

Auto Email

Version 15.2.3.0

Setup and User Manual

For Microsoft Dynamics 365 Business Central

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Contents

Description	3
Email Delivery	3
Auto Email License	4
Setup of Auto Email	4
SMTP setup	4
Important note on SMTP services	4
Auto Email Setup.....	5
General Tab	5
Statement Options.....	6
License Tab.....	7
Actions	7
Auto Email Templates	8
Copy Email Templates.....	9
Merge Fields for Templates	10
Template Wizard.....	10
Customer Setup	11
Auto Email To's	12
Auto Email Template Groups.....	12
Copy Email Template Groups.....	13
Email Template Group Flow.....	13
Vendor Setup	14
Job Queue Setup.....	14
Permissions	15
User Manual.....	16
Special emails.....	17
Email Customer Statement.....	18
Email Collection	18
Auto Email Log File.....	19
Auto Email Dashboard	20
Test Mode	21
Auto Email Customer Statements.....	22
Auto Email Attachments	23
General Attachments.....	23
Specific Attachments	25
Trial Period and Activating/Renewing a Subscription	27
Customer Support and Request for new features.....	28
Extending Auto Email.....	28
Frequently Asked Questions	29
SMTP Trouble Shooting	30

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.

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.

SMTP Mail Setup

Apply Office 365...erver Settings
Test Email Setup
More options

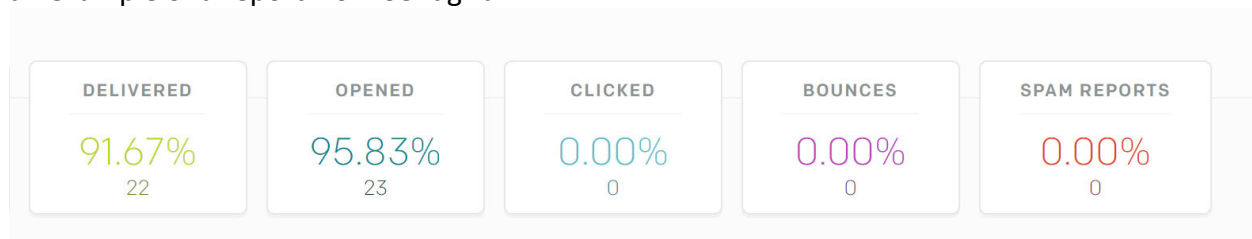
General

SMTP Server	smtp.sendgrid.net	Password
SMTP Server Port	25	Secure Connection	<input checked="" type="checkbox"/>
Authentication	Basic	Send As	sales@simcrest.com
User ID	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 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.

Auto Email Setup

Subscription		Process Emails		Email Templates		Create New Email Templates		Create Job Queue Entry		Email Attachments		Email Log		More options	
General															
Send from Email Address	billing@company.com			Email Cr.Memos When Posting	<input type="checkbox"/>										
Send From Email Name	Billing Department			Email Shipments When Posting	<input type="checkbox"/>										
Email Sent Message Delay (in milliseconds)	1000			Email Prepayment Invoices When Posting	<input type="checkbox"/>										
Test Mode	<input type="checkbox"/>			Email Prepayment Cr.Memos When Posting	<input type="checkbox"/>										
Test Mode To Email				Email Reminders When Issuing	<input type="checkbox"/>										
Email Invoices When Posting	<input checked="" type="checkbox"/>			Email Finance Charge Memo When Issuing	<input type="checkbox"/>										
Statement Options															
Start Date	1/1/2000			Update Statement No.	<input type="checkbox"/>										
Statement To-date Formula	-1M+CM			Statement Style	Open Item										
Print All with Balance	<input checked="" type="checkbox"/>			Aging Method	Due Date										
Print All with Entries	<input type="checkbox"/>			Length of Aging Periods	1M										
License															
Expiration Date	12/31/2020			Licensed Company Name	CRONUS CAH										
Trial Period	<input type="checkbox"/>														

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

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 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:

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

Here is the Sales Order Template:

General	
Code	SALESORDER
Description	Sales Order Template
Default	<input checked="" type="checkbox"/>
Document Type	Sales Order
Customer Type	Bill-To
Report No.	1305
Email Address From	sales@company.com
Email From Name	Sales Department
Email from User	<input checked="" type="checkbox"/>
Email Subject	Sales Order %1
Email Body Text	Dear %2. Please find sales order %1 attached. We appreciate your business. Best Regards Company, Inc.
Test Mode	<input checked="" 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
- **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.	<input type="text" value="70163326"/>
Invoice Report No.	<input type="text" value="1306"/>
Credit Memo Report No.	<input type="text" value="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	:		<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

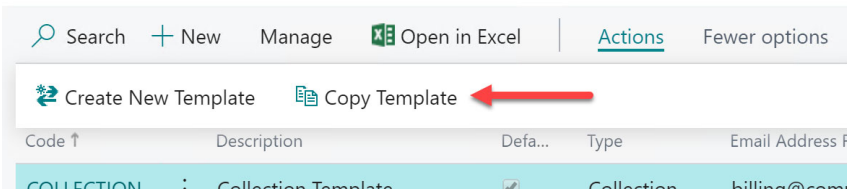
Here the email body is provided. You can merge two fields from the document into the text (use %1 and %2 to place the fields in the text). The merge fields are provided in a table below for each document.

- 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.

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:

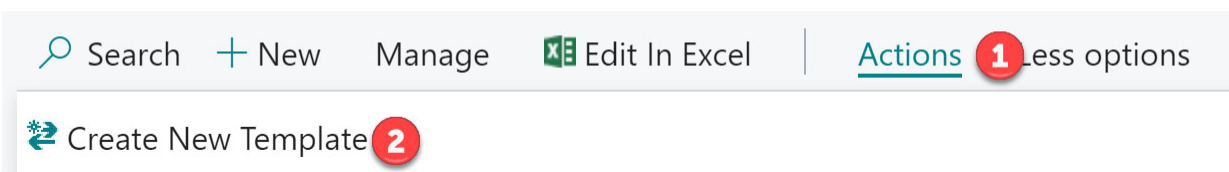
Document Type	%1	%2
Sales Quote	Quote No.	Customer Name
Sales Order	Order No.	Customer Name
Sales Return Order	Return Order No.	Customer Name
Sales/Service Invoice	Invoice No.	Customer Name
Sales/Service Credit Memo	Credit Memo No.	Customer Name
Sales Shipment	Shipment No.	Customer Name
Short Paid Notice	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:

AUTO EMAIL TEMPLATES



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

CREATE AUTO EMAIL TEMPLATE

ENTER GENERAL INFORMATION
Enter Document Type, Code and Description. Code must be unique.

Document Type

Sales Return Order

Code

RETURN ORDER

Description

Return Order

Back

Next

Finish

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.

Invoicing

Show less

Customer

Tax Registration No.

GLN

Copy Sell-to Addr. to Qte From ...

Tax Liable

Tax Area Code

Tax Identification Type

Tax Exemption No.

Invoice Copies

POSTING DETAILS

Gen. Bus. Posting Group

Tax Bus. Posting Group

Customer Posting Group

PRICES AND DISCOUNTS

Currency Code

Customer Price Group

Customer Disc. Group

Allow Line Disc.

Invoice Disc. Code

Auto-Email

Auto Email Statements

Email To

ccEmail To

bccEmail To

Auto Email Tos

Auto Email Template Group

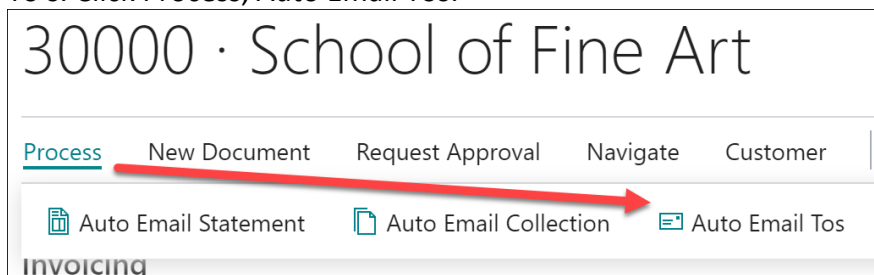
A check mark in Auto Email Statements is used to indicate that the customer will receive automated statements via email rather than printed and mailed. You must have Email To filled

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:



AUTO EMAIL TOS | WORK DATE: 12/31/2018 ✓ SAVED

Search + New Edit List Delete Page

Document Type ↑	Email To	ccEmail To	bccEmail To
→ Sales Quot. ▾	purhasing@company.com		
Purchase Or...	sales@company.com		
Reminder	ap@company.com		

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.

AUTO EMAIL TEMPLATE GROUP CARD | WORK DATE: 12/31/2018

LARGE

General

Code	LARGE	Collection Template	COLLECTION
Description	Large account	Reminder Template	REMINDER
Sales Quote Template	SALESQUOTE	Fin. Change Memo Template	
Sales Order Template	SALESORDER	Email Invoices When Posting	<input checked="" type="checkbox"/>
Sales Return Order Template	SALESRETURN	Email Cr.Memos When Posting	<input type="checkbox"/>
Sales Invoice Template	SALESINVOICE	Email Shipments When Posting	<input checked="" type="checkbox"/>
Sales Credit Memo Template	SALESCRMEMO	Email Prepayment Invoices When Posting	<input type="checkbox"/>
Sales Shipment Template	SALESSHIPMENT	Email Prepayment Cr.Memos When Posting	<input type="checkbox"/>
Shortpaid Template		Email Reminders When Issuing	<input checked="" type="checkbox"/>
Statement Template	STATEMENT	Email Finance Charge Memo When Issuing	<input checked="" type="checkbox"/>

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.

AUTO EMAIL TEMPLATE GROUPS | WORK DATE: 4/8/2019

Search + New Edit List Delete Edit View

Copy Template Group

Code	Description	Template	Tem
→ LARGE	Large Account	SALESQUOTE	SAL

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.

Auto E-Mail			
Email To	<input type="text" value="krystal.york@contoso.com"/>	bccEmail To	<input type="text"/>
ccEmail To	<input type="text"/>	Email Template (PO)	<input type="text" value="PURCHORDER"/> ▾

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.

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”.

Codeunit · 70163325 · SIMC AEM Send Emails

Process Report Actions Navigate Less options

General

Show more

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 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"/> + New Edit List Delete Permissions User Groups Copy Permission Set... </div>			
Permission Set ↑	Name	Type ↑	Extension Name
→ SIMCREST AUTOEMAIL	SimCrest Auto Email	Extension	Auto Email

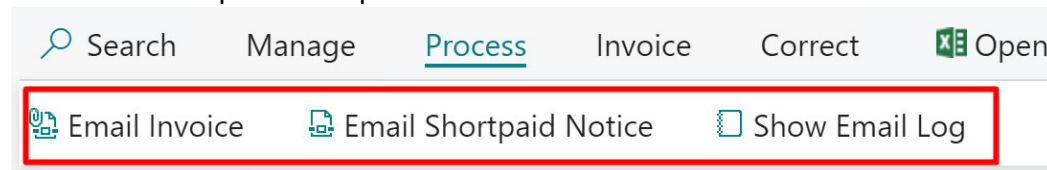
Assign this permission set to all the users that should have access to Auto Email.

User Manual

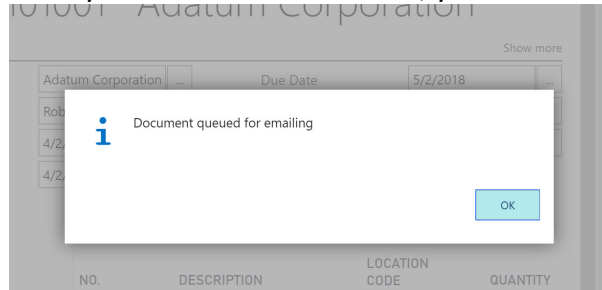
The ability to email documents has been added to several pages (cards and lists):

- 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
- Reminders
- Finance Charge Memos

Here is an example from a posted invoice:



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



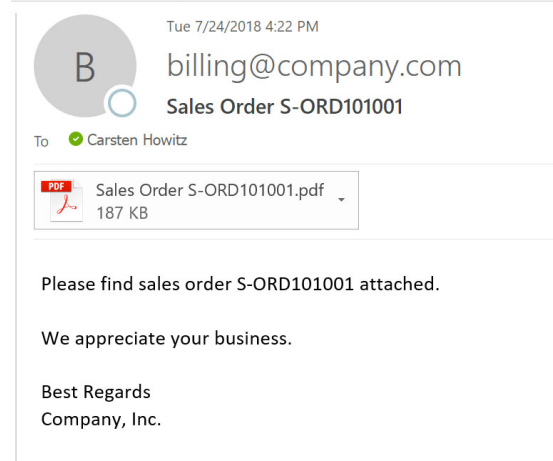
The Show Email Log button, will show all the related log entries for the document you are standing on. Here is an example for a Sales Order.

Auto Email Log

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... 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:

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. Please find sales invoice %1 attached. We appreciate your business. Best Regards 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 statements via email ("Auto Email Statements" 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 email

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

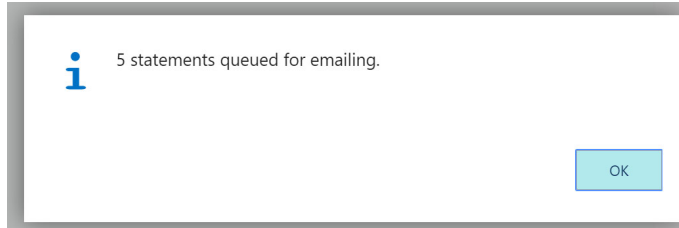
Customer

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... 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:

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 checked="" type="checkbox"/>
			<input type="checkbox"/>			<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:

AUTO EMAIL ATTACHMENTS WORK DATE: 12/31/2018						
Search	+ New	Edit List	Delete	Import Attachment	Export Attachment	Page ...
Email Type ↑	Code ↑	Description	Atta...	Attachment Name	Attachment Date/Time	


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

AUTO EMAIL ATTACHMENTS WORK DATE: 12/31/2018						✓ SAVED			
Search	+ New	Edit List	Delete	Import Attachment	Export Attachment	Page	...		
Email Type ↑	Code ↑	Description	Atta...	Attachment Name	Attachment Date/Time				
→ Sales Order	TERMS	Terms and Conditions	<input checked="" type="checkbox"/>	Terms and Conditions.pdf	12/16/2019 3:55 ...				

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.

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"/>


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.




Sat 8/25/2018 5:22 PM


billing@company.com


Debug: Sales Order S-ORD101001

To  Carsten Howitz

Retention Policy Junk Email (30 days) Expires Never

 Sales Order S-ORD101001.pdf
187 KB

 Return Instructions.pdf
27 KB

 Terms And Conditions.pdf
27 KB

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 would 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 would 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.

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 SMTP 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.