

Product Fact Sheet DXC Smart Business Form Email Manager

for Microsoft Dynamics 365 for Finance and Operations



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Overview

DXC Smart Business Form Email Manager for Microsoft Dynamics 365 Finance and Operations is a simple and smart solution for automated emailing of business forms and other reports to your customers and vendors. The solution automates distribution of business forms and reports based on contact preferences using rich format email templates. The following are example business forms processes that can be streamlined using the DXC Smart Business Form Email Manager solution:

- Customer
 - Sales agreement confirmation
 - Sales quotation
 - Sales order confirmation
 - Sales delivery note
 - Sales invoice
 - Sales return order
 - Sales return acknowledgement
 - Free text invoice
 - Customer account statement
 - Customer payment advice
 - Collection letter note
- Vendor
 - Request for quotation
 - Purchase order
 - Vendor payment advice
- Project
 - Project quotation
 - Project invoice
- Inventory management
 - Transfer overview
- Warehouse management
 - Bill of lading
 - Container contents

Email Distribution

Business forms are sent automatically using email templates and are directed to recipients based on contact information setup on the customer account.

- Email distribution may be controlled with the ability to hold and release documents before they are sent with the capability to fix and resend emails with incorrect addresses.
- Email content is authored using placeholder tags which dynamically looks information up from the business form or report to include in the email subject or body.
- Email can include the business form as well as additional file attachments associated with the business form or report.

Save to Azure Storage

DXC Smart Business Form Email Manager can also save copies of the emailed/printed business forms or reports into Azure storage. This allows for an archive of the actual business forms produced and sent. File location and file name can utilize placeholder tags which dynamically looks information up from the business form or report to include in the file name and define the Azure Storage location. Any fixed list placeholder tags are stored as metadata against the file in the Azure Storage.

Extendable

While out of the box functionality is for the business forms listed above, the solution can be extended on further business forms or reports, and a technical guide is provided. Alternatively, upon request additional business forms or reports can be evaluated for product enhancements. DXC Smart Business Form Email Manager for Microsoft Dynamics 365 Finance and Operations is simple to deploy, setup, and configure. Using the Microsoft Dynamics 365 extension framework you can deploy continuous updates for your Microsoft Dynamics 365 installation while maintaining compatibility with the add-on without taking a new release or merging code¹.

¹ Major updates to the underlying Microsoft Dynamics 365 solution may require a new version of the add-on solution to remain compatible with Microsoft Dynamics 365. Best practices in extension-based development are used to maintain maximum compatibility with future versions of Microsoft Dynamics 365. Most incremental Microsoft Dynamics 365 updates should not require a new version of the add-on solution, but testing should always be performed before deploying to a production environment.

Features

Automatic routing to multiple email addresses:

Run processes such as invoicing or EFT payments once and automatically send business forms, reports and attached documents to appropriate parties using configured email addresses. Supported reports for automated routing:

- Customer
 - Sales agreement confirmation
 - Sales quotation
 - Sales order confirmation
 - Sales delivery note
 - Sales invoice
 - Sales return order
 - Sales return acknowledgement
 - Free text invoice
 - Customer account statement
 - Customer payment advice
 - Collection letter note
- Vendor
 - Request for quotation
 - Purchase order
 - Vendor payment advice
- Project
 - Project quotation
 - Project invoice
- Inventory management
 - Transfer overview
- Warehouse management
 - Bill of lading
 - Container contents
- Extendable to other business forms and reports for automated routing using included extension points

Email addresses are configured on customer and vendor contact information as well as customer and vendor contacts. Recipients can be assigned for single or multiple business forms and reports based on user definable address contact information purposes.

Email Templates

- Embed document details directly in the body of the email for professional and contextual emails
- Create unique email templates for each process or report
- Send **any** report using a rich format email template

Email management

- Emails can be held before sending
- Email send errors can be fixed and re-sent.
- Customer/Vendor accounts missing email addresses can be printed or routed to an alternative email account.
- Attach other recipients dynamically including the current system user as a To: Cc: or Bcc: recipient.

Re-send Business Forms

- Ability to resend reports to individual recipients directly from the user interface.

Email Attached Documents

- Automatically attach additional documents saved with the business form source record and email template.

Auto Archive to Azure Storage

- Auto archive reports to Azure blob storage with configurable and dynamic file names, directory locations
- Auto archive reports to Azure blob storage with meta data tags to support integration scenarios

Other Features

- Quick setup using data entity for uploading contact information. May also be used for continuous updates.
- Fully integrated with Print management setup within Dynamics 365 Finance and Operations

Screenshots

The screenshot displays the 'Finance and Operations' application interface. On the left, a sidebar lists various email templates: SS_CusInv (Free Text Invoice), SS_CusStm (Customer Account Statement), SS_PayAdv (Payment Advice), SS_PrlInv (Project Invoice), SS_PurOrd (Purchase Order), SS_PurRFQ (Request for Quotation), and SS_SalCon (Sales Order Confirmation). The main area shows the 'Free Text Invoice' template details. It includes fields for Email ID (SS_CusInv), Email description (Free Text Invoice), Sender name (Contoso Team), and Sender email (user@contoso.com). Below these, there are sections for 'General' (Default language code: en-us, Priority: Normal, Batch group) and 'Email message content'. The 'Email message content' section shows a table with columns for Language, Subject, and Has body. The subject line is 'Customer Invoice %InvoiceId% for %InvoiceAccount% %InvoiceAccountName%'. The 'Has body' checkbox is checked.

Screenshot 1. Email templates including fixed and dynamic placeholder tokens

This screenshot shows the same 'Free Text Invoice' template details as Screenshot 1, but with an 'Upload email template' modal window open on the right. The modal window has a title bar with a question mark icon. It contains a text area for the 'Html body of the email message.' with the following content:


```
[Invoice Id: %InvoiceId%
Invoice Account: %InvoiceAccount%
Invoice Account Name: %InvoiceAccountName%
Invoice Date: %InvoiceDate%
Invoice Due Date: %DueDate%
Created Date: %CreatedDate%]
```

 At the bottom of the modal, there are 'OK' and 'Cancel' buttons.

Screenshot 2. Email template body including fixed and dynamic placeholder tokens

Product Fact Sheet – DXC Smart Business Form Email Manager

Email parameters

Smart Send reports

Overview

✓	Report	Report format	Description	Email ID	File name	Recipient	Include account contacts	Hold e-mail in the queue	Purpose
<input checked="" type="checkbox"/>	Customer account statement	CustAccountStatement...	Customer Account S...	SS_CusStm	Customer Account Statement %AccountNu...	Account	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SS Cu
<input checked="" type="checkbox"/>	Purchase order	PurchPurchaseOrder.R...	Purchase Order	SS_PurOrd	Purchase Order %PurchaseOrderId%	Specific	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SS Pu
<input checked="" type="checkbox"/>	Sales Invoice	SalesInvoice.Report	Sales Invoice	SS_SalInv	Sales Invoice %InvoiceId%	Both	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SS Sal
<input checked="" type="checkbox"/>	Free text invoice	FreeTextInvoice.Report	Free Text Invoice	SS_CustInv	Customer Invoice %InvoiceId%	Account	<input type="checkbox"/>	<input type="checkbox"/>	SS Cu
<input checked="" type="checkbox"/>	Sales quotation	SalesQuotation.Report	Sales Quotation	SS_SalQuo	Sales Quotation %QuotationId%	Account	<input type="checkbox"/>	<input type="checkbox"/>	SS Sal
<input checked="" type="checkbox"/>	Project invoice	PSAProjectInvoice.Report	Project Invoice	SS_PjInv	Project Invoice %InvoiceId%	Account	<input type="checkbox"/>	<input type="checkbox"/>	SS Prc
<input checked="" type="checkbox"/>	Sales order confirmation	SalesConfirm.Report	Sales Order Confirm	SS_SalCon	Sales Order Confirmation %ConfirmationId%	Account	<input type="checkbox"/>	<input type="checkbox"/>	SS Sal

General

Test azure blob storage connection

ADDITIONAL ATTACHMENTS

Document handling file type: File

ALTERNATE EMAIL

Send to alternate email: Yes

Email address: Customer.Service@contoso.com

AZURE BLOB STORAGE SETUP

Storage options: All

Blob container: smartsend

Folder name: SalInv

Blob connection string: https://id365Contoso.blob.core...

Overwrite: No

SENDING USER

Email sending user: Cc

Email destination defaults

✓	Document type	Report format	Email ID	File name
<input checked="" type="checkbox"/>	Customer invoice	SalesInvoice.Report	SalInv	Sales Invoice %InvoiceId%
<input checked="" type="checkbox"/>	Sales order confirmation	SalesConfirm.Report	SalCon	Sales Order Confirmation %ConfirmationId%

Screenshot 3. Email parameters defining the business form, email template, recipients, and Azure storage settings

CUSTOMERS

US-009 : Owl Wholesales

General

Addresses

Contact information

+ Add - Remove Advanced

Description	Type	Contact number/address	Extension	Primary ↓	
Owl Wholesales Phone	Phone	123-555-0164		<input checked="" type="checkbox"/>	📞
Owl Accounts Payable	Email address	accounts.payable@owl.wholesale.com		<input type="checkbox"/>	✉️
Owl Sales Email	Email address	procurement@owl.wholesale.com		<input checked="" type="checkbox"/>	✉️

Screenshot 4. Customer/Vendor Contact information record.

Edit contact information

Description
Owl Sales Email

Type
Email address

Email address
procurement@owl.wholesale.co...

Purpose
Sales Invoice:Sales Order Confir

Role ↑

Role	Description
SS Payment Advice	Payment Advice
SS Project Invoice	Project Invoice
SS Purchase Order	Purchase Order
SS Sales Invoice	Sales Invoice
SS Sales Order Confirmation	Sales Order Confirmation
SS Sales Packing Slip	Sales Packing Slip
SS Sales Quotation	Sales Quotation

Select

OK Cancel

Screenshot 5. Assign 'Purpose,' to contact information on account or account contact person

Finance and Operations

Search for a page

Save OPTIONS

Customer invoice

Email parameters

Email providers

SMTP settings

Test email

Smart Send

Smart Send reports

Overview

Report	Report format	Description	Email ID	File name	Recipient
Customer account statement	CustAccountStatement...	Customer Account S...	SS_CustStm	Customer Account Statement %AccountNu...	Account
Purchase order	PurchPurchaseOrder.R...	Purchase Order	SS_PurOrd	Purchase Order %PurchaseOrderId%	Specific
Sales invoice	SalesInvoice.Report	Sales Invoice	SS_SalInv	Sales Invoice %InvoiceId%	Both
Free text invoice	FreeTextInvoice.Report	Free Text Invoice	SS_CustInv	Customer Invoice %InvoiceId%	Account
Sales quotation	SalesQuotation.Report	Sales Quotation	SS_SalQuo	Sales Quotation %QuotationId%	Account
Project invoice	PSAProjectInvoice.Report	Project Invoice	SS_PjInv	Project Invoice %InvoiceId%	Account
Sales order confirmation	SalesOrderConfirmation	Sales Order Confirmation	SS_SalCon	Sales Order Confirmation %ConfirmationId%	Account

General

Test azure blob storage connection

ADDITIONAL ATTACHMENTS

Document handling file type
File

ALTERNATE EMAIL

Send to alternate email
Yes

Email address
Customer.Service@contoso.com

AZURE BLOB STORAGE SETUP

Storage options
All

Blob container
smartsend

Folder name
SalInv

Override
No

SENDING USER

Email sending user
Cc

Email destination defaults

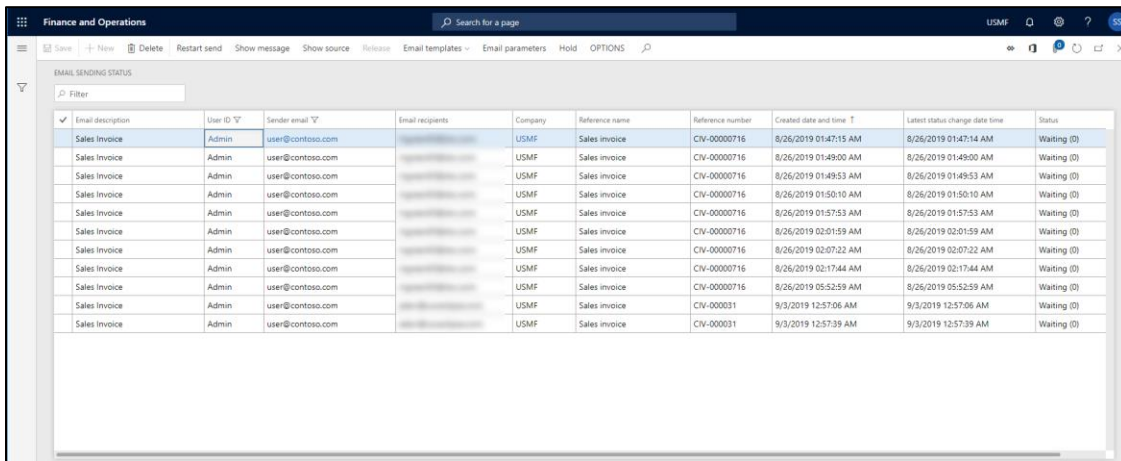
Message details

Customer invoice

- %CustomerInvoiceOrderAccount% Label: Customer account
- %CustomerInvoiceInvoiceId% Label: Invoice
- %CustomerInvoiceBackorder% Label: Backorder sales
- %CustomerInvoiceBankExportLine% Label: Shipme number
- %CustomerInvoiceBillOfLading% Label: Bill of lading
- %CustomerInvoiceCashDisc% Label: Cash discount
- %CustomerInvoiceCashDiscountDate% Label: Payment terms base date
- %CustomerInvoiceCashDiscountLabel% Label: Cash discount
- %CustomerInvoiceCashDiscountPercent% Label: Discount percentage
- %CustomerInvoiceContactPerson% Label: Contact
- %CustomerInvoiceCoStatus% Label: Cash flow forecast
- %CustomerInvoiceCurrencyCode% Label: Currency
- %CustomerInvoiceCustomerRef% Label: Your ref.
- %CustomerInvoiceDefaultDimension% Label: Dimension
- %CustomerInvoiceDeliveryName% Label: Delivery name
- %CustomerInvoiceDeliveryPostAddress% Label: Postal address
- %CustomerInvoiceDirectDebitMandate% Label: Direct debit mandate ID
- %CustomerInvoiceDivModel% Label: Mode of delivery
- %CustomerInvoiceDivTerm% Label: Delivery terms
- %CustomerInvoiceDocumentDate% Label: Document date
- %CustomerInvoiceDocumentNum% Label: Document number
- %CustomerInvoiceDueDate% Label: Due

Screenshot 6. Dynamic token placeholders provided to users setting email content & file names

Product Fact Sheet – DXC Smart Business Form Email Manager



The screenshot shows the 'Email Sending Status' form in the DXC Smart Business Form Email Manager. The form has a search bar at the top and a table of email sending status records below. The table has the following columns: Email description, User ID, Sender email, Email recipients, Company, Reference name, Reference number, Created date and time, Latest status change date time, and Status.

Email description	User ID	Sender email	Email recipients	Company	Reference name	Reference number	Created date and time	Latest status change date time	Status
Sales Invoice	Admin	user@contoso.com	user@contoso.com	USMF	Sales invoice	CIV-00000716	8/26/2019 01:47:15 AM	8/26/2019 01:47:14 AM	Waiting (0)
Sales Invoice	Admin	user@contoso.com	user@contoso.com	USMF	Sales invoice	CIV-00000716	8/26/2019 01:49:00 AM	8/26/2019 01:49:00 AM	Waiting (0)
Sales Invoice	Admin	user@contoso.com	user@contoso.com	USMF	Sales invoice	CIV-00000716	8/26/2019 01:49:53 AM	8/26/2019 01:49:53 AM	Waiting (0)
Sales Invoice	Admin	user@contoso.com	user@contoso.com	USMF	Sales invoice	CIV-00000716	8/26/2019 01:50:10 AM	8/26/2019 01:50:10 AM	Waiting (0)
Sales Invoice	Admin	user@contoso.com	user@contoso.com	USMF	Sales invoice	CIV-00000716	8/26/2019 01:57:53 AM	8/26/2019 01:57:53 AM	Waiting (0)
Sales Invoice	Admin	user@contoso.com	user@contoso.com	USMF	Sales invoice	CIV-00000716	8/26/2019 02:01:59 AM	8/26/2019 02:01:59 AM	Waiting (0)
Sales Invoice	Admin	user@contoso.com	user@contoso.com	USMF	Sales invoice	CIV-00000716	8/26/2019 02:07:22 AM	8/26/2019 02:07:22 AM	Waiting (0)
Sales Invoice	Admin	user@contoso.com	user@contoso.com	USMF	Sales invoice	CIV-00000716	8/26/2019 02:17:44 AM	8/26/2019 02:17:44 AM	Waiting (0)
Sales Invoice	Admin	user@contoso.com	user@contoso.com	USMF	Sales invoice	CIV-00000716	8/26/2019 05:52:59 AM	8/26/2019 05:52:59 AM	Waiting (0)
Sales Invoice	Admin	user@contoso.com	user@contoso.com	USMF	Sales invoice	CIV-0000031	9/3/2019 12:57:06 AM	9/3/2019 12:57:06 AM	Waiting (0)
Sales Invoice	Admin	user@contoso.com	user@contoso.com	USMF	Sales invoice	CIV-0000031	9/3/2019 12:57:39 AM	9/3/2019 12:57:39 AM	Waiting (0)

Screenshot 7 Email send status form.

About DXC Technology

DXC Technology (DXC: NYSE) is the world's leading independent, end-to-end IT services company, helping clients harness the power of innovation to thrive on change. DXC Technology serves nearly 6,000 private and public sector clients across 70 countries. The company's technology independence, global talent and extensive partner network combine to deliver powerful next-generation IT services and solutions. DXC Technology is recognized among the best corporate citizens globally. For more information, visit www.dxc.technology.