DynamicsShop.com Making Business Make Sense with Microsoft Dynamics 365



Apps and Automation On Microsoft Dynamics 365

DynamicsShop is a trading name of Simply Dynamics Ltd

User Guide

SD Bulk Mailer





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2 Getting Started

SD Bulk Mailer allows you to distribute your standard Microsoft Dynamics 365 Business Central document outputs, in bulk, to multiple recipients via Email.

SD Bulk Mailer facilitates direct communications to the correct point of contact and allows your customers self-service for copy documents via web services on your website.

With SD Bulk Mailer you can automate the emailing of all your standard Microsoft Dynamics 365 Business Central documents, with flexible Email templates using a rich HTML editor for professional and consistent Email communications

You can also easily attach multiple additional documents to your standard Microsoft Dynamics 365 Business Central documents allowing you to include items such as terms and conditions, and brochures, with your automated outbound Emails.





3 Security Setup

We have provided the following permission sets for SD Bulk Mailer: SD-BULK ADMIN, SD-BULK USER and SD-BULK VIEW (*Figure 3-1*).

		sd bulk	×	
	Role ID 1	Name	✓ Extension Name	Scope †
\rightarrow	SD-BULK ADMIN	SD Bulk Mailer - Admin	SD Bulk Mailer	Tenant
	SD-BULK USER	SD Bulk Mailer - User	SD Bulk Mailer	Tenant
	SD-BULK VIEW	SD Bulk Mailer - View	SD Bulk Mailer	Tenant

Figure 3-1





4 Installing SD Bulk Mailer

To install **SD Bulk Mailer** from the Business Administration Shell:

- 1. Run the Business Central Administration Shell as Administrator.
- 2. To publish the extension from the package file (.app), use the **Publish-NAVApp** cmdlet.

Example: Publish-NAVApp -ServerInstance BC180 -Path "C:\Users\name\Downloads\Simply Dynamics_SD Bulk Mailer_9.1.9.0.app"

3. To synchronise the schema changes, use the **Sync-NAVApp cmdlet**.

Example: Sync-NavApp -ServerInstance BC180 -Name "SD Bulk Mailer"

4. To install the published NAV App, use the **Install-NAVApp cmdlet**.

Example: Install-NAVApp -ServerInstance BC180 -Name "SD Bulk Mailer"

5. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 4-1*).

								٩	۵	Ø	?	•
Invent	TELL ME WHAT YOU WANT TO DO		2	\times								
Sales J	extension			×				2				
	Go to Pages and Tasks			_								
	> Extension Management	Administration		П	+ Sales Credit Memo Tasks	SalesReports	> History					
ЭГ	Didn't find what you were looking for? Try exploring			_		7 hepona						
254	+											
		_	-	-	_	_	-	-	-	-	-	-



6. In the **Extension Management** list, you should see the SD Bulk Mailer App installed.





4.1 Allowing HttpClient Requests in SD Bulk Mailer

Switching on the **Allow HttpClient Requests** option allows SD Bulk Mailer to call an API that sends and returns licence key information to activate the product licence and to call GitHub to import sample data for the product.

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 4-2*).

								٩	Q	Ø	?	
	TELL ME WHAT YOU WANT TO DO		2	\times								
	extension			×				2				
	Go to Pages and Tasks			_								
	> Extension Management	Administration		Ω	+ Sales Credit Memo Tasks	SalesReports	> History					
	Didn't find what you were looking for? Try exploring				7 10383	y neports						
Z	ł											
			_	-		_	_	_	_	_		-

Figure 4-2

2. In the **Extension Management** list, you should see the **SD Bulk Mailer** App installed (*Figure 4-3*).

🔎 Search Manage	More options	
Description	Name †	Version
Installed	Email - SMTP Connector	v. 18.0.23013.23795
Installed	Essential Business Headlines	v. 18.0.23013.23795
Installed	Late Payment Prediction	v. 18.0.23013.23795
Installed	OnPrem Permissions	v. 18.0.23013.23795
Installed	PayPal Payments Standard	v. 18.0.23013.23795
Not Installed	Performance Toolkit	v. 18.0.23013.23795
Installed	Sales and Inventory Forecast	v. 18.0.23013.23795
Installed	SD Billing Engine	v. 3.0.0.0
Installed	SD Bulk Mailer	v. 9.1.9.0
Installed	SD Case Manager	v. 3.0.6.0
Installed	SD Data and GDPR Manager	v. 3.0.0.0
Installed	SD Document Pack	v. 3.4.0.0
Installed	SD Intelli Pricing	v. 2.1.0.0
Installed	SD Interface Banking	v. 2.0.2.0
Installed	SD Long Term Agreements	v. 2.1.0.0
Installed	Send remittance advice by email	v. 18.0.23013.23795
Installed	Send To Email Printer	v. 18.0.23013.23795





3. Select the **SD Bulk Mailer App** record and from the menu, select the **Manage** group, and choose **Configure** (*Figure 4-4*).

Extension Management						
✓ Search Manage	More options			7		
🗿 Extension Marketplace	🗟 Deployment Stat	us 🗦 Uninstall	📌 Configure 🛛 🗒 Refresh	ı		
Dpload Extension	≣ [≭] Install	🛃 Unpublish	Download Source			
Description	Name 1		Version			
Installed	Email - SMTF	Connector	v. 18.0.23013.23795			
Installed	Essential Bus	iness Headlines	v. 18.0.23013.23795	v. 18.0.23013.23795 v. 18.0.23013.23795 v. 18.0.23013.23795		
Installed	Late Paymen	t Prediction	v. 18.0.23013.23795			
Installed	OnPrem Perr	nissions	v. 18.0.23013.23795			
Installed	PayPal Payme	ents Standard	v. 18.0.23013.23795			
Not Installed	Performance	Toolkit	v. 18.0.23013.23795			
Installed	Sales and Inv	ventory Forecast	v. 18.0.23013.23795			
Installed	SD Billing En	gine	v. 3.0.0.0			
Installed	SD Bulk Mail	er	v. 9.1.9.0			
Installed	SD Case Mar	nager	v. 3.0.6.0			
Installed	SD Data and	GDPR Manager	v. 3.0.0.0			
Installed	SD Documen	nt Pack	v. 3.4.0.0			
Installed	SD Intelli Prid	sing	v. 2.1.0.0			
Installed	SD Interface	Banking	v. 2.0.2.0			



4. Choose to allow the Allow HttpClient Requests option (Figure 4-5).

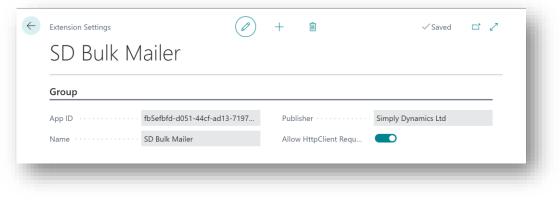


Figure 4-5





4.2 Choosing the SD Bulk Mailer Role

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** (*Figure 4-6*).

						Q	Ω	Ô	? 🚺
nventory \lor Posted Documents \lor Setup & Extens	ions∨ 🛛 🔳					Personalise			- 1
ales Journals Cash Receipt Journals Transfer Ord	ers					Design			
·						My Settings			0
	ACTIONS					Company info	ormation		
	+ Sales Quote + Sales Invoice	+ Sales Order + Sales Return Order	+ Sales Credit Memo	SalesReports	> His	Assisted setu	р		- 8
	1 54155 1115155	,		, noperto		Advanced set	ttings		- 8
254									- 8
									_

Figure 4-6

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon (*Figure 4-7*).

		-
Role	Sales Order Processor	
Company	CRONUS UK Ltd.	
Work Date	1/27/2022	i
REGION & LANGUAGE		
Region	English (United States)	
Language	English (United Kingdom)	
Time Zone	(UTC+01:00) Brussels, Copenhag	
Notifications	Change when I receive notifications.	
Your last sign in was on 08/10/2	0 01:19 PM.	
	OK Can	cel

Figure 4-7

3. You should see **SD Bulk Mailer** in the list of Roles (*Figure 4-8*).





	Display Name		
\rightarrow	SD Bulk Mailer		:
	Company Hub		
	Accountant		
	Business Manager		
	Service Manager		
	Sales Order Processor		
	Manufacturing Manager		
	Project Manager		
	Sales and Relationship Manager		
	Administration of users, user groups and permissions		
	Inventory Manager		
	Shipping and Receiving - Warehouse Management System		
	Team Member		
		ОК	Cancel
		OK	cancer

Figure 4-8

- 4. Choose SD Bulk Mailer and click OK.
- 5. The **SD Bulk Mailer** Role should now be displayed in the **Role** field. Click **OK** to close the **My Settings** page (*Figure 4-9*).

cole	SD Bulk Mailer	
ompany	CRONUS International Ltd.	
Vork Date	23/10/2020	
Region & Language		
Region	English (United Kingdom)	
anguage	English (United Kingdom)	
Time Zone	(UTC+00:00) Dublin, Edinburgh, Lisbon, L	
Notifications	Change when I receive notifications.	
Your last sign in was on 23/10/20 10:4	0.	
	OK Cano	el







4.3 Accessing the SD Bulk Mailer Pages

Use the **Tell Me** to search for **SD Bulk Mailer** pages. Begin typing **SD**, or **Bulk** to see a list of the SD Bulk Mailer pages (*Figure 4-10*).

bulk		-
Go to Pages and Tasks	Show less (3)	
> SD Bulk Mailer Jobs	Lists	
> SD Bulk Mailer Setup	Administration	
> SD Bulk Mailer Drafts	Lists 🛛	
> SD Bulk Mailer History	Lists	
> SD Bulk Mailer Draft Activities	Tasks	
> SD Bulk Mailer History Activities	Tasks	
> SD Bulk Mailer Attention Activities	Tasks	

Figure 4-10

4.4 Activating the SD Bulk Mailer Licence

To use SD Bulk Mailer, you must activate the licence.

- 1. From the Tell Me, search for and select the **SD Bulk Mailer Setup** page.
- 2. When the **SD Bulk Mailer Setup** page opens, you will be prompted that "Your license is invalid". Choose **OK** (*Figure 4-11*).

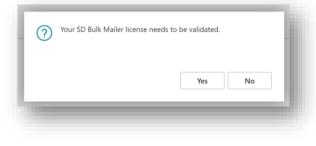
O Your license is invalid.		
	ОК	
-		٢

Figure 4-11





3. You will then be prompted that "Your SD Bulk Mailer license needs to be validated". Choose **Yes** (*Figure 4-12*).





4. You will then see the "Activate your product" page below (Figure 4-13).

Product Key			
Company Name			
mail · · · · · · · · · · · · ·			
/alid · · · · · · · · · · · ·	••••••		
icense Type			
xpiry Date			
our license is invalid			
		Free Trial	Activate



4.4.1 Activating the SD Bulk Mailer Licence with a Product Key

If you have received a Product Key from Simply Dynamics Ltd (Figure 4-14):

- 1. Paste the supplied product key into the Product Key field.
- 2. Enter your company email value in Email
- 3. Choose Activate





Activate your product \sim X
Product Key · · · · · · · · · · · · · · · · · · ·
Company Name
Email · · · · · ·
Valid ·····
License Type
Expiry Date
Your license is invalid
Free Trial Activate

Figure 4-14

4. The "Activate your product" page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial (*Figure 4-15*).

Product Key · · · · · · · · · · · · · · · · · · ·	
Company Name	
Email · · · · · · · · · · · · · · · · · · ·	
Valid · · · · · · · · · · · · · · · · · · ·	
License Type	
Expiry Date 21/11/2020	
Activation successful!Thank you for using	
	Activate

Figure 4-15





4.4.2 Activating the SD Bulk Mailer Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd. and want to avail of a free trial (*Figure 4-16*):

- 1. Enter your company email value in Email
- 2. Choose Free Trial

Product Key		
Company Name	No. of Concession, Name	
Email · · · · · · · · · · · · · · · · · · ·		
Valid · · · · · · · · · · · · · · · · · · ·		
License Type		
Expiry Date		
Your license is invalid		
	Free Trial Activat	te

Figure 4-16

- 3. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes.**
- 4. The "Activate your product" page will update to display a message that the activation was successful. The expiry date will depend on the date that you activated your free trial (*Figure 4-17*).





Product Key		
Company Name		
Email · · · · · · · · · · · · · · · · · · ·		
Valid · · · · · · · · · · · · · · · · · · ·		
License Type	trial	
Expiry Date	21/11/2020	
Activation successful!Thank you fo Your license expires on 11/21/2020		
		Activate

Figure 4-17





5 Uninstalling SD Bulk Mailer

You can uninstall SD Bulk Mailer using the Web Client.

1. Open your Dynamics 365 Business Central Web Client and use the **Tell Me** to search for **Extension Management** (*Figure 5-1*).

TELL ME WHAT YOU WANT TO DO		Z×						
extension		×				2		
Go to Pages and Tasks								
> Extension Management	Administration	Д	+ Sales Credit Memo > Tasks	SalesReports	> History			
Didn't find what you were looking for? Try exploring			, rusio	, noperto				
4								

Figure 5-1

- 2. In Extension Management, you should see the SD Bulk Mailer App installed.
- 3. Select the **SD Bulk Mailer** App and choose the **Uninstall** Action (*Figure 5-2*).

🔎 Search Details	Manage Open in Excel	Actions Fewer options		Y	≣
🗚 Install 🗼 Uninst	all 🗳 Configure 🗋 Downloa	ad Source 1 Learn More	📰 Refresh		Ś
Description	Name †		Version		

Figure 5-2





6 Upgrading from v9.1.5 to v9.1.8 and above of SD Bulk Mailer

Version 9.1.5 of SD Bulk Mailer uses the details in the standard Dynamics 365 Business Central **SMTP Mail Setup** page to deliver emails *(Figure 6-1)*:

SMTP Mail Setup	
Apply Office 365 Server Settings 🛛 🕆 🛅 Test Email S	Setup Actions Fewer options
General	
SMTP Server	Password · · · · · · · · · · · · · · · · · · ·
SMTP Server Port	Secure Connection
Authentication	✓ Send As · · · · · · · · ·
User ID · · · · · · · · ·	Allow Sender Substitu

Figure 6-1

Version 9.1.8 and above of SD Bulk Mailer uses the details in the standard Dynamics 365 Business Central **Email Accounts** page to deliver emails (*Figure 6-2*):

Name↑ Email Address	

Figure 6-2

When you have upgraded from **version 9.1.5** of SD Bulk Mailer to **version 9.1.8** and above of SD Bulk Mailer you need to open the **SD Bulk Mailer Setup** page and navigate to the **Email Account** FastTab. From here you can choose the SMTP email account that you have entered as per standard Dynamics 365 Business Central Email Accounts (*Figure 6-3*).





Process About	Actions Related	Fewer options		
🖥 Test Email Setup	roduct Activation	🕏 Import Assisted Setup File	Assisted Setup	×3
General				
Туре	SMTP	✓ Enforce Thrott	tling · · · · · ·	
Email Account				
Default Email Account				

Figure 6-3





7 Setup and Configuration

7.1 SD Bulk Mailer Assisted Setup

You can easily import default setup for SD Bulk Mailer using the **Assisted Setup** Action on the **SD Bulk Mailer Setup** page.

1. In the **SD Bulk Mailer Setup** page, from the menu choose the **Process** group, and then **Assisted Setup** (*Figure 7-1*).

SL) Bulk Maile	er Setup)			
	About Actions	Related F	ewer options	vation 🌐	Assisted Setup	
Gen	eral >					
Con	nection Settings >					
	j,					
	ult Keys >					

Figure 7-1

2. You are prompted that "Importing setup will delete all of the existing data in SD Bulk Mailer. Press Yes to proceed." Choose **Yes** if this is your first time to use SD Bulk Mailer and you have not already created any setup in SD Bulk Mailer (*Figure 7-2*).

ings >	?	Importing setup will delete all of the existing data in SD Bulk Mailer, press Yes to proceed
l	_	Yes No
	_	







3. You are then prompted, "Are you sure?" Choose **Yes** (*Figure 7-3*).

?	Are you sure?			exa
>		Yes	No	



4. You will then receive a prompt similar to the below that the default setup has imported. Choose OK (*Figure 7-4*).

(j)	52 records successfully imp	ported.		İ
			ОК	
				10



7.2 Setting Up Your Mail Server Details

To use SD Bulk Mailer to deliver draft emails, you need to set up your SMTP Mail Server details as per standard Dynamics 365 Business Central.

Version 9.1.5 of SD Bulk Mailer uses the details in the standard Dynamics 365 Business Central **SMTP Mail Setup** page to deliver emails *(Figure 7-5)*:





SMTP Mail Setup	
* Apply Office 365 Server Settings 🛛 🕆 Test Email Setup	Actions Fewer options
General	
SMTP Server	Password
SMTP Server Port	Secure Connection
Authentication	Send As
User ID	Allow Sender Substitu 🕔 🦲

Figure 7-5

Version 9.1.8 and above of SD Bulk Mailer uses the details in the standard Dynamics 365 Business Central **Email Accounts** page to deliver emails (*Figure 7-6*):

Email Accounts $ \ P \lor \cdots$	© ∠ ×
Name †	Email Address
$\rightarrow \square$:	



 For version 9.1.5 of SD Bulk Mailer, in the SD Bulk Mailer Setup page, navigate to the Connection Settings FastTab. From here you can see your SMTP mail server settings that you have entered as per standard Dynamics 365 Business Central SMTP Mail Setup (Figure 7-7).





SMTP Settings	
SMTP Server	Authentication
SMTP Server Port	User ID ·····
Secure Connection	Password

Figure 7-7

1. For version 9.1.8 and above of SD Bulk Mailer, in the SD Bulk Mailer Setup page, navigate to the Email Account FastTab. From here you can choose your SMTP email account that you have entered as per standard Dynamics 365 Business Central Email Accounts (*Figure 7-8*).

Process About	Actions Related	Fewer options		
🛅 Test Email Setup	roduct Activation	import Assisted Setup File	Assisted Setup	於
General				
Type	SMTP	✓ Enforce Thrott	ling ·····	

Figure 7-8





8 Understanding SD Bulk Mailer Concepts

As mentioned above, SD Bulk Mailer allows you to send report outputs, in bulk, to multiple recipients, via Email and can also be configured to direct Drafts to a print output.

SD Bulk Mailer facilitates direct communications to the correct point of contact and allows your customers self-service for copy documents via web services on your website.

SD Bulk Mailer executes a Job, which uses a Template, to create a Draft.

You can also attach multiple additional documents to your standard Microsoft Dynamics 365 Business Central documents allowing you to include items such as terms and conditions, and brochures, with your automated outbound Emails.

Once the Draft is reviewed, and error free, it can be delivered and recorded to History.





8.1 SD Bulk Mailer Jobs

A Job in SD Bulk Mailer defines the report to run, the filters to use on the report, the Template used to create the Email Body and the source of the contact that the Template uses.

The Job in SD Bulk Mailer also defines the structure of the Email, the from details, the attachment type, any additional attachments, and the Email recipients.

The Job also indicates the delivery method – Email, Print or Web Service.

8.2 SD Bulk Mailer – Templates

A Template in SD Bulk Mailer defines the Subject and Body of the Email. The Email Body and Subject is HTML and can include data from: fields on the Document; the Account (Customer or Vendor); and the Contact tables defined by the Job.

8.3 SD Bulk Mailer – Drafts

Each Job will create one or more Drafts that can be reviewed and edited before being delivered. Drafts created by a Job Queue Entry or a Web Service call will be delivered automatically unless there is an issue with the Draft.

8.4 SD Bulk Mailer – History

SD Bulk Mailer holds the History of all the Drafts that have been delivered.





9 Using SD Bulk Mailer - Setup

In the **General** FastTab the following fields are displayed in the **SD Bulk Mailer Setup** card (*Figure 9-1*):

Process About	Actions Related	Fewer option:	S		
📌 Default SMTP Set	ings 🛛 🕆 Test Email Se	etup 🕀 Produc	ct Activation 🛛 🌐 As	sisted Setup	众
General					
General					
Туре	SMTP	\sim	Enforce Throttling		

Figure 9-1

- **Type** This field specifies the type of Email Server. This field is set to **SMTP** (normal Email Server).
- Enforce Throttling Using SMTP may cause errors due to a limitation in Office 365 to reject email streams of over 30 mails per minute. This field allows you to turn on throttling in SD Bulk Mailer which, if turned on, sends emails through your SMTP Server at a rate of that specified in the Message Rate (Emails/Minute) field.
- Message Rate (Emails/Minute) This field allows you to specify the rate at which SD Bulk Mailer sends emails through your SMTP Server. This field defaults to a rate of 25 Emails per minute.

For **version 9.1.5** of SD Bulk Mailer, navigate to the **Connection Settings** FastTab. From here you can see your SMTP mail server settings that you have entered as per standard Dynamics 365 Business Central SMTP Mail Setup (*Figure 9-2*).





SMTP Settings	
MTP Server	Authentication
SMTP Server Port	User ID
Secure Connection	Password

Figure 9-2

For **version 9.1.8** and above of SD Bulk Mailer, navigate to the **Email Account** FastTab. From here you can choose your SMTP email account that you have entered as per standard Dynamics 365 Business Central Email Accounts (*Figure 9-3*).

Process About	Actions Related	Fewer options		
🖥 Test Email Setup	Product Activation	import Assisted Setup File 🖥	Assisted Setup	Ŕ
General				
Type	SMTP	✓ Enforce Thrott	ing (

Figure 9-3





In the SD Bulk Mailer Setup Page, expand the Default Keys FastTab (Figure 9-4):

SD Bulk Mailer	Setun	
	Jetap	
Process About Actions	Related Fewer options	
📋 Jobs 🕙 History		sà
General		
General >		
General >		
General > Connection Settings >		
Connection Settings >	···· Item Ledger Key ·····	
Connection Settings > Default Keys	Item Ledger Key	

Figure 9-4

By default, SD Bulk Mailer will use the primary key when searching the Ledger Entry Tables to see if a Draft needs to be created for certain Job Types. This section allows the use of another index to be specified.

- **Cust. Ledger Entry Index ID** The number of the index to use, 1 being the first, 2 the second, etc.
- Vendor Ledger Entry Index ID The number of the index to use, 1 being the first, 2 the second, etc.
- Item Ledger Entry Index ID The number of the index to use, 1 being the first, 2 the second, etc.





10 Using SD Bulk Mailer - Jobs

The **SD Bulk Mailer Jobs** Page is accessed from the Bulk Mailer **Setup** Page. From the **Related** group, choose **Jobs** (*Figure 10-1*).

	SD Bulk Mailer Set	up	
General > Connection Settings >		Fewer options	Ŕ
Connection Settings >	General >		
Default Keys >	Connection Settings >		

Figure 10-1

The Jobs Page can also be accessed from the **Drafts List** Page. From the **Actions** tab, in the **Configuration** group, choose Jobs (*Figure 10-2*).

Search	Manage	Drafts	Act	ons History 🚺 Ope	n in Excel	Actions Fewer options
Drafts \smallsetminus	Actions	 ✓ History 	$^{\prime}$	Configuration \checkmark		
DELIVER' METHOD	(JOB TYPE	DO NO	🗈 Jobs	CCOUNT ODE	ACCOUNT NAME
				🎉 Job Queue Entries	ere is nothing	to show in this view)
				🗚 Setup		

Figure 10-2





The **Jobs List** page is displayed. The **Job Card** is accessed by selecting **New**, **Edit** or **View** from the **Jobs List** page (*Figure 10-3*).

	∇			
🖍 Edit 🛛 🗟 View 💼	Ŕ			
Code †	Description	Туре	Enabled	Delivery Method
CREDIT MEMO	Sales Credit Memo	Sales Credit Memo		Email
CUSTOMER	Customer	Customer		Email
ORDER CONFIRM	Cust. Order Confirmation	Sales Order		Email
PAYMENT RECEIPT	Cust. Payment Receipt	Customer - Payment R	. 🗹	Email
PURCHASE ORDER	Purchase Order	Purchase Order		Email
REMINDER	Reminder	Reminder		Email
SALES INVOICE	Cust. Sales Invoice	Sales Invoice		Email
SALES QUOTE	Sales Quote	Sales Quote		Email
SALES SHIPMENT	Sales Shipment	Sales Shipment		Email
SERVICE ORDER	Service Order	Service Order		Email
SERVICE QUOTE	Service Quote	Service Quote		Email
<u>STATEMENT</u>	Customer Statement	Statement		Email
VENDOR	Vendor	Vendor		Email
VENDOR REMITTANCE	Vendor Remittance Advice	Vendor Remittance		Email

Figure 10-3

Taking the **Job Card** for a **Job Type** of **Statement** as an example, the **SD Bulk Mailer Job Card** contains the following fields in the **General** FastTab (*Figure 10-4*):

JOB CARD WORK DATE: 28/01/2021) + 🛍	✓ SAVED
Statement · STATEMEN	IT · Customer S	Statement
Selected Configuration Security Actions F	ewer options	
General		
Code · · · · · · · STATEMENT	Type Star	tement 🗸
Description Customer Statement	Sub-Type Bill-	to/Pay-to
Enabled · · · · · · · · · · · ·	Delivery Method	ail ~
Create if already deliv	Skip Issue of Job Que	







- **Code** Enter a unique code to identify the Job.
- **Description** Specify a user defined description of the Job.
- **Enabled** Select this flag to enable the Job. This field must be ticked if you wish to create Drafts of the Type associated with the Job using SD Bulk Mailer. Jobs that are not enabled cannot be used to generate their document types in SD Bulk Mailer.
- **Create if already delivered** This field specifies whether a new Draft is to be created if a Draft has previously been delivered. This field checks the History to see if an entry for the document exists in the History.
- Type Options are Customer, Purchase Order, Reminder, Sales Credit Memo, Sales Invoice, Sales Order, Sales Quote, Sales Shipment, Service Order, Service Quote, Statement, Vendor, Vendor Remittance, or Customer Payment Receipt.

This **Type** field defines both the **Search Table** to look for documents and the **Document Table** used when running the report.

The **Search Table** to look for Documents and the Document Table are listed below by **Type** (*Table 1*):

Туре	Search Table	Document Table
Customer	Customer	Customer
Purchase Order	Purchase Header	Purchase Header
Reminder	Issued Reminder Header	Issued Reminder Header
Sales Credit Memo	Cust. Ledger Entry	Sales Cr. Memo Header
Sales Invoice	Cust. Ledger Entry	Sales Invoice Header
Sales Order	Sales Header	Sales Header
Sales Quote	Sales Header	Sales Header
Sales Shipment	Item Ledger Entry	Sales Shipment Header
Service Order	Service Header	Service Header
Service Quote	Service Header	Service Header
Statement	Customer	Customer
Vendor	Vendor	Vendor
Vendor Remittance	Vendor Ledger Entry	Vendor
Customer Payment Receipt	Cust. Ledger Entry	Customer

Table 1





- Sub-Type With certain Job Types, the associated document can have a Sell-to/Buyfrom or a Bill-to/Pay-to Account. This field defines which Account is used for the Template and Recipients list. The Options are Sell-to/Buy-from or Bill-to/Pay-to.
- **Delivery Method** Specifies the method used to deliver the document. The options are **Email** or **Print**.
- Skip Issue of Job Queue Generated Drafts Select this checkbox to skip the automatic issuing of the generated Drafts when running the Bulk Mailer Job using D365 Business Centre Job Queues. This allows users to choose to auto generate the Drafts, review the generated Drafts, and then manually issue the Drafts.

JOB CARD WORK DATE: 2		\bigcirc	Î		SAVED
Statemen	t · STATEM	IENT · C	ustome	r Stateme	ent
Selected Configuration	n Security Actio	ns Fewer options	5		
General >					
General /					
Security					
					0

Expand the Security FastTab of the Job Card (Figure 10-5).

Figure 10-5

• User Groups Assigned - Displays how many user groups are linked to the Job. If a user group has been assigned to the Job, then only users in the user group can generate and view the Drafts associated with the Job.





Expand the **Configuration** FastTab of the Job Card (*Figure 10-6*).

	8/01/2021	Ø	+ 💼	√ SAVED
Statement	\cdot Stateme	ENT	\cdot Custome	r Statement
Selected Configuration	Security Actions	Few	er options	
General >				
Security >				
			STATEMENT RANGE	
Configuration	PDF	~	STATEMENT RANGE	Y00-200Y
Configuration	PDF 1310			

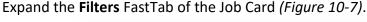
Figure 10-6

- **Output File Type** Specifies the type of file that the report will be exported as and attached to the Email. Options are **PDF**, **Word**, or **Excel**.
- **Report ID** Specifies the ID of the report to be used to generate the document to be delivered. The report will be run with the filtered Document Table (listed above and in **Appendix 13.2**) containing the record upon which it should run.
- **Report Name** Displays the report name of the specified **Report ID**.
- Search From Entry No. For Job Types whose Search Table (listed above and in Appendix 13.1) is a Ledger Entry Table, this contains the Entry No. from which the Job will start looking for new documents to generate and deliver. This will automatically advance when all the intervening documents have been delivered.
- **Start Date Formula** For Jobs of **Type Statement**, this is the date formula used to calculate the start date to be applied to the **Date Filter** field on the Customer table.
- End Date Formula For Jobs of Type Statement, this is the date formula used to calculate the end date to be applied to the Date Filter field on the Customer table.
- **Example** For Jobs of **Type Statement**, this displays an example of the filter that will be applied to the **Date Filter** field on the Customer table, based on the contents of the **Start Date Formula** and **End Date Formula**.





• **Aging Band** - For Jobs of **Type Statement**, select this option to print the Aging Band on the Statement Report for those Customers that have invoices on their Statements.





This Filters List Part Page is a list of all the filters to be used when searching for the documents that need to be sent for the Job. The filter is logically added to any filter already applied as part of the Job (For example, the Date Filter field on the customer table for Jobs of Type Statement). The filters also remain in place when the Email is generated from the Template - this allows for FlowFields to be calculated correctly.

Note: For **Jobs** of **Type Statement**, it is recommended to set a filter to include Net Change <> 0 as the document search table is the Customer table and the Statement reports off the Customer Ledger Entry table.

- Field No. Enter the field number upon which to apply the filter. The fields available are those of the Search Table for the selected Job Type (listed above and in Appendix 13.2).
- Field Name Displays the name of the field in Field No.
- Field Filter Enter the filter to apply.





Expand the **Email** FastTab of the Job Card (*Figure 10-8*).

OB CARD WORK DATE: 28/01/2021	
Statement · STATEME	NT \cdot Customer Statement
Selected Configuration Security Actions	Fewer options
Email	
FROM	TEMPLATE
From Email Address sample@sample.com	Template Code · · · · · · STATEMENT · ·
From Name · · · · · · · Finance Department	Contact Source · · · · · · Account Contact · · ·
	Contact Field No. 5049 ····
	Contact Field Name

Figure 10-8

- From Email Address This field specifies the Email address that is used as the from and reply-to address for the Email.
- From Name Enter a name to use in the "From" and "Reply-to" name for the Email.
- **Template Code** Enter the Template to use when generating the Email.
- **Contact Source** The option chosen for this field determines the Dynamics 365 Business Central source table from which to select the field that contains the No. of the Contact record to be used in the Template as the Template Contact.

The options are:

- Account Contact: Based on the Job Type it will be either the Customer or Vendor table. Also, depending on the Job Sub-Type, it will be either the Sell-to/Buy-from or Bill-to/Pay-to account.
- 2. **Document Contact**: The Document Table for the Job Type (listed above and in **Appendix 13.2**).
- **Contact Field No.** This is the field of the table selected in **Contact Source** that contains the No. of the Contact record to be used in the Template as the Template Contact.

For example, for the Statement Job Type, if you chose Account Contact as the Contact Source, then you are presented with the Customer table from which to select the field





that contains the No. of the Contact record to be used in the Template as the Template Contact. You could choose the Primary Contact No. field from the Customer table. The Primary Contact No. from the Customer table will then be used as the Template Contact.

Expand the **Recipients** FastTab of the Job Card (*Figure 10-9*):

e	cipients		Manage							
3	Rew Line	*	Delete Line							埝
	Туре		Source	Specific Address	Job Resp. Code	Mailing Group Code	Contact Field No.	Contact Field Name	Address Field No.	Address F
	То		Account Contact				5049	Primary Contact No.	102	E-Mail
	Cc		Specific	example@example.com						
	Cc		Job Responsibility Contacts		SALE				102	E-Mail
÷	Cc	÷	Mailing Group Contacts			X-CARD 🗸			102	E-Mail
4										•



This is a list of all the Recipients to be added to the Draft when it is sent as an Email.

- **Type** Specifies if the recipient is to be added to the To, Cc, or Bcc, section of the Email. Options are **To**, **Cc**, **Bcc**.
- Source This defines the source of the field containing the Email address to add as a recipient to the Draft when it is sent as an Email. The options are Account, Account Contact, Document, Document Contact, Job Responsibility Contacts, Mailing Group Contacts or Specific.

Account: Depending on the Job Type, a field on either the Customer or Vendor table.

Account Contact: Depending on the Job Type, a Contact record whose Contact No. is stored on either the Customer or Vendor table.

Document: A field on the Document Table for the Job Type (listed above and in **Appendix 13.2**).

Document Contact: A Contact record whose No. is stored on the Document Table for the Job Type (listed above and in **Appendix 13.2**).





Job Responsibility Contacts: Depending on the Job Type, all Contacts with a specific Job Resp. Code for either the Customer or Vendor.

Mailing Group Code: Depending on the Job Type, all Contacts with a specific Mailing Group for either the Customer or Vendor.

Specific: The Email address is specified in the Specific Address field.

- **Specific Address** Applies when **Source** is set to **Specific**. This field contains the specific address to add as a recipient to the Draft when it is sent as an Email.
- Job Resp. Code Applies when Source is set to Job Responsibility Contacts. This field specifies the Job Responsibility Code that Account Contacts must have to be added as a recipient to the Draft when it is sent as an Email.
- Mailing Group Code Applies when Source is set to Mailing Group Contacts. This field specifies the Mailing Group Code that Contacts must have to be added as a recipient to the Draft when it is sent as an Email.
- **Contact Field No.** Applies when **Source** is **Account Contact** or **Document Contact**. This field specifies the Field No. of the table to be used as a Contact record.
- Contact Field Name Displays the Name of the Field in Contact Field No.
- Address Field No. Applies when Source is <u>not</u> set to Specific. This field specifies the field number that contains the Email address to add as the recipient to the Draft when it is sent as an Email.
- Address Field Name The name of the field as specified in Address Field No.

Expand the Additional Attachments FastTab of the Job Card (Figure 10-10):

	File name †		Start Date	End Date
•	Sales Brochure.pdf	:	01/10/2020	01/01/2021
	Terms and Conditions.pdf			







This is a list of all the additional attachments to be added to the Draft when it is sent as an Email.

- File Name This field specifies the File Name of the file to add as an additional attachment to the Draft.
- **Start Date** Enter the from date from which the file will be attached to the Draft.
- End Date Enter the to date up to which the file will be attached to the Draft.

The following Actions are available from the **Manage** menu in the **Additional Attachments** List Part Page (*Figure 10-11*):

JOB CARD WORK DATE: 28/01/2021		SAVED	2
Statement · S	TATEMENT \cdot Customer Statem	ent	
Additional Attachments	Manage	Υ I	53
👫 New Line 🛛 🔭 Delete Line	🕞 Import New File 🛛 😂 Update File 🔹 Export File	;	53

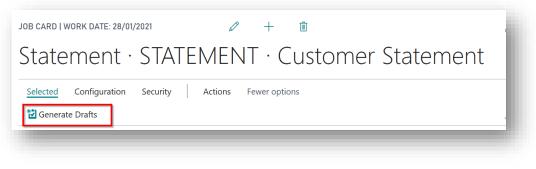


- Import New File Select this Action to import a new file to add as an additional attachment to the Drafts generated by the Job.
- **Update File** Select this Action to update the file to add as an additional attachment to the Drafts generated by the Job.
- **Export File** Select this Action to export the file.

The following Action is available from the menu in the **Selected** group in the Job Card (*Figure 10-12*):









• **Generate Drafts** – Choose this Action to generate Drafts for the current Job.

The following Actions are available from the menu in the **Configuration** group in the Job Card *(Figure 10-13)*:

JOB CARD WORK DATE: 28/01/2021	
Statement · STA	ATEMENT · Customer Statement
Selected Configuration Securit	v Actions Fewer options
Templates	

Figure 10-13

- **Templates** Choose this Action to display the Templates that are associated with the Job Type of the current Job.
- Job Queue Entries Choose this Action to open the SD Bulk Mailer Job Queue Entry List. Please refer to the Section Generating Jobs Automatically Using Job Queue Entries in this User Guide.

The following action is available from the menu in the **Security** group in the Job Card (*Figure 10-14*):





JOB CARD WORK DATE: 28/01/2021 🖉 + 💼
Statement \cdot STATEMENT \cdot Customer Statement
Selected Configuration Security Actions Fewer options

Figure 10-14

• Assign User Group Security – Choose this Action to assign available user groups for the current Job card. If a user group has been assigned to the Job, then only users in the user group can generate and view the Drafts associated with the Job.





11 Using SD Bulk Mailer - Templates

The SD Bulk Mailer **Templates** Page is accessed from the Bulk Mailer **Drafts** Page. From the **Actions** tab, in the **Configuration** group, choose **Templates**. The **Templates** Page is displayed *(Figure 11-1):*

The SD Bulk Mailer Template Card is used to define the Email Subject and Body. A Template defines the Subject and Body of the Email and allows you to construct an Email Subject Line and Body for each Job Type.

The body and subject are HTML and can include variable data taken from fields on the Document, Account (Customer or Vendor) and Contact tables defined by the Job e.g., Document No., Customer Name, Customer Address, Contact Name, Contact Address etc.

	Job Type 🕇	~		Code †	Name
	Customer			CUSTOMER	Customer
	Purchase Order			PUCRHASE ORDER	Purchase Order
	Reminder			REMINDER	Reminder
	Sales Credit Memo			SALES CREDIT MEMO	Sales Credit Memo
\rightarrow	Sales Invoice		:	SALES INVOICE	Sales Invoice
	Sales Order			SO ORDER CONFIRM	Sales Order Confirmation
	Sales Quote			SALES QUOTE	Sales Quote
	Sales Shipment			SALES SHIPMENT	Sales Shipment
	Service Order			SERVICE ORDER	Service Order
	Service Quote			SERVICE QUOTE	Service Quote
	Statement			STATEMENT	Statement
	Vendor			VENDOR	Vendor
	Vendor Remittance			VENDOR REMITTANCE	Vendor Remittance
	Customer - Payment Receipt			CUST. PAYMENT REC	Cust. Payment Receipt

Figure 11-1

The **Template Card** is accessed by selecting **New** or clicking on the individual template in the **Templates** List Page.





Taking the Template Card for a Job Type of Sales Invoice as an example, the SD Bulk Mailer – Template Card contains the following fields (*Figure 11-2*):

「emplate Card Work Da	ate: 27/01/2022	(+	- 🔟		✓ Saved	
Sales Invo	bice · SAL	ES INV		Sales	Invoice	
			OTCL	56165		
General						
оb Туре	Sales Invoice	~ N	Jame · · · · ·	Sales	Invoice	
Code · · · · · · · · · · · · · · · · · · ·	SALES INVOICE					
Subject						
Sales Invoice [Sales Invo	bice Header:No.] [Sales Inv	voice Header:Bill-to	Customer No.]	[Sales Invoice He	ader:Bill-to Name]	
B I <u>U</u> 8	Calibri • 14 • S	X ² X ₂ A •	:= 1= =	• 🔆• TI	•	
	– 🖛 🛥 Placeh	olders - Save				
Hello [Customer:Name]	,					
	r sales invoice [Sales Invoice ur nominated company cont					
If you have any queries, p						
Best Regards, Sales Department.						



- Job Type This field specifies the Job Type that the Template is created for. Options are Customer, Purchase Order, Reminder, Sales Credit Memo, Sales Invoice, Sales Order, Sales Quote, Sales Shipment, Service Order, Service Quote, Statement, Vendor, Vendor Remittance, or Customer Payment Receipt.
- **Code** Enter a unique code to identify this Template.
- Name Enter a user defined description for the Template.

As mentioned, the subject and body of the Email can include variable data from fields on the Account, Template Contact, and Document tables defined by the Job Type.





FlowFields can also be used in the Subject and Body as they are calculated using the filters applied by the Job when it is executed.

• Subject – Defines the text that you want to display in the Subject of the Email.

In the Subject, choosing the ellipses button prompts the user to select the Placeholder Source from the Account Fields, Template Contact Fields, and Document Fields. A page then opens listing the field names that can be used for the current Template's Job Type in the Subject. Please refer to the table below for details of the Source Fields Table by Job Type (*Table 2*).

• **Body** – Defines the text that you want to display in the Body of the Email.

Choose the Placeholders drop down list to add a place holder to include data from a field. The Placeholder Source is from the Account Fields, Template Contact Fields, and Document Fields. Please refer to the table below for details of the Source Fields Table by Job Type (*Table 2*).

Job Type	Account Table	Template Contact Table	Document Table
Customer	Customer	Contact	Customer
Purchase Order	Vendor	Contact	Purchase Header
Reminder	Customer	Contact	Issued Reminder Header
Sales Credit Memo	Customer	Contact	Sales Cr.Memo Header
Sales Invoice	Customer	Contact	Sales Invoice Header
Sales Order	Customer	Contact	Sales Header
Sales Quote	Customer	Contact	Sales Header
Sales Shipment	Customer	Contact	Sales Shipment Header
Service Order	Customer	Contact	Service Header
Service Quote	Customer	Contact	Service Header
Statement	Customer	Contact	Customer
Vendor	Vendor	Contact	Vendor
Vendor Remittance	Vendor	Contact	Vendor
Customer Payment Receipt	Customer	Contact	Customer

The Source Fields Table by Job Type (*Table 2*):

Table 2





12 Using SD Bulk Mailer - Drafts

12.1 Generating Drafts Manually

To generate and issue your documents by Email or Print, select the **Drafts Worksheet** menu item or drill through on the **Drafts** cue in the **SD Bulk Mailer Role Centre**. You can also search for the Drafts list page in the **Tell Me**.

From the **Drafts** List Page, choose the **Generate Drafts** Action in the **Drafts** group (*Figure 12-1*):

D Bulk Mai	ler D	Drafts:	✓ Search	📋 Delete	$Drafts \smallsetminus $	Actions \vee	History \sim	🛂 Open in Excel	Actions \checkmark	Fewer options
DELIVERY		JOB TYPE	DOCUME NO.	TEMPLATE	🔁 Generat	te Drafts	NAME	STATUS	STATUS DETAIL	FROM EMAIL ADDRESS
Email	÷	Sales Order	101013	SD ORDER C			Kontorsmöb	bler AB		sample@sample.com
Email		Sales Order	101015	SD ORDER O	🔠 Skip an	d Archive Drafts	Mielberg K0	G		sample@sample.com



• Generate Drafts – Choose this Action to create Drafts. You are prompted to choose to create Drafts from select from available Jobs or from all available Jobs (Figure 12-2).

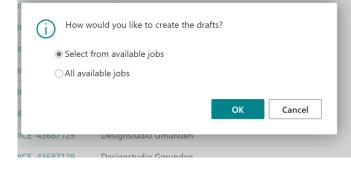


Figure 12-2

If you choose to create the Drafts from **select from available Jobs**, you are brought into the Jobs List Page where you can see all the Enabled Jobs that are setup in SD Bulk Mailer. Select the Job(s) for the documents that you wish to generate. Choose **OK** (*Figure 12-3*):





	Code 1	Description ~	Туре	Enabled T	Delivery Method
•	CREDIT MEMO	Sales Credit Memo	Sales Credit Memo		Email
	CUSTOMER	Customer	Customer	1	Email
	ORDER CONFIRM	Cust. Order Confirmation	Sales Order	1	Email
	PAYMENT RECEIPT	Cust. Payment Receipt	Customer - Payment	1	Email
	PURCHASE ORDER	Purchase Order	Purchase Order	1	Email
	REMINDER	Reminder	Reminder	1	Email
	SALES INVOICE	Cust. Sales Invoice	Sales Invoice	1	Email
	SALES QUOTE	Sales Quote	Sales Quote	1	Email
	SALES SHIPMENT	Sales Shipment	Sales Shipment	V	Email
	SERVICE ORDER	Service Order	Service Order	V	Email

Figure 12-3

If you choose to create Drafts from **all available Jobs**, <u>all</u> Jobs that are **enabled** in SD Bulk Mailer will generate documents.

The Drafts List Page contains the following fields:

- **Delivery Method** This specifies the sending method of the document. Options are **Email or Print**.
- Job Type This field indicates the Job Type for the line.
- **Document No.** This field specifies the document number.
- **Template** Indicates the Template used by the Job to generate the Draft.
- Account Code This specifies the Account Code of the generated document.
- Account Name This specifies the associated Account Name of the generated document.
- Status This field specifies the Status of the individual Draft. Options are **<blank>** and Attention.





- **Status Detail** This field displays the description of the status.
- From Email Address This field specifies what Email address the Email will be sent from.
- From Name This field specifies what Name the Email will be sent from.
- Email Subject This field specifies the Email subject of the Email to be delivered.
- **Created at** Indicates the date and time that the Draft was created.
- Created by User Indicates the User that created the Draft.
- Generated by Indicates how the Draft was generated. Options are User, Job Queue, or Web Service.
- **Generation ID** Indicates the ID of the generated Draft. This is an internal field used by SD Bulk Mailer.

Once the Drafts have generated, there are five FactBoxes on the Draft List page that provide additional information about the individual Drafts. Some of this information is only created for those Jobs with a Delivery Method of Email.

• **Overview** – This FactBox contains an overview of all the lines in the Draft List Page (*Figure 12-4*).

Overview	
Draft Count	
Total Drafts	125
My Drafts	125
No. of Job Queue Drafts	
Attention Count	
Drafts in Error	30
My Drafts in Error	30
Job Queue Drafts needing At	







• **Recipients** – This FactBox displays the recipients of the currently selected Draft in the Draft List Page. Double click on a Recipient Address to easily edit or update the current Email Address (*Figure 12-5*).

Туре		Address
То		frau.karin.fleischer@contoso.co
Cc	:	example@example.com



• **Detail** – This FactBox displays fields relating to the currently selected Draft in the Draft List Page (*Figure 12-6*).

Detail	
General	
Entry No.	1
Delivery Method	Email
Job Type	Sales Invoice
Job	SALES INVOICE
Job Description	Cust. Sales Invoice
Email	
Template	SALES INVOICE
From Email Address	example@example.com
From Name	Sales Department
Email Subj Sales Invoid	e 103005 49525252 Beef
Contact	
Account Type	Customer
Account Code	49525252
Account Name	Beef House
Other	
Created at	23/10/2020 12:00
Created by User	DEMOUSER2
Generated by	User
Generation.	and the second second second

Figure 12-6





• **Attachments** - This FactBox displays the attachments for the currently selected Draft in the Draft List Page. Double click on an Attachment to view (*Figure 12-7*).

λ ttachments \vee	
ile Name	
Sales Invoice - 103005.pdf	



• Email Content – This FactBox displays the Subject and Email Body content of the draft email (*Figure 12-8*).

mail Content	
Sales Invoice 103005 49525252 Beef House	
Hello Beef House ,	
Please find attached your sales invoice 103005 .	
This has been sent to your nominated company contact(s).	•

Figure 12-8

Selecting an individual line in the Drafts List Page will bring you into the **Draft Card** for the individual Draft Line. In the Draft Card, you can modify a number of fields for the individual Draft (*Figure 12-9*).

For example, you choose a new Template for the Job Type, modify the From Email Address and the From Name, or modify the Recipients Email Address.





General				
Entry No. · · · · · · · · · · ·		31	Job Description	Sales Credit Memo
Delivery Method	Email		Status	
Job Type	Sales Credit Memo		Status Detail	
Job dol	CREDIT MEMO			
Details				
Account Type	Customer		Account Name	The Cannon Group PLC
Account Code	10000		Document No.	104001
Email				
			From Name	Calas Dapartment
Template	SALES CREDIT MEMO	~	From Name	Sales Department
	SALES CREDIT MEMO example@example.com	~	From Name · · · · · · · · · · · · · · · · · · ·	Sales Department Sales Credit Memo 104001 The
Template		~		
Template	example@example.com	×		
Template	example@example.com	~		
Template	example@example.com			
Template	example@example.com	diess andy.teal0		
Template From Email Address Recipients Mana	ge		Email Subject	
Template ····· From Email Address ···· Recipients Mana ^{Typ∞} → To	ge		Email Subject	
Template ···· From Email Address ···· Recipients Mana ^{Typ∞} → To	ge		Email Subject	
Template From Email Address Recipients Mana Type → To Cc Cc	ge		Email Subject	

Figure 12-9





12.1.1 Issuing the Drafts

When your Drafts have generated, you can then send the Drafts to their recipients.

If you do not want to issue the draft and do not want the draft to generate again, you can also choose to skip the delivery of a Draft and archive the Draft to History.

To deliver the Drafts, from the **Drafts** List Page, in the **Drafts** group, choose the **Issue Drafts** Action (*Figure 12-10*).

\leftarrow	Total Drafts Work Date: 27/01/2022
	Search Manage Drafts Actions History Actions Fewer options
	🔁 Generate Drafts 📧 Issue Drafts 📲 Skip and Archive Drafts
	Delivery Document Method Joh Tupo No. Tomplato Account Codo Account Name

Figure 12-10

• Issue Drafts – Choose this Action to issue and deliver the generated Drafts. You are prompted to deliver Drafts from selected Drafts or from all Drafts.

To issue Selected Draft documents, highlight the lines you want to deliver, choose the **Issue Drafts** Action and then choose **Only Selected Drafts in the List.**

To issue All Draft documents, choose the **Issue Drafts** Action and then choose **All Drafts in the List.**

Drafts with a Delivery Method of Email will be delivered by Email. Drafts with a Delivery Method of Print will output to printer.





To skip delivery of a Draft and archive the Draft to History, from the **Drafts** List Page, in the **Drafts** group, choose the **Skip and Archive Drafts** Action (*Figure 12-11*).

🔎 Search	Manage Dra	fts Actions	History	Actions	Fewer options
🔁 Generate	e Drafts ा≣ Iss	ue Drafts	🗄 Skip and A	rchive Drafts	
Delivery	Joh Type	Document	Tomplato		



 Skip and Archive Drafts – If you do not want to issue the Draft and do not want the Draft to generate again, choose this Action to skip the delivery of a Draft(s) and archive the Draft(s) to History. You are prompted to skip and archive Drafts from selected Drafts or from all Drafts.

To Skip and Archive Selected Draft documents, highlight the lines you want to deliver, choose the **Skip and Archive Drafts** Action, and then choose **Only Selected Drafts in the List.**

To Skip and Archive All Draft documents, choose the **Skip and Archive Drafts** Action and then choose **All Drafts in the List.**

Drafts that are skipped and archived, have the **Skipped and Archived** checkbox selected in the **SD Bulk Mailer History List** page.





12.1.2 Viewing Delivered Drafts

You can view the History of Drafts delivered, whether by Email or Print by selecting the **History** Action in the **History** Tab of the **Drafts** List Page (*Figure 12-12*).

Bulk Mailer I	Drafts:	🔎 Search	📋 Delete	Drafts \lor	Actions \lor	${\rm History}{\scriptstyle \bigvee}$	📲 Open in Exc	el Actions 🗸	Fewer options
DELIVERY METHOD	JOB TYPE	DOCUME NO.	TEMPLATE	ACCOUNT CODE	ACCOUN	History		STATUS DETAIL	FROM EMAIL ADDRESS

Figure 12-12

The **History** List Page displays a log of the documents delivered with details of the Draft sent, including the Report Name, Account Code and Document No. You can apply filters, as standard, in the History Page to limit the number of documents you are searching for (*Figure 12-13*).

🔎 Search	Ma	nage <u>Actic</u>	ons 🛛 🚺 Open in Exc	:el							
记 Resend											
Entry No. ↑		Delivery Method T	Job	Job Description	Job Type	Document No.	Account Type	Account Code	Account Name	Creat	
1	:	Email	SALES INVOICE		Sales Invoice	103001	Customer	10000	The Cannon Group PLC	OS	Detail
2		Email	SALES INVOICE		Sales Invoice	103005	Customer	49525252	Beef House	05	General
3	÷	Email	SALES INVOICE		Sales Invoice	103002	Customer	20000	Selangorian Ltd.	09	Entry No.
4		Email	SALES INVOICE		Sales Invoice	103003	Customer	30000	John Haddock Insurance Co.	05	Delivery Method Job Type
-		Emoil			Color Invision	102000	C	40525252	Destillaria	01	Job Type



You can review each document in the History Page by double clicking on the File Name in the Attachment FactBox.

For Drafts with a Delivery Method of Email, you can also view the Email Content in the **Email Content** FactBox.





12.1.3 Re-Delivering a Document from History

You can re-deliver a Document(s) from History by selecting the required line(s) in the History list and selecting **Resend** from the **Actions** Tab (*Figure 12-14*).

\leftarrow	SD Bulk Mailer H	listory								
	✓ Search M ■ Resend	Manage <u>Act</u>	ions 🛛 🖓 Open in E	xcel						
	Entry No. †	Delivery Method	dol	Job Description	Job Type	Document No.	Account Type	Account Code	Account Name	Creat
		: Email	SALES INVOICE		Sales Invoice	103001	Customer	10000	The Cannon Group PLC	05

Figure 12-14

You are prompted whether to resend the draft form history or to recreate the draft from the history entry (*Figure 12-15*). This second option is relevant where you may have added lines for example to a Purchase Order after first sending the draft and you now want to send the up-to-date document with the email.

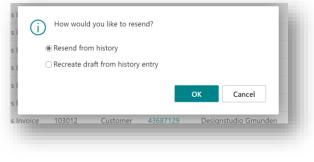


Figure 12-15

The Deliveries field on the History line will increment each time you choose to Deliver Selected from History.





12.2 Generating Drafts Automatically

12.2.1 Generating Jobs Automatically Using Job Queue Entries

You can set Drafts to automatically generate and deliver from SD Bulk Mailer by using Job Queue Entries. As a pre-requisite, you must have Job Queues already setup and running in Microsoft Dynamics 365 Business Central.

In the SD Bulk Mailer **Role Centre** Page, choose **Job Queue Entries** in the **Actions** groups *(Figure 12-16).*

-	 + iii 	🗸 Saved 🔲 🖬 🖉
SD Bulk Mailer S	Setup	
Process About Actions R	elated Fewer options	18
General >		



1. In the Job Queue Entries, create a New Job Queue Entry by selecting **New**.

As an example, we will set up a Job Queue Entry to automatically generate and deliver Drafts for Purchase Order Documents (*Figure 12-17*).





🔊 Set Status to Ready	Set On Hold Show Error	Restart
General		
Description	Purchase Orders Job Queue	Advanced
Job Code	PURCHASE ORDER ····	Maximum No. of Atte 0
Object		Job Queue Category 🔻
Object Type to Run	Codeunit	Run in User Session · · · · ·
Object ID to Run	43014009	Schedule
Object Caption to Run	SDY BM Job Queue	Earliest Start Date/Time · · 14/11/2020 00:00
Info		Expiration Date/Time
User ID	ADMIN	Status ····· Ready
Last Ready State	13/11/2020 16:25	

Figure 12-17

- 2. In the General FastTab of the Job Queue Entry Card, enter the following details:
 - **Description** Enter a Description for the Job Queue Entry, in our example, we'll enter a Description of BM Purchase Orders.
 - Job Code Select a Job Code from the list of Jobs in SD Bulk Mailer. In this example we'll select a Job Code of PURCHASE-ORDER, the Job Code for a Job in SD Bulk Mailer that generates a Purchase Order Report and delivers the Draft via Email.
 - **Object Type to Run** This field defaults to Codeunit. Keep this Object Type as the value for this field.
 - **Object ID to Run** This field defaults to an Object ID of 43014009, SD-BM Job Queue. Keep this Object ID as the value for this field.
 - User ID this is the User ID of the User creating the Job Queue Entry.
 - Maximum No. Of Attempts to Run This field specifies the number of times a job queue entry should be re-run after a Job Queue fails to run.





- Job Queue Category Code This field specifies the Job Queue Category Code that the Job Queue Entry belongs to.
- **Run in User Session** This field is automatically updated and indicates if the Job Queue Entry will be processed in a session that has been started by the user.
- Earliest Start Date/Time Specifies the earliest date and time on which the Job runs. Enter your required Schedule Details for the Job Queue Entry.
- **Expiration Date/Time** Specifies the last date and time on which the Job runs. Enter your required **Schedule** Details for the Job Queue Entry.
- **Status** This field specifies the Status of the Job Queue Entry. On creation, this field defaults to a Status of **On Hold**.
- 3. In the Recurrence FastTab of the Job Queue Entry Card, you can choose to setup **Recurrence** details for the Job Queue Entry.
- 4. Choose **OK** to save the Job Queue Entry.
- 5. When you have reviewed your Job Queue Entry, set the Status of the Job Queue Entry to Ready.
- 6. According to your Schedule Details for the Job Queue Entry, the Job Queue Entry will automatically generate and deliver the Drafts as specified in the PURCHASE-ORDER Job Code and its related Template.

Note: If Skip Issue of Job Queue Drafts checkbox on the Job Card is not selected, the Drafts created by a Job Queue Entry will be delivered automatically, unless there is an issue with the Draft. If there is an issue, the Draft will appear in the Drafts List Page.





13 Using the SD Utilities - Launch Open Items Statement Report, ID 43006016, in a Job

1. Our **SD Utilities – Launch Open Items Statement Report** (Report ID **43006016**) <u>is not</u> designed to be run as a balance forward Statement but is designed and structured to be run from 0D to a user-specified End Date. All running totals and entries displayed and calculated in the Report with the assumption of having a Start Date of 0D.

If you are setting up our SD Utilities – Launch Open Items Statement Report (Report ID **43006016**) in your Bulk Mailer Job Card for a Type of Statement, you will need to amend your Start Date Formula to return a 0D in the **Example** field on the Job Card.

 Our SD Utilities – Launch Balance Forward Statement Report (Report ID 43006030) is based on the Standard Microsoft Dynamics 365 Business Central Statement Report (Report ID 116) and <u>is</u> designed to be run as a balance forward Statement with a userspecified Start Date and End Date.





14 Appendix

14.1 Job Card – Search Table and Document Table by Type

The Type field on the Job Card defines both the Search Table to look for documents and the Document Table used when running the report.

The Search Table to look for documents and the Document Table used when running the report are listed below by Type (*Table 3*):

Туре	Search Table	Document Table
Customer	Customer	Customer
Purchase Order	Purchase Header	Purchase Header
Reminder	Issued Reminder Header	Issued Reminder Header
Sales Credit Memo	Cust. Ledger Entry	Sales Cr. Memo Header
Sales Invoice	Cust. Ledger Entry	Sales Invoice Header
Sales Order	Sales Header	Sales Header
Sales Quote	Sales Header	Sales Header
Sales Shipment	Item Ledger Entry	Sales Shipment Header
Service Order	Service Header	Service Header
Service Quote	Service Header	Service Header
Statement	Customer	Customer
Vendor	Vendor	Vendor
Vendor Remittance	Vendor Ledger Entry	Vendor
Customer Payment Receipt	Cust. Ledger Entry	Customer

Table 3





14.2 Template Card - Account Table, Template Contact Table, and Document Table by Job Type

The Account Fields, Template Contact Fields, and Document Fields Actions on the Home Tab of the Template Card Ribbon will open pages listing the field names and field numbers that can be used for the current Template's Job Type.

Job Type	Account Table	Template Contact Table	Document Table
Customer	Customer	Contact	Customer
Purchase Order	Vendor	Contact	Purchase Header
Reminder	Customer	Contact	Issued Reminder Header
Sales Credit Memo	Customer	Contact	Sales Cr.Memo Header
Sales Invoice	Customer	Contact	Sales Invoice Header
Sales Order	Customer	Contact	Sales Header
Sales Quote	Customer	Contact	Sales Header
Sales Shipment	Customer	Contact	Sales Shipment Header
Service Order	Customer	Contact	Service Header
Service Quote	Customer	Contact	Service Header
Statement	Customer	Contact	Customer
Vendor	Vendor	Contact	Vendor
Vendor Remittance	Vendor	Contact	Vendor
Customer Payment Receipt	Customer	Contact	Customer

The Source Fields Table by Job Type (*Table 4*):

Table 4