

ANAPTIS MAILPLUS DOCUMENTATION

Microsoft Dynamics 365 Business Central Extension

anaptis GmbH

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1 INTRODUCTION

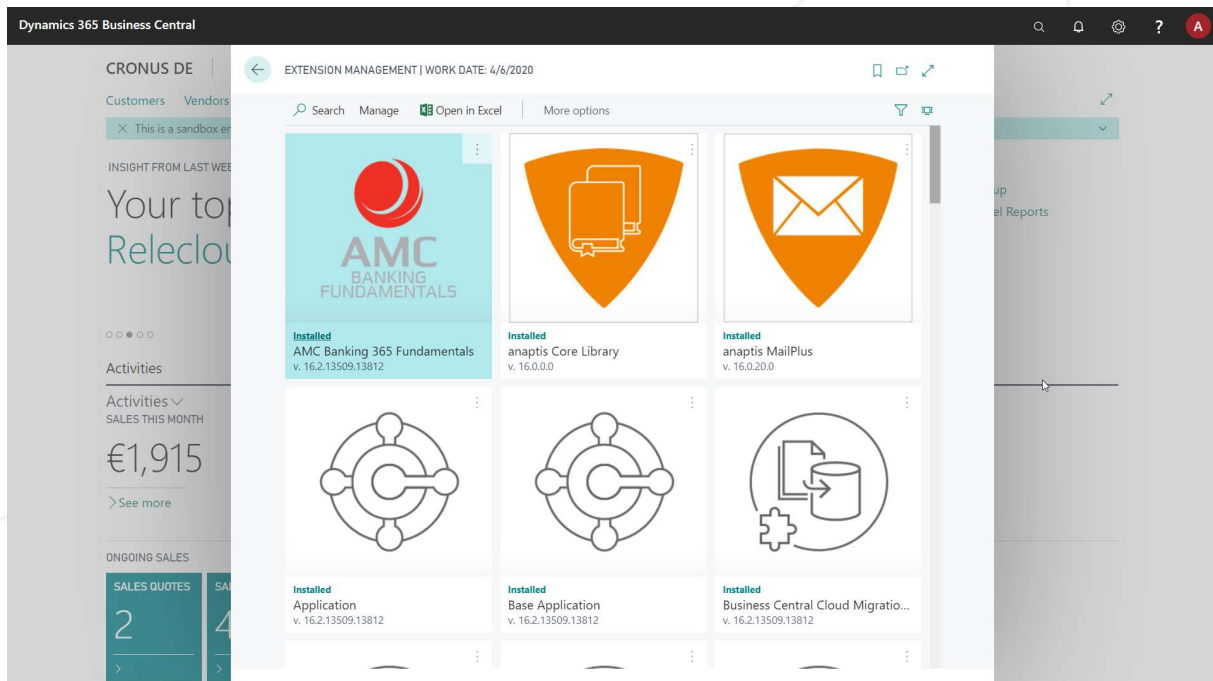
anaptis MailPlus (hereinafter referred to as MailPlus) is an extension for Microsoft Dynamics 365 Business Central. MailPlus gives the user the opportunity to expand the Dynamics 365 Business Central Standard so that he/she can change the email as required.

In detail, the extension currently has the following functionality:

- Presetting different mail addresses (To, CC, BCC) at the customer for each document type
- Preassignment of a new subject and the name of the attachment
- Hierarchical setup: from a "global" for all e-mails via a "document type" -controlled (e.g. sending all orders to a specific BCC) to fine definition via "accounts receivable / accounts payable"
- This extension can be used in Purchase and Sales

2 INSTALLATION

After you have downloaded the application from the AppSource, you can install the app as usual under "Extensions".

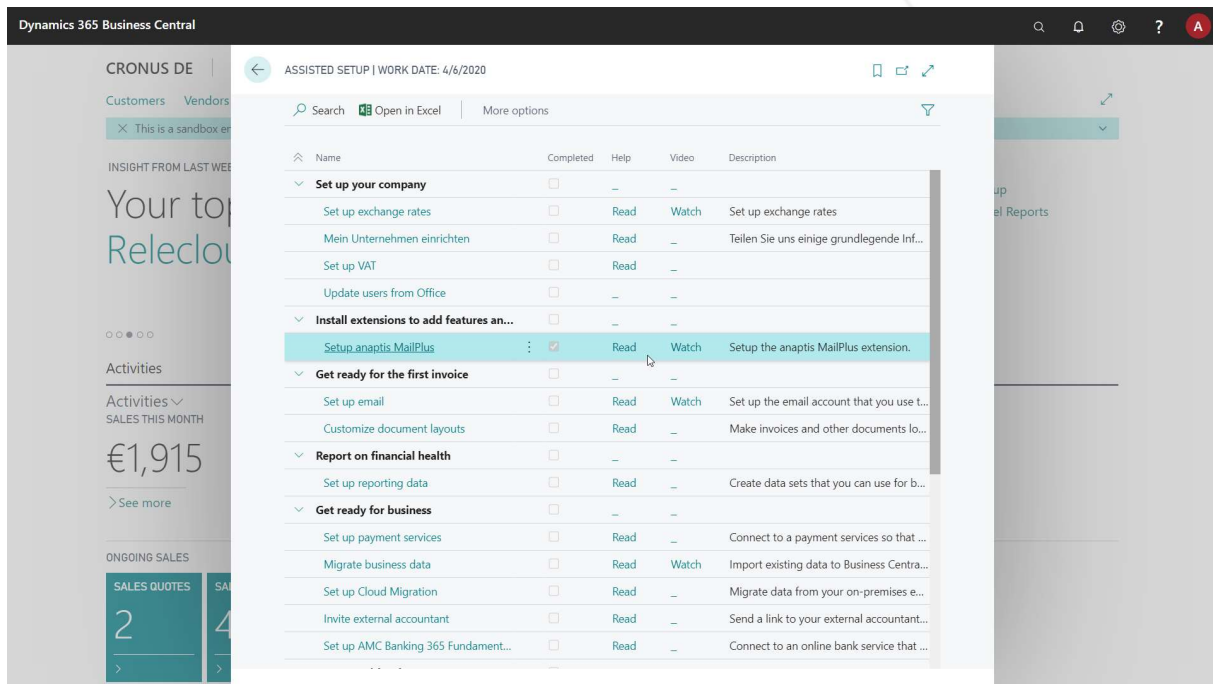


When you have read and accepted the license agreement, MailPlus will be installed. MailPlus is available in English (United States) and German.

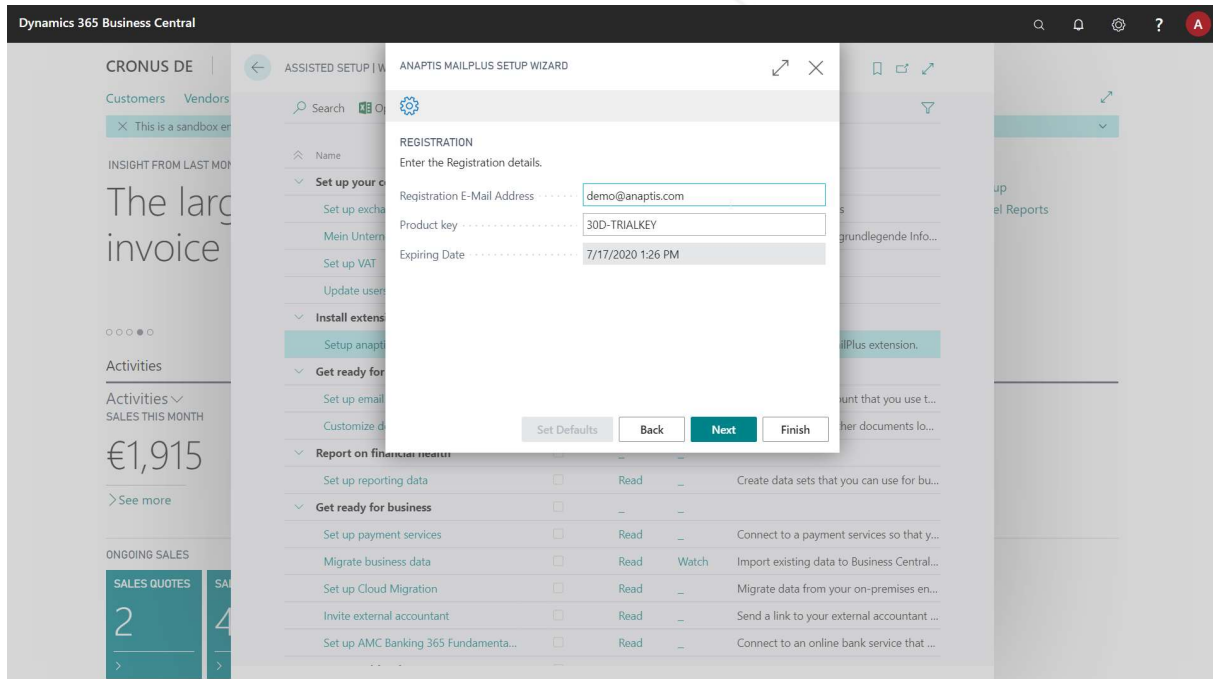
3 FIRST BASIC SETUP

Hence, it is assumed that the Dynamics 365 Business Central SMTP setup has been completed. This can be found via the search function by entering the term "SMTP facility". This is a standard facility for sending e-mail from Dynamics 365 Business Central.

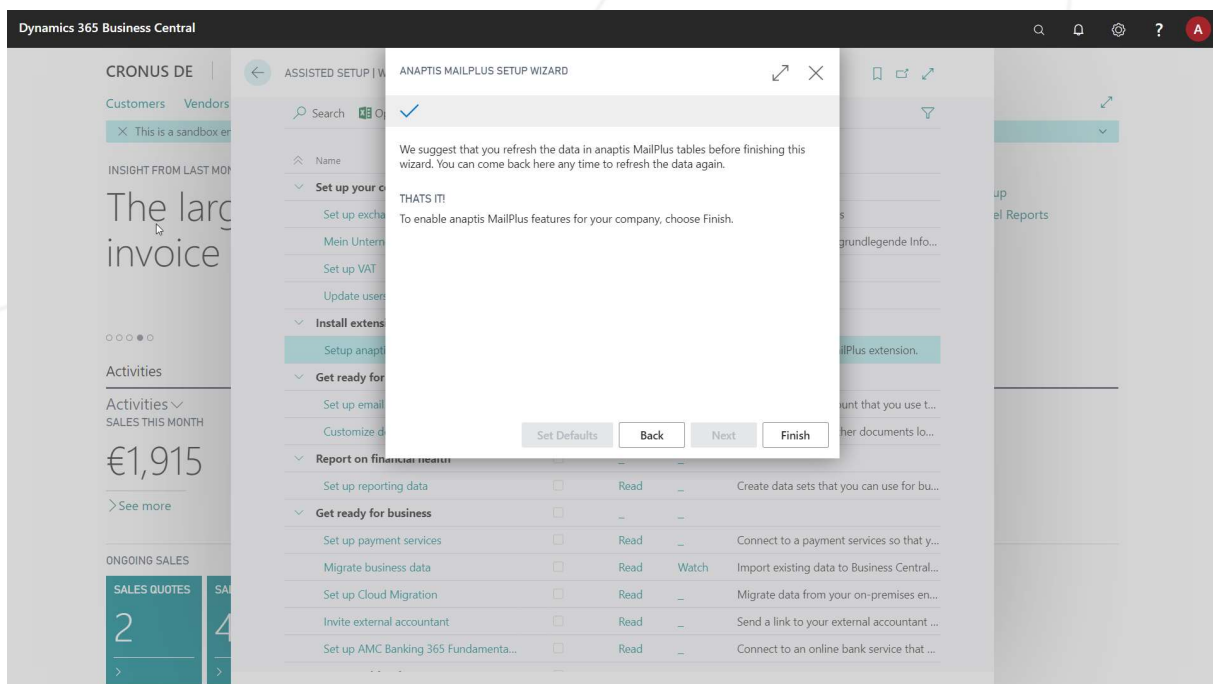
Before MailPlus can be used, this setup must be successfully completed. You can find the setup wizard in "Supported facilities" in your Dynamics 365 Business Central.



If you set up the extension for the first time, you can use the app to its full extent for 30 days.



If you like it and wish to use it further, you can purchase a registration key in our [anaptis-Shop](#).



4 DETAILED DESCRIPTION OF THE HIERARCHY FUNCTIONALITY

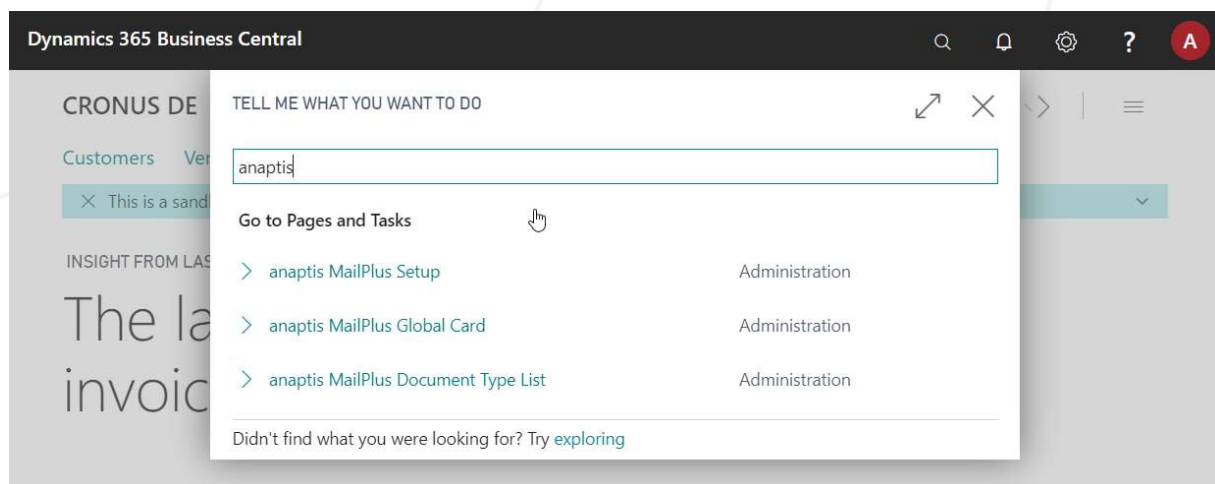
There are various setup levels (global, document type and payables / receivables) for the configuration of the outgoing e-mail, which have different priorities. Among other things, the "To" email address can come from the global setup if the field in the document type controlled setup is not filled. If a mail address is entered there, the "To" field of the global setup is ignored and that of the document type-controlled setup is used. Is this (email) field even given e.g. in the Accounts receivables, this is used.

Here is the priority order in detail:

Global Settings < Typed Settings < Accounts Receivable / Accounts Payable Settings

This means that customer / vendor settings have the highest priority per field and thus overwrite the global configuration. Not the entire setup is used.

- Global settings
 - For all outgoing mails
 - To be found under „anaptis MailPlus Global Card“
- Individual settings
 - For all outgoing sales orders, offers, credit notes, reminders etc..
 - To be found under „anaptis MailPlus Document Type List“
- Customer settings
 - Personalized settings for individual customers
 - To be found in the customer list and customer card
- Vendor settings
 - Personalized settings for individual vendors
 - To be found in the vendor list and the vendor card



5 GLOBAL SETUP

This is the top level of the setup and takes effect if the fields are not filled by the two lower levels. This level MUST NOT be filled.

Dynamics 365 Business Central

... GLOBAL CARD | WORK DATE: 4/6/2020

Global

Mail Settings

Subject My subject

Addressing | Manage

Mail-address ↑	Add MailTo	Add CC	Add BCC
demo@contonso.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
→ musterman@contonso.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

1. Here you can enter a subject.
2. Specify the email addresses to which the email should be sent. A check box can be used to decide whether to send directly to this address or whether it should be inserted as CC or BCC.

5.1 NOTICE ON E-MAIL ADDRESS SETUP

In order to avoid incorrect entries, a mail address list is stored each time an email address is entered in MailPlus. Only from this list mail addresses can be used in MailPlus.

Addressing | Manage

Mail-address ↑	Add MailTo	Add CC	Add BCC
demo@contonso.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
musterman@contonso.com	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

→

Type ↑	Code ↑	Email ↑
→ Recipient	DEMO@CONT...	demo@contonso.com
Recipient	MUSTERMAN...	musterman@contonso.com
+ New		

Select from full list

The e-mail addresses can be managed in the "Addressing" area in the "EMAIL" field via "New" (global, document-controlled and customer / vendor).

6 DOCUMENT CONTROLLED SETUP

Setup can be stored for the following document types:

- Sales offer
- Sales order
- Sales invoice
- Sales complaint
- Sales credit memo
- Reminder
- Purchase order
- Purchase invoice
- Purchase credit memo

Dynamics 365 Business Central

...NT TYPE CARD | WORK DATE: 4/6/2020

S.Quote

General

Type: S.Quote (dropdown menu open, showing options: S.Order, S.Quote, S.Invoice, S.Credit Memo, S.Ret.Rcpt, P.Order, Reminder, P.Invoice, P.Credit Memo)

Mail Settings






Subject: [text input field]

Addressing | Manage

Mail-address ↑	Add MailTo	Add CC	Add BCC
→ [text input field]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[text input field]	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

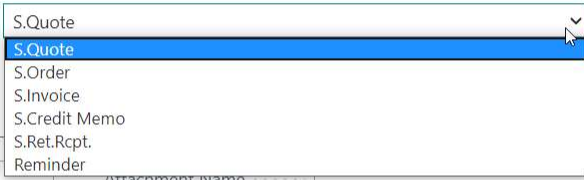
1. Under "General" you specify for which outgoing document (e.g. invoice, sales order, sales offer, ...) this setup applies.
2. Define the subject and the name of the PDF attachment.
3. Define the addressing, if necessary add additional recipients, CCs and BCCs.

7 CUSTOMER-SETUP

← ...STOMER CARD | WORK DATE: 4/6/2020     

S.Quote · Customer · 10000


General

Type 

Mail Settings

Subject Attachment Name

Addressing

[Manage](#) 

	Mail-address ↑		Add MailTo	Add CC	Add BCC
→			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. Under "General" you specify the outgoing document (e.g. invoice, sales order, sales offer, ...) for which this setup applies.
2. Define the subject and the name of the PDF attachment..
3. Define the addressing, if necessary add additional recipients, CCs and BCCs.

8 VENDOR SETUP

P.Order · Vendor · 10000

General

Type

P.Order

P.Order

P.Invoice

P.Cr.Memo

Mail Settings

Subject Attachment Name

Addressing

Manage



	Mail-address ↑		Add MailTo	Add CC	Add BCC
→	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="text"/>				

1. Under "General" you define the incoming document (e.g. invoice, sales order, sales offer, ...) for which this setup applies..
2. Define the subject and the name of the PDF attachment.
3. Define the addressing, if necessary add additional recipients, CCs and BCCs.

9 USE AND CALLS

The functionality of MailPlus is triggered by the following actions:

9.1 SEND SALES QUOTE

SALES QUOTE
1001 · Trey Research

Process | Quote | Request Approval | Actions | Navigate | Less options

Send by Email | Make Order | Make Invoice

Customer Name: Trey Research | Due Date: 4/16/2018
Contact: Brigitte Werner | Requested Deliver...

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
Item	1936-S	BERLIN Gästestuhl, gelb		10

Subtotal Excl. VAT (...): 1,937.00 | Total Excl. VAT (EUR):

Sell-to Customer Sales History

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
1	0	0
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
1	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
51	51	0

9.2 SETUP SALES ORDER

SALES ORDER
101003 · School of Fine Art

Process | Posting | Request Approval | Actions | Navigate | Less options

Email Confirmation... | Statistics

Release | Attachments | Reopen | Create Inventory...t-away/Pick... | Print Confirmation...

Contact: Meagan Bond | Requested Deliver: 4/23/2018
Posting Date: 4/22/2018 | External Document:
Order Date: 4/22/2018

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
Item	1920-S	ANTWERP Conference Table		8

Sell-to Customer Sales History

Ongoing Sales Quotes	Ongoing Sales Blanket Orders	Ongoing Sales Orders
0	0	1
Ongoing Sales Invoices	Ongoing Sales Return Orders	Ongoing Sales Credit Memos
1	0	0
Posted Sales Shipments	Posted Sales Invoices	Posted Sales Return Receipts
60	60	0
0		

9.3 POST AND SEND SALES INVOICE

Dynamics 365 Business Central Sales Quotes Sales Orders Sales Invoices 102199 · Adatum Corporation

SALES INVOICE

102199 · Adatum Corporation

Posting Prepare Invoice Release Request Approval Actions Navigate Less options

Post Post and New... **Post and Send...** Test Report...

Customer Name: Adatum Corporation Posting Date: 4/4/2018
Contact: Jakob Otto Due Date: 4/18/2018

Documents: 0

Customer Details

Customer No. 10000
Phone No.
Email jakob.otto@contoso.com
Fax No.
Credit Limit (LCY) 0.00
Available Credit (LCY) 0.00
Payment Terms Co. 14 TAGE
Contact Jakob Otto

Item Details - Invoicing

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE
Item	1968-S	MEXICO Bürostuhl, schwarz		5	STÜ
Item	1996-S	ATLANTA Whiteboard, Basis		7	STÜ
Comment		Vielen Dank für die Bestellung			

9.4 POST AND SEND SALES RETURN ORDERS

Dynamics 365 Business Central Sales Return Orders

Sales Return Orders

Search + New Manage Process Request Approval Release Open in Excel Actions Navigate ...

Post... Post and Print... Statistics Print... Get Posted Documents to Reverse... **Post and Email...** Post Batch...

NO.	NO.	SELL-TO CUSTOMER NAME	NO.	CODE	USER ID	STATUS
1001	20000	Trey Research				Open

Customer Statistics

Customer No. 20000
Balance (LCY) 15,155.96

9.5 POST AND SEND SALES CREDIT MEMO

Dynamics 365 Business Central Sales Credit Memos 1001 · Trey Research

1001 · Trey Research

Release Posting Prepare Credit Memo Request Approval Actions Navigate Less options

Post **Post and Send...** Test Report...

Customer Name: Trey Research Posting Date: 5/1/2018
Contact: Brigitte Werner Due Date: 5/1/2018

Documents: 0

Customer Statistics

Customer No. 20000
Balance (LCY) 15,155.96

SALES

Outstanding Order... 0.00
Shipped Not Invd... 0.00
Outstanding Invoic... 1,196.90
Total (LCY) 16,352.86
Credit Limit (LCY) 0.00
Overdue Amounts... 15,155.96
Total Sales (LCY) 21,590.20

TYPE	DESCRIPTION	LOCATION CODE	QUANTITY	UNIT OF MEASURE
Item	ONDON Schreibtischstuhl, blau		2	STÜCK

9.6 SEND REMINDERS VIA E-MAIL

Dynamics 365 Business Central Issued Reminders

Issued Reminders

Search Manage Process Report Open in Excel Actions Navigate Report Less options

Print... **Send by Email** Navigate Statistics

9.7 SEND PURCHASE ORDER

Dynamics 365 Business Central | Purchase Orders | 106003 - Wide World Importers

PURCHASE ORDER

106003 · Wide World Importers

Process Release Request Approval **Print** Actions Navigate Less options

Send... Print...

Vendor Name: Wide World Importers Vendor Invoice No.: D-304
 Contact: Han Carstens Vendor Shipment: ...
 Document Date: 4/13/2018

Documents: 0

Vendor Statistics

Vendor No.	40000
Balance (LCY)	20,526.66
Outstanding Order...	13,071.91
Amt. Rcd. Not Inv...	0.00
Outstanding Invoi...	0.00
Total (LCY)	33,598.57
Overdue Amounts...	20,526.66
Invoiced Prepaym...	0.00

Buy-from Vendor History

Lines Manage More options

TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY
Item	1900-S	PARIS Gästestuhl, schwarz		8
Item	1908-S	LONDON Schreibtischstuhl, ...		20
Item	1906-S	ATHENS Schubladenelement		20

9.8 SEND PURCHASE CREDIT MEMO

Dynamics 365 Business Central

POSTED PURCHASE CREDIT MEMO | WORK DATE: 4/6/2020

109001 · Fabrikam, Inc.

Navigate Print/Send Credit Memo **Actions** Navigate Fewer options

Vendor Print... Attach as PDF **Send as Email** Navigate Incoming Document

No.: 109001 Document Date: 4/8/2020
 Vendor: Fabrikam, Inc. Vendor Cr. Memo No.: 4535345
 Contact: Krystal York Order Address Code: ...
 Posting Date: 4/8/2020

Incoming Document Files

Name Type
 (There is nothing to show in this view)

Lines Manage More options

Type	No.	Cross-Reference No.	Description	Return Reason Code	Quantity	Unit Me.
→ Comment			Invoice No. 108209:			
Comment			Inv. No. 108209 - Rcpt. No. 107...			
Item	1928-S		AMSTERDAM Lamp		5	STI

Invoice Discount Amount: 0.00 Total VAT (EUR): 0.00

9.9 SEND PURCHASE INVOICE

Dynamics 365 Business Central

POSTED PURCHASE INVOICE | WORK DATE: 4/6/2020

108209 · Fabrikam, Inc.

Process Correct Invoice Print/Send Navigate **Actions** Navigate Fewer options

Print... Attach as PDF **Send as Email** Correct Actions Incoming Document

Vendor: Fabrikam, Inc. Due Date: 4/30/2020
 Contact: Krystal York Vendor Invoice No.: 107209
 Posting Date: 4/8/2020

Incoming Document Files

Name Type
 (There is nothing to show in this view)

Lines Manage More options

Type	No.	Description	Quantity	Unit of Measure Code	Direct Unit Cost Excl. VAT
→ Item	1928-S	AMSTERDAM Lamp	5	STÜCK	43.10

Invoice Discount Amount: 0.00 Total VAT (EUR): 0.00
 Total Excl. VAT (EUR): 215.50 Total Incl. VAT (EUR): 215.50