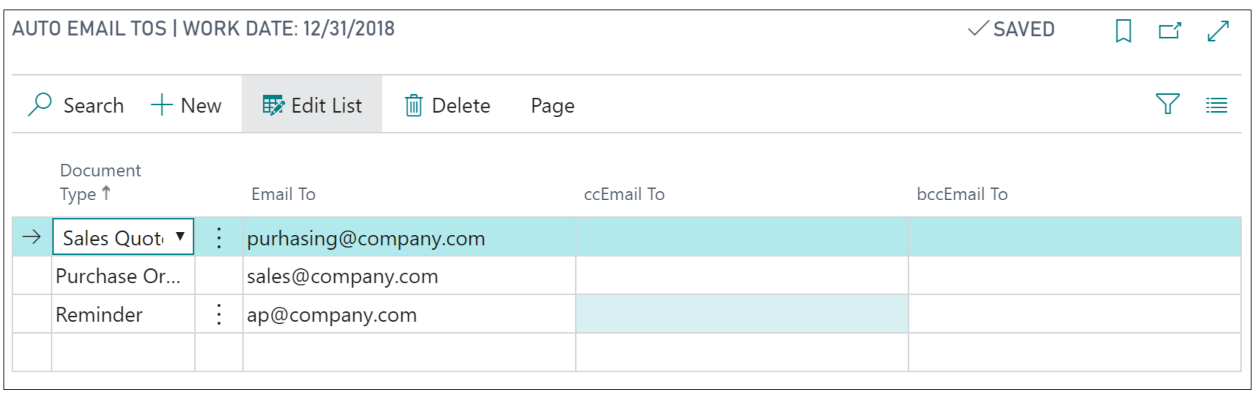
A check mark in Auto Email Statements is used to indicate that the customer will receive automated statements via email rather than printed and mailed. You must have Email To filled out (unless you are using the Auto Email Tos functionality). ccEmail and bccEmail are optional. You can specify several addresses by separating them with semicolon (;) and no spaces.

- Auto Email Tos will show how many email tos you have defined. Email To's will allow advanced per-document email addresses per customer. See below for more information.
- Auto Email Template Group is a group of templates assigned to the customer. These templates will override the default templates previously mentioned. If no group is assigned to the customer, default templates will be used instead.

Auto Email To's

On the customer card you can specify email addresses for all documents. This means that every document you email will be sent to the this/these address(es). If you like to specify different email addresses depending on the document type being sent, you need to set up Auto Email To's. Click Process, Auto Email Tos:

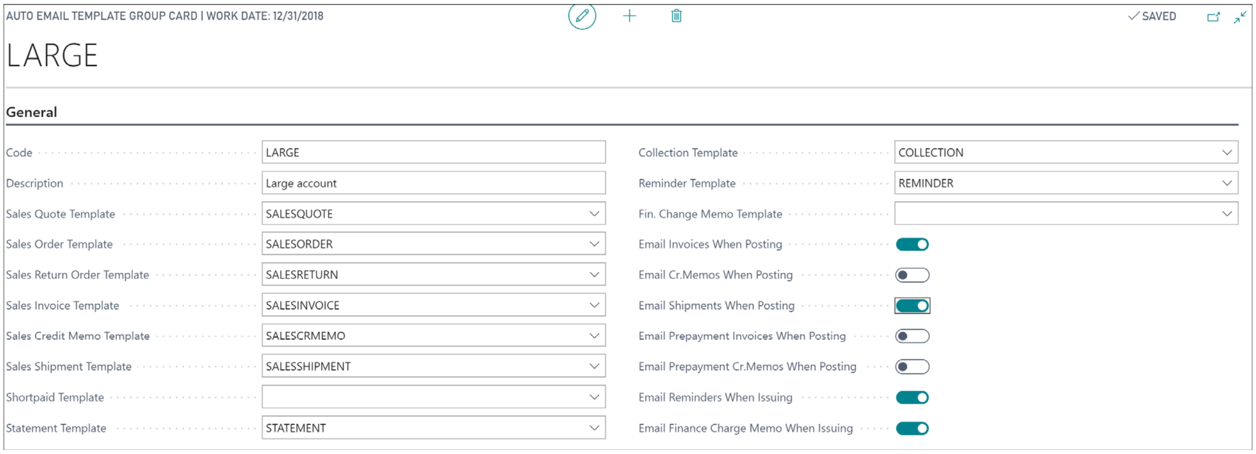




Specify document dependent email addresses on this page. If an email for a document is not found on this page, the default email addresses on the customer card will be used instead. If no email is found on this page or the customer, an error will be displayed and generated in the Email log.

Auto Email Template Groups

Email templates are used to determine how an email should be generated to the customer. The default template we discussed earlier will apply to all customers, however you can define Email Template Groups and assign them to one or several customers, to customize the email experience for each group.



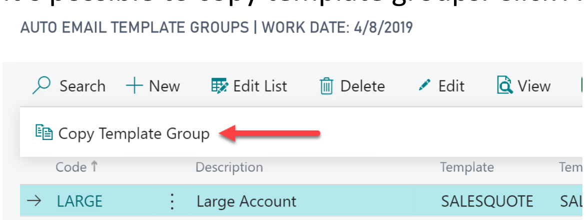
Above is an example of an email group for large account customers. Each group will have one or more templates assigned, including if emails should be sent upon posting/issuing of documents. You can create as many groups as you like and assign them to your customers. If a customer is assigned an email group, you MUST specify templates for all applicable document types that this customer could potentially receive. If not, you will receive an error if an unsupported document is emailed.

Template Groups will follow documents created from the customer and can be changed along the way to make special exceptions for documents if needed. Example, an order has been created and the customer's email group has been automatically assigned to the order. You can change the email group and thereby change the way emails are sent to the customer.

If you don't assign an email group to the customer, the default templates will be used instead.

Copy Email Template Groups

It's possible to copy template groups. Click Actions, Copy Template Group.



Email Template Group Flow

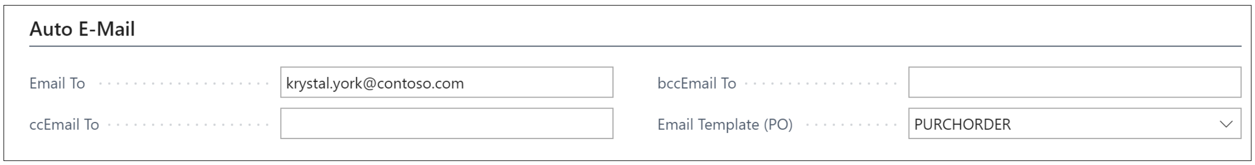
It's important to understand how Email Templates Groups are flowing from the customer. Here is an example:

1. The customer is assigned an email template group called "LARGE".
2. A quote is created for the customer and the group is set to "LARGE" inherited from the customer. If a sales quote is emailed, the system will use the Quote template from the "LARGE" group to email it.
3. The quote is converted into an order and the template group is inherited from the quote. If a sales order is emailed, the system will use the Sales Order template from the "Large" group to email it.

4. Shipments and or invoices may be posted from the and emailed based on the templates and information in the “LARGE” template group.
5. At ANY time, the user can change the template group to something else, for instance “SMALL”, and make a different email delivery based on the new group’s setup.
6. Once posted, documents will inherit the template group, but the group can no longer be edited.

Vendor Setup

The vendor has a simpler setup because only Purchase Orders are currently supported for vendors.

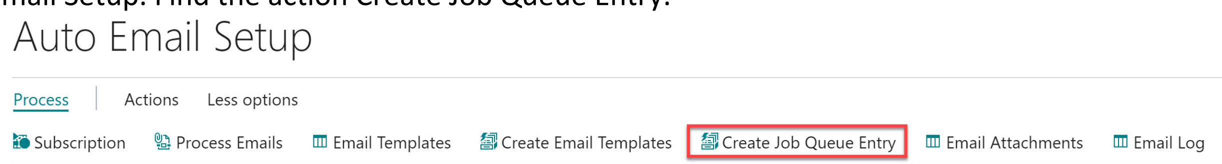


You must have Email To filled out; ccEmail and bccEmail are optional. You can specify several addresses by separating them with semicolon (;) and no spaces.

- Email Template (PO). Here you can specify the email template to use for sending Purchase Orders for this vendor. If no template is specified, the default template is used instead.

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.



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

Now search for “Job Queue Entries”.

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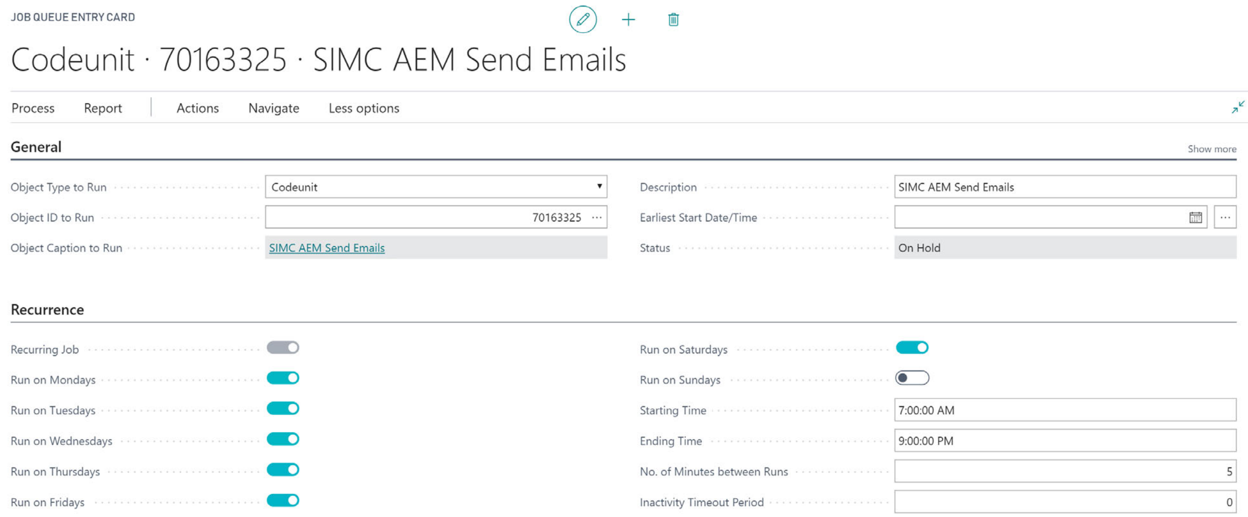
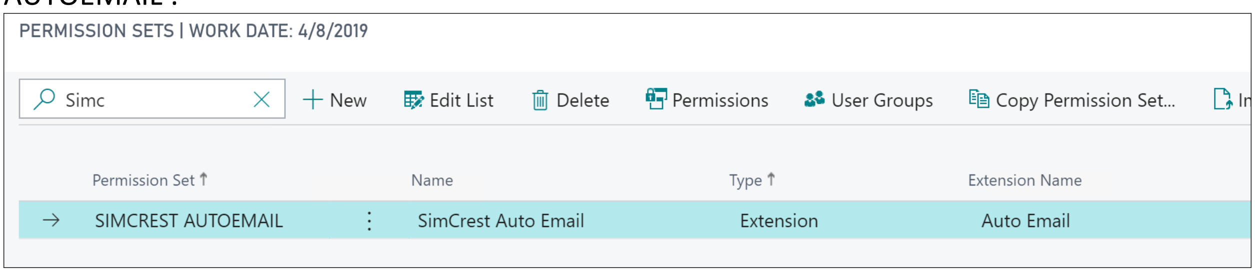


Set the recurrence to your preference. We suggest emailing every 5 minutes, but that can be adjusted up or down as needed. Once you have tested the solution thoroughly, Set Status to ready.

Permissions

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



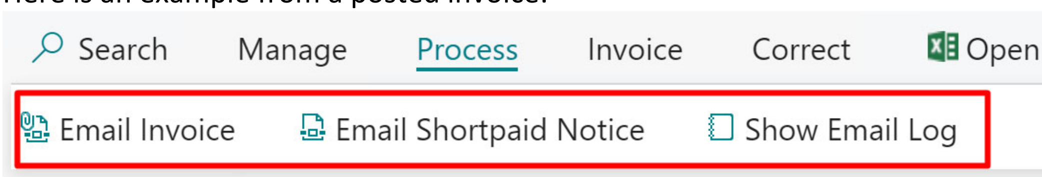
Assign this permission set to all the users that should have access to Auto Email.

User Manual

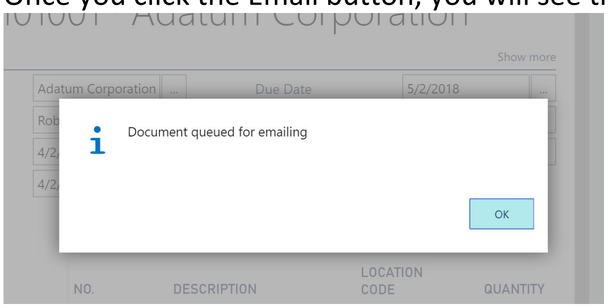
The ability to email documents has been added to several pages (cards and lists):

- 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
- Reminders
- Finance Charge Memos

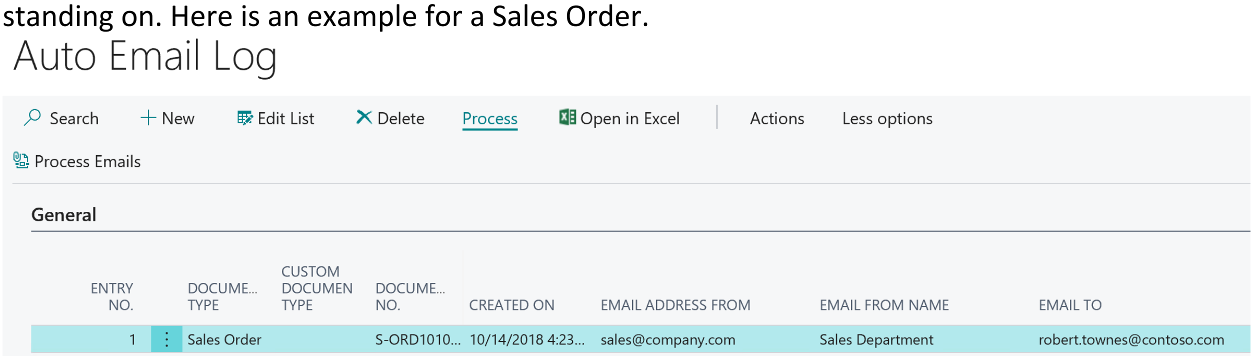
Here is an example from a posted invoice:



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

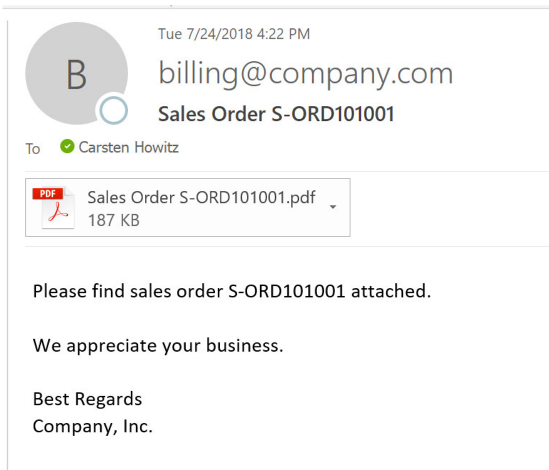


The Show Email Log button, will show all the related log entries for the document you are standing on. Here is an example for a Sales Order.



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:

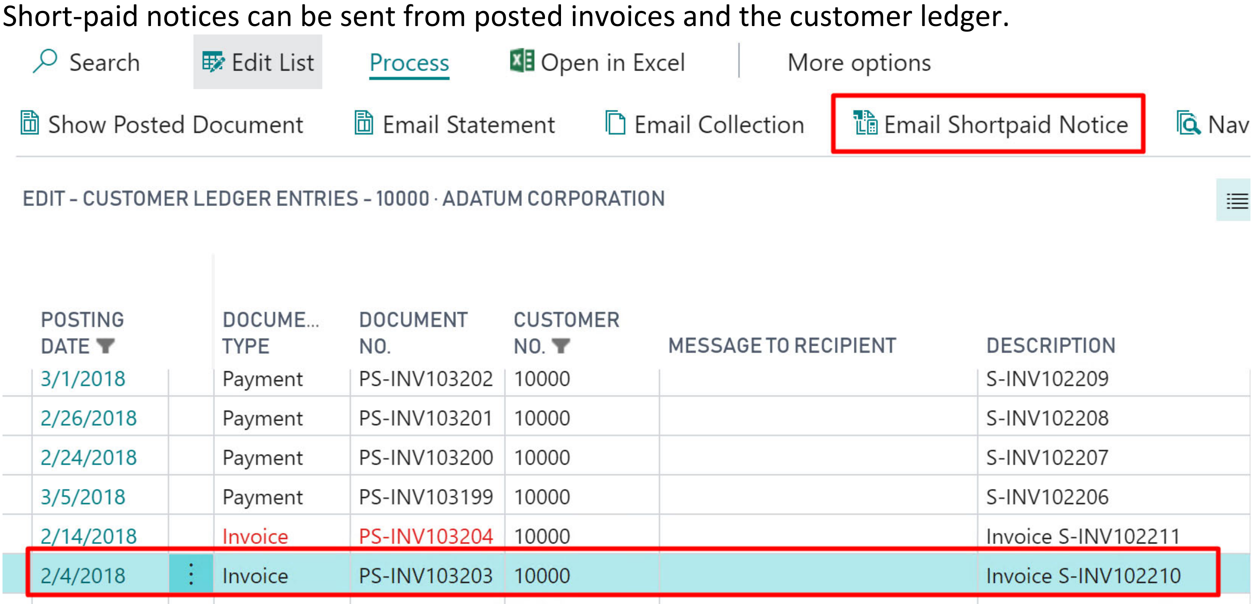


Special emails

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.



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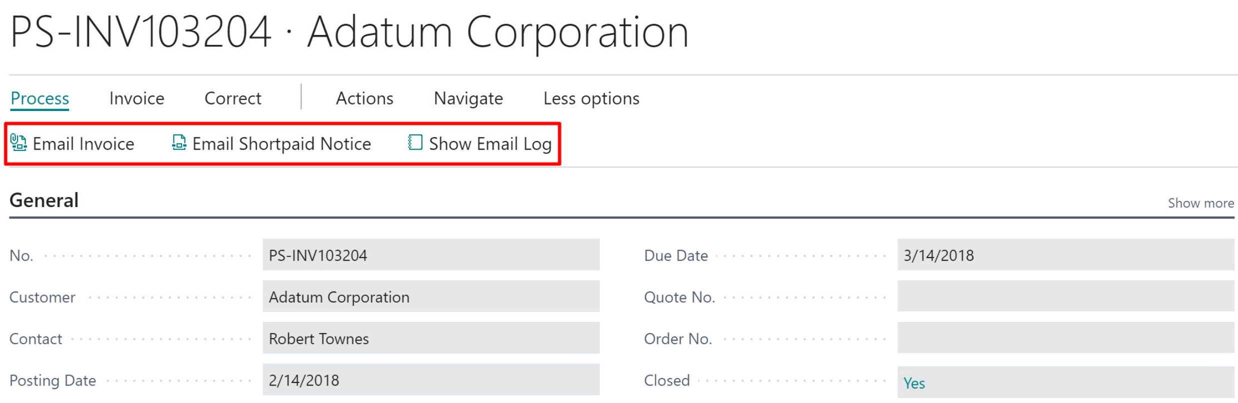
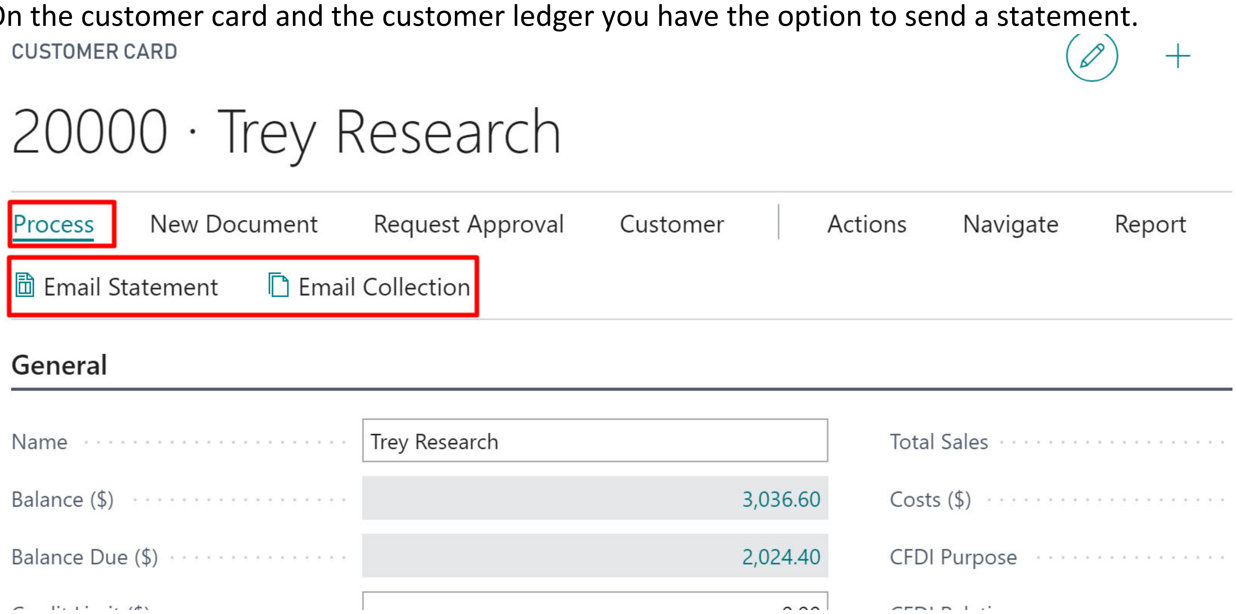


Email Customer Statement

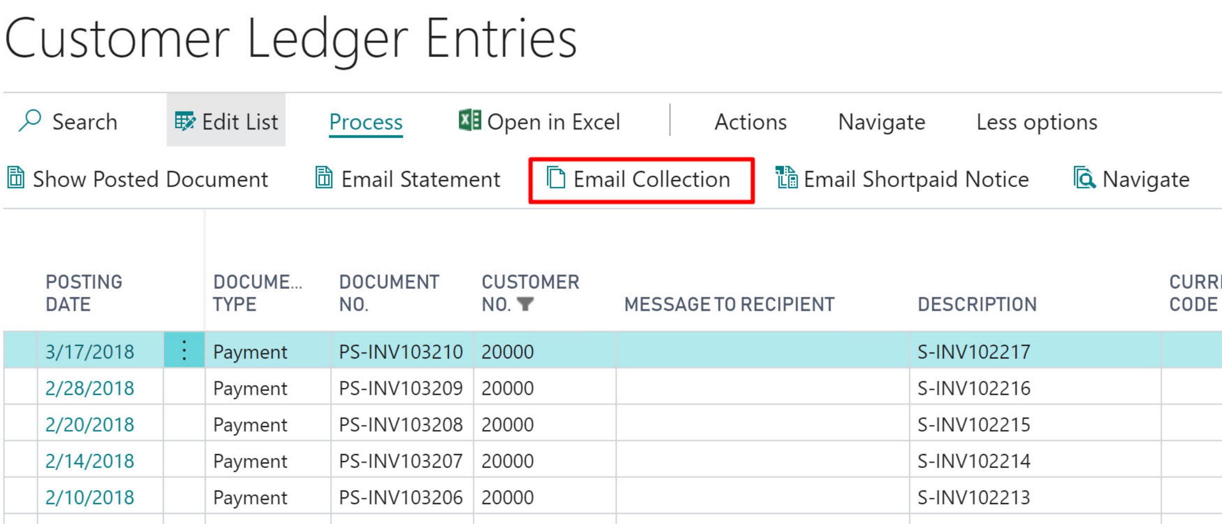
You must use the statement report that comes with the App. The number is 70163326 (Online version) and 93326 (On Premise Version).
On the customer card and the customer ledger you have the option to send a statement.

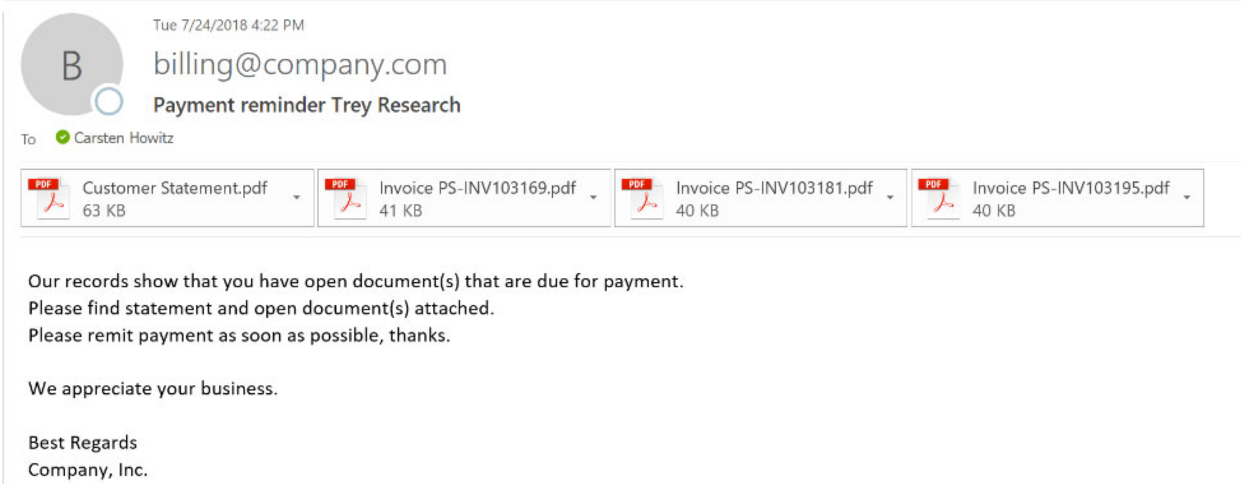


You can send statements and collections (see more about collections below). The statements will use the values from the Auto Email Setup page.

Email Collection

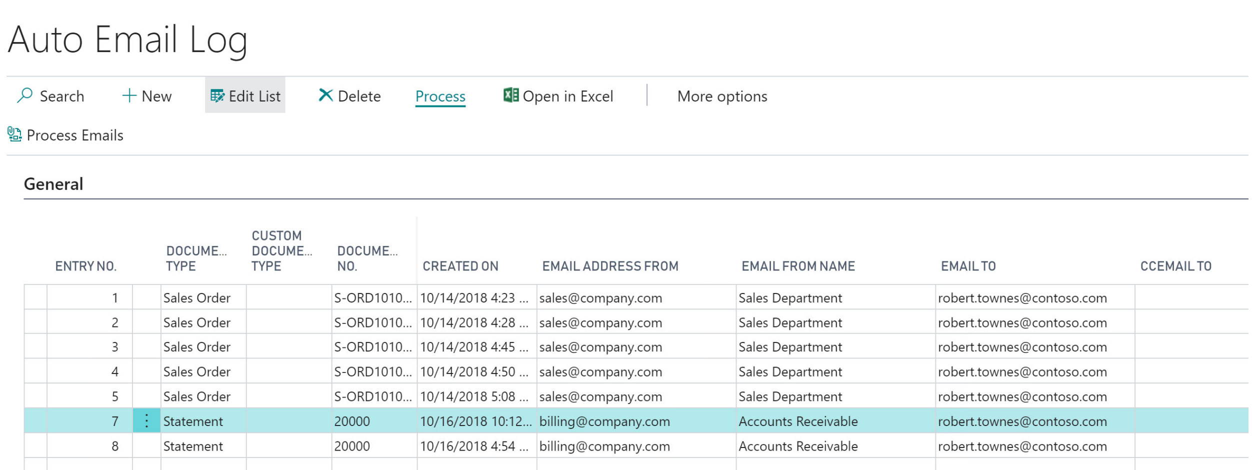
A collection email is a special email that will send a statement (using the setting as described above) along with all the supporting documents (invoices and credit memos).
On the customer card and the customer ledger you have the option to send a collection email.





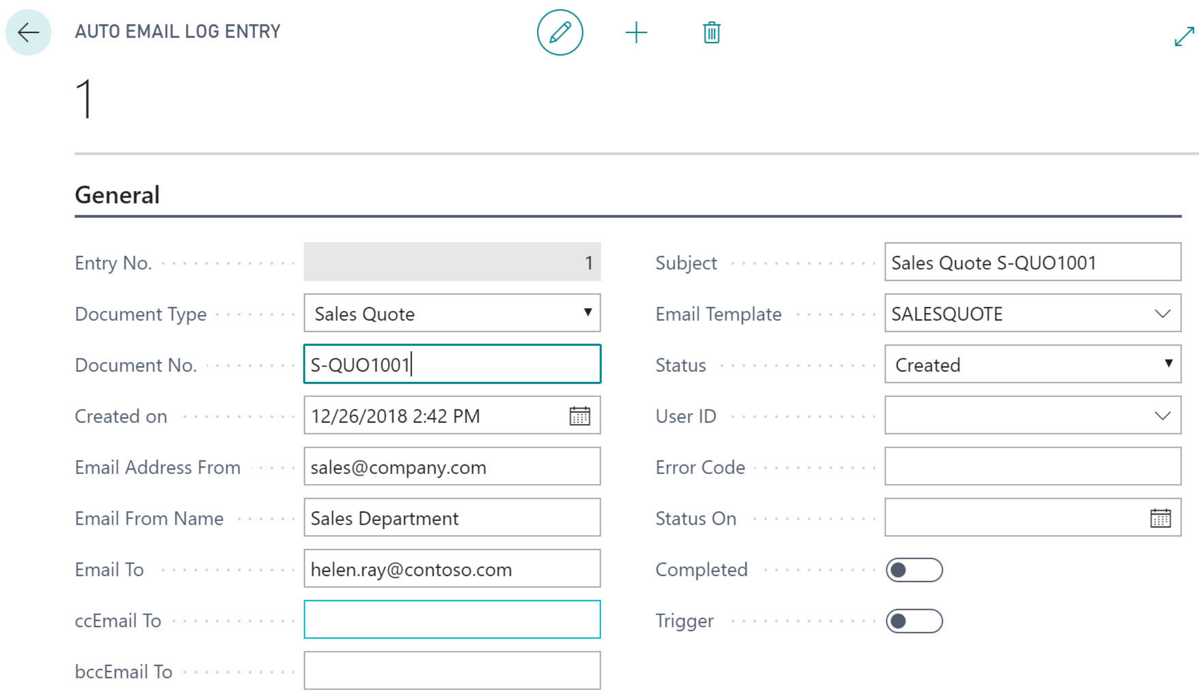
Auto Email Log File

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.



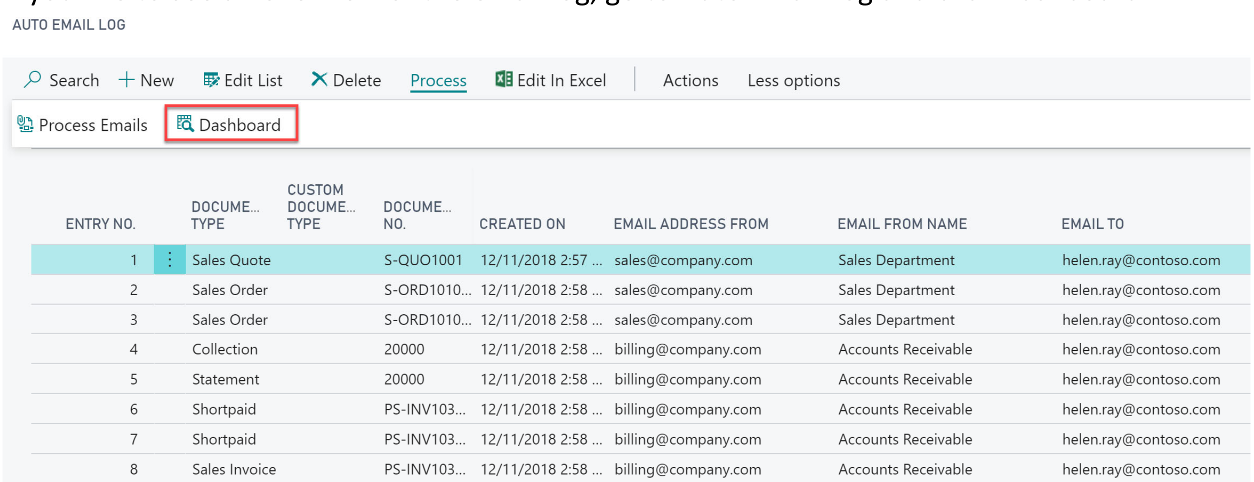
You can use the log to find out if emails went out correctly and see if there is an error to be corrected. If there is an error, you typically must resolve the error. You can also check if the job queue has stopped due to an error. If it has stopped, you must resolve the error before you start the job 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:



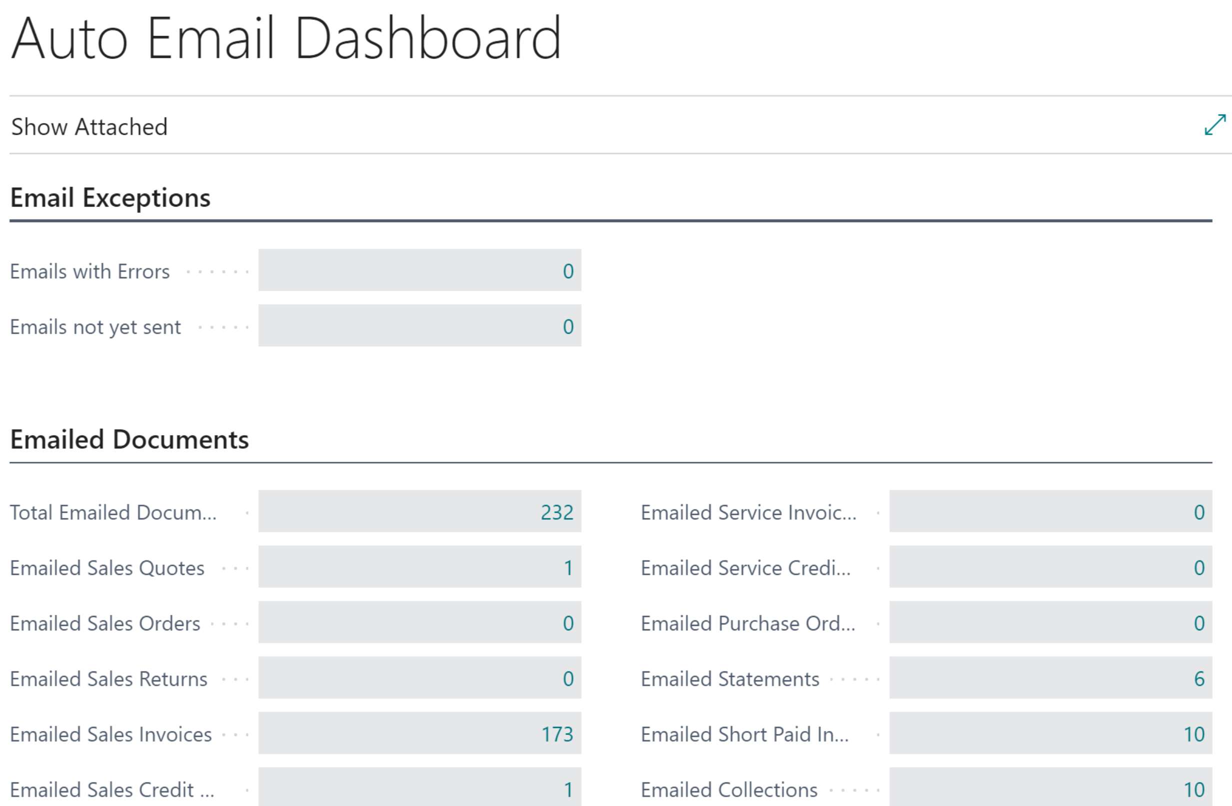
Auto Email Dashboard

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



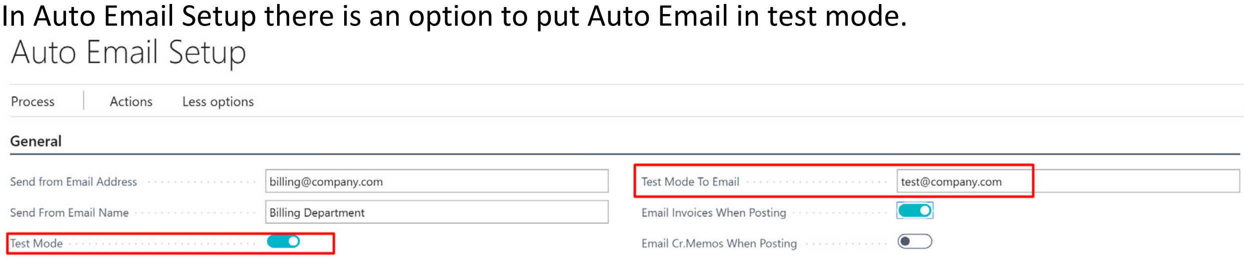
ENTRY NO.	DOCUME... TYPE	CUSTOM DOCUME... TYPE	DOCUME... NO.	CREATED ON	EMAIL ADDRESS FROM	EMAIL FROM NAME	EMAIL TO
1	Sales Quote		S-QUO1001	12/11/2018 2:57 ...	sales@company.com	Sales Department	helen.ray@contoso.com
2	Sales Order		S-ORD1010...	12/11/2018 2:58 ...	sales@company.com	Sales Department	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:



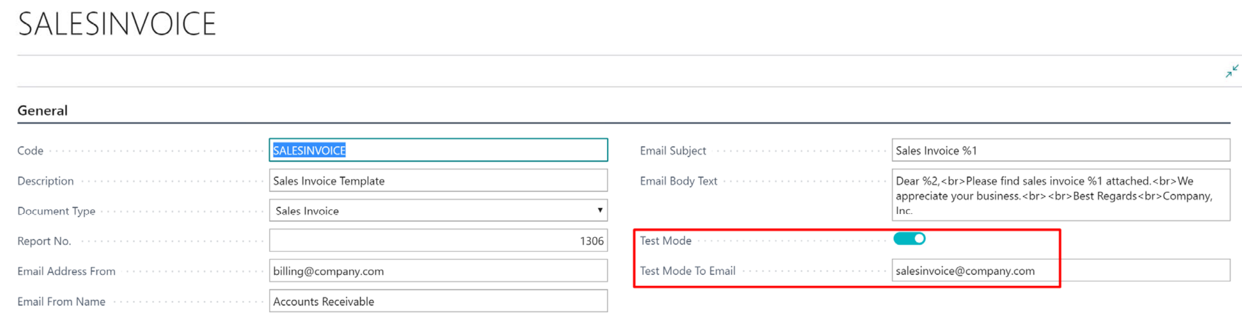
Test Mode

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



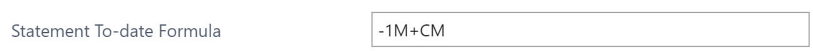
If checked, Auto Email, will send all emails to the “Test Mode To Email” address instead of the actual customers/vendors. This is useful when setting up Auto Email and checking that documents are showing up correctly in the emails. Just uncheck again when the system is tested and ready to go.

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

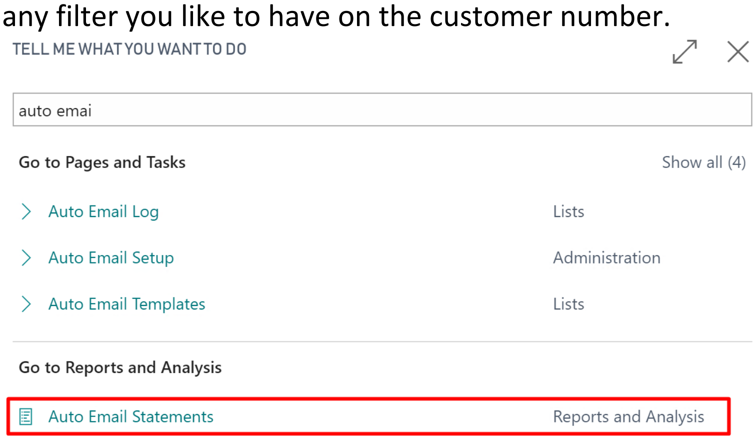


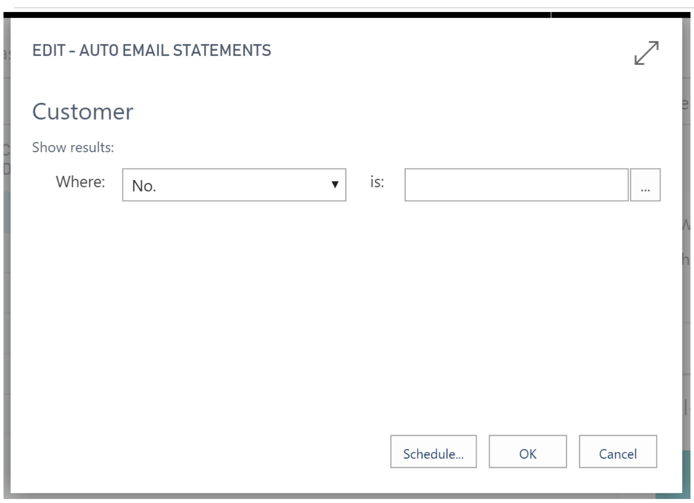
Auto Email Customer Statements

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 statements via email ("Auto Email Statements" on Customer Card).

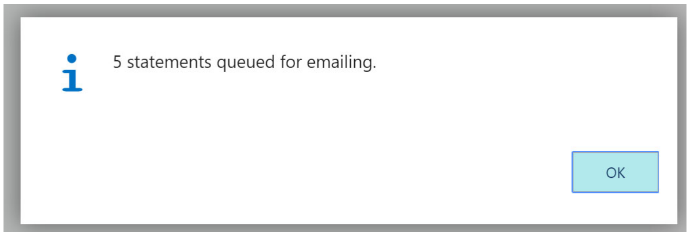


To email the customer statement search for Auto Email Statements and run the report. Specify any filter you like to have on the customer number.





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



VIEW - AUTO EMAIL LOG + New

General

ENTRY NO.	DOCUME... TYPE	DOCUME... 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

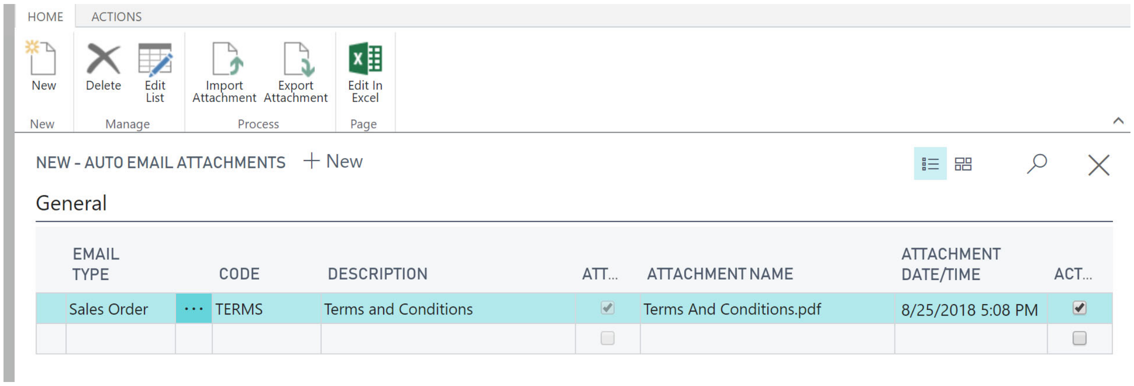
Type page or report name to start search: auto emai

4 search results: All Lists Administration Reports and Analysis

Search the help for 'auto emai' ?

NAME	DEPARTMENT
Auto Email Log	Departments/Auto Email
Auto Email Setup	Departments/Auto Email
Auto Email Attachments	Departments/Auto Email
Auto Email Statements	Departments/Auto Email

Here is the attachment table:

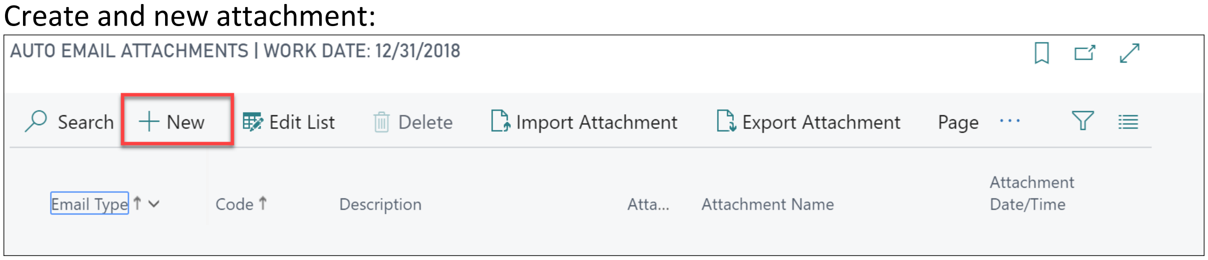


Here are the fields used on the page:

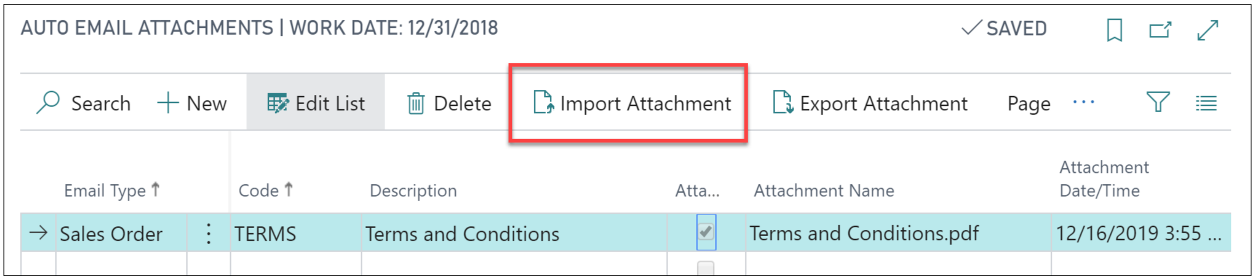
- Email Type
  Here you pick the document type you are emailing
- Code
  This is a unique code used per email type
- Description
  The description of the document
- Attachment
  This will be checked if there is an attachment imported
- Attachment Name
  This is the file name of the attachment. Make sure 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

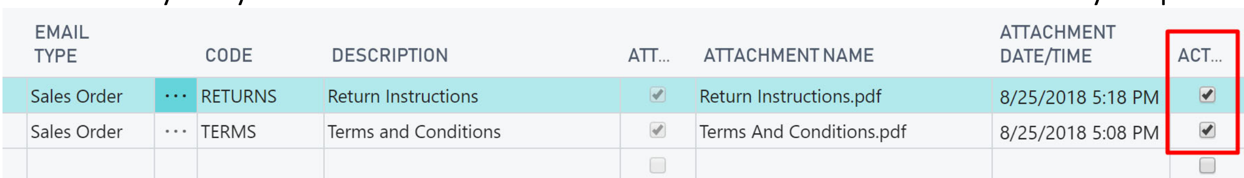
Create and new attachment:



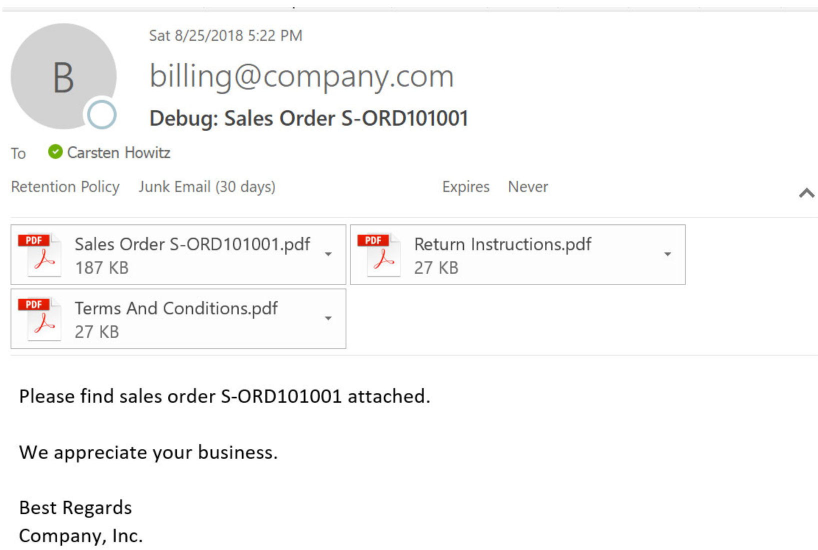
Pick the Email Type and enter the code and description. Click Import attachment on the line just entered.



Pick the file and it loads it 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.



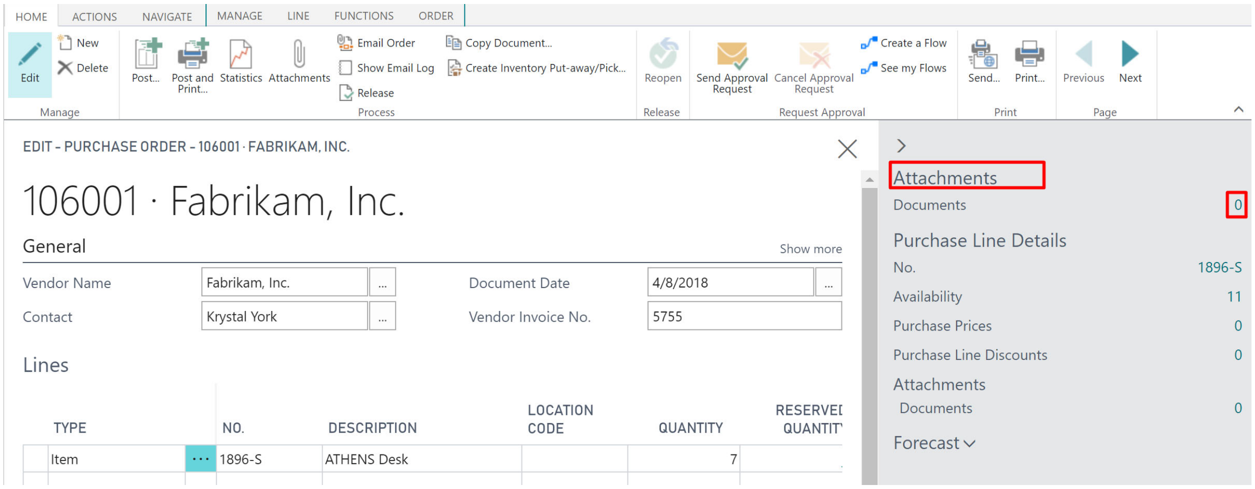
In the above case, two attachments will be sent with the sales order. Make sure Active is checked for the document to be included in emails.



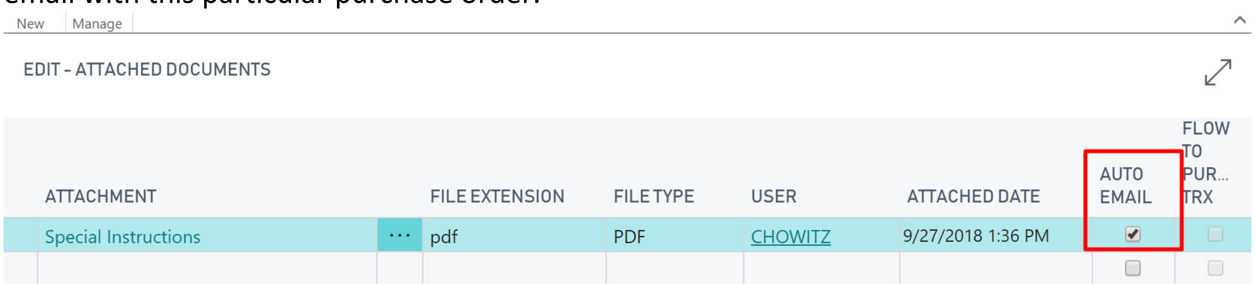
If you use the Export attachment, the file will be downloaded to your Downloads folder.
If you like to delete the attachment, delete the entire record.

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 would like to email special instructions with the purchase order.
Open the attachments pane:



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

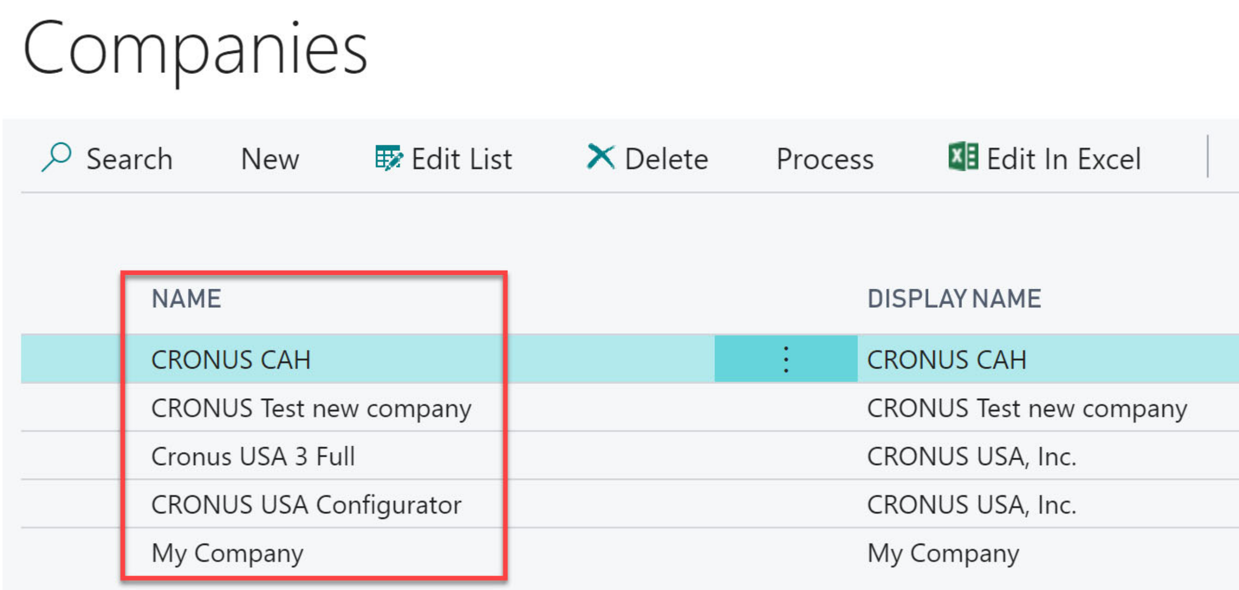


Make sure to check the Auto Email checkbox. Any document you load here will be emailed along with the purchase order if the Auto Email is checked. If not, it will not be emailed.

Trial Period and Activating/Renewing a Subscription

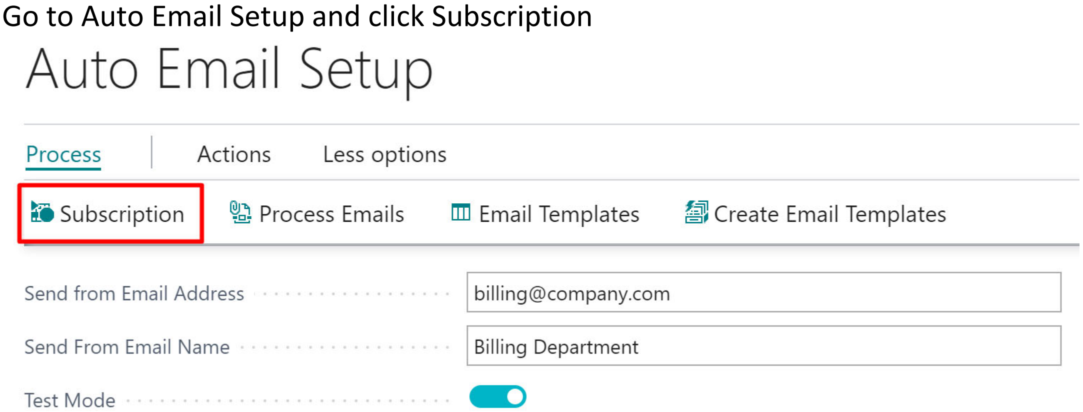
When you have installed Auto Email, it will automatically run for a trail period of 30 days. During that time, you are free to evaluate the solution and there are no restrictions to the version running under the trial period.
Once the trial period has expired, Auto Email will no longer send emails. To 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”:

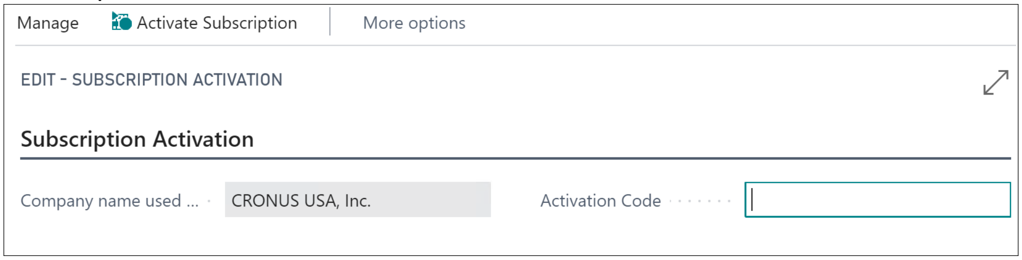


Pick the company name from the name column (not the Display Name) and send it to SimCrest together with the request for a subscription. Subscriptions usually run for 1 year at a time but can be customized to your specific needs.
Once purchased, SimCrest will issue you an activation code. Here is how to activate the subscription:

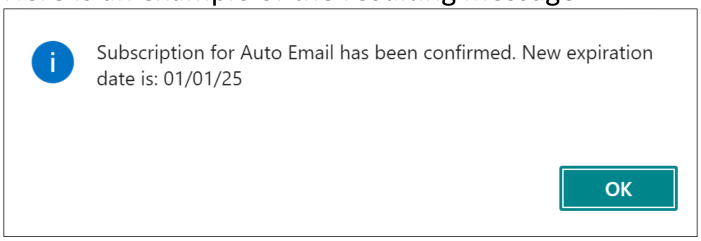
- Go to Auto Email Setup and click Subscription



- 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



- Here is an example of the resulting message



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.

Extending Auto Email

The Auto Email App has been made extensible. That means that your Business Central partner (or SimCrest) can extend the solution with new features, like support for a new document type. Please contact SimCrest to get access to the Auto Email Developer's manual.

Frequently Asked Questions

Q: Is it possible to send sales orders to one set of email addresses and sales invoices and shipments to other email addresses for the same customer?

A: Yes. Under the customer you will set up Auto Email Tos. For each document type, you can specify the email addresses. If a document type has no email addresses defined, the default emails on the customer card (under Auto Email) will be used instead.

Q: I like to send certain customers invoices that looks different than those sent to other customers. Same goes for other document types like sales shipments. Is that possible?

A: Yes, you will need to set up several Auto Email Template Groups and assign them to the customers in question. Each group will define the templates with the different reports.

Q: Can I change the Template Group on a document and achieve a different email experience for that particular document?

A: Yes. On each document, the template group will be displayed on the General tab. Just change the group and the email experience will change to that of the new group assigned to the document. If the document is posted, the new email template will apply to this document also.

Q: I am getting errors in the Email Log. The error says "SMTP error" of some kind. How can I resolve this error?

A: Auto Email is using the standard SMTP email features of Business Central. Any SMTP error that may occur will be related to connection issues with your SMTP provider or invalid email addresses or email domains not supported by the SMTP provider. Please contact your SMTP provider for more information.

Q: I have resolved the SMTP errors above, but the email log entries say they are completed. How can I send the emails that had errors again?

A: Edit each entry. Change Status = Created and uncheck Completed for each entry. The job queue will pick up the changed log entries on its next run. You can also click Process Emails from the log to force an email run manually.

SMTP Trouble Shooting

Auto Email is using the standard SMTP service of Dynamics 365 Business Central, which is communicating to your SMTP provider. Auto Email are simply sending the email information to the SMTP service that will take it from there.

If you see SMTP errors in the Auto Email log, there is an issue with one of the following:

1. SMTP Setup issue. Make sure the SMTP server settings are correct.
2. Connection issues. The SMTP service is not seeing the SMTP provider. Check login and password setup. Check port settings.
3. SMTP email violations. Emails are being sent with from email addresses that are not in the correct domain. You may try to send emails from abc@company_A.com and company_A.com is not your domain.

SMTP email violation are more and more common. SMTP provider are protecting against spammers and they usually will not allow from emails in another domain than the domain you have set up with them. Make sure all email addresses you are sending from are in your domain.

SMTP errors can be challenging to troubleshoot, but here are some well-known errors and their most likely causes (errors may not be exactly like below).

Error: SMTP Error: The remote certificate is invalid according to the validation procedure.

Likely issue: SMTP setup issue. The STMP server address is pointing to an unsupported host.

Error: SMTP Error: No such host is known

Likely issue: SMTP Setup issue. The SMTP Server address is not correct.

Error: SMTP Error: The operation has timed out.

Likely issue: SMTP setup issue. The port or authentication method is not correct.

Error: SMTP Authentication Error: The SMTP server has unexpectedly disconnected.

Likely issue: User ID or password is incorrect, or login expired or unsupported.

SMTP Error: Unable to read data from the transport connection: net_io_connect

Likely issue: User ID or password is incorrect, or login expired or unsupported.