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Making Business Make Sense with Microsoft Dynamics 365

Apps and Automation

On Microsoft Dynamics 365

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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.

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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).*

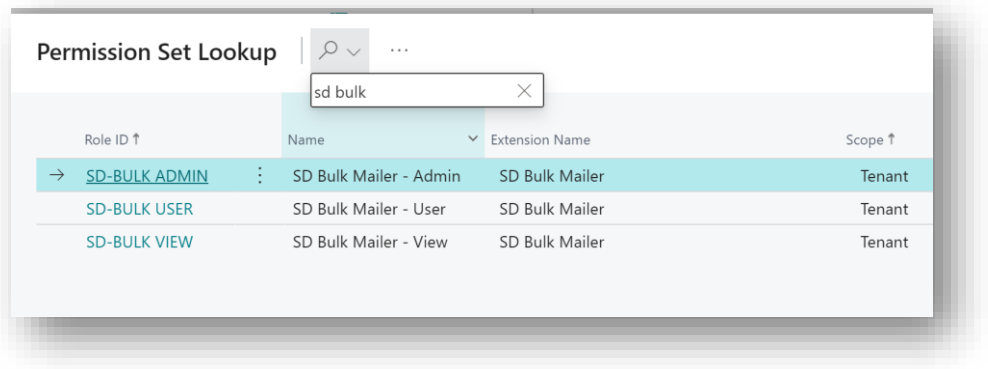

Figure 3-1

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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).*

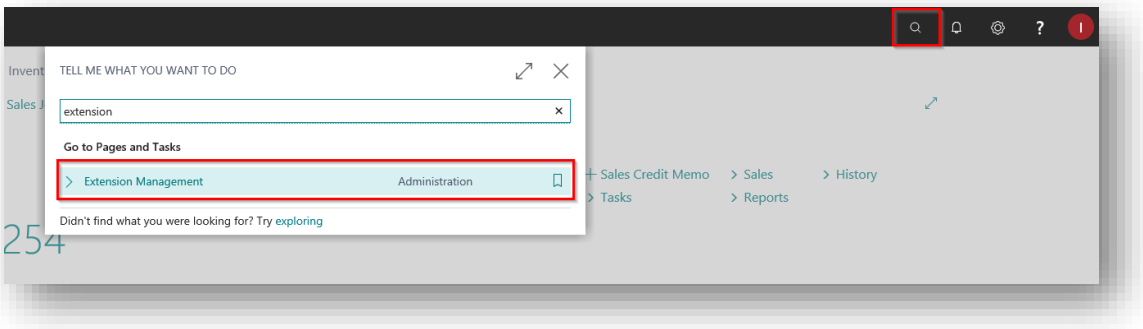

Figure 4-1

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

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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).*

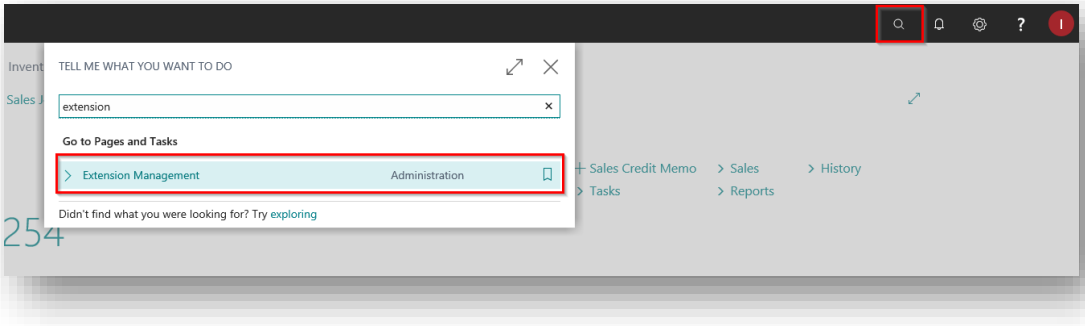

Figure 4-2

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

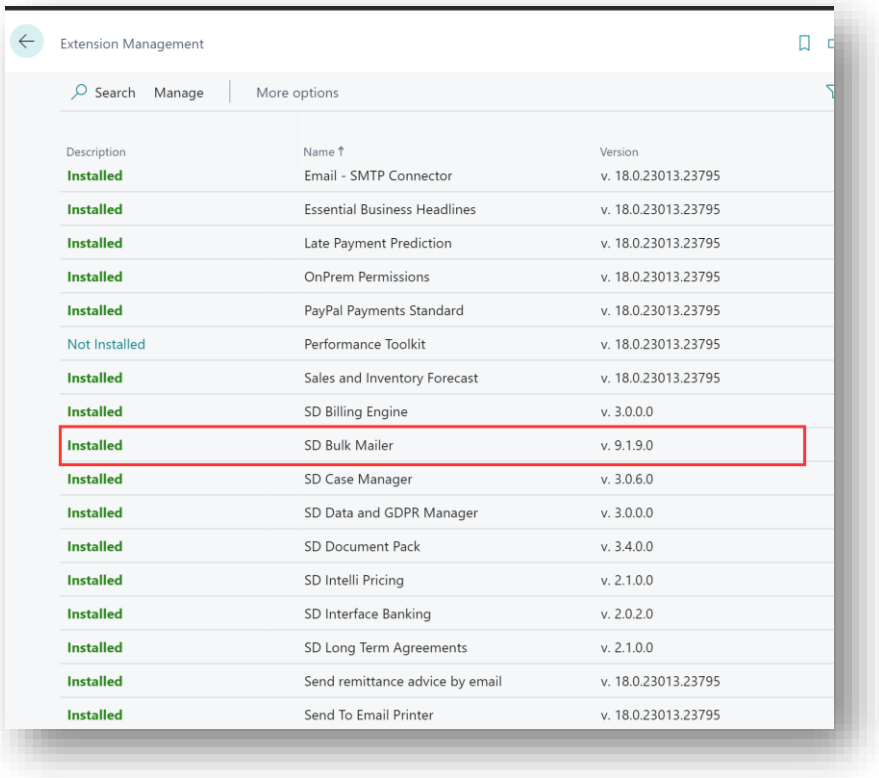

Figure 4-3

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

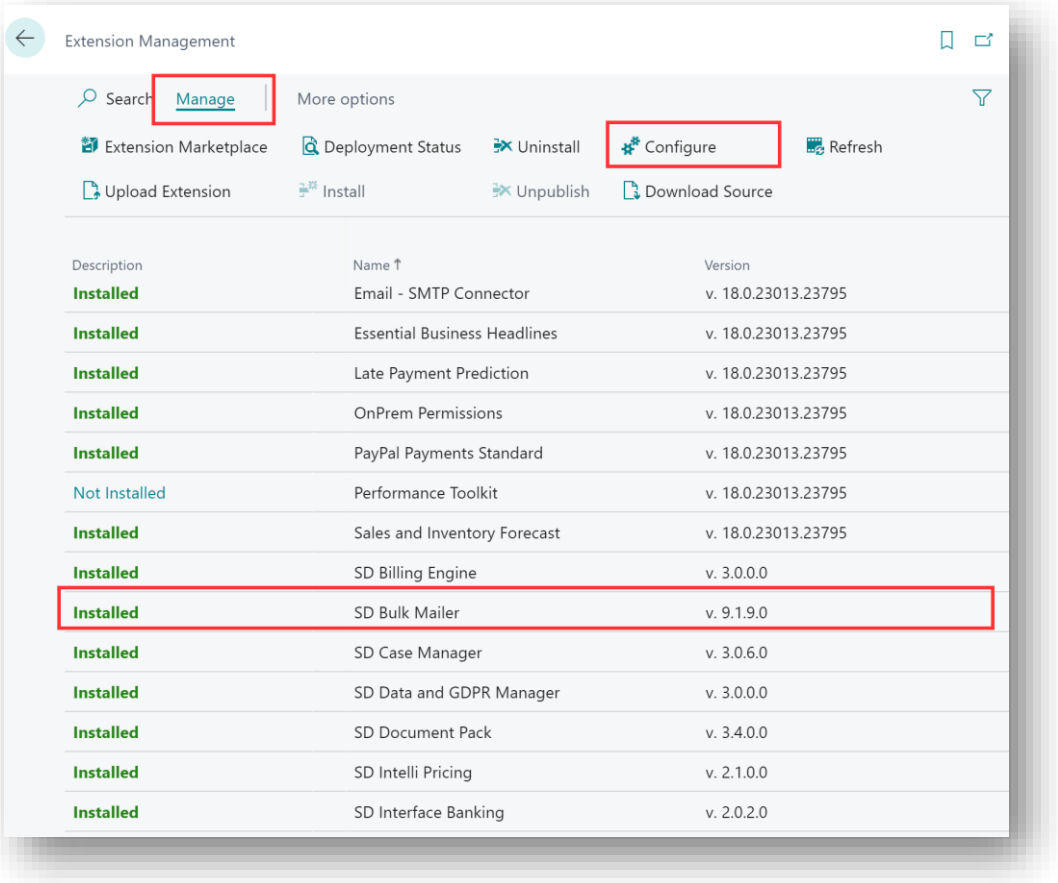

Figure 4-4

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

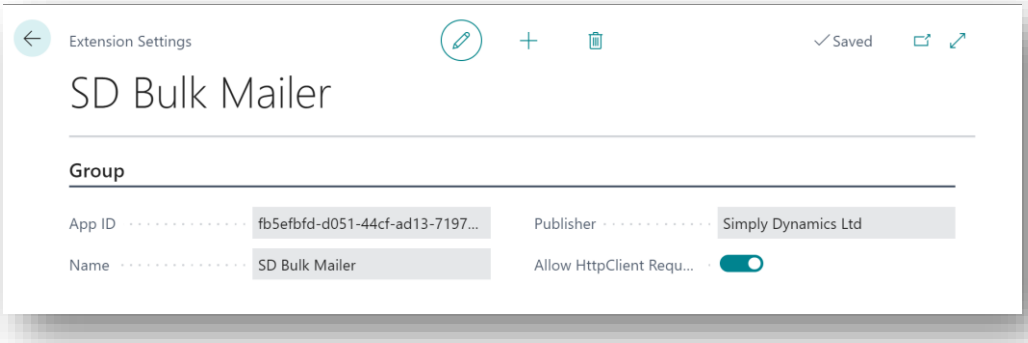

Figure 4-5

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)*.

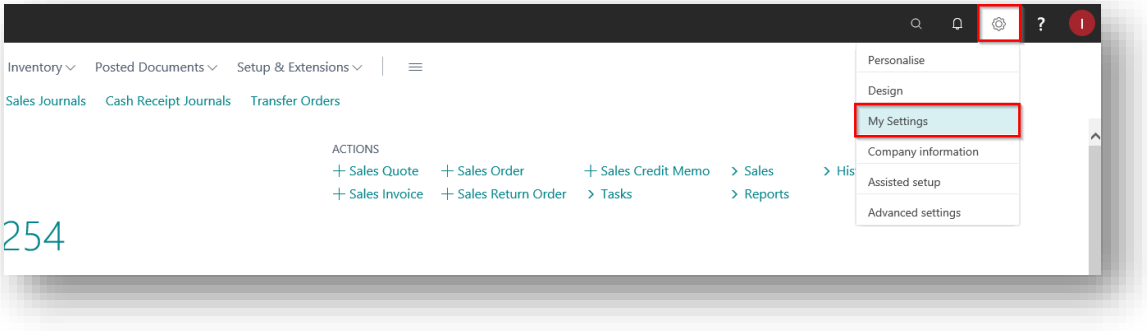

Figure 4-6

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

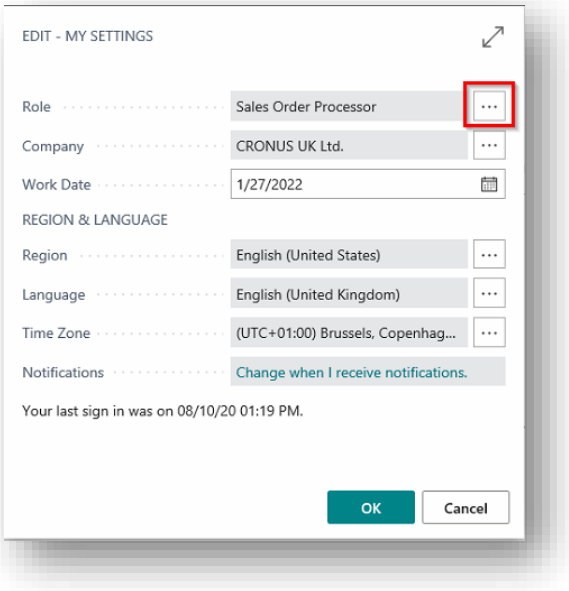

Figure 4-7

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

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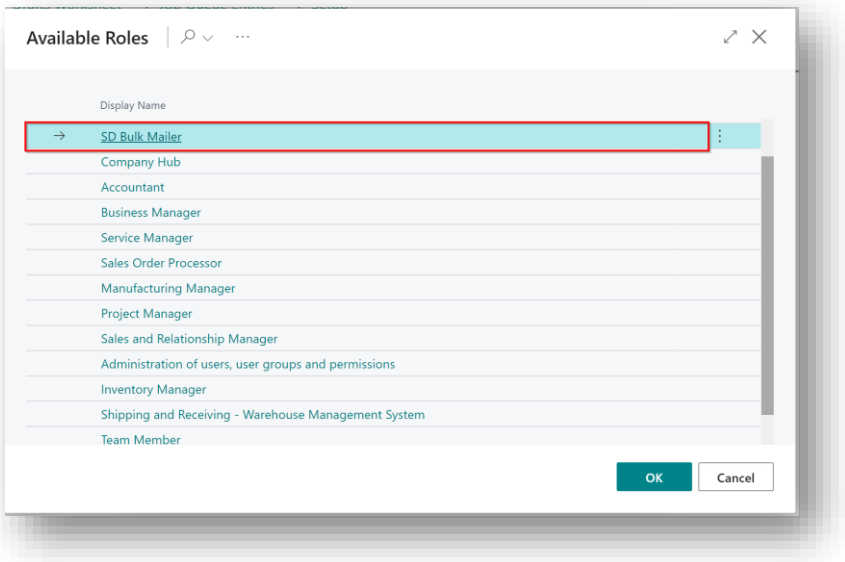

Figure 4-8

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)*.

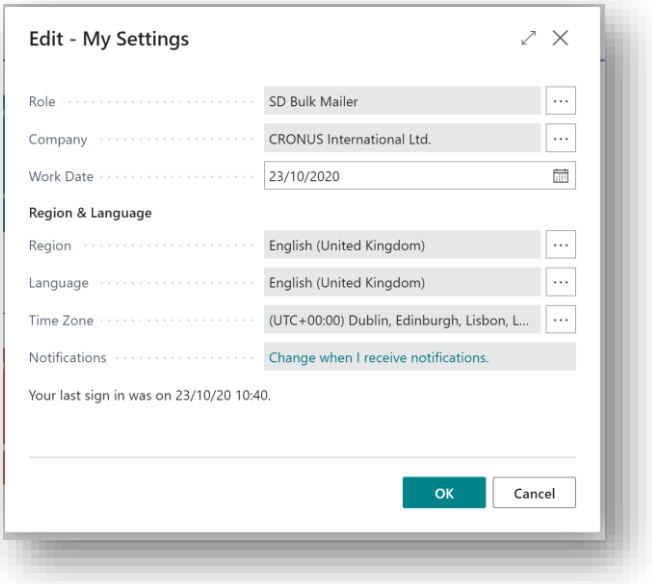

Figure 4-9

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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)*.

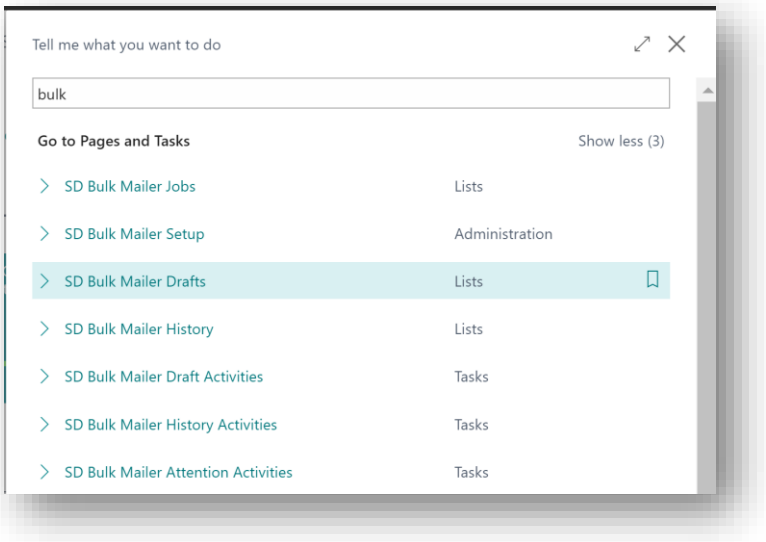

Figure 4-10

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)*.

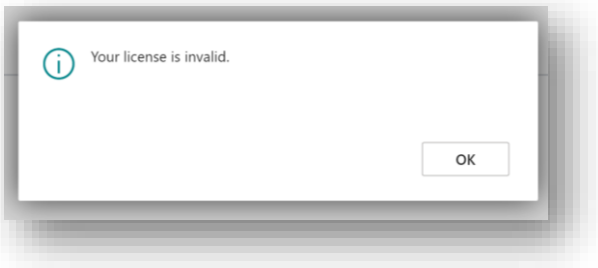

Figure 4-11

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

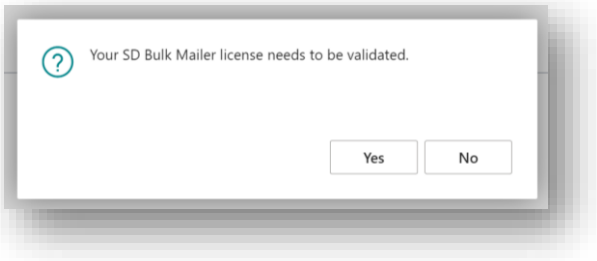

Figure 4-12

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

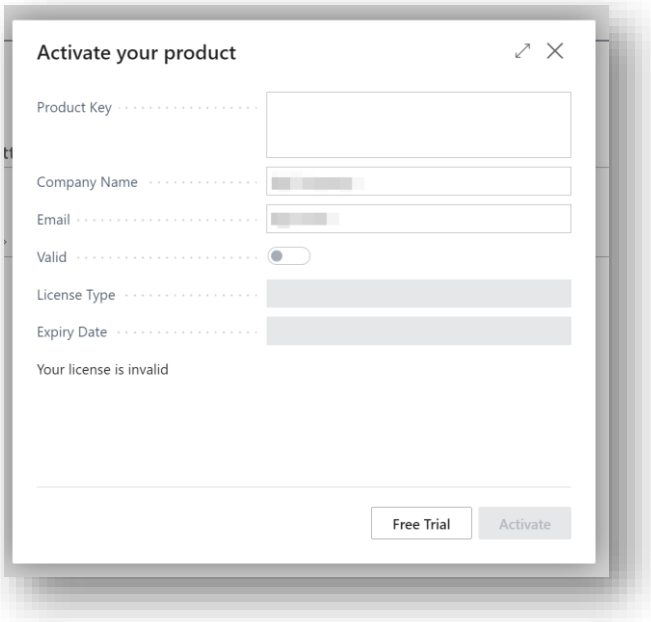

Figure 4-13

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**

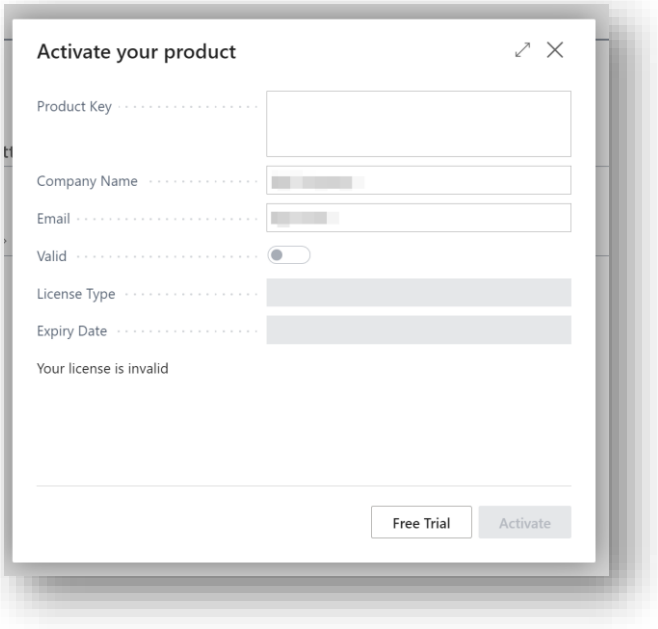

Figure 4-14

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)*.

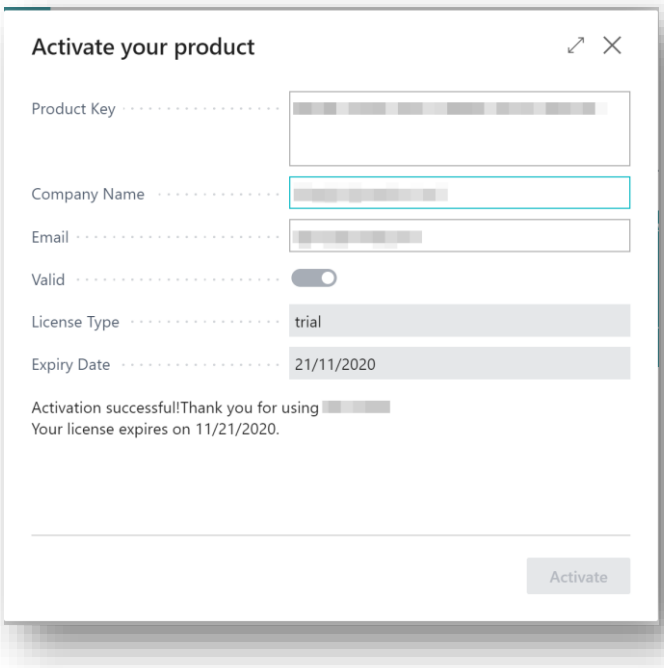

Figure 4-15

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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**

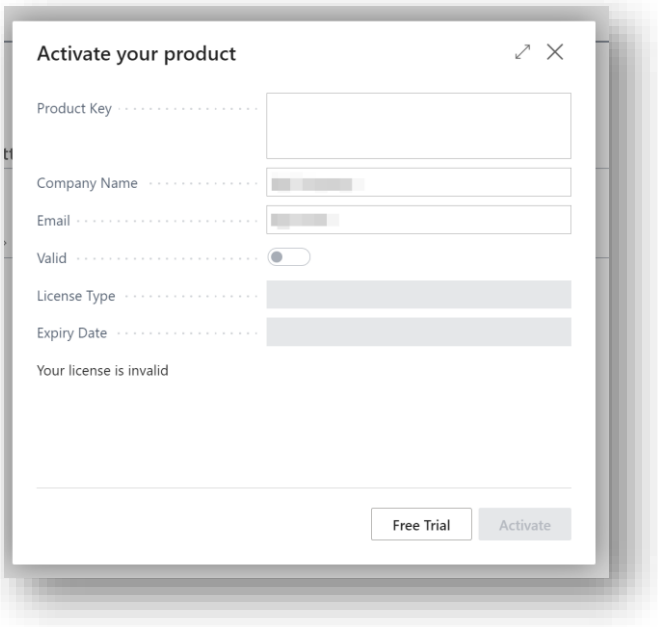

Figure 4-16

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)*.

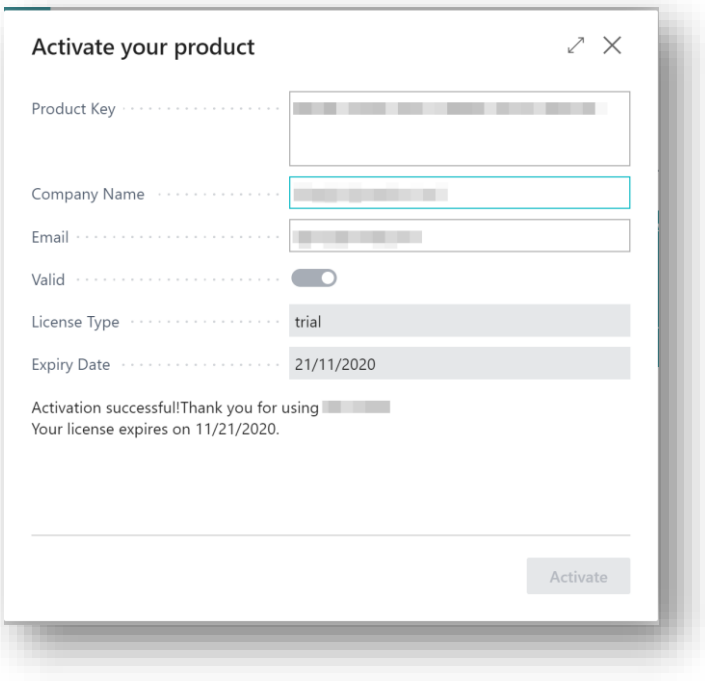

Figure 4-17

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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)*.

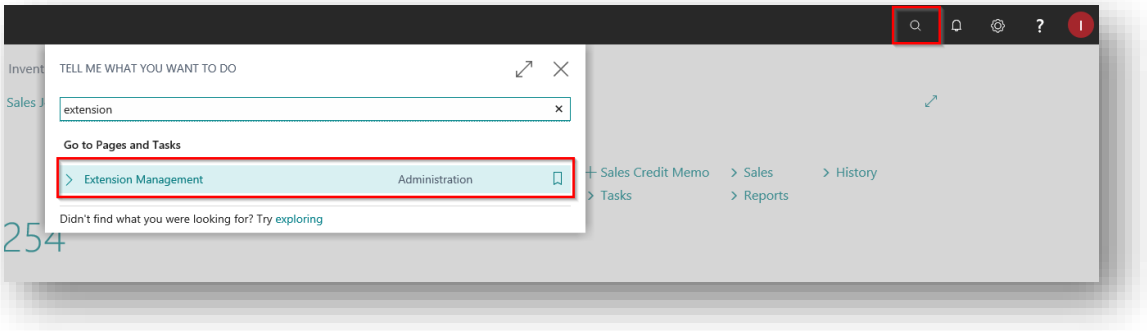

Figure 5-1

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)*.

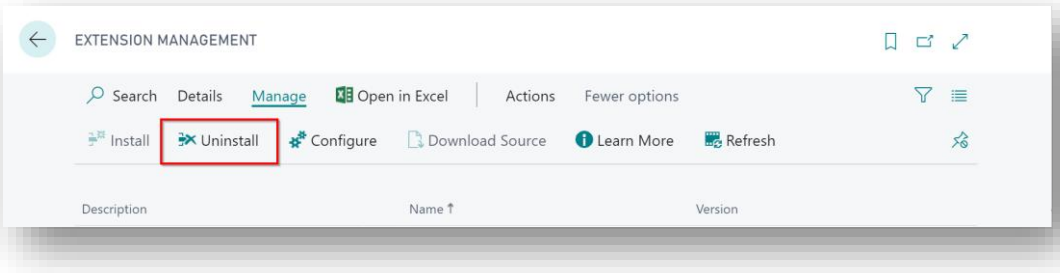

Figure 5-2

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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)*:

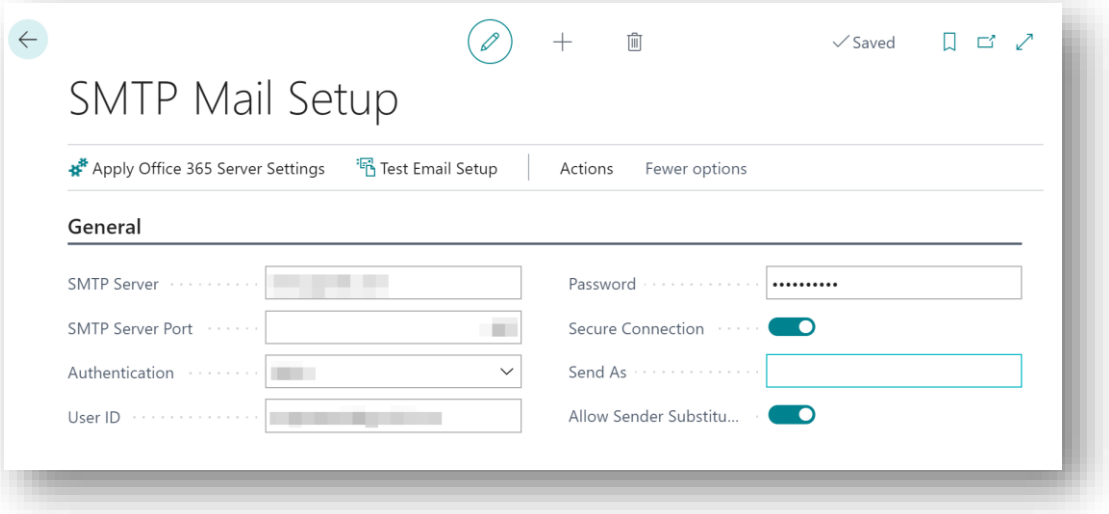

Figure 6-1

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)*:

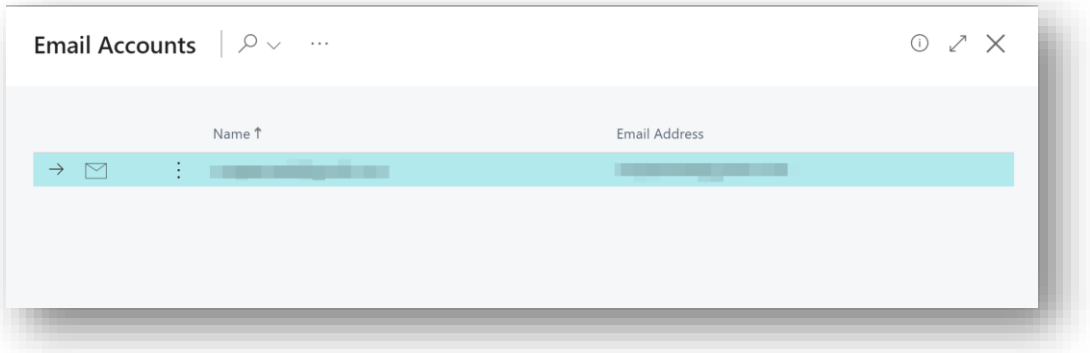

Figure 6-2

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)*.

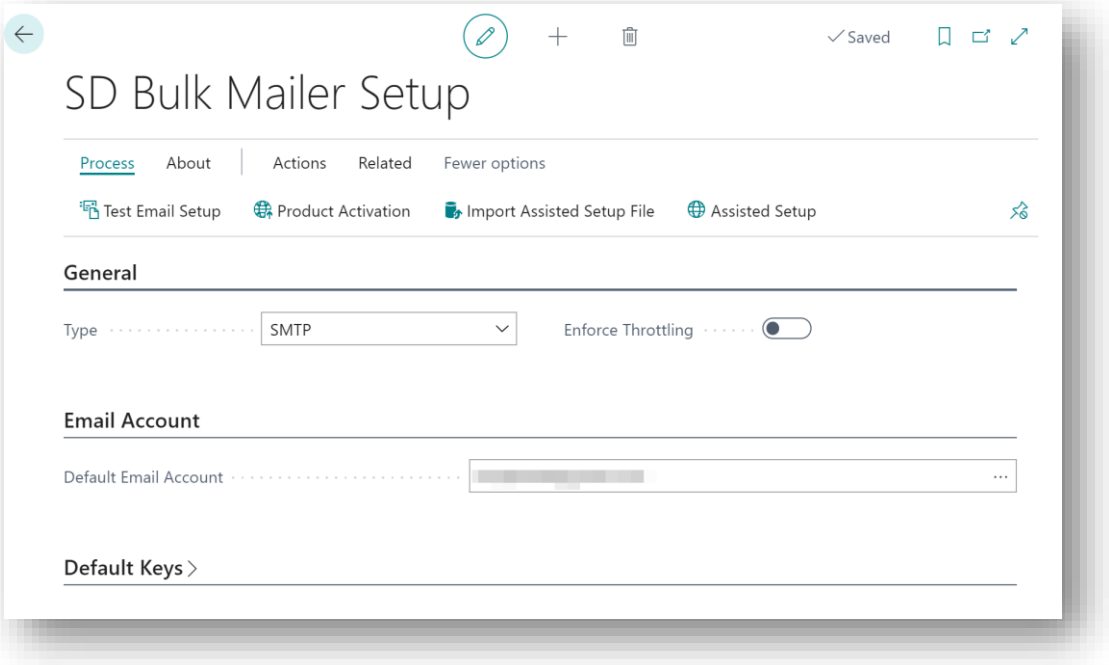

Figure 6-3

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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)*.

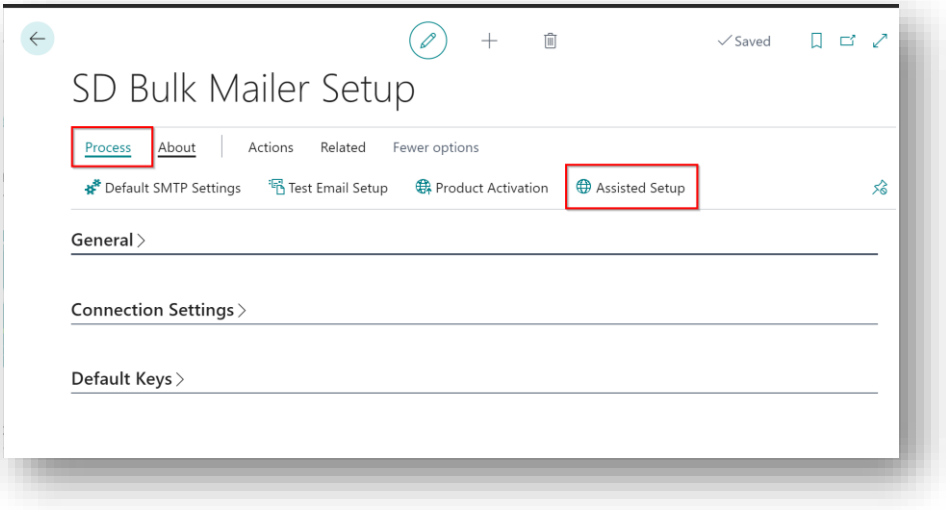

Figure 7-1

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)*.

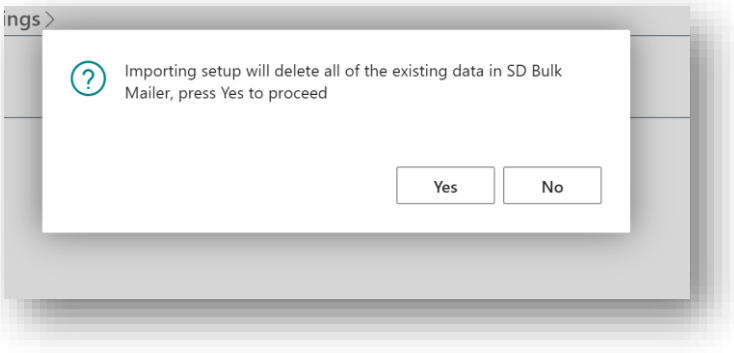

Figure 7-2

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

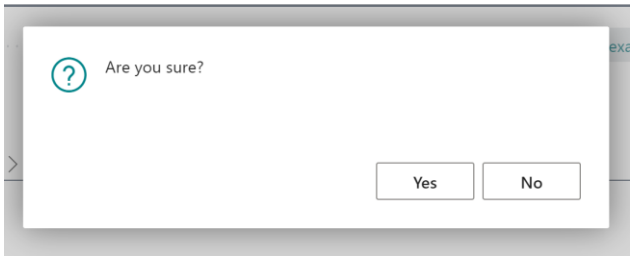

Figure 7-3

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

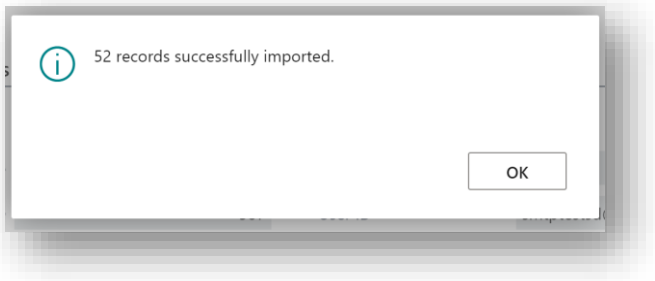

Figure 7-4

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)*:

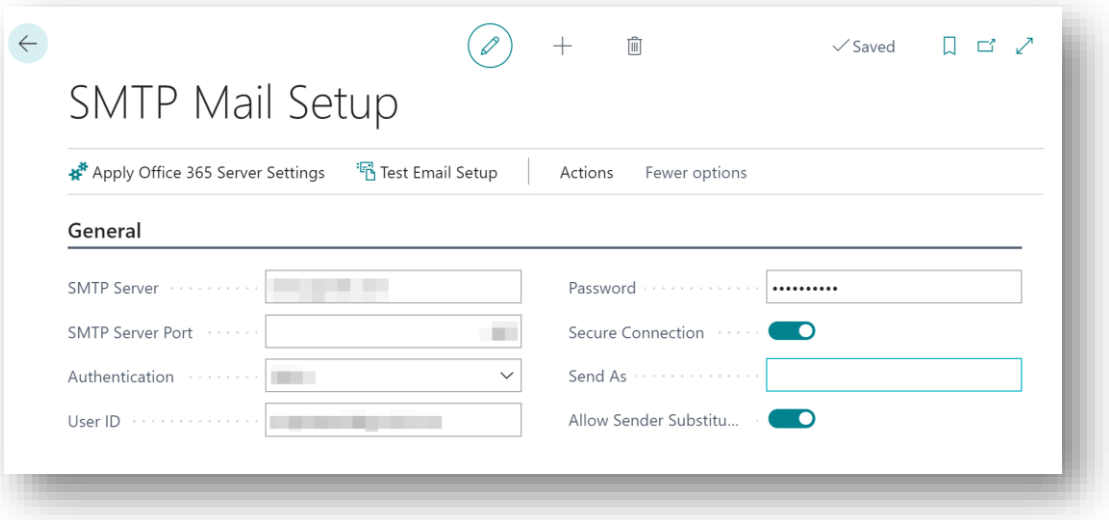

Figure 7-5

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)*:

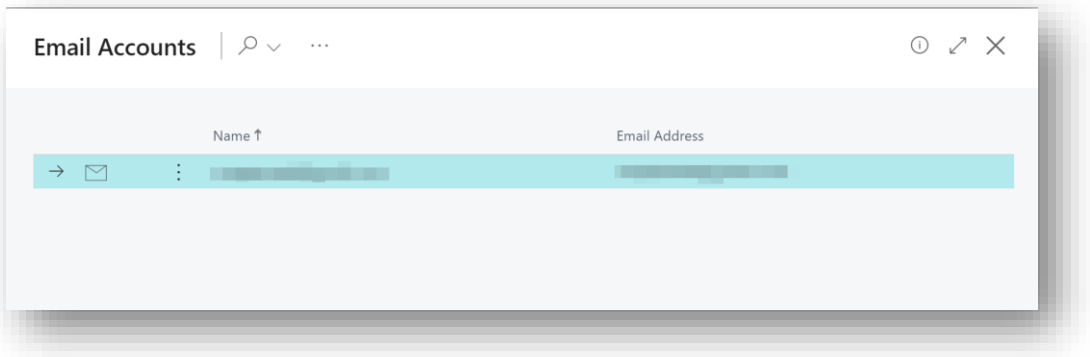

Figure 7-6

1. 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)*.

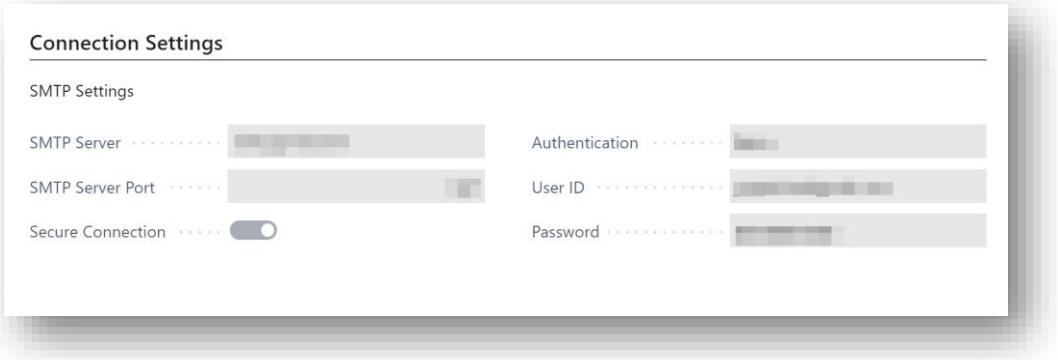

Figure 7-7

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)*.

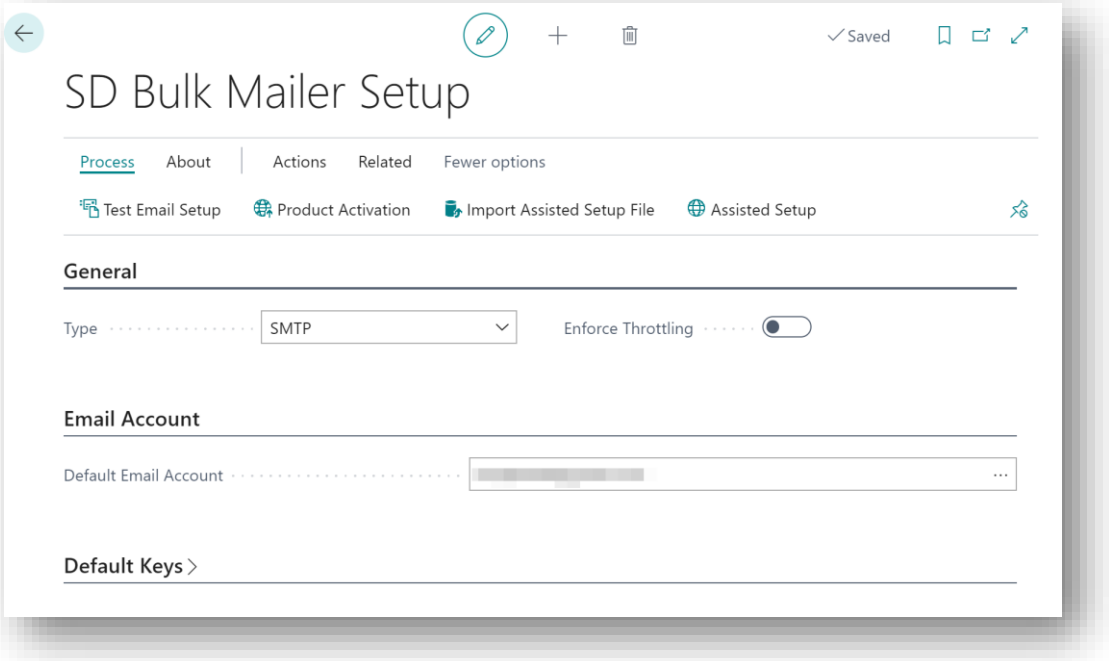

Figure 7-8

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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)*:

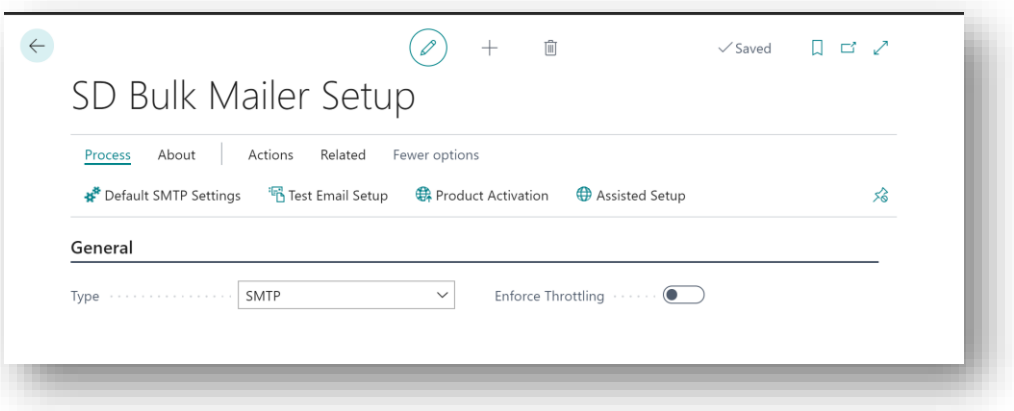

Figure 9-1

- **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)*.

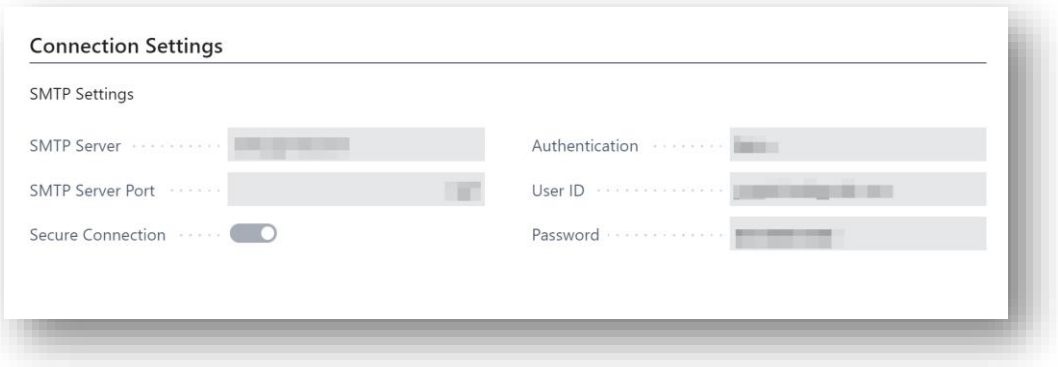

Figure 9-2

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)*.

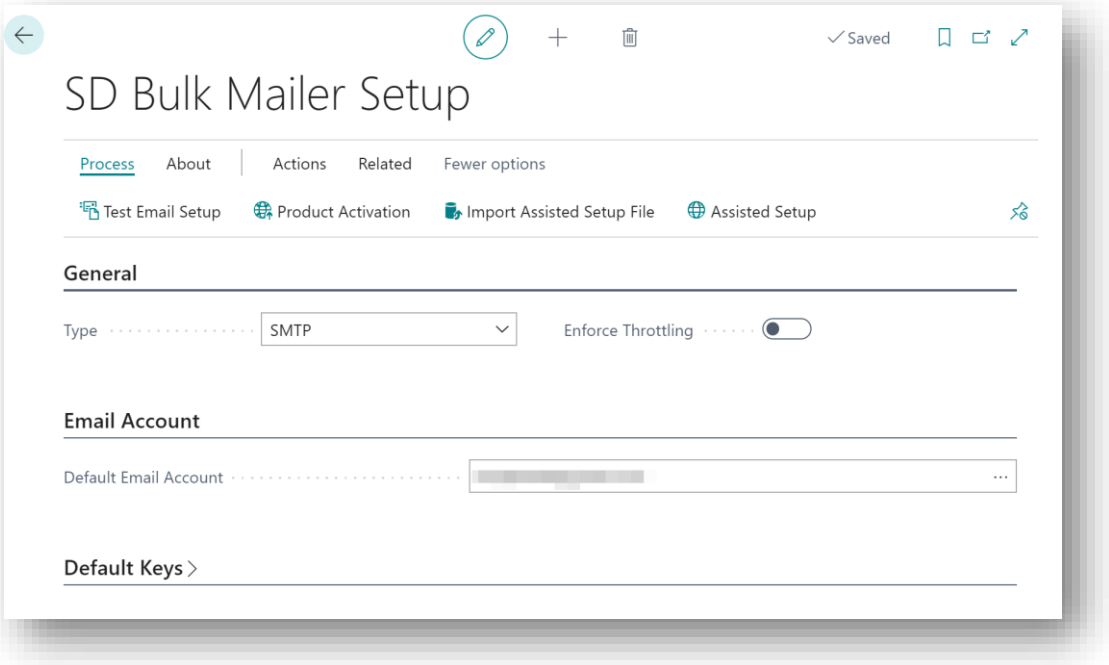

Figure 9-3

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

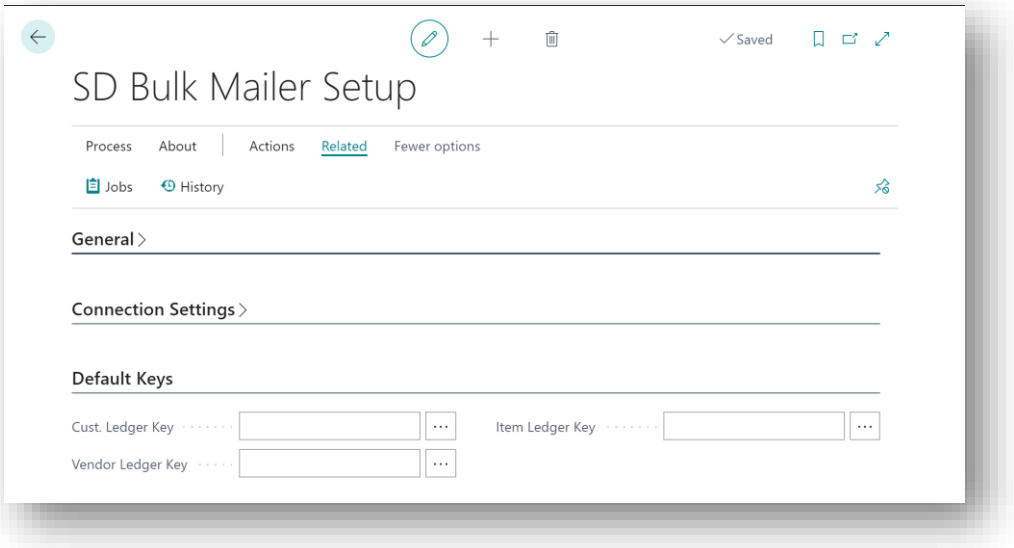

Figure 9-4

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)*.

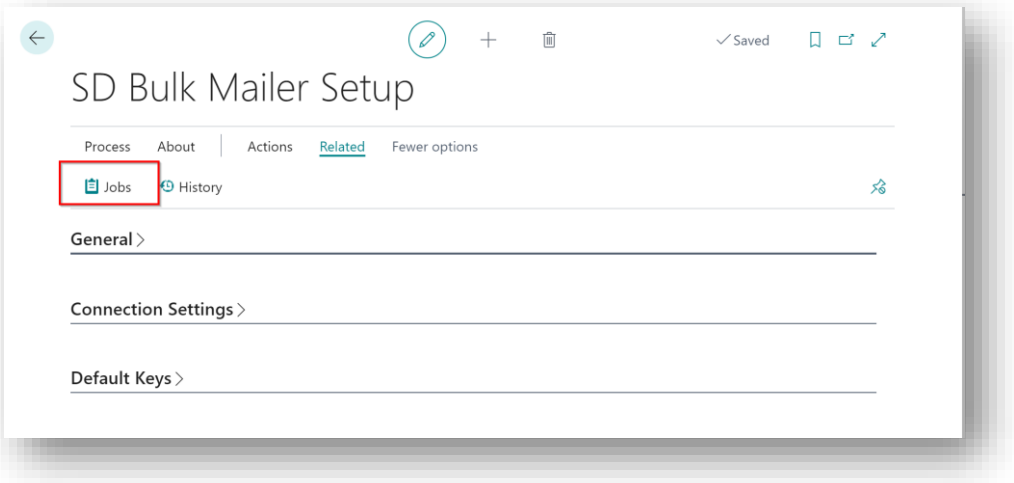

Figure 10-1

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)*.

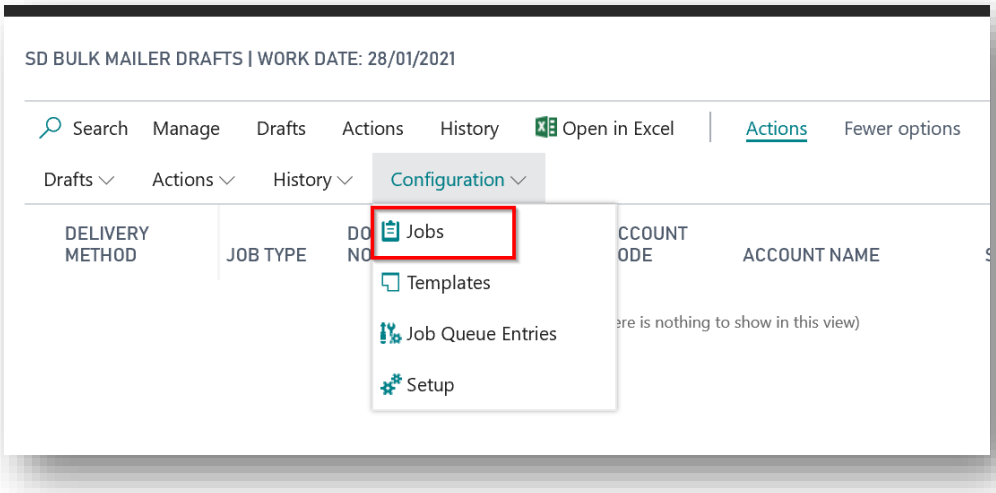

Figure 10-2

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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)*.

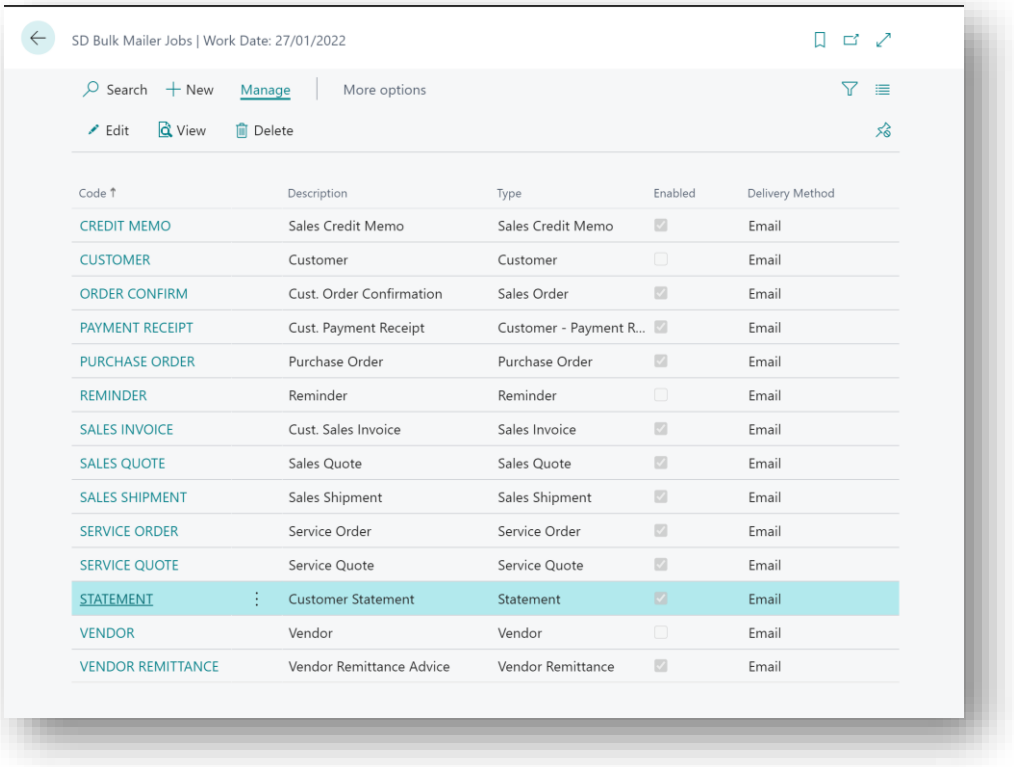

Figure 10-3

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)*:

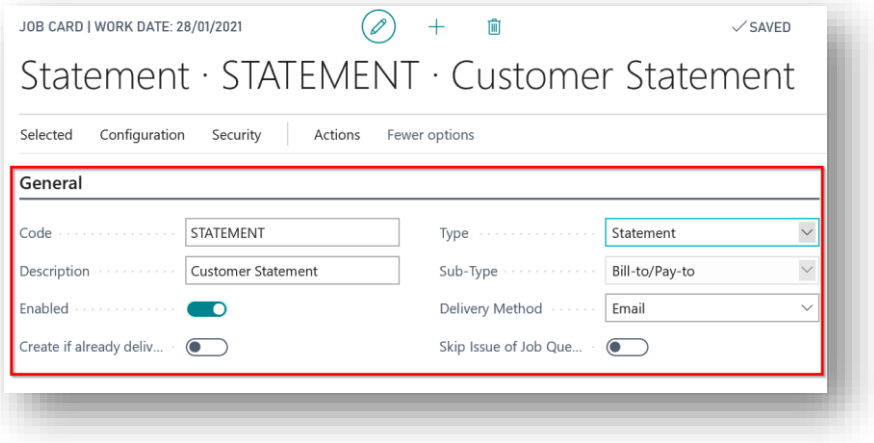

Figure 10-4

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- **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*):

Type	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/Buy-from** 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.

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

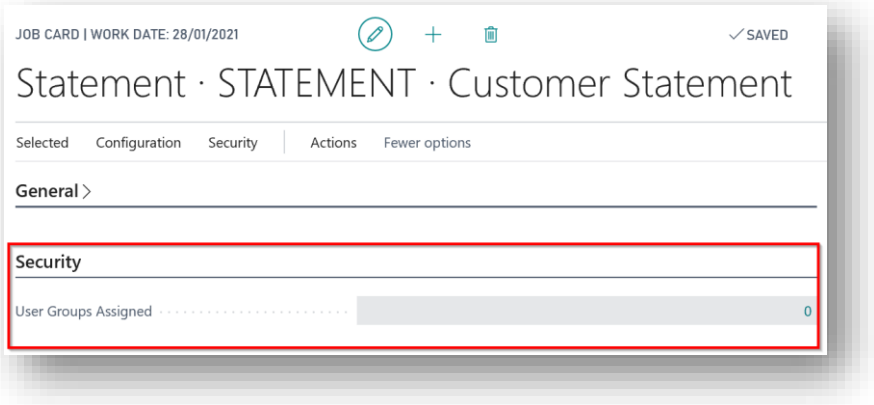

Figure 10-5

- **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)*.

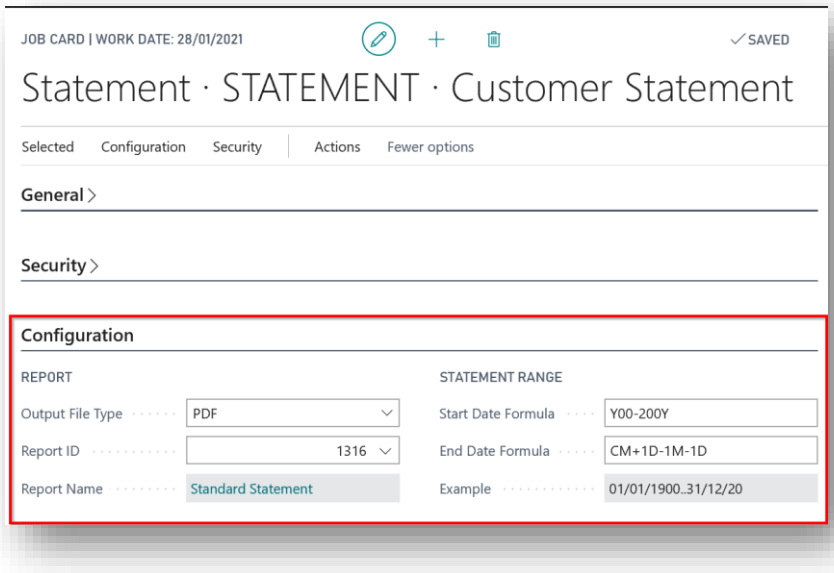

Figure 10-6

- **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**.

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- **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.

Expand the **Filters** FastTab of the Job Card *(Figure 10-7)*.

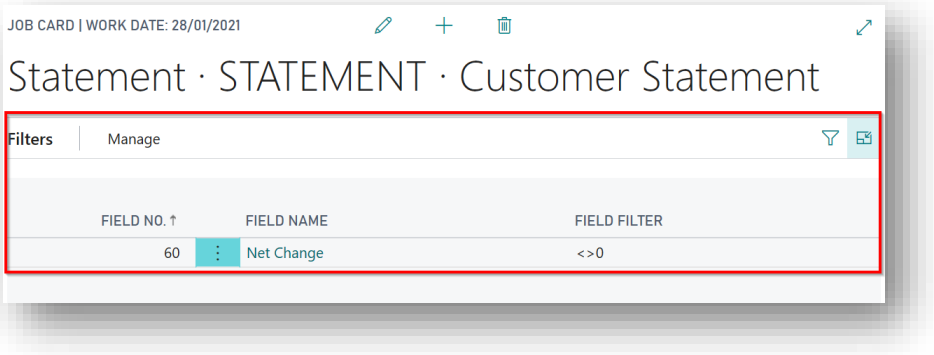


Figure 10-7

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)*.

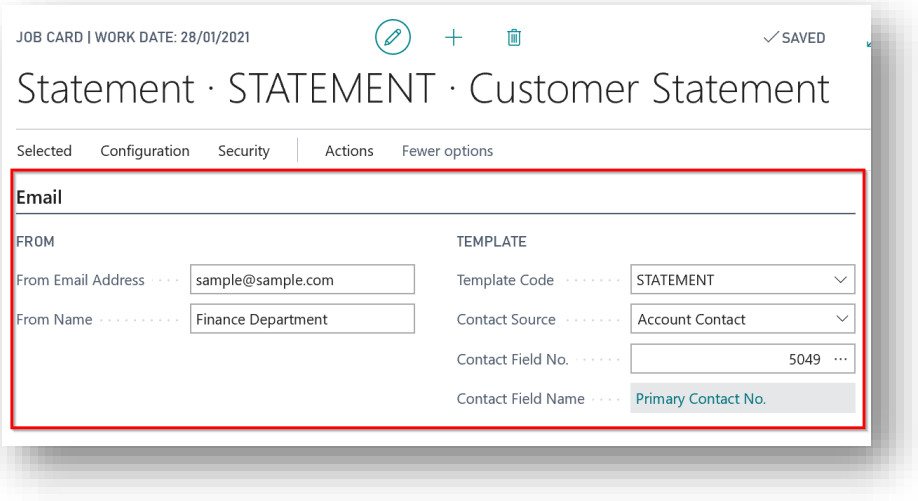


Figure 10-8

- **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:

  1. **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)*:

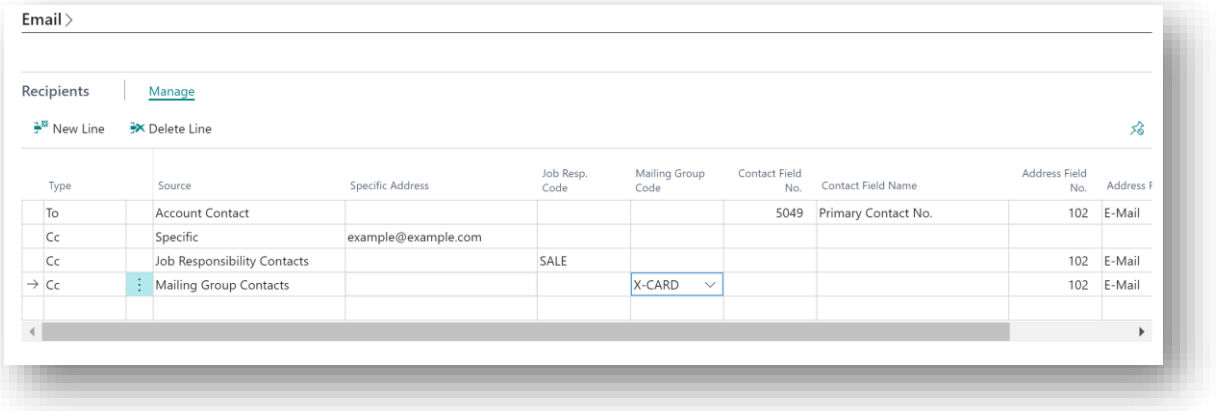


Figure 10-9

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 **not** 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)*:

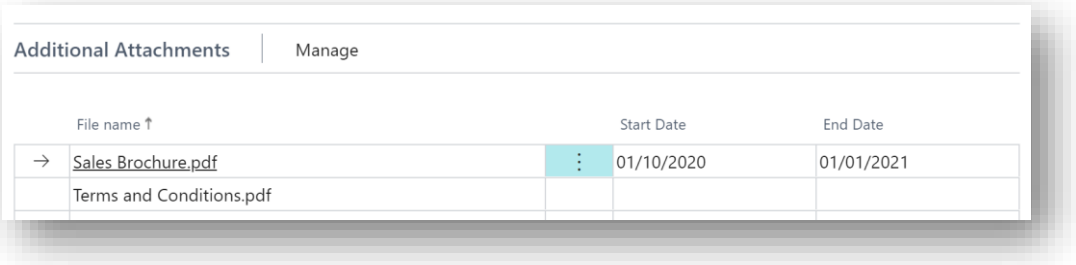


Figure 10-10

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)*:

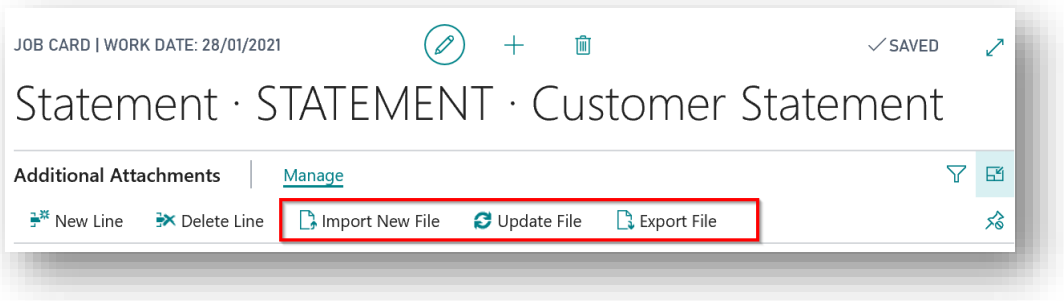


Figure 10-11

- **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)*:

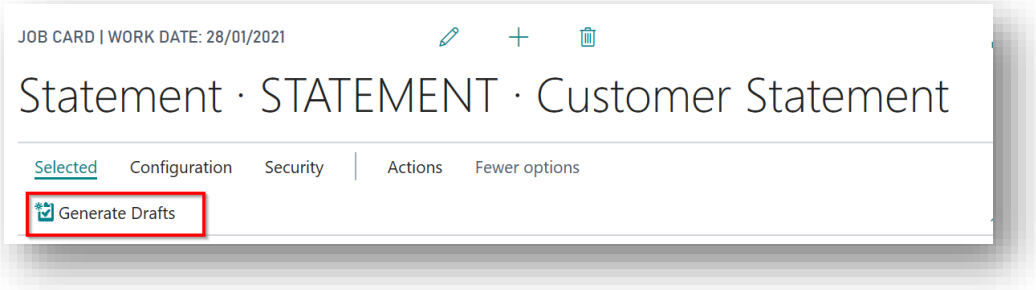


Figure 10-12

- **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)*:

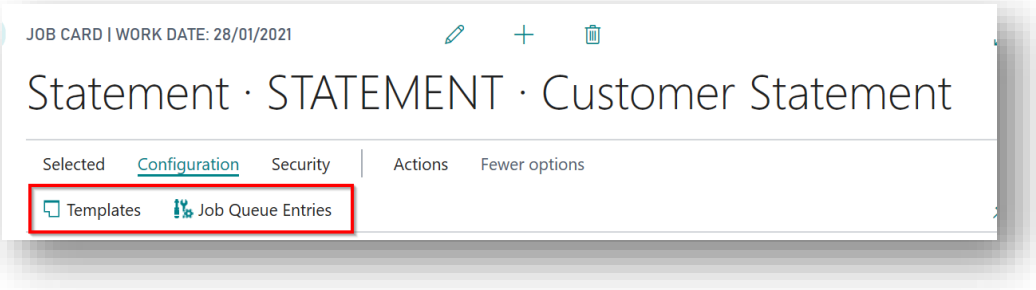


Figure 10-13

- **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)*:

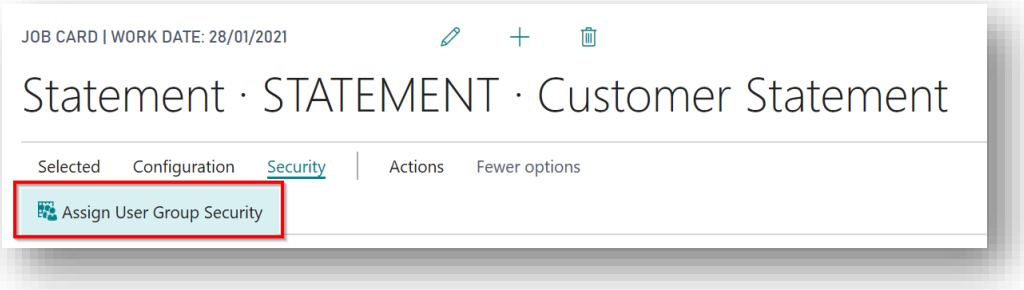


Figure 10-14

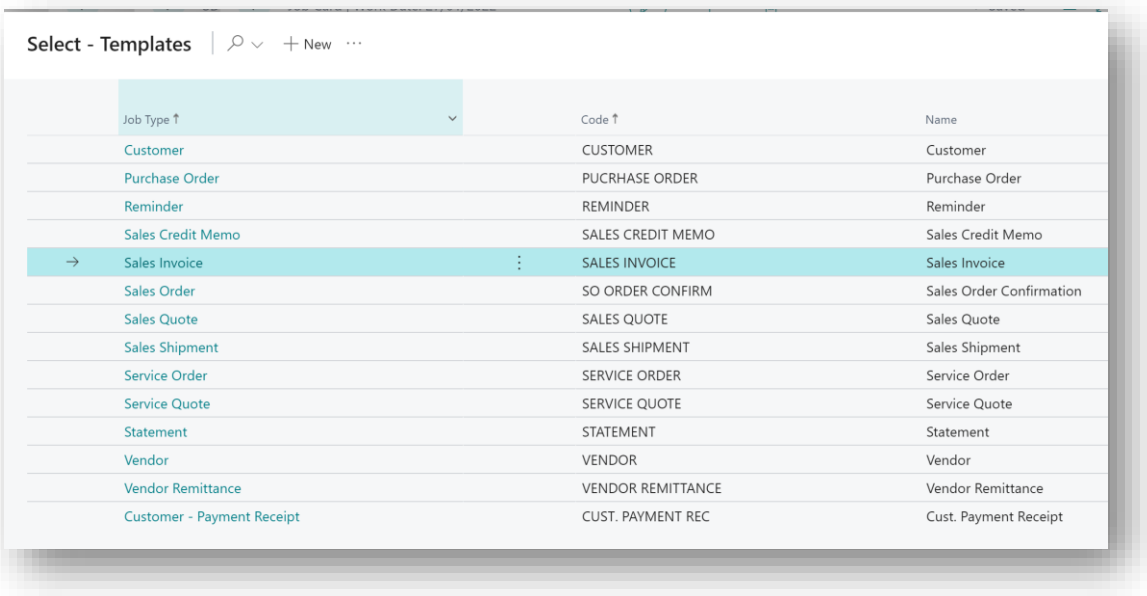
- **Assign User Group Security** – Choose this Action to assign available user groups for the current Job card. If a user group has been assigned to the Job, then only users in the user group can generate and view the Drafts associated with the Job.

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
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.

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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):*

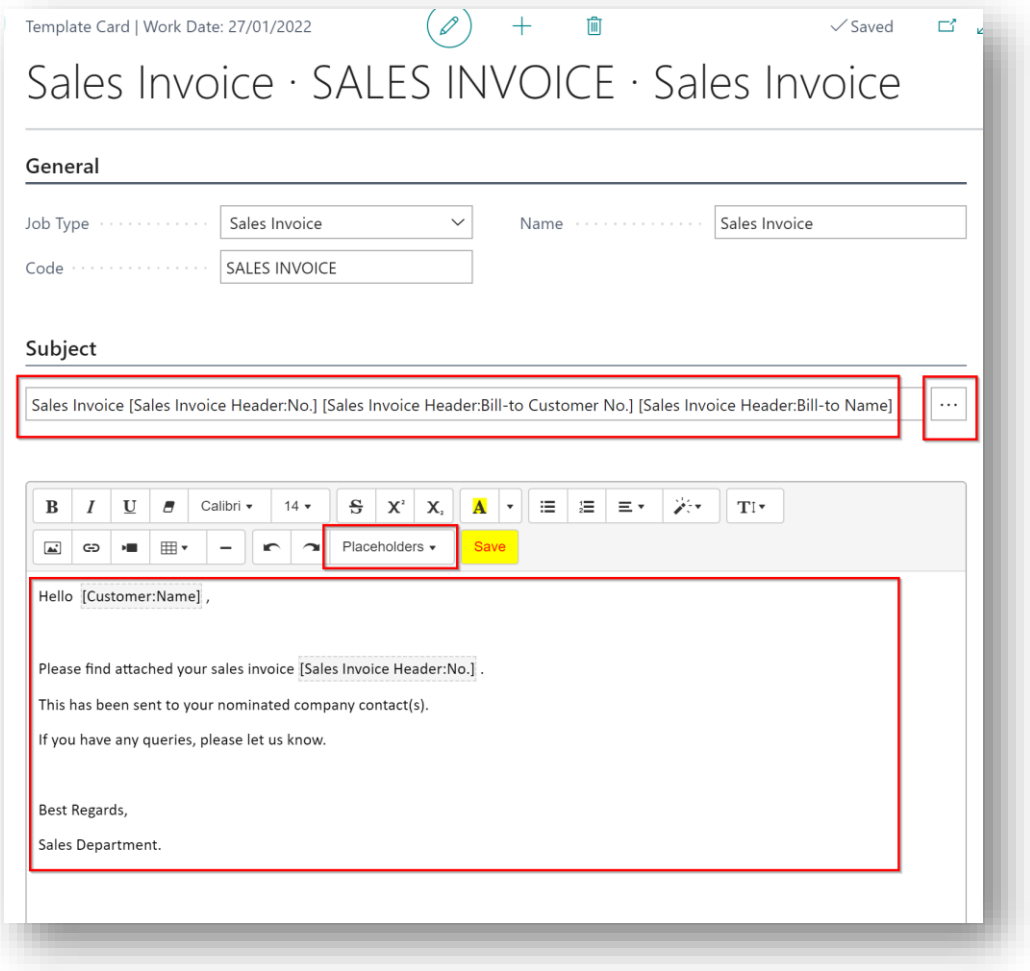

Figure 11-2

- **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*).

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

Table 2

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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):*

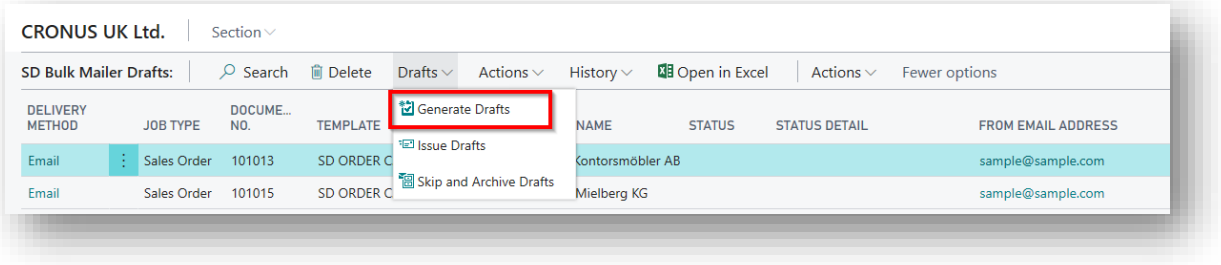

Figure 12-1

- **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)*.

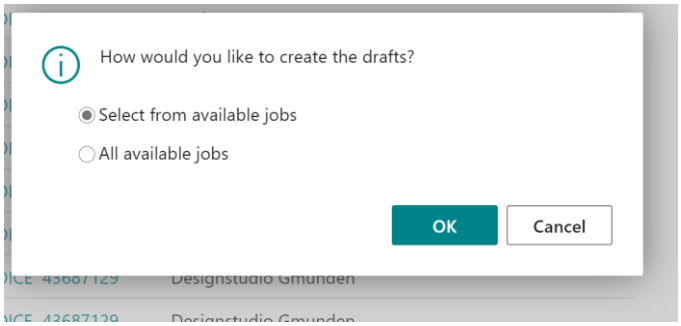

Figure 12-2

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):*

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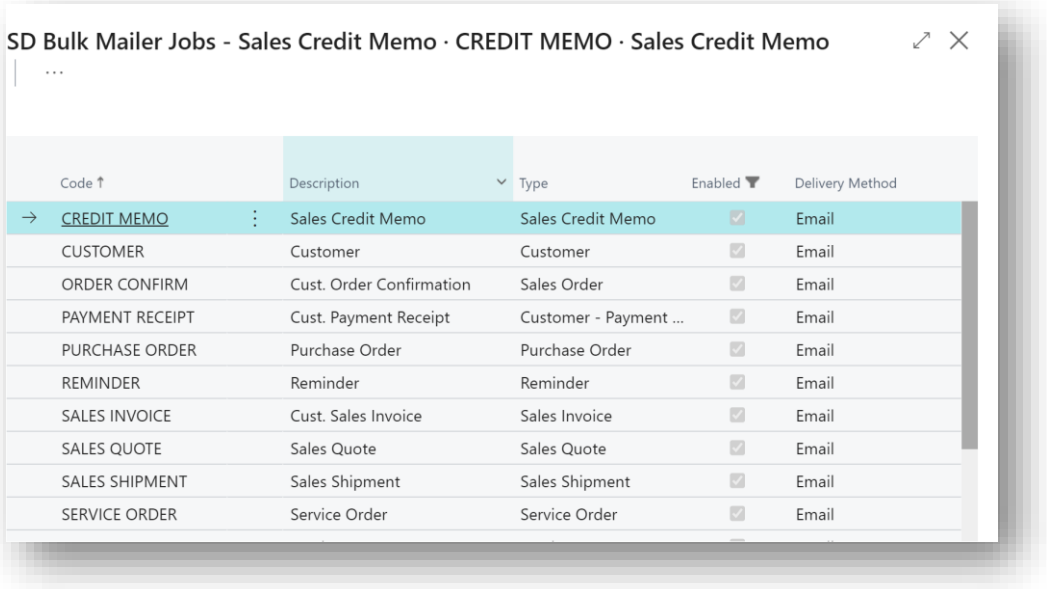

Figure 12-3

If you choose to create Drafts from **all available Jobs**, all 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).*

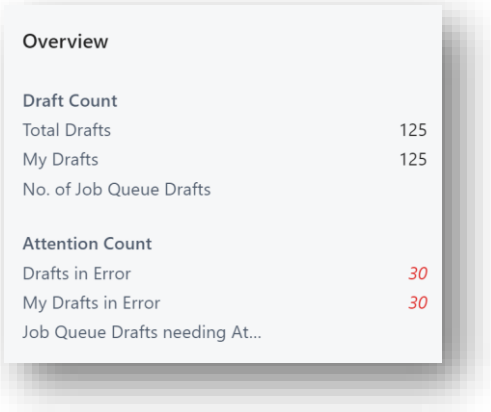

Figure 12-4

- **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).*

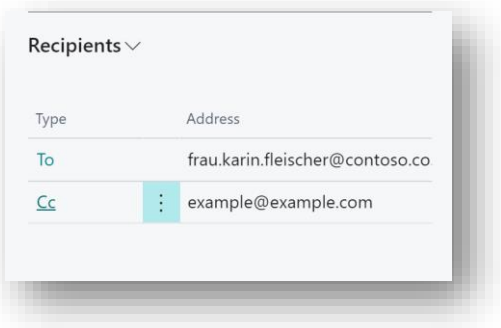

Figure 12-5

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

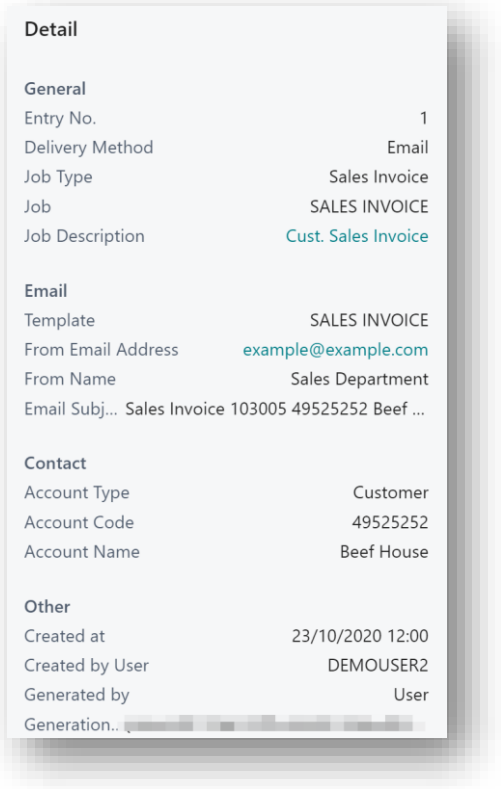

Figure 12-6

- **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).*

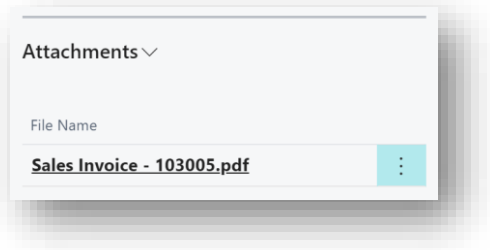

Figure 12-7

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

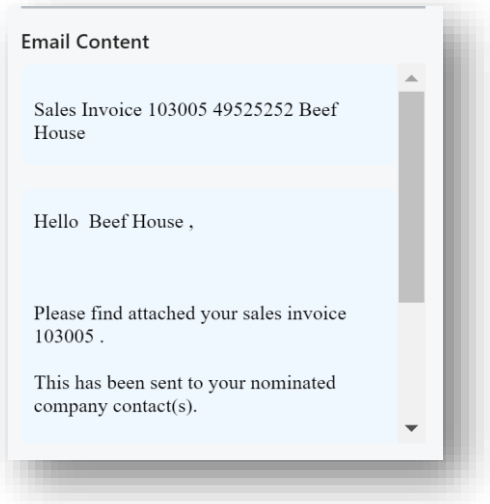

Figure 12-8

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.

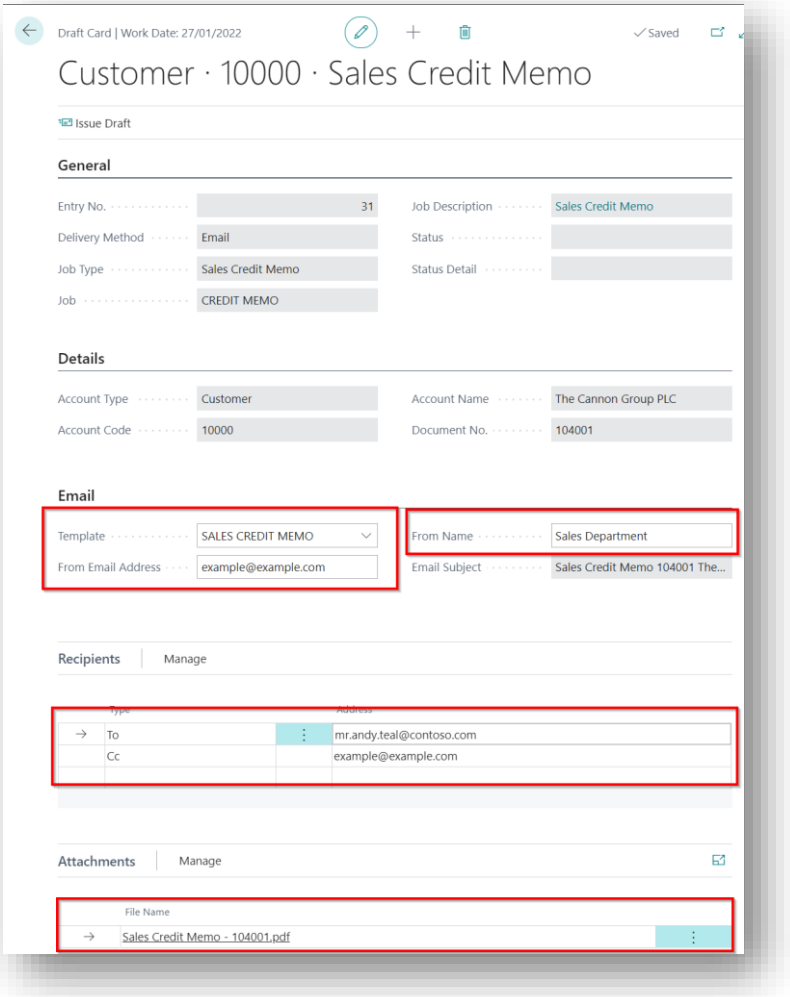

Figure 12-9

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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).*

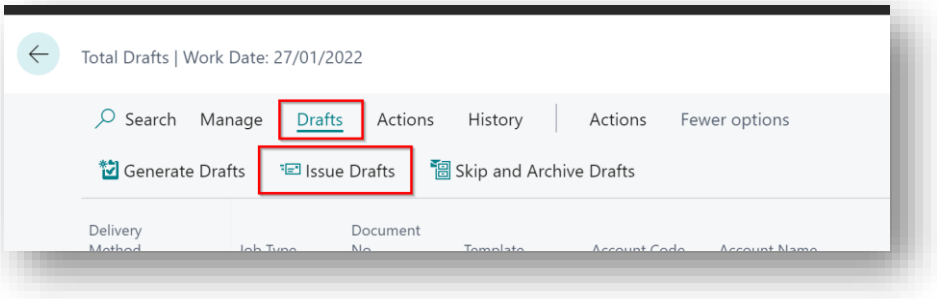

Figure 12-10

- **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).*

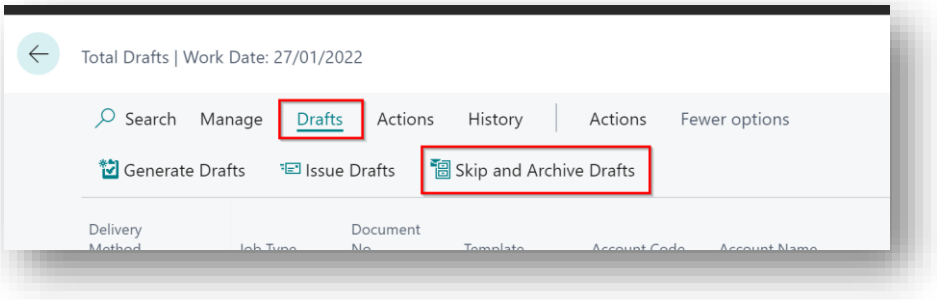

Figure 12-11

- **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.

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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).*

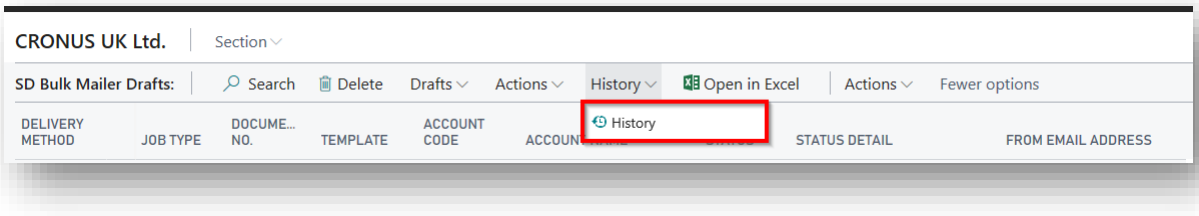

Figure 12-12

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).*

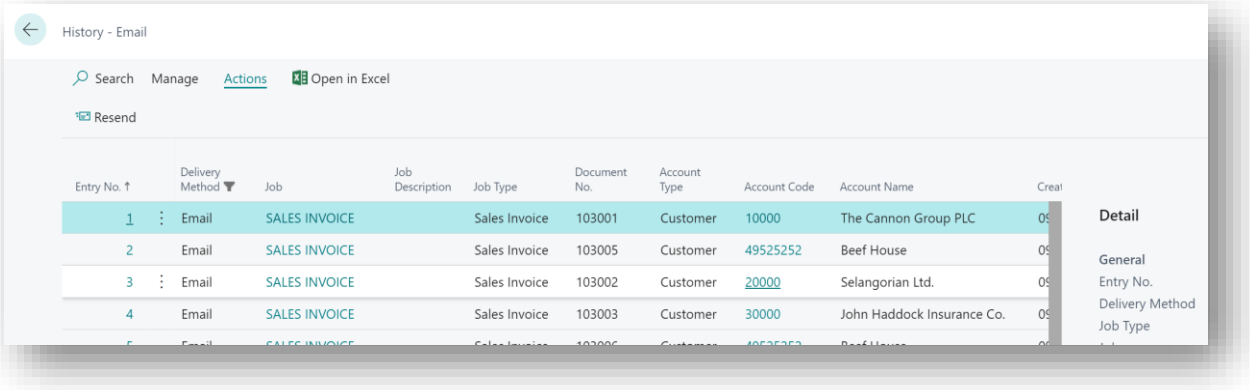

Figure 12-13

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).*

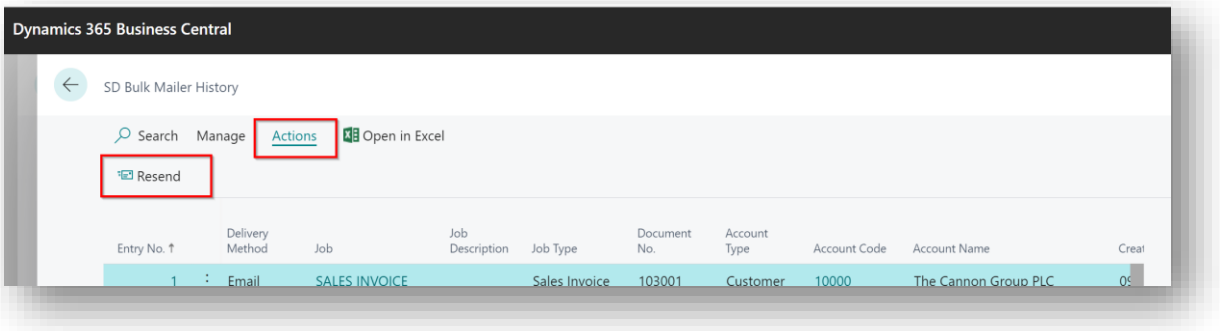

Figure 12-14

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.

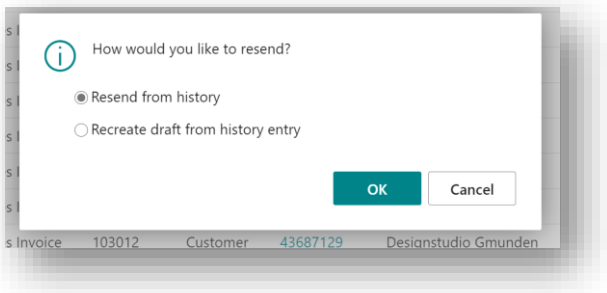

Figure 12-15

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).*

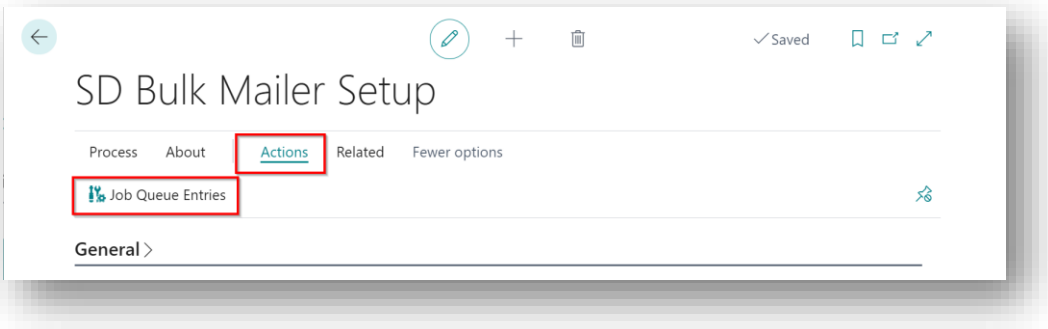

Figure 12-16

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).*

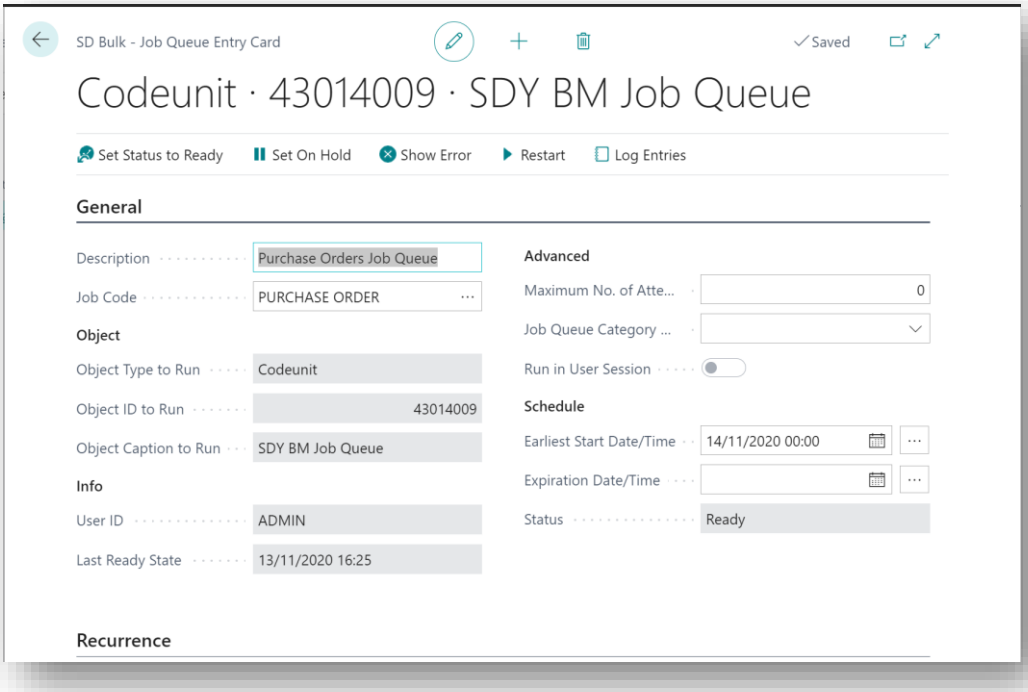

Figure 12-17

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**) is not 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.

2. 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 is designed to be run as a balance forward Statement with a user-specified 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*):

Type	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.

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

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

Table 4

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