SIMCREST
TECHNOLOGY SOLUTIONS THAT FIT

Auto Email

Version 18.4.6.0

Setup and User Manual

For Microsoft Dynamics 365 Business Central

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Description

Automatically email sales and purchase documents to customers and vendors without any effort.

- Send a collection email to a customer that includes a statement and all supporting documents with one click.
- Remind customers if they have short-paid or non-paid invoices with a single click.
- Send monthly statements to all customers automatically and without user interaction.
- Review email log to see when emails were sent and by whom.
- Save hours every day having Auto Email do the hard work of collecting documents, writing email bodies, emailing and storing evidence that emails were sent.
- Send specific and default attachments with sales and purchase documents.
- Email templates decides how the email experience will be for each document type.
- Email template groups allow you to set up customer email experiences depending on the customer.
- Setup custom rules who get which emails depending on the document type.
- Allow users to edit email settings just before email delivery.
- Documents supported: sales quotes, sales orders, sales return orders, sales invoices, sales credit memos, sales shipments, purchase orders, service invoices, service credit memos, customer statements, collection notices (statement and supporting documents), short-paid notices, reminders, and finance charge memos. Support for additional documents can be provided via extensions (from Microsoft Partners or SimCrest).
- Auto Email is simple to use and saves you a lot of time.

Auto Email is a solution that makes it effortless to send out emails and at the same time release the user immediately even when sending 1000s of emails. The solution uses an email log to place all the emails in and let Microsoft Dynamics 365 Business Central do the rest of the work. Auto Email can also be set to automatically email invoices, credit memos, shipments, reminders, and finance charge memos as they are being posted or issued.
For accounts receivable, Auto Email can send customer statements and collection notices with all open and past due invoices and credit memos at a single click of a button and if a customer short-paid an invoice, Auto Email can send a notice to the customer about that too.

Email Delivery

Auto Email is using an email log for the emails and the Job Queue to email the logged documents. Auto Email has an entry log that is populated every time a document is submitted to be emailed. The Job Queue will check the log every X minutes and if there are entries that have not been emailed the system will automatically start emailing the documents until all have been emailed. The log will be updated once the document has been emailed with a status to ensure that the document is not emailed again. This means that there is nothing emailed from the client and the user is instantly released once the document has been submitted.

Auto Email License

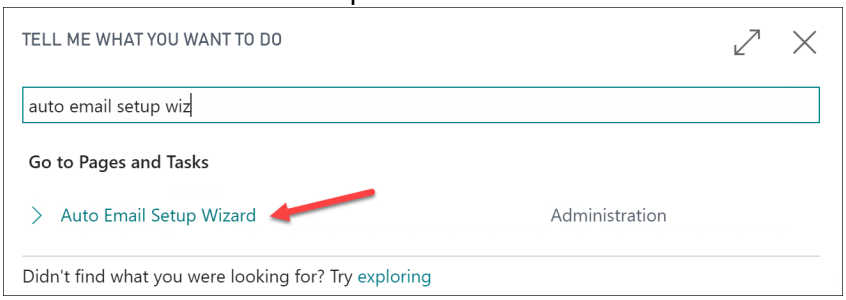
Auto Email can be acquired as an App in the Extension Market Place inside Dynamics 365 Business Central. Just click Free Trial to install and try out the solution. The trial will last for 30 days. A subscription can be purchased from SimCrest or a Microsoft Partner.

Setup of Auto Email

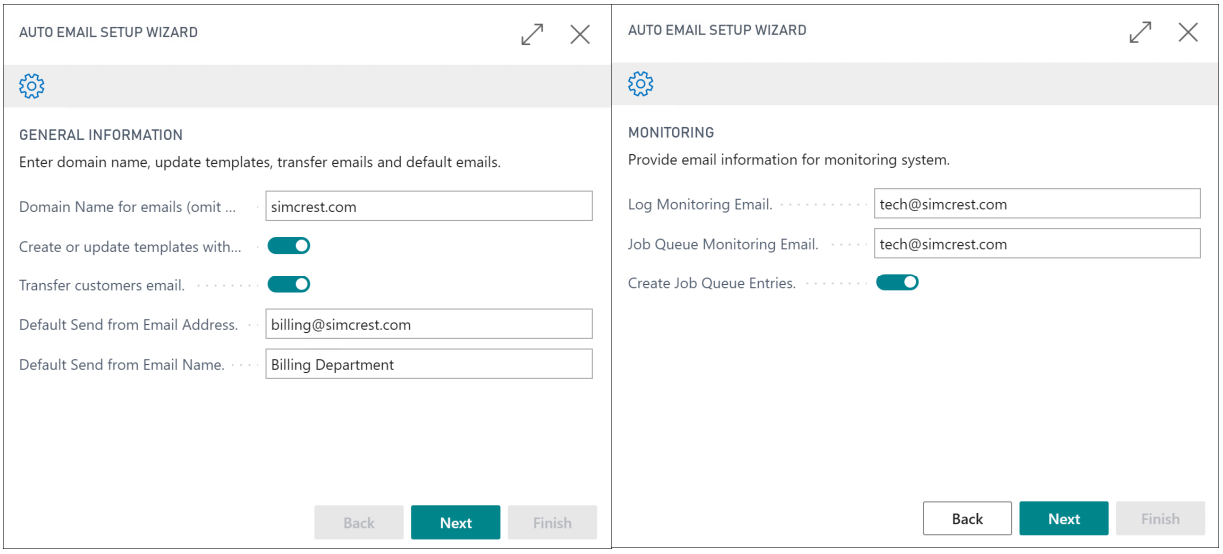
There are a couple of steps needed for Auto Email to work.

First Time Setup: Auto Email Setup Wizard

You need to run the Auto Email Setup Wizard that will guide you through the initial setup. Search for Auto Email Setup Wizard:



The Wizard will start:



Explanation:

- Domain Name: Specify the email domain name to update email addresses in the setup and templates to the domain name your company uses. Omit the @ sign.
- Create or Update templates with domain name: Update domain name above in all templates.
- Transfer customers email: Transfers the email from all customers to Auto Email. If there is an email address in Auto Email “Email To” already, it will not be overridden.

- Default send from email addresses are only available if using SMTP setup (deprecated). We suggest using Email Accounts instead.
- Monitoring: Enter emails and create job queue entries.
- Create Job Queue Entries: Will create all the relevant Job Queue Entries. Entries can be edited afterward as needed.

You can run the Setup Wizard as many times as you like, just note that templates may be updated (if turned on in wizard).

Emailing Documents

Auto Email can send emails via two methods:

- Using Email Accounts (enhanced email features)
- Using SMTP Setup (will not be supported by Microsoft at a later version)

We recommend using Email Accounts because they are easier to use and more reliable than using SMTP.

Enhanced Email capabilities are turned on under Feature Management:

Feature Management | Work Date: 4/12/2021

Search | Edit List | Page

Feature		Automatically enabled from	Enabled for	Get started
Feature Update: Action bar in dialogs	Learn more	Update 18.0 (Q2 2021)	**All Users**	Try it out
Performance - Disable Integration Management and I...	Learn more	Update 19.0 (Q4 2021)	**All Users**	_
Feature Update: Enhanced email capabilities	Learn more	Update 19.0 (Q4 2021)	**All Users**	_
Feature Update: Write longer item references	Learn more	Update 18.0 (Q2 2021)	None	_
Check financial journals in background	Learn more	Update 19.0 (Q4 2021)	**All Users**	_
Feature Update: Conversion templates to convert con...	Learn more	Update 19.0 (Q4 2021)	None	_
Feature Update: Bank reconciliation improvements	Learn more	Update 18.0 (Q2 2021)	**All Users**	_
Feature Update: New sales pricing experience	Learn more	Update 20.0 (Q2 2022)	None	_

Once turned on, SMTP Setup is ignored.

Email Accounts (Enhanced Email Feature)

Auto Email is using Email Accounts, which is a standard feature of Microsoft Dynamics 365 Business Central.

Email Accounts | Work Date: 4/12/2021

Search New Process Navigate Open in Excel

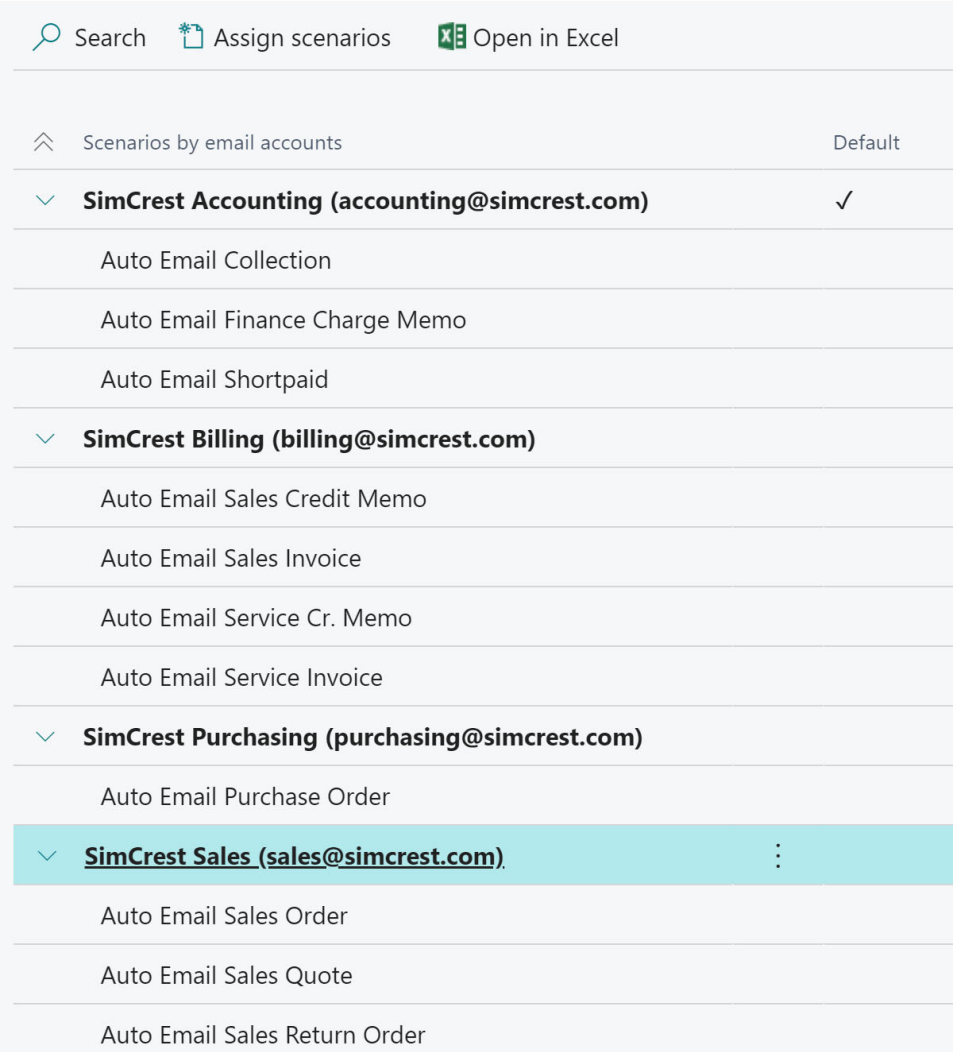
Name	Email Address	Default
SimCrest Accounting	accounting@simcrest.com	✓
SimCrest Billing	billing@simcrest.com	
SimCrest Purchasing	purchasing@simcrest.com	
SimCrest Sales	sales@simcrest.com	
SimCrest SMTP	smtp@simcrest.com	

We recommend setting up Microsoft 365 shared mailboxes for Auto Email. Notice that if you had an SMTP account it might have been converted to an Email Account.
Auto Email supports Email Scenarios to use different email accounts to send certain documents by email. See next section for more information.

Email Scenario Assignment

Email Scenarios is a standard Microsoft Dynamics 365 Business Central feature that Auto Email supports. You can set up all the different Auto Email document types under each Email Account and Auto Email will pick the email account that has been set up in the Email Scenario Assignment.
If a document is not assigned, the default Email Account is used instead. This also means that if no Emails are assigned, the default Email Account will also be used.

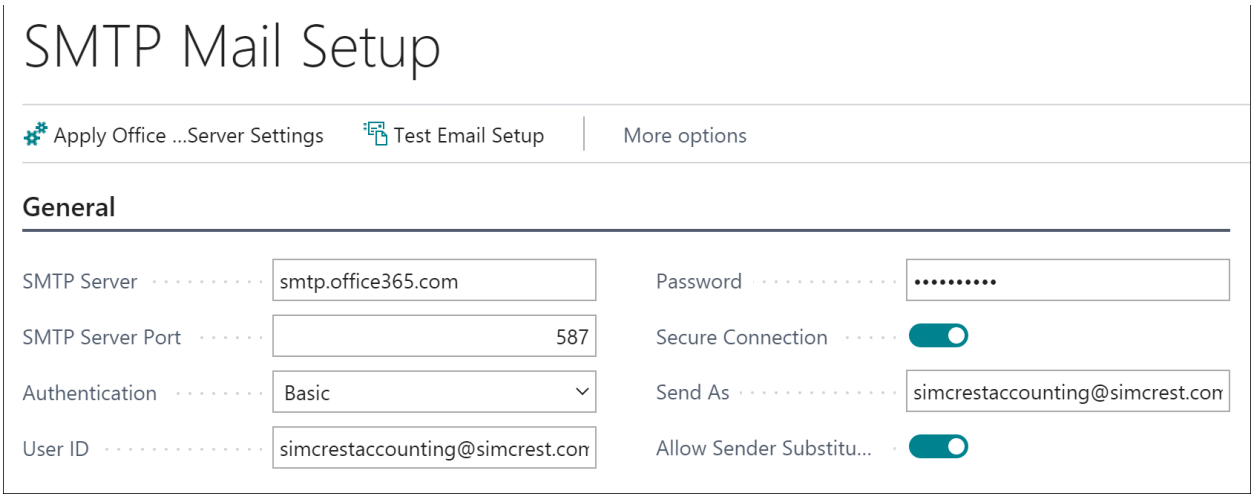
Email Scenario Assignment | Work Date: 4/12/2021



Notice that Auto Email only supports documents that start with “Auto Email”.
Example: Since Auto Email Sales Invoice is assigned to SimCrest Billing, it will be sent from this email account using the name “SimCrest Billing” and using the email address “billing@simcrest.com”.

SMTP Setup (Deprecated)

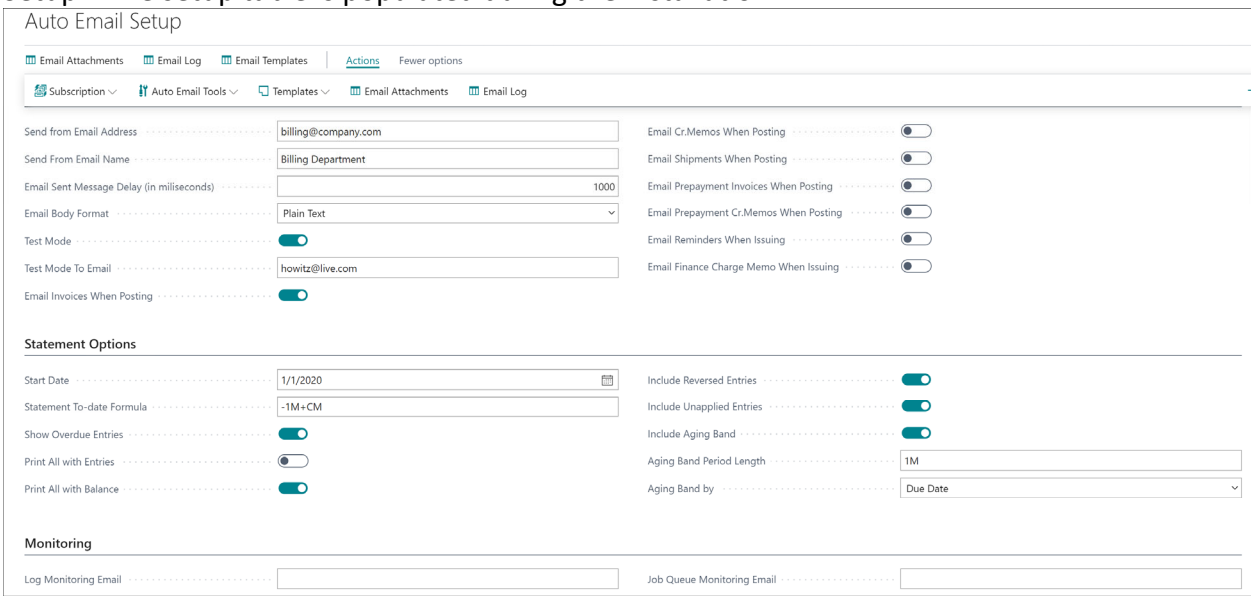
Auto Email can use Business Central’s SMTP mail service to send emails. For the system to email via SMTP, you will have to specify an SMTP server. The feature is deprecated and will not be available in a future version. We recommend using Email Accounts instead.
The SMTP service is of the utmost importance. Many SMTP services may have issues sending emails consistently and securely, so we recommend using an SMTP service with your Office 365 subscription.
Search for SMTP Mail Setup.



Specify the server's name or IP address along with the other fields as needed by your SMTP provider. You may have to consult with your IT administrator to get this information. Test the setup before you continue.

Auto Email Setup

You will also have to set up Auto Email to be able to email documents. Search for "Auto Email Setup". The setup table is populated during the installation.



Here is an explanation for all the fields in the setup table:

General Tab

- Send from Email Address and Name (deprecated)
  These are the email address and name that will show as the sender of all emails sent via Auto Email unless an email template overrides them (see templates below). Make sure the email address is the same as you use in the SMTP setup (the name can be different if

you like). Will not be available if using enhanced email features. Use Email Scenario Assignments instead.

- Email Sent Message Delay (in milliseconds)
  Each time an email is sent, the system will display a message. This field displays the time (in milliseconds) where the message is displayed until it goes away. If set to 0 (zero), the message will show until the user clicks OK.
- Email Body Format
  Specifies the format of the email bodies for templates. If set to “Plain Text”, new lines are converted to HTML automatically by the App (HTML is still allowed, but HTML line breaks are not needed). If set to HTML, all formats must be using HTML.
- Test Mode, Test Mode To Email
  If Test Mode is checked, all emails will be sent to the Test Mode To Email unless overwritten by document email templates (see later). This is used for testing that emails and documents look correct before you start sending them to customers and vendors.
- Log Monitoring Email
  This email address is used to send issues with the auto email log. Some issues with the emailer can cause the Job Queue that sends emails to stop with an error. This email address will get a message if that happens. If not filled out, no issues will be sent.
- Job Queue Monitoring Email
  This email address is used to send issues with the Job Queue that is sending emails. This will warn the user(s) that emails are not being sent out. If not filled out, no issues will be sent.
- Logger Email Address
  This email address is used to log all emails going out. The App will bcc all emails sent via Auto Email to this address (or addresses if more than one is entered). If a logger email is specified on the email template, it will take precedence over the logger email in the setup table.
- Email Invoices When Posting
  If checked, invoices will be emailed automatically when they are posted. This can be overridden by the Auto Email Template Group (see later).
- Email Cr. Memos When Posting
  If checked, credit memos will be emailed automatically when they are posted. This can be overridden by the Auto Email Template Group (see later).
- Email Shipments When Posting
  If checked, shipments will be emailed automatically when they are posted. This can be overridden by the Auto Email Template Group (see later).
- Email Prepayment Invoices When Posting
  If checked, prepayment invoices will be emailed automatically when they are posted. This can be overridden by the Auto Email Template Group (see later).
- Email Prepayment Cr. Memos When Posting
  If checked, prepayment credit memos will be emailed automatically when they are posted. This can be overridden by the Auto Email Template Group (see later).
- Email Reminders when issued

If checked, reminders will be emailed automatically when they are issued. This can be overridden by the Auto Email Template Group (see later).

- Email Finance Charge Memos when issued
  If checked, finance charge memos will be emailed automatically when they are issued. This can be overridden by the Auto Email Template Group (see later).

Statement Options

These options are used for the two statement reports that can be used for the Statement and Collection templates. The report numbers are 70163326 (plain black and white statement) and 70163327 (colorful statement) for the online version and 93326 and 93327 for the On-Premise version. If you use your own statement report, it must be modified to set the statement options below in the report. Check the last section in this manual for more information about modifying statements for use with Auto Email.

- Start Date
  This is the start date of the date filter on the statement lines.
- Statement To-date Formula
  This information is needed for the Auto Email Statement report. The formula is used to determine if a customer has a balance due as of the date calculated using this formula in relation to the work date. Example. Work Date = 05/05/20. If the formula is '-1M+CM' the balance as of 04/30/20 is used to determine if the customer has a balance as of this date. If so, the statement will be emailed. If not, the statement for this customer is skipped. The date formula is also used to determine the statement date. If you are using the statement report provided by the Auto Email App, the statement date on the report is calculated using this formula also.
- Print All with Entries
  The statement will be printed if the customer has entries. The customer also needs to have a balance due by the To-date above.
- Print All with Balance
  The statement will be printed if the customer has a balance. The customer also needs to have a balance due by the To-date above.
- Update Statement No.
  This will update the customer's statement no. This is only applicable for reports 70163326 and 93326.
- Statement Style
  Will show Open Items or Balance only. This is only applicable for reports 70163326 and 93326.
- Aging Method
  This is used to show an aging band. Options are None, Due Date, Transaction Date, or Document Date. This is only applicable for reports 70163326 and 93326.
- Aging Method (2)
  This is used to show an aging band. Options are None, Due Date, Transaction Date, or Document Date. This is only applicable for reports 70163327 and 93327.
- Length of Aging Periods

If the Aging Method is different from None, this will show the date formula for the aging periods.

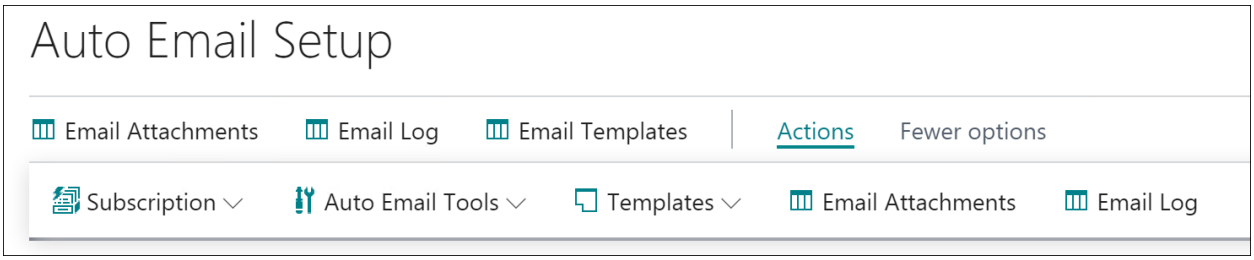
Monitoring Tab

- Log Monitoring Email
  This is the email address (several can be entered separated by semicolon) that will get an email if there are errors in the auto email log.
- Job Queue Monitoring Email
  This is the email address (several can be entered separated by semicolon) that will get an email if the send email job queue entry stops for any reason. See more information in the Job Queue section.

License Tab

- Expiration Date
  This is the expiration date of the subscription. The app will stop working after this date.
- Trial Period
  You are granted a 30 days trial period upon installation of the app.
- Licensed Company Name
  This is the company name that owns the subscription. It must be the exact same as the company name in the system. This field does not apply to trial versions.

Actions



Here is an explanation for all Process Actions:

- Email Attachments
  These are standard attachments that can be assigned to a document type. See later for more details.
- Email Log
  This is the email log that will show all emails sent with statuses. See later for more details.
- Email Templates
  Access the Email Templates used to determine how emails are sent for each document type.
- Subscription
  - Activate Subscription
    This is used to activate or renew a subscription. See later in this document how to activate a license.

  - Initialize License and Setup
    Used when creating new companies after the app has been installed. It makes the company ready for Auto Email.
- Auto Email Tools
  - Auto Email Setup Wizard
    This wizard is used when doing the initial setup of Auto Email, but can also be used later as needed.
  - Process Emails
    When clicked, Auto Email will simulate running the job queue. This should usually only be used for testing.
  - Create Job Queue Entries
    Create the job queue entries used by Auto Email to automatically send emails and errors. You could also use the setup wizard to accomplish the same.
  - Copy emails from customers
    Transfers the email from all customers to Auto Email. If there is an email address in Auto Email "Email To" already, it will not be overridden.
  - Delete empty email log entries
    This is used to delete log entries with no email address in the Email To field. Should only be used if instructed so by SimCrest or partner.
- Create Email Templates
  Default templates are created upon installation of the App. At any time after the installation, this will recreate the templates if they were accidentally deleted. Existing templates will NOT be overwritten.

Auto Email Templates

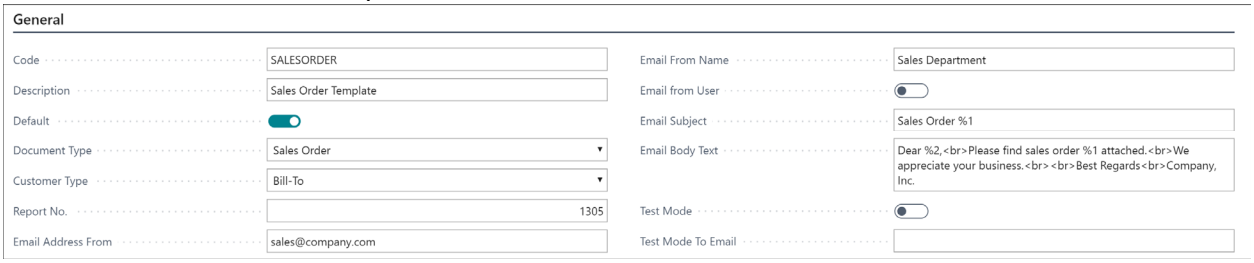
Each supported document needs to have a template set up for the document to be emailed. The default templates (templates flagged as "Default) are used to email documents unless you have set up Auto Email Template groups (see later for more info). Search for Auto Email Templates:

AUTO EMAIL TEMPLATES | WORK DATE: 12/31/2018

Search | New | Manage | Page | More options

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

Here is the Sales Order Template:



Here is an explanation for all the fields:

- Code
  A unique code for the template
- Description
  A description of the template
- Default
  This is the default template for this document type. You should only have ONE default template. If you have more templates for the same document type, they can only be selected if you assign an Email Template Group to the customer.
- Document Type
  This is the document type of the emailed document. You can have several templates of the same document type (if the code is different), but you should only have one default template per document type. If you have more than one default template per document type, only the first template will be used unless you use template groups (see later).
- Customer Type
  This is used to determine if the sell-to or bill-to customer is used for the document type being emailed. In the above screenshot, the sales order will email the bill-to customer.
- Report No.
  Type the report number for the report you would like to use for this document type. Report numbers can be found by searching “Report Layout Selection”.
  The collection report has seven report no’s (one for each supported document type). The below 3 are the minimum you have to define.

Statement Report No.	70163326
Invoice Report No.	1306
Credit Memo Report No.	1307

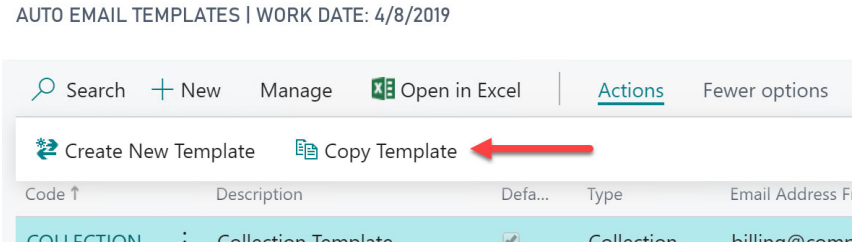
  The report number for the statement report should be 70163326 or 70163327 (Online version) or 93326 or 93327 (On-Premise Version).
- Email Address From and Name (deprecated)
- These are the email address and name that will show as the sender of all emails sent via Auto Email for this particular template. Make sure the email address is the same as you use in the SMTP setup (the name can be different if you like). Will not be available if using enhanced email features. Use Email Scenario Assignments instead.
- Email From User (deprecated)

When checked, the Auto Email Name and Email in the User Setup table are used as the email from. This overrides all other settings for Email From. Will not be available if using enhanced email features. Use Email Accounts instead.

- Email Subject
  Here the subject line is provided. You can merge one field from the document into the text (use %1 place the fields in the text). The merge fields for each document are provided in a table below.
- Email Body Text
  Here the email body is provided. You can merge two fields from the document into the text (use %1 and %2 to place the fields in the text). The merge fields are provided in a table below for each document.
- Custom Email Settings
  This allows the user to edit the email settings before the email is sent. If a document is automatically posted or issued during posting, custom email settings will not apply.
- Test Mode and To Email
  This works just like the same fields in the Setup page, but these two fields override the setting in the Setup table.
- Logger Email Address
  This email address is used to log emails going out for this template only. The App will bcc all emails sent using this template via Auto Email to this address (or addresses if more than one is entered). If a logger email is specified on the setup table, the logger email on the template takes precedence.

Copy Email Templates

Email templates can be copied as needed. Click Actions Copy Template.



Merge Fields for Templates

Merge fields are used to substitute %1 in the subject line and %1 and %2 in the body text. Here are the fields for each document type:

Document Type	%1	%2
Sales Quote	Quote No.	Customer Name
Sales Order	Order No.	Customer Name

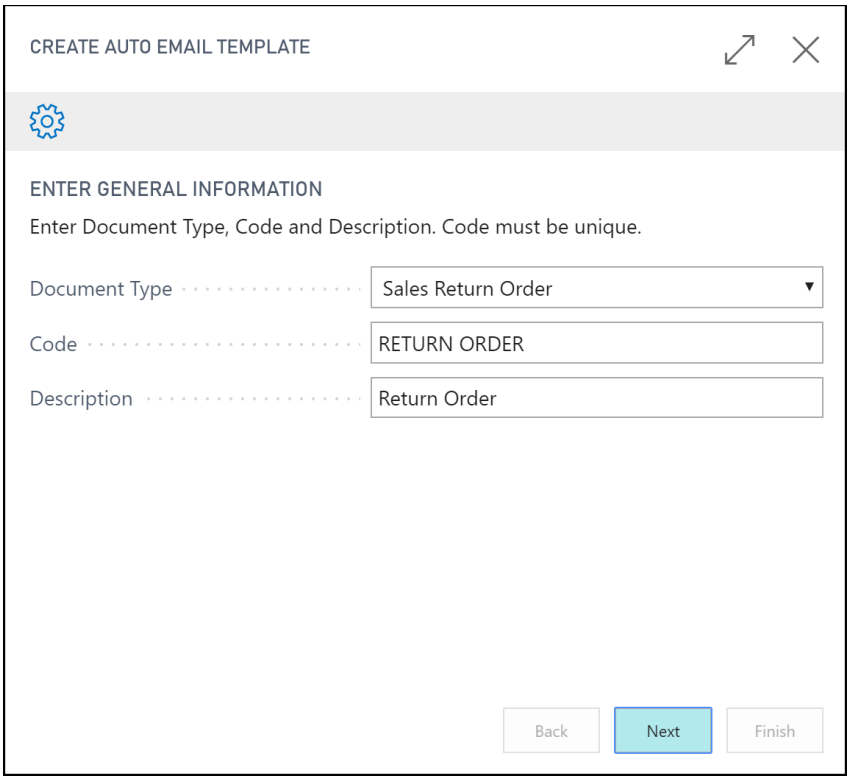
Sales Return Order	Return Order No.	Customer Name
Sales/Service Invoice	Invoice No.	Customer Name
Sales/Service Credit Memo	Credit Memo No.	Customer Name
Sales Shipment	Shipment No.	Customer Name
Short Paid Notice	Invoice No.	Customer Name
Statement	Customer No.	Customer Name
Collection	Customer No.	Customer Name
Purchase Order	Order No.	Vendor Name
Reminder	Reminder No.	Customer Name
Finance Change Memo	Finance Charge Memo No.	Customer Name

Example for a sales order: “Please find sales order %1 for customer %2 attached”.
It’s possible to extend the Auto Email App to support additional merge fields. Contact your partner or SimCrest for more information.

Template Wizard

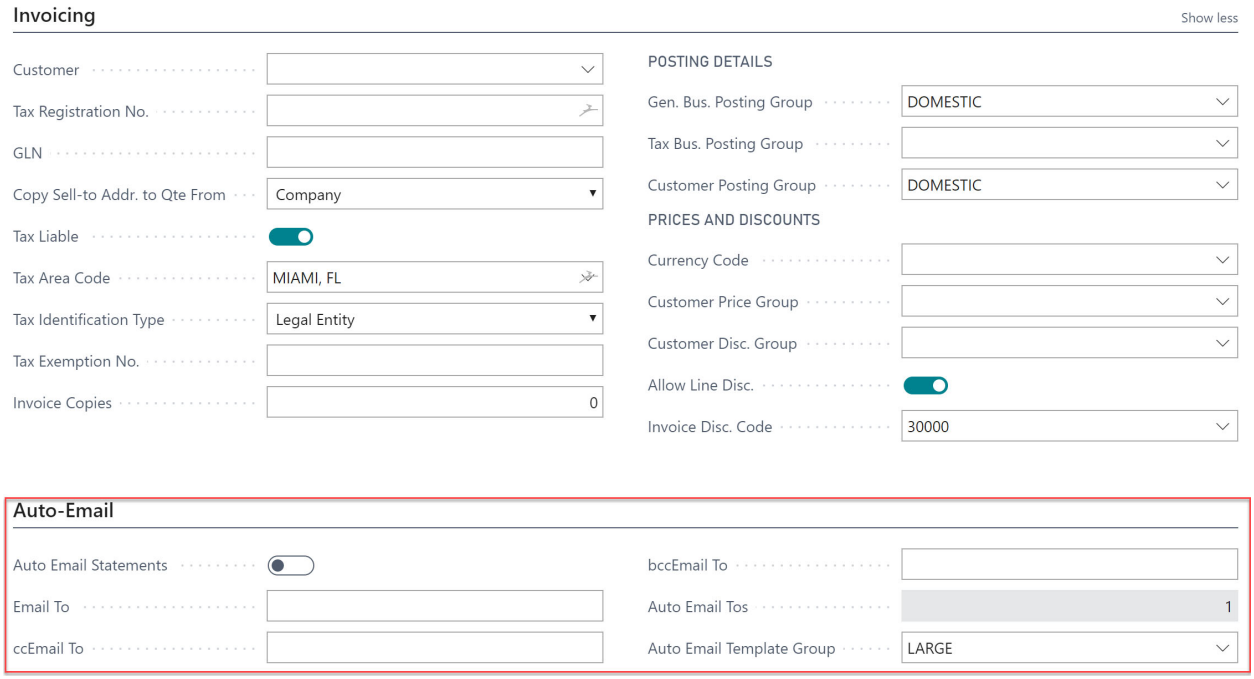
There is a template wizard that allows you to be guided through the process of creating the templates. From the Template List, Click Actions, Create New Template:

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



Customer Setup

On the customer, the Auto Email information is found on the Auto Email tab. Here you will specify, for each customer, how they should have documents emailed.



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

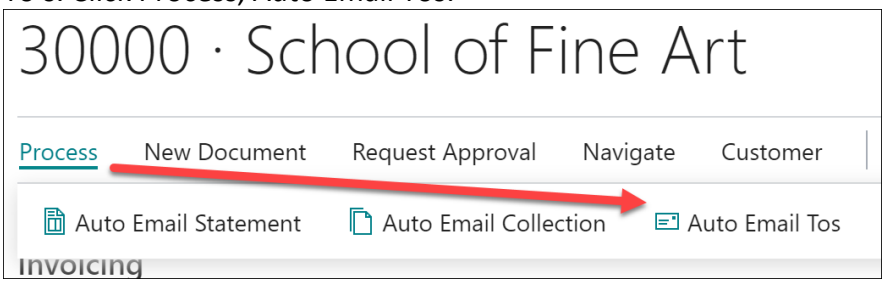
out (unless you are using the Auto Email Tos functionality). ccEmail and bccEmail are optional. You can specify several addresses by separating them with a semicolon (;) and no spaces.

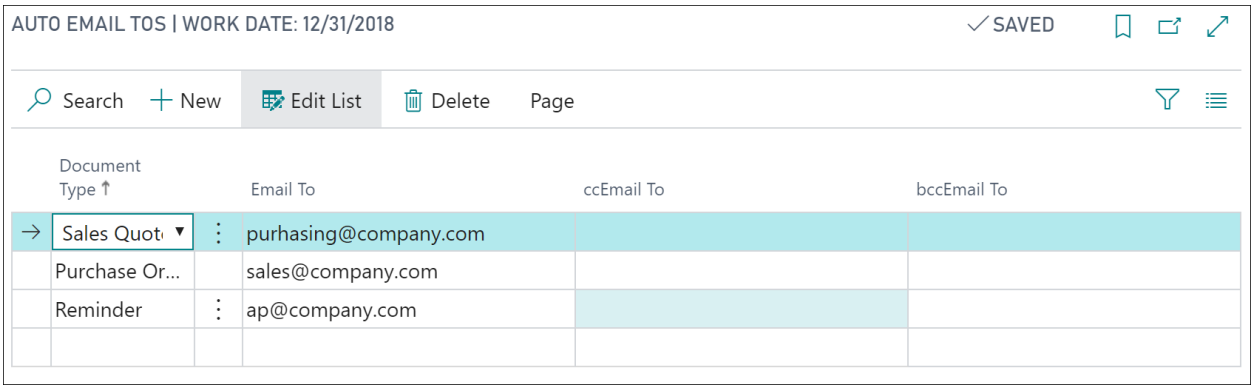
- Auto Email Tos will show how many email tos you have defined. Email To's will allow advanced per-document email addresses per customer. See below for more information.
- Auto Email Template Group is a group of templates assigned to the customer. These templates will override the default templates previously mentioned. If no group is assigned to the customer, default templates will be used instead.

If no "Email To" is specified on the customer card or in Auto Email Tos, the system will try to use the standard email address on the customer card. If no email address is found here either an error will occur upon log creation or SMTP email submission.

Auto Email To's

On the customer card, you can specify email addresses for all documents. This means that every document you email will be sent to this/these address(es). If you like to specify different email addresses depending on the document type being sent, you need to set up Auto Email To's. Click Process, Auto Email Tos:



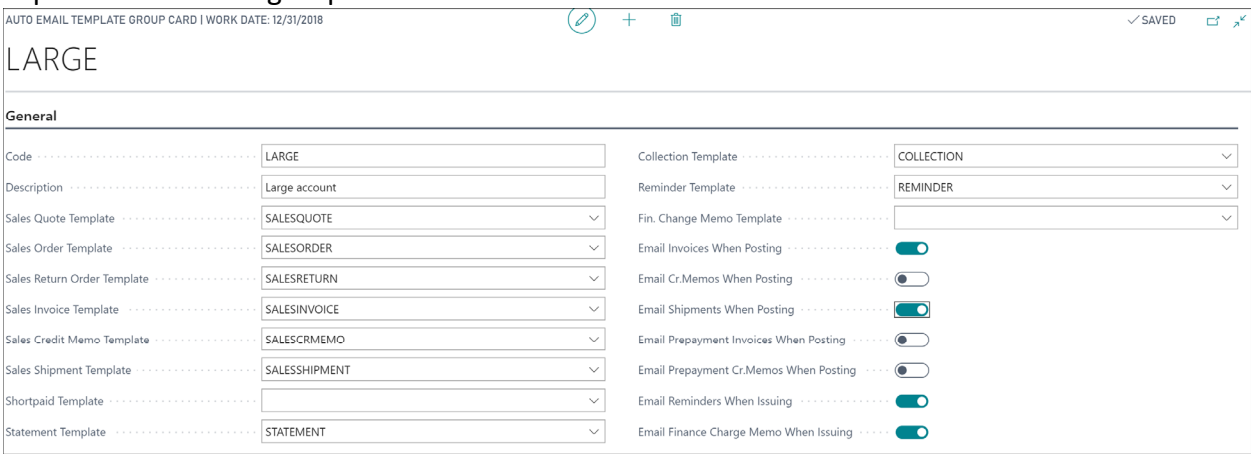


Specify document-dependent email addresses on this page. If an email for a document is not found on this page, the default email addresses on the customer card will be used instead. If no email is found on this page or the customer, an error will be displayed and/or generated in the Email log.

Auto Email Template Groups

Email templates are used to determine how an email should be generated to the customer. The default template we discussed earlier will apply to all customers, however, you can define Email

Template Groups and assign them to one or several customers, to customize the email experience for each group.



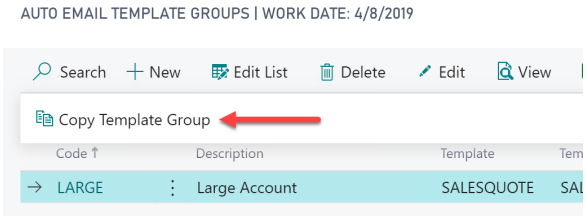
Above is an example of an email group for large account customers. Each group will have one or more templates assigned, including if emails should be sent upon posting/issuing of documents. You can create as many groups as you like and assign them to your customers. If a customer is assigned an email group, you MUST specify templates for all applicable document types that this customer could potentially receive. If not, you will receive an error if an unsupported document is emailed.

Template Groups will follow documents created from the customer and can be changed along the way to make special exceptions for documents if needed. For example, an order has been created and the customer's email group has been automatically assigned to the order. You can change the email group and thereby change the way emails are sent to the customer.

If you do not assign an email group to the customer, the default templates will be used instead.

Copy Email Template Groups

It is possible to copy template groups. Click Actions, Copy Template Group.



Email Template Group Flow

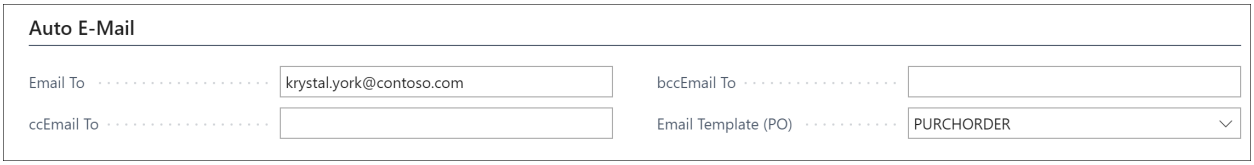
It's important to understand how Email Templates Groups are flowing from the customer. Here is an example:

1. The customer is assigned an email template group called "LARGE".
2. A quote is created for the customer and the group is set to "LARGE" inherited from the customer. If a sales quote is emailed, the system will use the Quote template from the "LARGE" group to email it.

3. The quote is converted into an order and the template group is inherited from the quote. If a sales order is emailed, the system will use the Sales Order template from the "Large" group to email it.
4. Shipments and or invoices may be posted from the email based on the templates and information in the "LARGE" template group.
5. At ANY time, the user can change the template group to something else, for instance, "SMALL", and make a different email delivery based on the new group's setup.
6. Once posted, documents will inherit the template group, but the group can no longer be edited.

Vendor Setup

The vendor has a simpler setup because only Purchase Orders are currently supported for vendors.

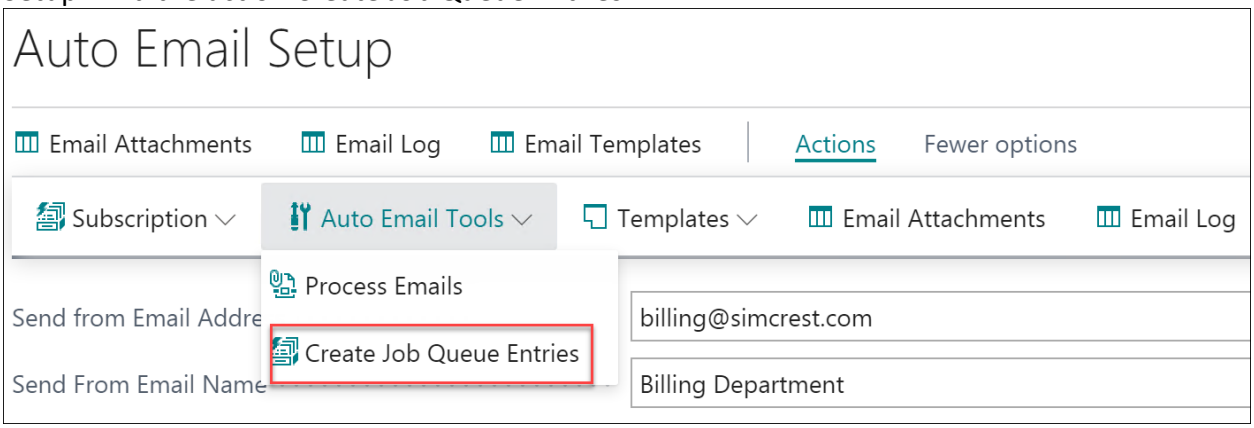


You must have Email To filled out; ccEmail and bccEmail are optional. You can specify several addresses by separating them with a semicolon (;) and no spaces.

- Email Template (PO). Here you can specify the email template to use for sending Purchase Orders for this vendor. If no template is specified, the default PO template is used instead.

Job Queue Setup

You will have to set up the Job Queue. Use the Auto Email Setup Wizard or Go to Auto Email Setup. Find the action Create Job Queue Entries.



Click it to create a new Job Queue Entries for Auto Email.

Now search for "Job Queue Entries". Auto email creates three job queue entries.

1. Send Emails
   This job will send auto email log entries that are ready to be emailed.
2. Log Monitor

This job will monitor the auto email log for errors. If one or more errors are found, it will send an email to the “Log Monitoring Email” in the setup table. The job will send an email if errors are found every time it is run, so it’s suggested to set the “No. of Minutes between runs” to 1440 (every 24 hours).

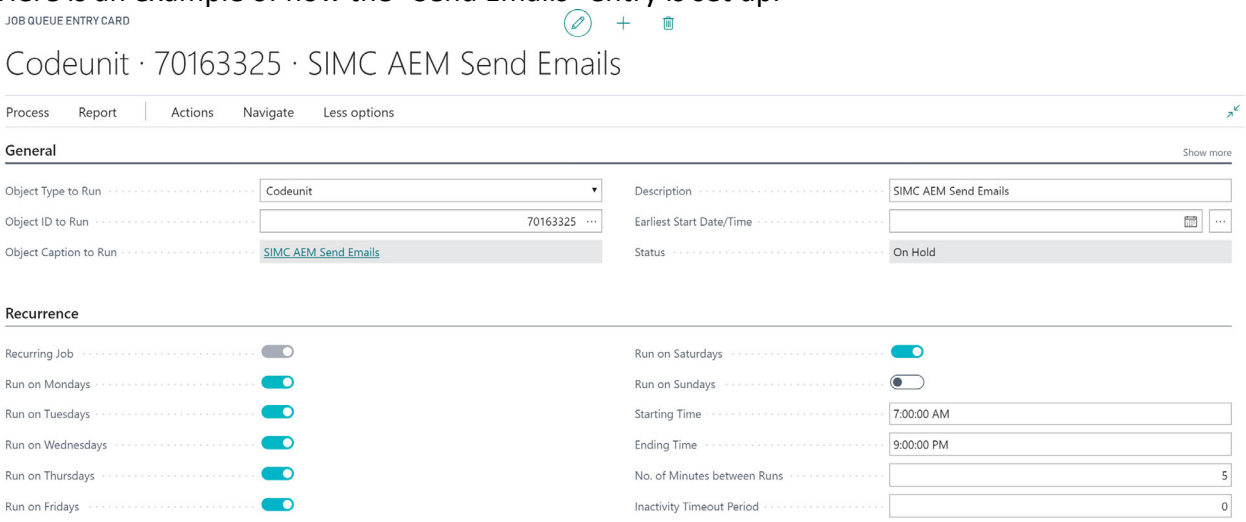
3. Job Queue Monitor
   This will monitor that the “Send Emails” entry is still running and if not, it will send an email to the “Job Queue Monitoring Email” to warn that emails are no longer going out.

Here are the three job queue entries (Online version):

Object Type to Run	Object ID to Run	Object Caption to Run	Description
Codeunit	70163325	SIMC AEM Send Emails	SIMC AEM Send Emails
Codeunit	70163340	SIMC AEM Job Queue Monitor	SIMC AEM Job Queue Monitor
Codeunit	70163341	SIMC AEM Log Monitor	SIMC AEM Log Monitor

Codeunit numbers will be different for the OnPrem version (93325, 93340, and 93341).

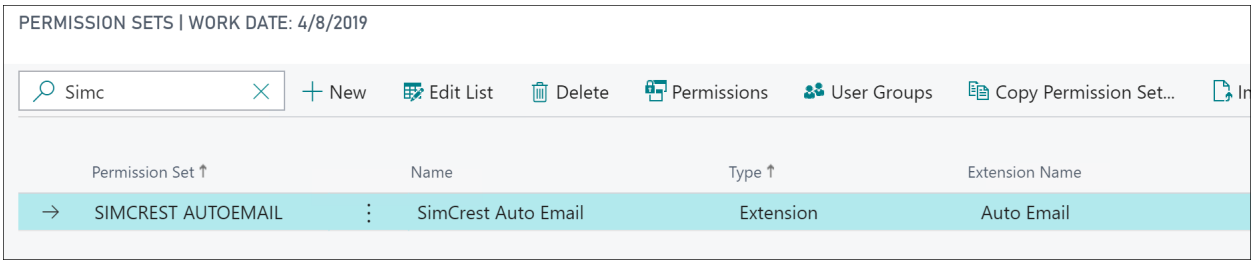
Here is an example of how the “Send Emails” entry is set up.



Set the recurrence to your preference. We suggest emailing every 5-15 minutes, but that can be adjusted up or down as needed. Once you have tested the solution thoroughly, Set Status to ready. The same goes for the monitoring job queue entries.
Please check the section Job Queue Management at the end of this document for more information.

Permissions

A permission set for Auto Email is created when the Extension is installed. It’s called ‘SIMCREST AUTOEMAIL’.



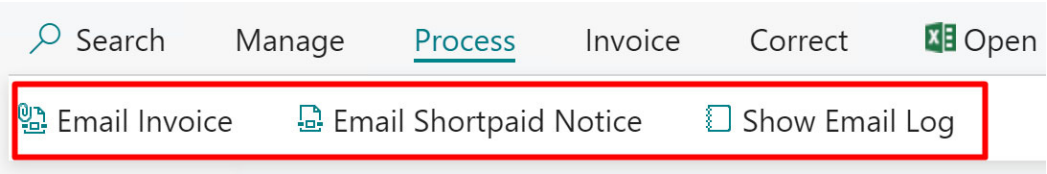
Assign this permission set to all the users that should have access to Auto Email.

User Manual

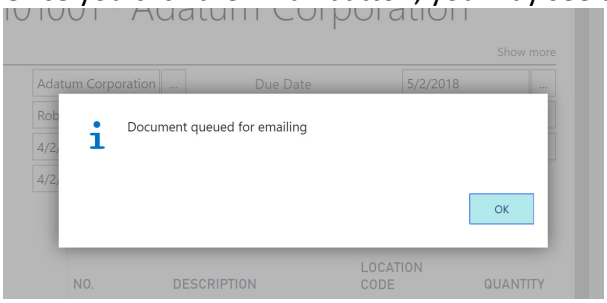
The ability to email documents has been added to several pages (cards and lists):

- Sales Quotes
- Sales Orders
- Sales Return Orders
- Posted Sales Invoices
- Posted Sales Credit Memos
- Posted Sales Shipments
- Posted Service Invoices (only available in premium version)
- Posted Service Credit Memos (only available in premium version)
- Purchase Orders
- Reminders
- Finance Charge Memos

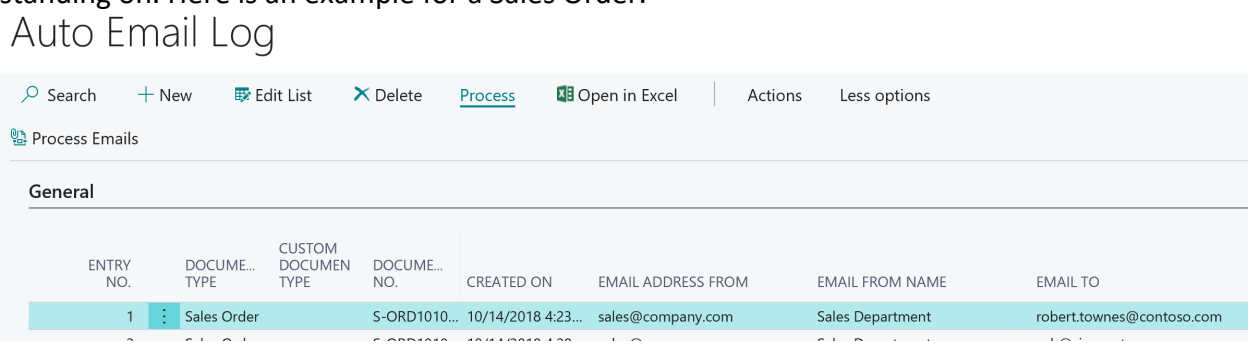
Here is an example from a posted invoice:



Once you click the Email button, you may see the queued message (depending on your setup):

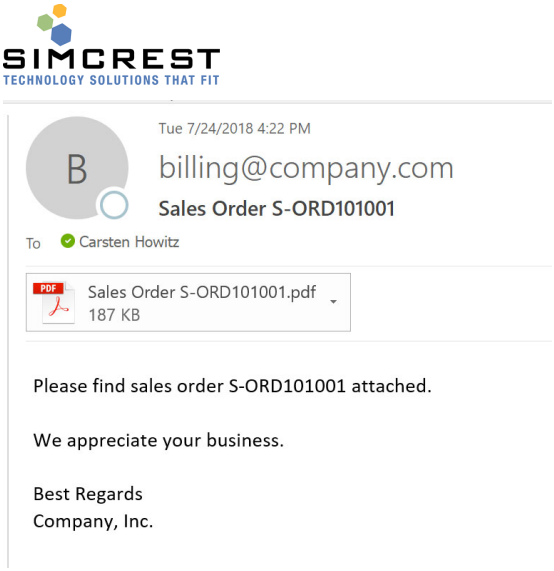


The Show Email Log button will show all the related log entries for the document you are standing on. Here is an example for a Sales Order.



The Process Emails action in the Auto Email Log can be used to force the emails to be sent if you can't wait for the Job Queue to process them. This is usually only used for testing.

Here is an example how a sales order would look like in the email:

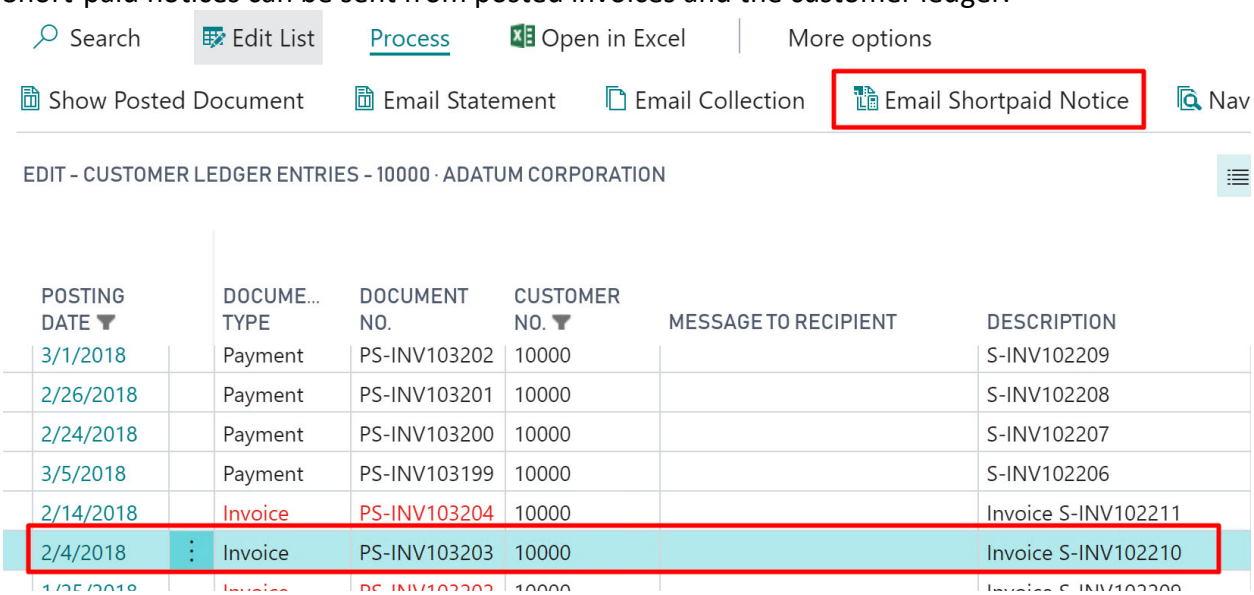


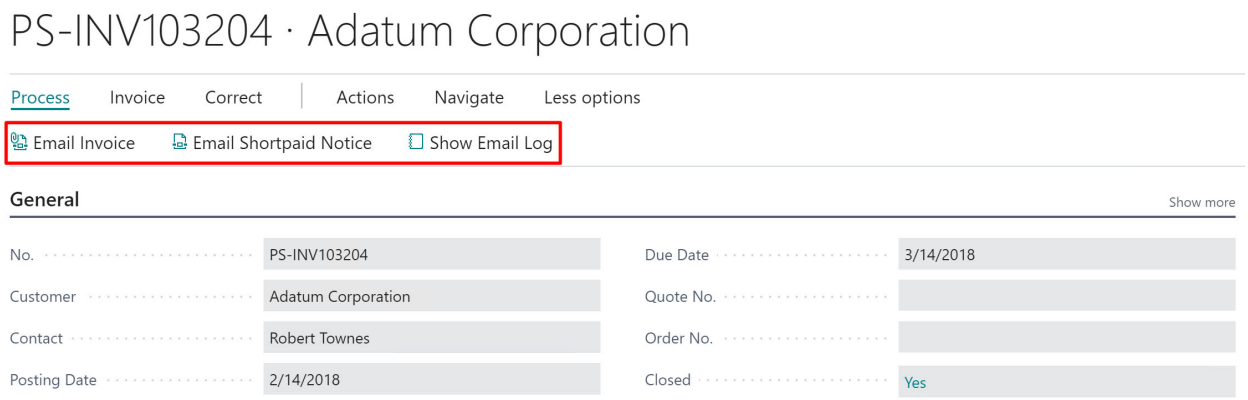
Special emails

Short-paid/Non-paid invoices.

You can email a short/non-paid notice. If the invoice is past due and the original amount is the same as the past due amount, Auto Email will send a non-paid email with the invoice attached. Use the Non-Paid body text in Auto Email Setup to tell the customer whatever you like. If the invoice is partially paid, Auto Email will send a short-paid notice (also with an invoice attached) using the short-paid body text in Auto Email Setup for this purpose.

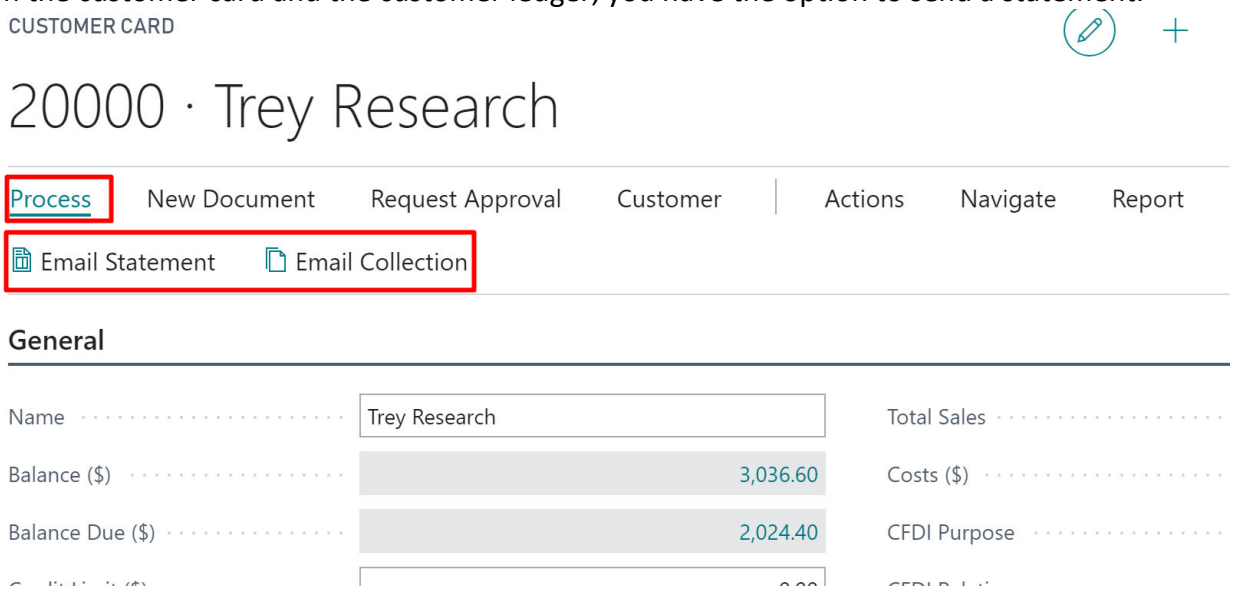
Short-paid notices can be sent from posted invoices and the customer ledger.





Email Customer Statement

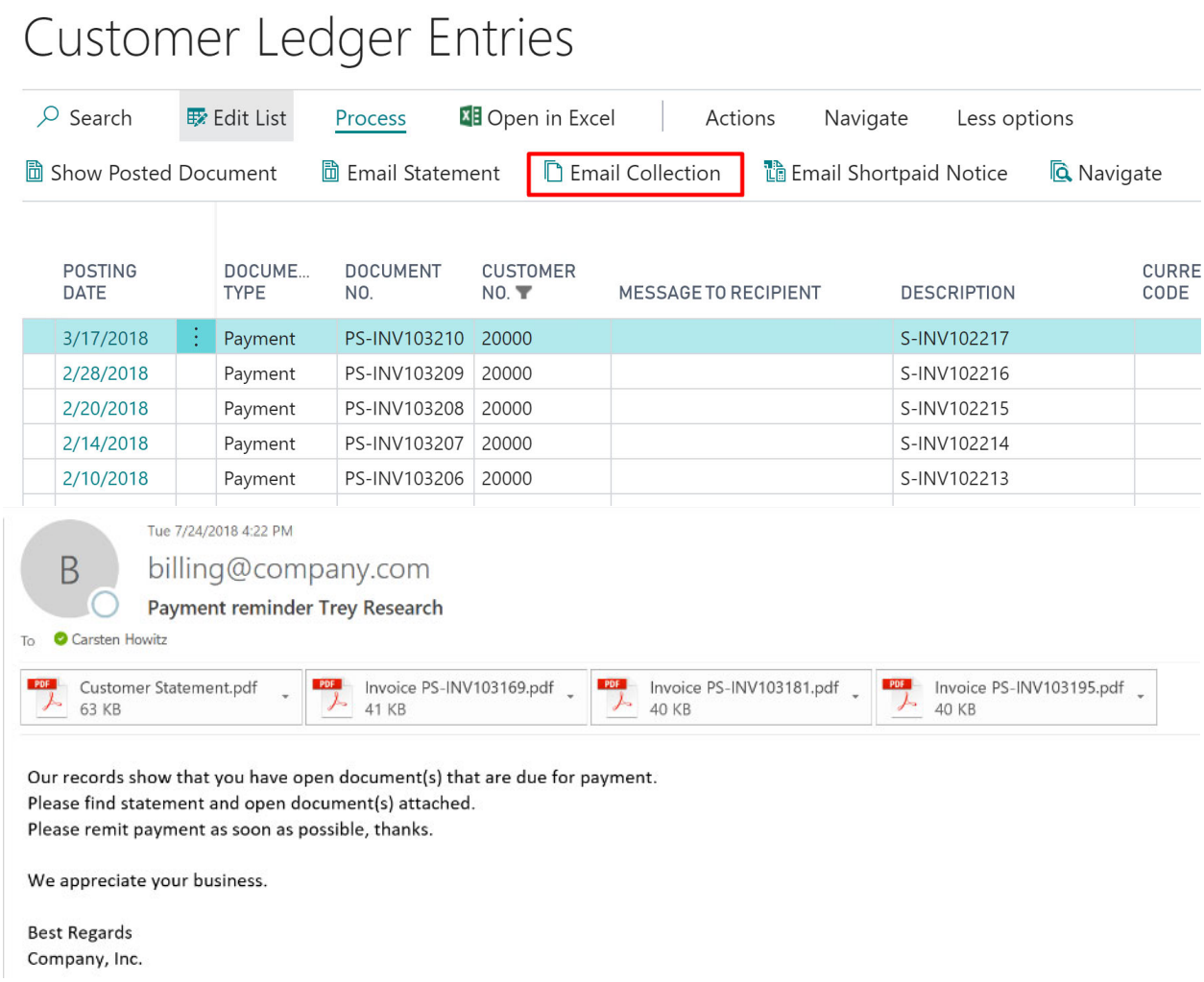
You must use the statement report that comes with the App. The number is 70163326 (Online version) and 93326 (On-Premise Version).
On the customer card and the customer ledger, you have the option to send a statement.



You can send statements and collections (see more about collections below). The statements will use the values from the Auto Email Setup page.

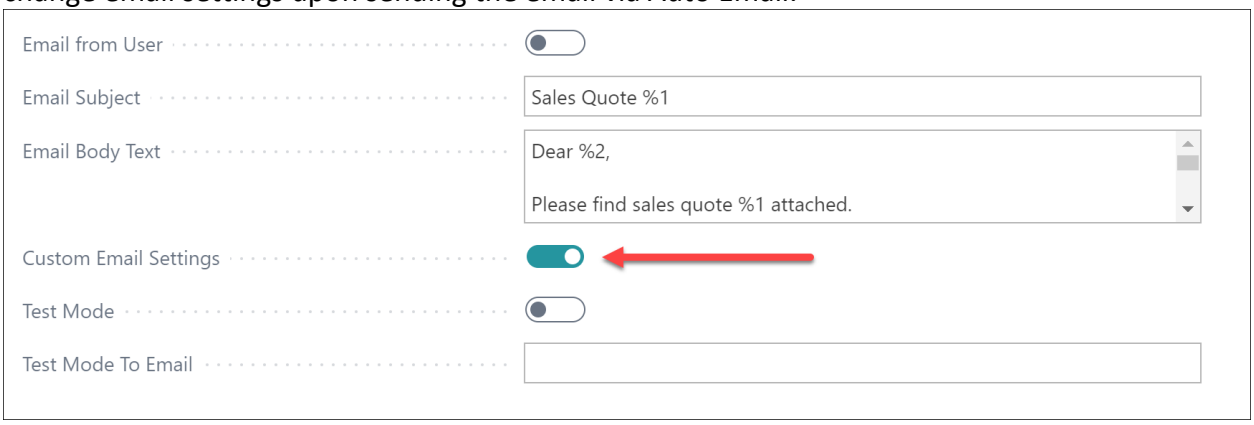
Email Collection

A collection email is a special email that will send a statement (using the settings as described above) along with all the supporting documents (invoices, credit memos, finance charge memos, and reminders).
On the customer card and the customer ledger, you have the option to send a collection email.

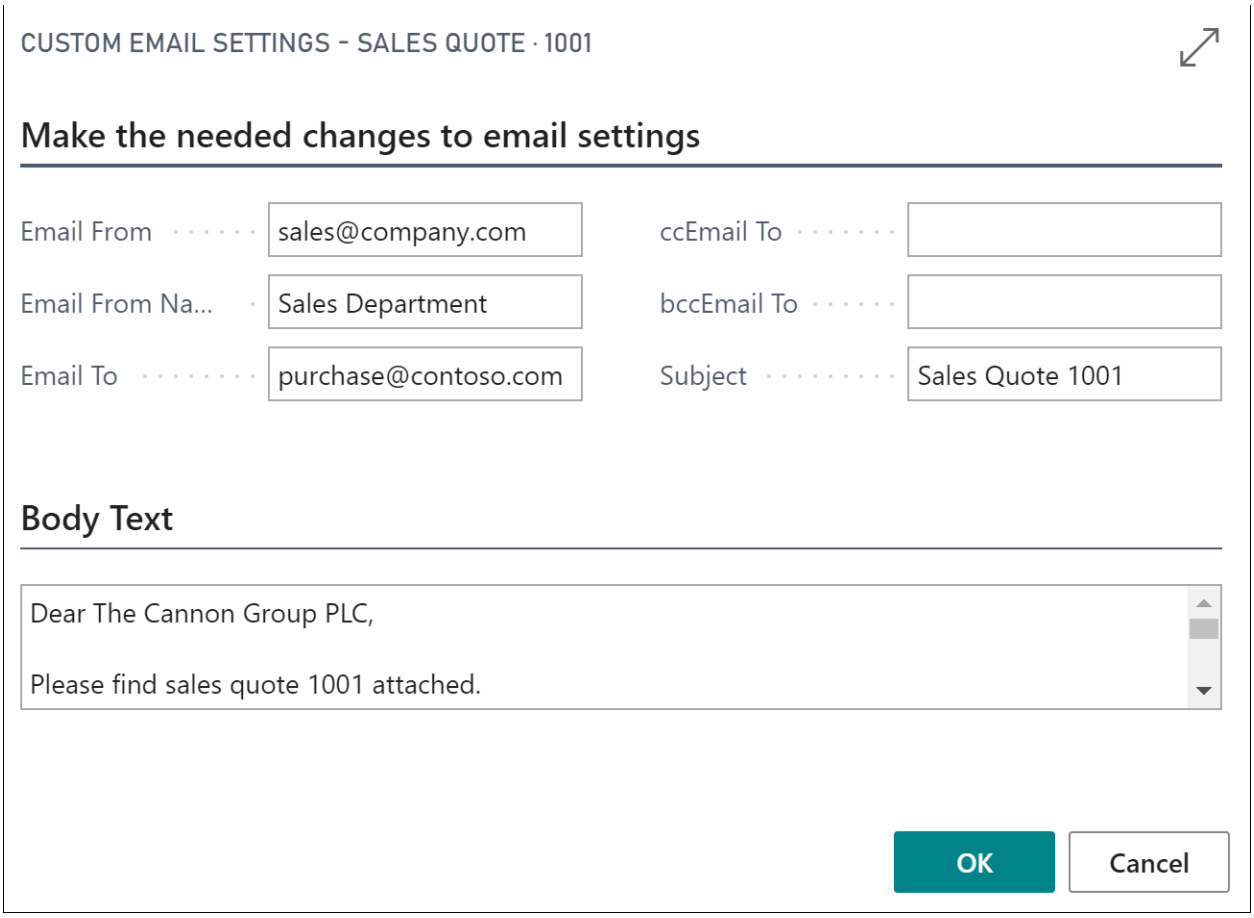


Custom Email Settings

On the email templates, the Custom Email Setting field determines if the user will be able to change email settings upon sending the email via Auto Email.



When an email is sent using a template that has custom email settings turned on, the user will be presented with the following page before the email is sent.

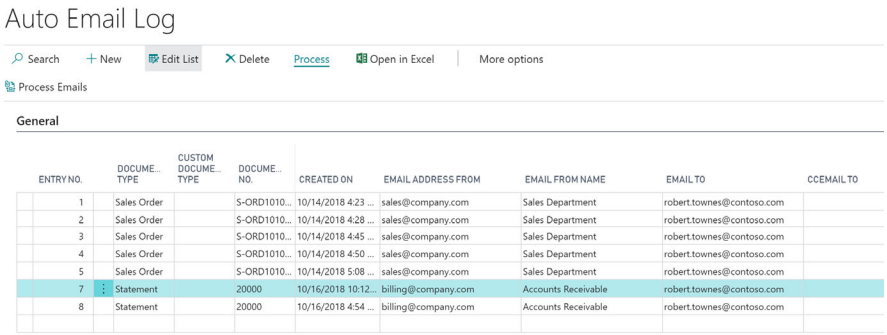


Edit all the settings needed and click OK to send the email. If you click Cancel, the email will not be logged and not sent. Email From and Email From Name are both deprecated and not available if using the enhanced email feature. Use Email Scenarios instead then.

NOTE: Custom Email Settings are ignored for documents that are being emailed automatically when they are posted or issued. If the posted or issued document is being emailed later, the custom settings screen will show up like above.

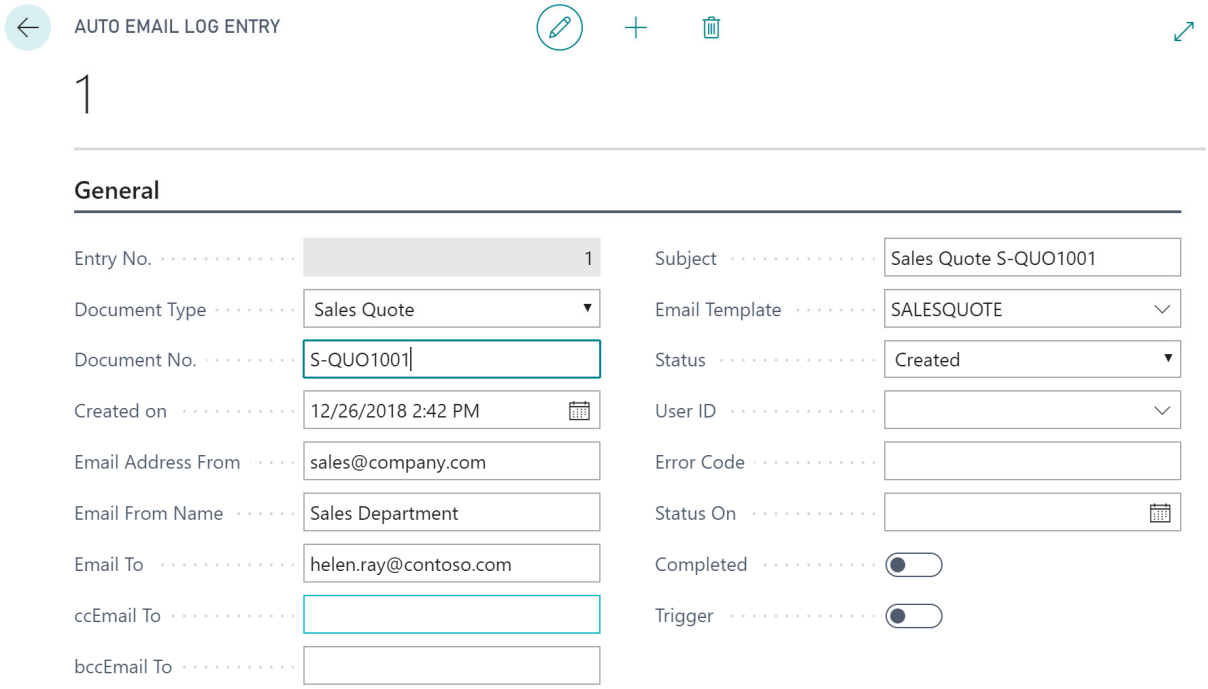
Auto Email Log

Auto Email maintains a log file that will show all the emails that were requested to be submitted with their status. Search for Auto Email Log.



ENTRY NO.	DOCUME... TYPE	CUSTOM DOCUME... TYPE	DOCUME... NO.	CREATED ON	EMAIL ADDRESS FROM	EMAIL FROM NAME	EMAIL TO	CCEMAIL TO
1	Sales Order		S-ORD1010...	10/14/2018 4:23 ...	sales@company.com	Sales Department	robert.townes@contoso.com	
2	Sales Order		S-ORD1010...	10/14/2018 4:28 ...	sales@company.com	Sales Department	robert.townes@contoso.com	
3	Sales Order		S-ORD1010...	10/14/2018 4:45 ...	sales@company.com	Sales Department	robert.townes@contoso.com	
4	Sales Order		S-ORD1010...	10/14/2018 4:50 ...	sales@company.com	Sales Department	robert.townes@contoso.com	
5	Sales Order		S-ORD1010...	10/14/2018 5:08 ...	sales@company.com	Sales Department	robert.townes@contoso.com	
7	Statement		20000	10/16/2018 10:12...	billing@company.com	Accounts Receivable	robert.townes@contoso.com	
8	Statement		20000	10/16/2018 4:54 ...	billing@company.com	Accounts Receivable	robert.townes@contoso.com	

The Email Name/Address fields are populated using the information from the actual email it was sent from (if using Email Accounts to send from). If you are using SMTP Setup (deprecated), the email address and name are coming from the email template.
You can use the log to find out if emails went out correctly and see if there is an error to be corrected. If there is an error, you typically must resolve the error. You can also check if the job queue has stopped due to an error. If it has stopped, you must resolve the error before you start the job queue again. You can edit and delete entries in the log if you have permission to do that.
By clicking on Entry No., you can see the Entry Page. Here is an example of the entry page:



The following actions are available for the log entries:

- Reset log entry
  This will reset the entry s it's ready to be emailed. It sets the Status to "Created" and clears the Completed flag, allowing the entry to be processed for email.
- Refresh Emails
  Will refresh the email addresses from the customer setup of emails. Use when entries are missing email addresses due to missing setup of customers.

Auto Email Dashboard

If you like to see an overview of the email log, go to Auto Email Log and click Dashboard.

AUTO EMAIL LOG

Search | New | Edit List | Delete | Process | Edit In Excel | Actions | Less options

Process Emails | Dashboard

ENTRY NO.	DOCUME... TYPE	CUSTOM DOCUME... TYPE	DOCUME... NO.	CREATED ON	EMAIL ADDRESS FROM	EMAIL FROM NAME	EMAIL TO
1	Sales Quote		S-QUO1001	12/11/2018 2:57 ...	sales@company.com	Sales Department	helen.ray@contoso.com
2	Sales Order		S-ORD1010...	12/11/2018 2:58 ...	sales@company.com	Sales Department	helen.ray@contoso.com
3	Sales Order		S-ORD1010...	12/11/2018 2:58 ...	sales@company.com	Sales Department	helen.ray@contoso.com
4	Collection		20000	12/11/2018 2:58 ...	billing@company.com	Accounts Receivable	helen.ray@contoso.com
5	Statement		20000	12/11/2018 2:58 ...	billing@company.com	Accounts Receivable	helen.ray@contoso.com
6	Shortpaid		PS-INV103...	12/11/2018 2:58 ...	billing@company.com	Accounts Receivable	helen.ray@contoso.com
7	Shortpaid		PS-INV103...	12/11/2018 2:58 ...	billing@company.com	Accounts Receivable	helen.ray@contoso.com
8	Sales Invoice		PS-INV103...	12/11/2018 2:58 ...	billing@company.com	Accounts Receivable	helen.ray@contoso.com

The Dashboard gives a quick overview of exceptions and emails sent:

Auto Email Dashboard

Show Attached

Email Exceptions

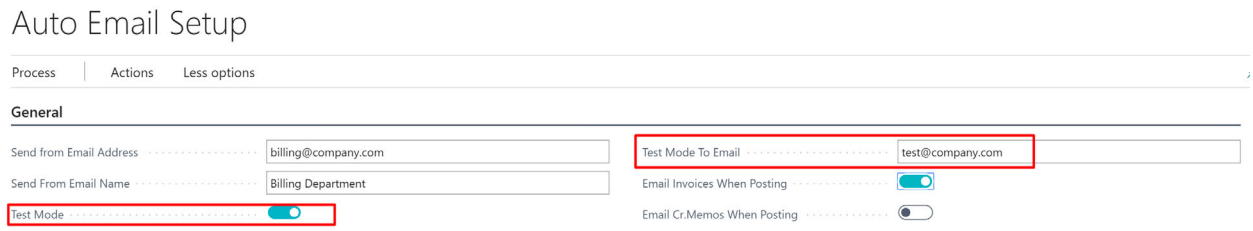
Emails with Errors	0
Emails not yet sent	0

Emailed Documents

Total Emailed Docum...	232	Emailed Service Invoic...	0
Emailed Sales Quotes	1	Emailed Service Credi...	0
Emailed Sales Orders	0	Emailed Purchase Ord...	0
Emailed Sales Returns	0	Emailed Statements	6
Emailed Sales Invoices	173	Emailed Short Paid In...	10
Emailed Sales Credit ...	1	Emailed Collections	10

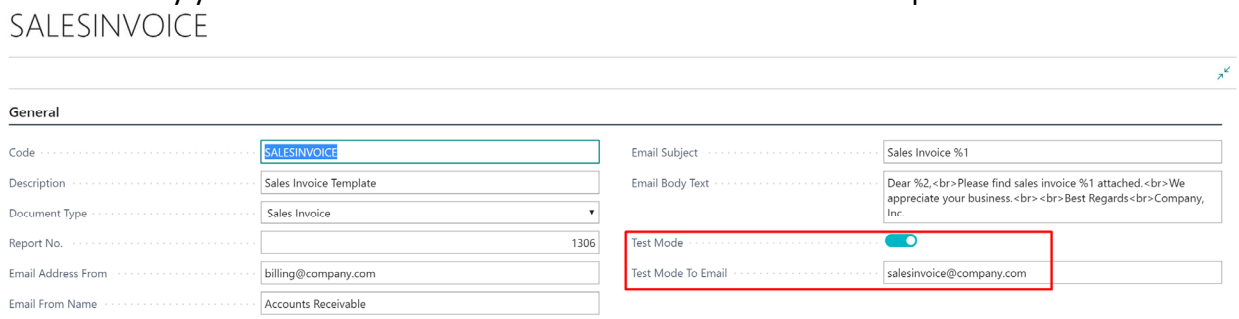
Test Mode

In Auto Email Setup there is an option to put Auto Email in test mode.



If checked, Auto Email will send all emails to the "Test Mode To Email" address instead of the actual customers/vendors. This is useful when setting up Auto Email and checking that documents are showing up correctly in the emails. Just uncheck again when the system is tested and ready to go.

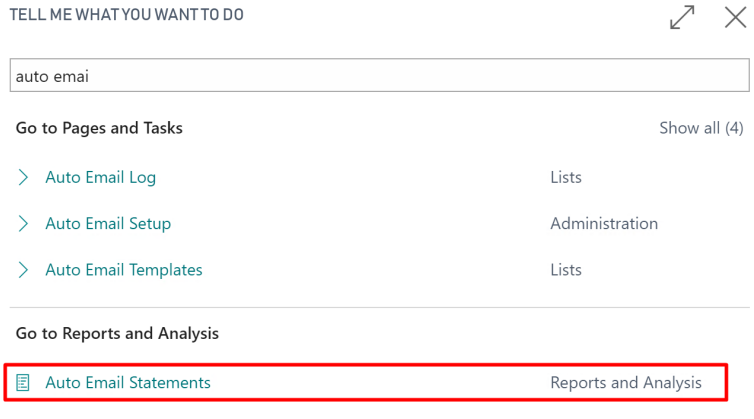
You can also set up test mode on the template. This setting will override the setting in the setup table. This way you can test certain documents while others are still in production.

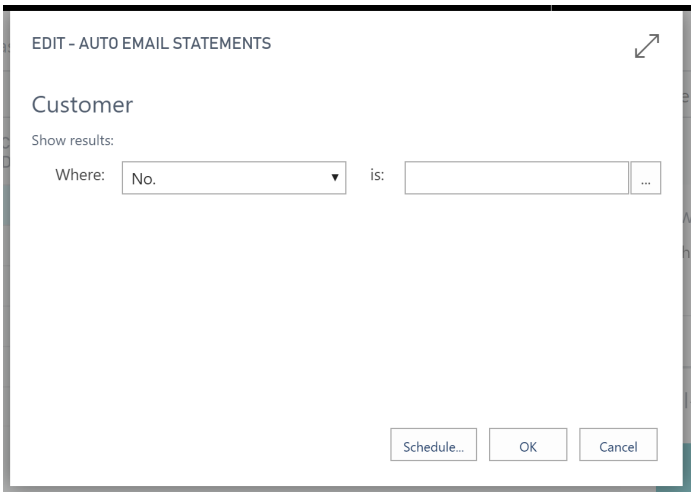


Auto Email Customer Statements

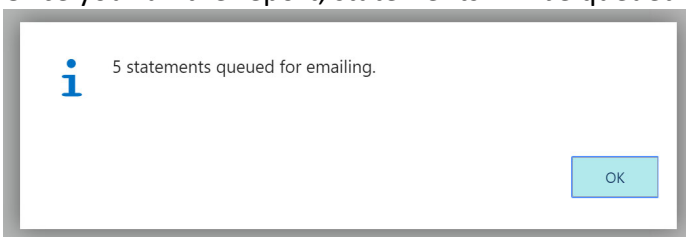
Auto Email can send customer statements to all customers that have a balance due according to the date formula. Check the documentation for Auto Email Setup for more information. The customer must also be set up to receive statements via email ("Auto Email Statements" on Customer Card).

To email the customer statement, search for Auto Email Statements and run the report. Specify any filter you like to have on the customer number.





Once you run the report, statements will be queued for emailing.



VIEW - AUTO EMAIL LOG + New

General

ENTRY NO.	DOCUME... TYPE	DOCUME... NO.	CREATED ON	EMAILTO	SUBJECT	STATUS
1	Sales Invoice	PS-INV1032...	8/3/2018 10:53 AM	johndoe@contoso.com	Sales Invoice PS-INV103215	Emailed
2	Sales Invoice	PS-INV1032...	8/3/2018 10:57 AM	johndoe@contoso.com	Sales Invoice PS-INV103215	Emailed
3	Sales Invoice	PS-INV1032...	8/3/2018 11:03 AM	johndoe@contoso.com	Debug: Sales Invoice PS-INV10...	Emailed
4	Statement	10000	8/3/2018 11:40 AM	johndoe@contoso.com	Customer statement for Adatu...	Created
5	Statement	20000	8/3/2018 11:40 AM	johndoe@contoso.com	Customer statement for Trey Re...	Created
6	Statement	30000	8/3/2018 11:40 AM	johndoe@contoso.com	Customer statement for School ...	Created
7	Statement	40000	8/3/2018 11:40 AM	johndoe@contoso.com	Customer statement for Alpine ...	Created
8	Statement	50000	8/3/2018 11:40 AM	johndoe@contoso.com	Customer statement for Releclo...	Created

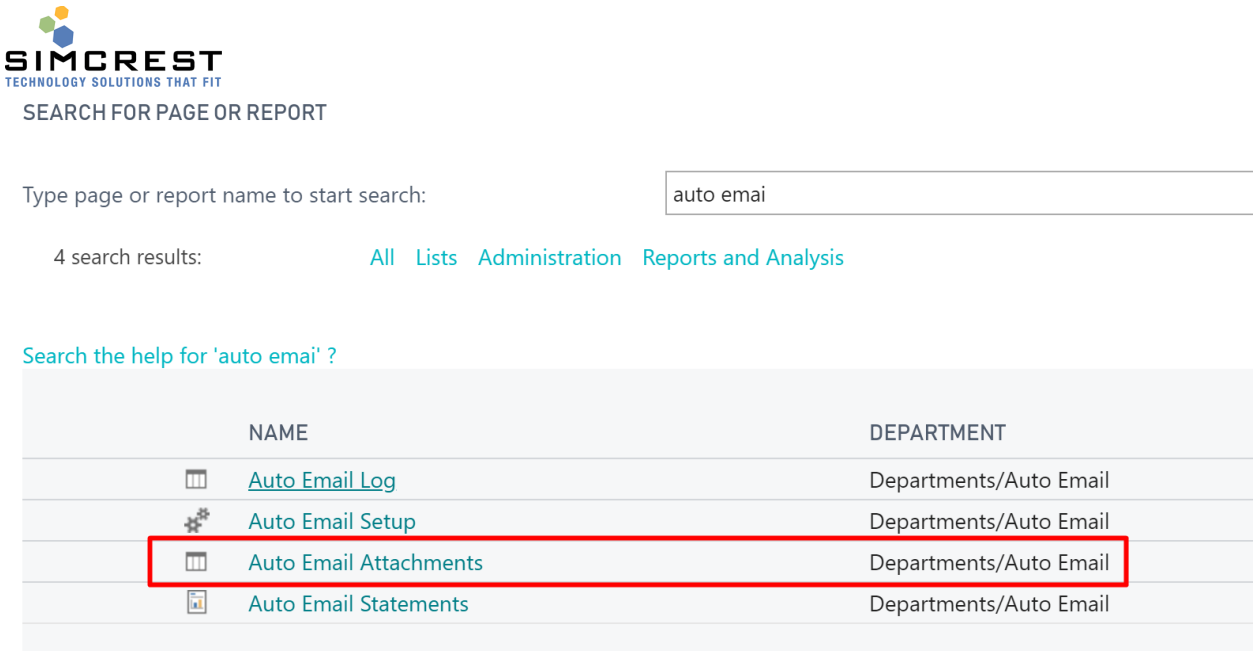
Auto Email Attachments

Auto Email allows you to send attachments with sales and purchase documents. There are two ways to send attachments:

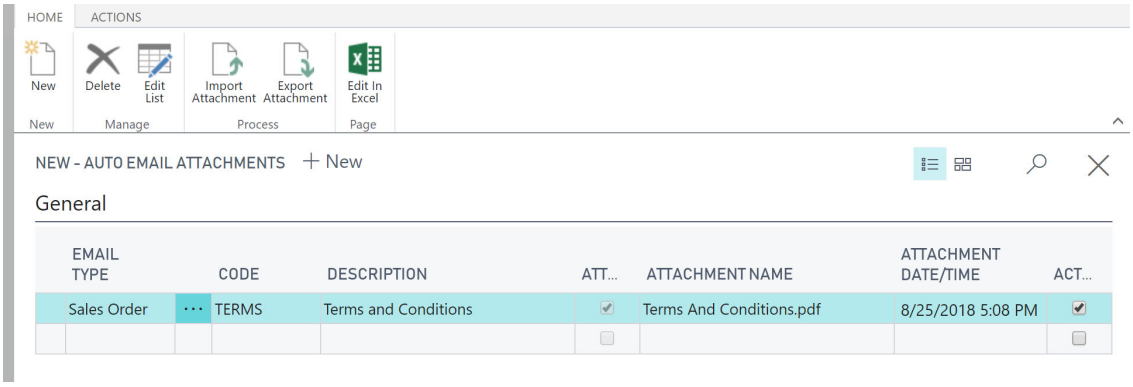
1. Send specific attachments saved on the sales or purchase document
2. Send general attachments related to sales or purchase document

General Attachments

General attachments can be sent with the sales and purchase documents. Let us say you like to send your “Terms and Conditions” and “Return Instructions” with all sales orders you email. Find the attachments page:



Here is the attachment table:

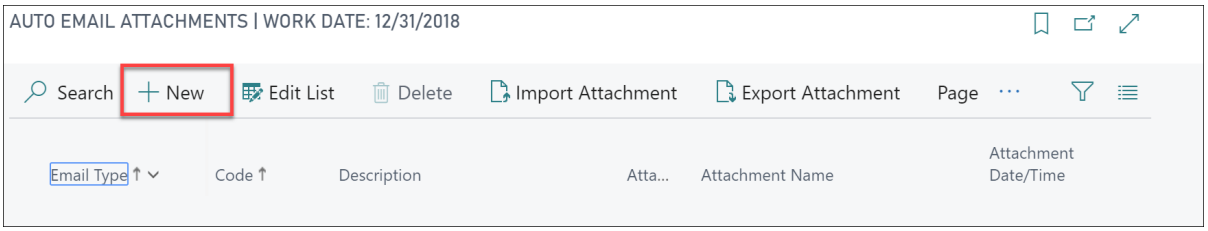


Here are the fields used on the page:

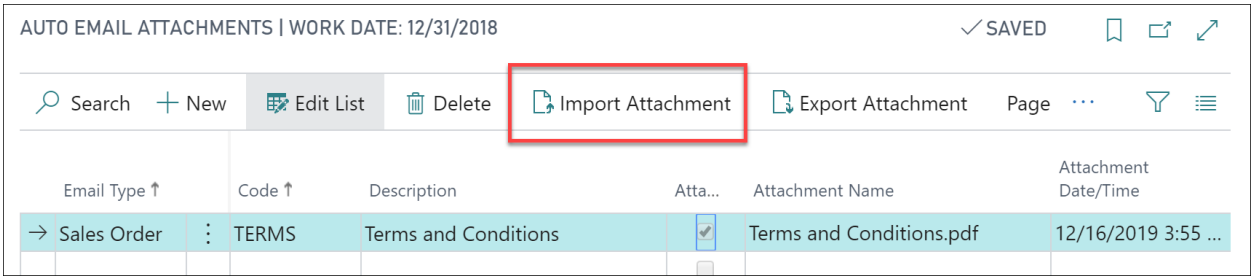
- Email Type
  Here you pick the document type you are emailing
- Code
  This is a unique code used per email type
- Description
  The description of the document
- Attachment
  This will be checked if there is an attachment imported
- Attachment Name
  This is the file name of the attachment. Make sure you include the extension (pdf, docx, xlsx, etc.). Do NOT include the full file path, only the name and extension.
- Attachment Date/Time
  The date and time the file was loaded.
- Active
  Click Active to include this attachment for the email type selected. If unchecked, the attachment will NOT be emailed.

Load Attachment

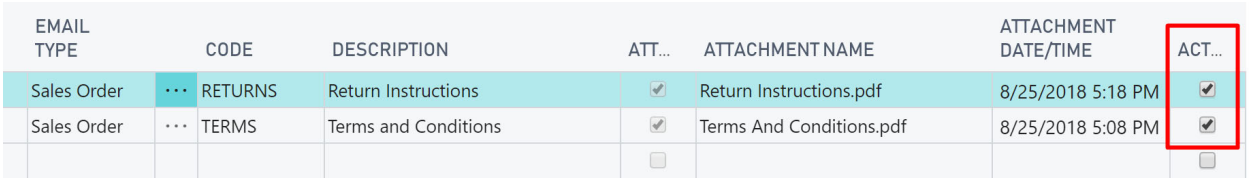
Create and new attachment:



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

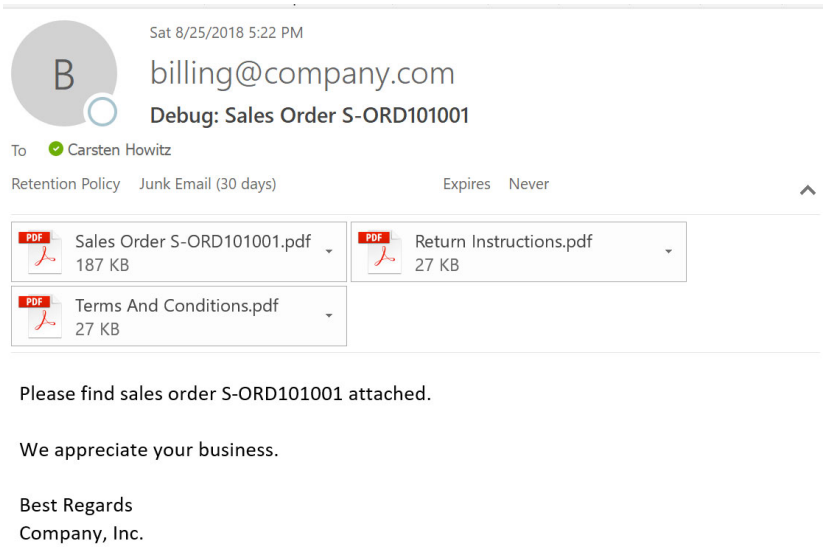


Pick the file and it loads it into the record we are entering. Make sure to enter the attachment name exactly like you want the customer to see the attachment. Do NOT include any file path.



EMAIL TYPE	CODE	DESCRIPTION	ATT...	ATTACHMENT NAME	ATTACHMENT DATE/TIME	ACT...
Sales Order	RETURNS	Return Instructions	✓	Return Instructions.pdf	8/25/2018 5:18 PM	✓
Sales Order	TERMS	Terms and Conditions	✓	Terms And Conditions.pdf	8/25/2018 5:08 PM	✓

In the above case, two attachments will be sent with the sales order. Make sure Active is checked for the document to be included in emails.

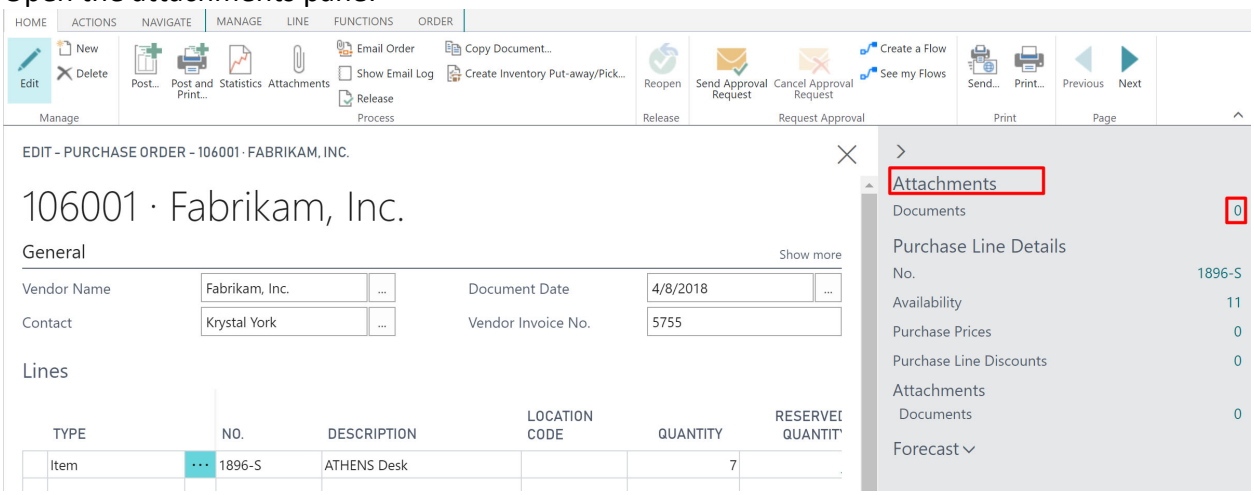


If you use the Export attachment, the file will be downloaded to your Downloads folder.
If you like to delete the attachment, delete the entire record.

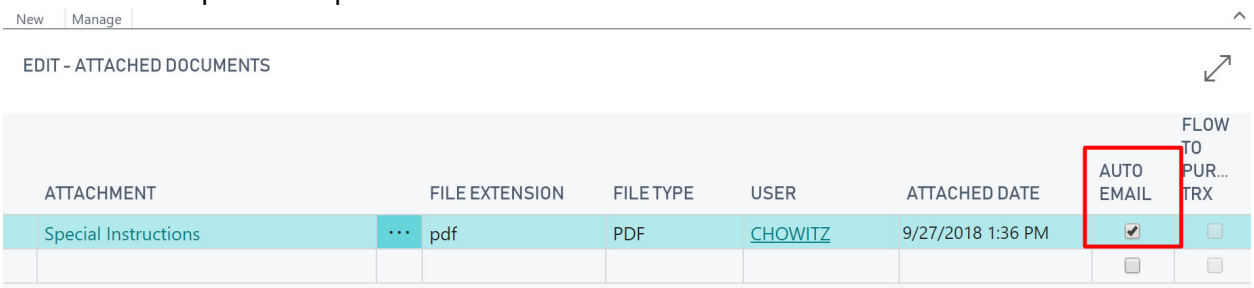
Specific Attachments

Specific attachments can be sent with the sales and purchase documents. Auto Email allows you to send the attachments that are associated with the standard Dynamics 365 Business Central functionality available for any document. Let's say you have a purchase order, and you would like to email special instructions with this particular purchase order.

Open the attachments pane:



Click the number of Documents (in this case 0) and attach the document you would like to email with this particular purchase order.



Make sure to check the Auto Email checkbox. Any document you load here will be emailed along with the purchase order if the Auto Email field is checked. If not, it will not be emailed.

Handling Email Exceptions

On occasion, it might be needed to override the auto emailing of documents to certain customers. It could be that you don't want a particular invoice or credit memo being auto emailed, even though the system has been set up to auto email the document for the customer in question. Or, it could be a credit memo, that was made internally and that should not be auto emailed to the customer.

Handling of exceptions has been implemented in the App, but will not prevent deliberate auto emailing, like emailing of collection notices with supporting documents or short paid notices. All accounts receivable functions will work as normal.

Please note that the exceptions, if not checked, will not Auto Email the documents, if the customer template specifically says not to email the document in question.

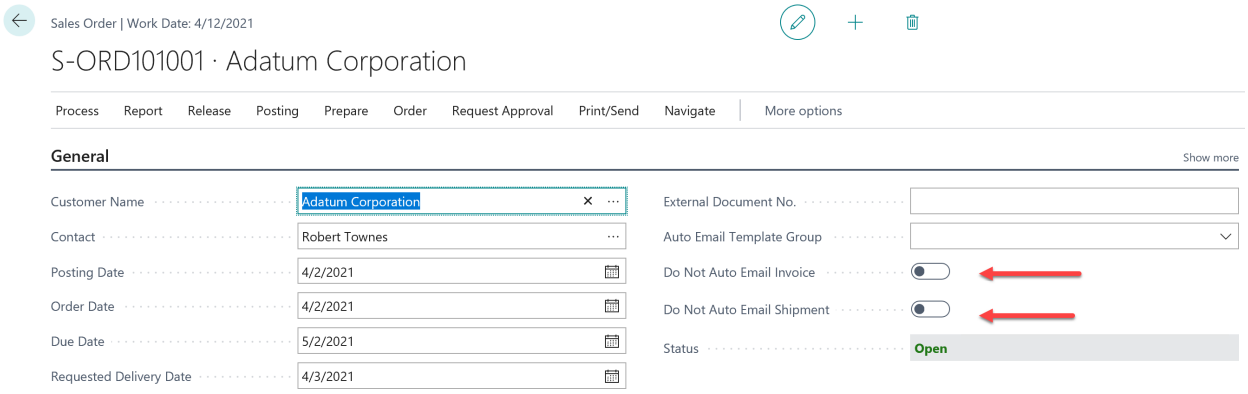
The following documents can have exceptions:

- Posted Invoices
- Posted Shipments
- Posted Credit Memos

Non-posted documents will not have exceptions, as the user can simply avoid auto emailing them.

How to Make Exceptions

Here is a sales order:



Two fields can make exceptions to auto emailing documents for this particular order:

- Do Not Auto Email Invoice
- Do Not Auto Email Shipment

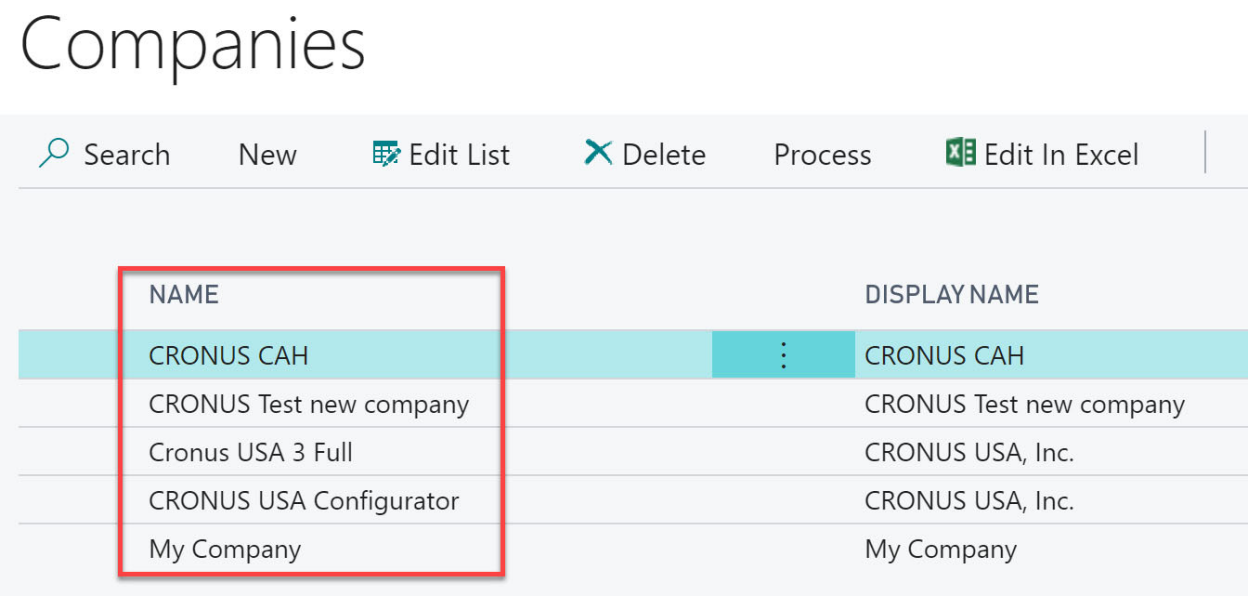
If checked, these fields will prevent auto emailing of the specific document when this order is posted. It will also warn you if you try to email the posted document later on by accident. You will find similar fields on sales invoices and credit memos.

If the fields are checked there is no auto email log generated for this document and consequently, the document is not emailed to the customer.

Trial Period and Activating/Renewing a Subscription

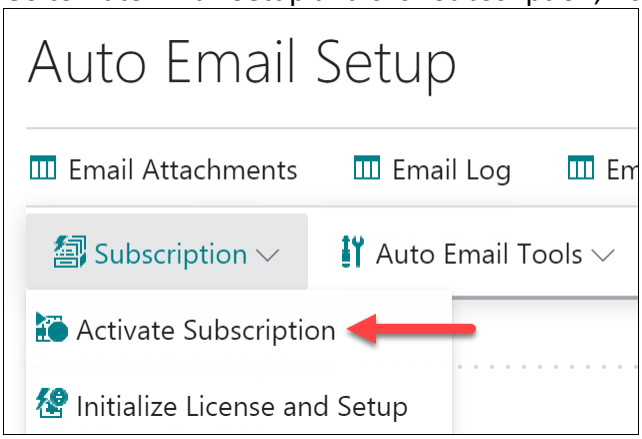
When you have installed Auto Email, it will automatically run for a trial period of 30 days. During that time, you are free to evaluate the solution and there are no restrictions to the version running under the trial period.
Once the trial period has expired, Auto Email will no longer send emails. To avoid that, you need to subscribe to Auto Email. Contact SimCrest to purchase a subscription. You can use this link http://simcrest.com/ContactUs to contact us.

Auto Email is licensed per company and is tied to the company name. You can see the company name by searching for "Companies":

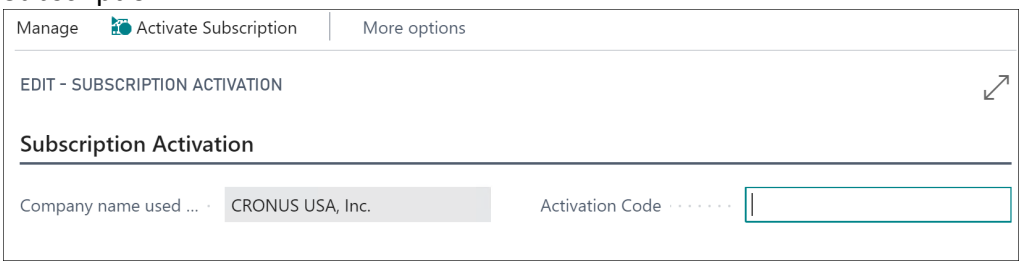


Pick the company name from the name column (not the Display Name) and send it to SimCrest together with the request for a subscription. Subscriptions usually run for 1 year at a time but can be customized to your specific needs.
Once purchased, SimCrest will issue you an activation code. Here is how to activate the subscription:

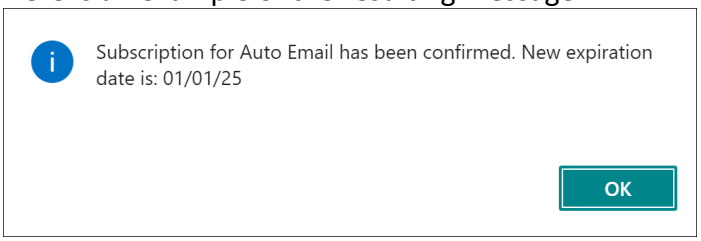
- Go to Auto Email Setup and click Subscription, Activate Subscription



- Note the Company name used for this activation. Make sure it's the same name as you provided to SimCrest. Paste the activation code into the field and click Activate Subscription



- Here is an example of the resulting message



Customer Support and Request for new features

If you have questions about how to use Auto Email or have issues to report, we would love to hear from you. Please go to http://simcrest.com/ContactUs and send us a message. Use the same link if you like to request new features for Auto Email.

Frequently Asked Questions

Q: Is it possible to send sales orders to one set of email addresses and sales invoices and shipments to other email addresses for the same customer?

A: Yes. Under the customer, you will set up Auto Email Tos. For each document type, you can specify the email addresses. If a document type has no email addresses defined, the default emails on the customer card (under Auto Email) will be used instead.

Q: I like to send certain customers invoices that look different than those sent to other customers. The same goes for other document types like sales shipments. Is that possible?

A: Yes, you will need to set up several Auto Email Template Groups and assign them to the customers in question. Each group will define the templates with the different reports.

Q: Can I change the Template Group on a document and achieve a different email experience for that particular document?

A: Yes. On each document, the template group will be displayed on the General tab. Just change the group and the email experience will change to that of the new group assigned to the document. If the document is posted, the new email template will apply to this document also.

Q: I am getting errors in the Email Log. The error says “SMTP error” of some kind. How can I resolve this error?

A: Auto Email can use the standard SMTP email features of Business Central. Any SMTP error that may occur will be related to connection issues with your SMTP provider or invalid email addresses or email domains not supported by the SMTP provider. Please contact your SMTP provider for more information. We suggest using Email Accounts instead as the SMTP email feature is deprecated and not supported in a future version.

Q: I have resolved the SMTP errors above, but the email log entries say they are completed. How can I send the emails that had errors again?

A: Find the entry and click “Reset log entry”. The job queue will pick up the changed log entries on its next run. You can also click Process Emails from the log to force an email to run manually.

Q: I am getting the following error: “Rendering output for the report failed and the following error occurred: The Hidden expression for the tablix ‘LinesTable’ contains an error: Input string was not in a correct format.”

A: Rendering errors occur when the document report that’s being used has errors. Make sure that all report numbers you are using are pointing to reports that work. Test the report on documents if you are not sure. If you are experiencing this when sending statements, make sure you are using our statement report and fill out the statement options in the Auto Email

Setup. If you are using your own statement report, you will need to contact your partner, so they can modify it to work with Auto Email.

SMTP Trouble Shooting

Auto Email can use the standard SMTP service of Dynamics 365 Business Central, which is communicating with your SMTP provider. Auto Email is simply sending the email information to the SMTP service that will take it from there.

If you see SMTP errors in the Auto Email log, there is an issue with one of the following:

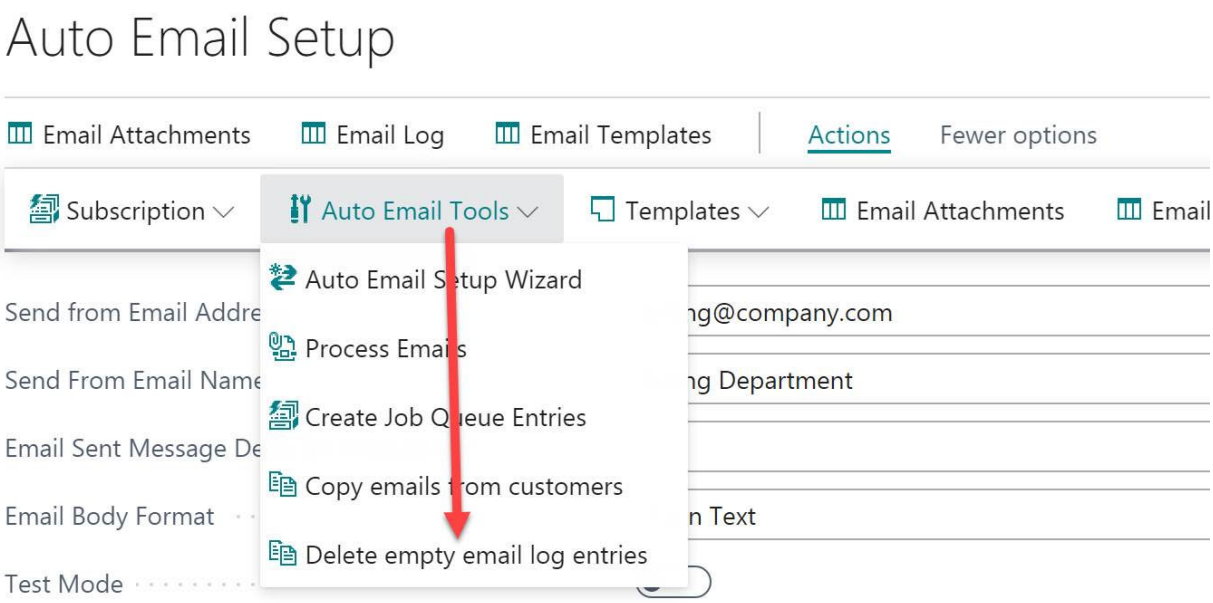
1. SMTP Setup issue. Make sure the SMTP server settings are correct.
2. Connection issues. The SMTP service is not seeing the SMTP provider. Check login and password setup. Check port settings.
3. SMTP email violations. Emails are being sent with from email addresses that are not in the correct domain. You may try to send emails from abc@company_A.com and company_A.com is not your domain.

SMTP email violations are very common. SMTP providers are protecting against spammers and they usually will not allow from emails in another domain than the domain you have set up with them. Make sure all email addresses you are sending from are in your domain. If you use Office 365, make sure the email address you use in your templates and setup is the same as the email address used to log into the SMTP service.

SMTP errors can be challenging to troubleshoot, but here are some well-known errors and their most likely causes (errors may not be exactly like below).
We suggest using the Email Accounts instead of SMTP setup that is deprecated and will not be supported in a future version.

Error: SMTP Error: Could not add recipient.

The Auto Email Log is having entries with no email address in the Email-To field. Delete all log entries with blank Email-To. You can use the function under Auto Email Tools to delete the entries.



Error: SMTP Error: The remote certificate is invalid according to the validation procedure.

Likely issue: SMTP setup issue. The STMP server address is pointing to an unsupported host.

Error: SMTP Error: No such host is known

Likely issue: SMTP Setup issue. The SMTP Server address is not correct.

Error: SMTP Error: The operation has timed out.

Likely issue: SMTP setup issue. The port or authentication method is not correct.

Error: SMTP Authentication Error: The SMTP server has unexpectedly disconnected.

Likely issue: User ID or password is incorrect, or login expired or unsupported.

SMTP Error: Unable to read data from the transport connection: net_io_connect

Likely issue: User ID or password is incorrect, or login expired or unsupported.

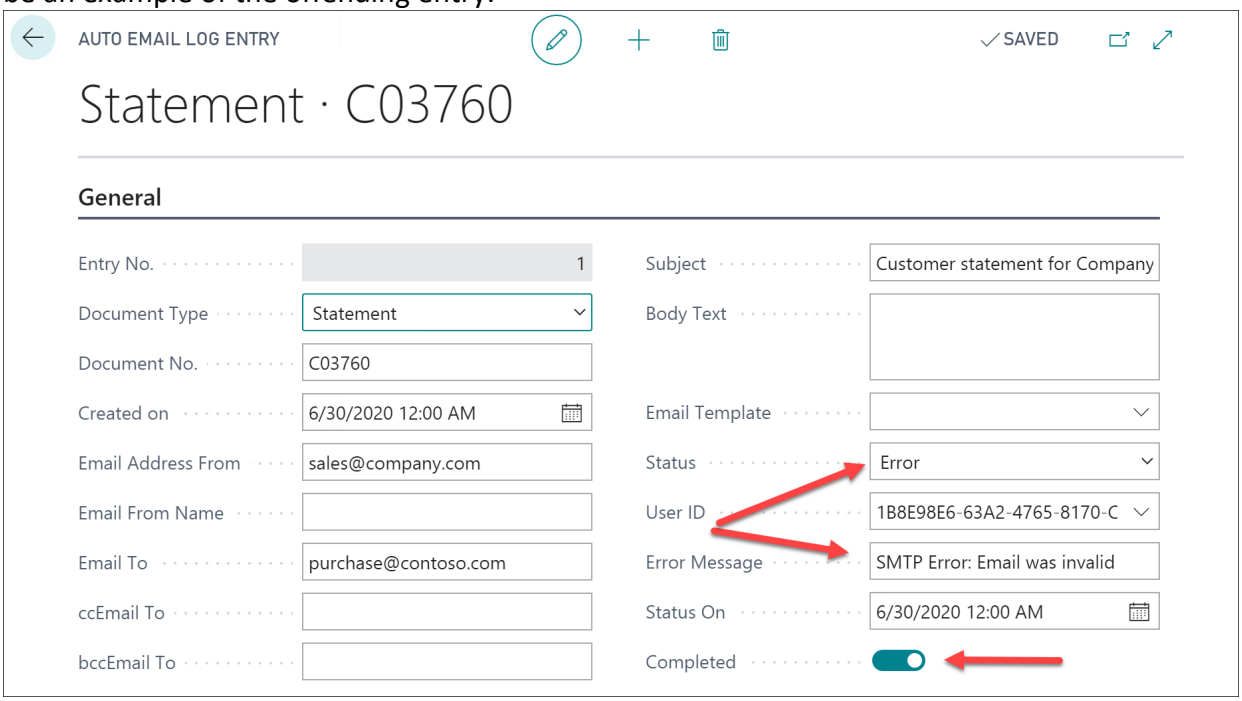
Job Queue Management

Auto Email is relying on the Job Queue to handle the following events in Business Central:

1. Sending emails that have been logged in the auto email log.
   Auto Email is using the job queue to send emails logged in the auto email log. If an entry is ready to be submitted, it will be emailed upon the next event triggering this job. All entries that are ready will be emailed unless an error occurs.
2. Monitoring the auto email log entries for errors.
   On occasion email settings are incorrect or missing information is encountered in the auto email log that will make the auto email entry fail to be processed. The log entry will be marked with the status = Error. In this case, an email is sent to the designated user(s) for this error.
3. Monitoring the "Sending Emails" job queue to see if it's running or not.
   Sometimes the job queue sending the emails from the auto email log may stop due to errors. In that case the monitoring job queue will notify the designated user(s) that an error occurred and that it needs to be resolved for emails to be sent again.

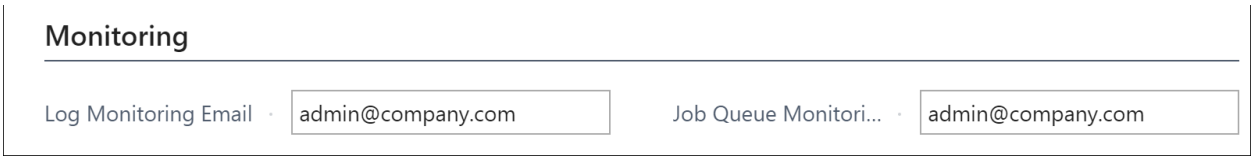
Errors in Auto Email Log

If an error is encountered during the processing in the "Send Emails" job queue event this could be an example of the offending entry:

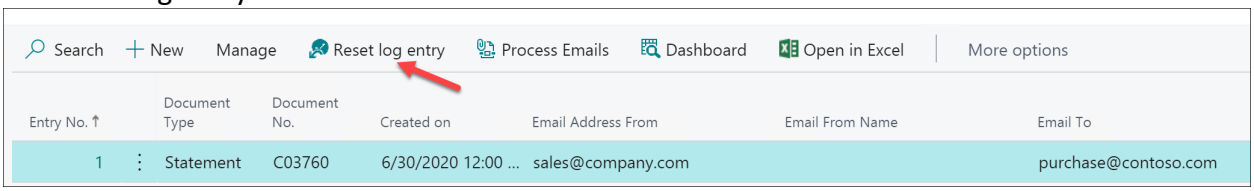


Notice the Status=Error and the error message. If there was an issue with the email, correct it on this entry or delete the entry to make a new email from the customer or document in this context.

An email will be sent to the log monitoring email (several emails can be entered separated with a semicolon) in the setup table:



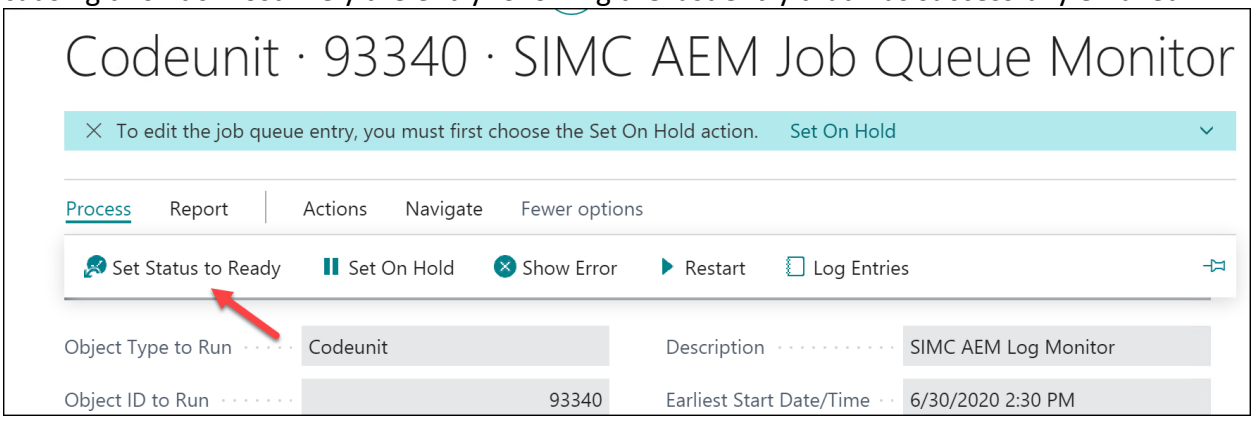
Reset the log entry once corrected:



Or delete the entry and redo the transaction to recreate the entry correctly.

Errors causing the "Send Emails" Job Queue Entry to fail

On occasion, the job queue responsible for sending the emails stops due to more severe issues. In that case, an email is sent to the Job Queue. Usually, there is an entry in the email log that is causing this. It's most likely the entry following the last entry that was successfully emailed.



Once the issues are corrected, Set the status to Ready.

Customer Statement Modification

If you are using your own customer statement report, it must be modified to be able to run unattended. The Statement Options in Auto Email Setup are used to set the parameters to allow this. See below for an example of how we implemented it into the two statement report we provided for Auto Email.

Colorful Word Statement

```
trigger OnPreReport()
var
    AutoEmailSetup: Record "SIMC Auto Email Setup";
begin
    //!SIMCAEM Start
    AutoEmailSetup.Get();
    StartDate := AutoEmailSetup."Start Date";
    EndDate := CalcDate(AutoEmailSetup."Statement To-date Formula", Today());      You, a few seconds ago • Uncommitted changes
    PrintEntriesDue := AutoEmailSetup."Show Overdue Entries";
    // Include
    PrintAllHavingEntry := AutoEmailSetup."Print All with Entries";
    PrintAllHavingBal := AutoEmailSetup."Print All with Balance";
    PrintReversedEntries := AutoEmailSetup."Include Reversed Entries";
    PrintUnappliedEntries := AutoEmailSetup."Include Unapplied Entries";
    // Aging Band
    IncludeAgingBand := AutoEmailSetup."Include Aging Band";
    PeriodLength := AutoEmailSetup."Length of Aging Periods";
    DateChoice := AutoEmailSetup."Aging Method";
    LogInteraction := AutoEmailSetup."Log Interaction";
    Customer.SETRANGE("Date Filter", AutoEmailSetup."Start Date", CalcDate(AutoEmailSetup."Statement To-date Formula", WORKDATE()));
    ///!SIMCAEM End

    InitRequestPageDataInternal;
end;
```

Contact your partner to adjust the code to work with your customer statement report.

Customizing Auto Email Functionality

Auto Email is fully extendable (customizable). This means that Microsoft Partners can extend the functionality of Auto Email if there are functional areas that need to be created and/or modified. Examples:

- Adding new document types to be emailed. If there is a requirement to email documents not supported by the standard Auto Email App, they can be added and supported.
- Changing email behavior to do something else than what is supported in the standard App. For instance, supporting additional merge fields or make more extensive HTML body texts in emails.
- Sending emails without attachments to notify email recipients about certain events that happened in the system. For instance, an email could be sent to a user if the credit limit of a customer is exceeded.
- Making additional checks of email message setup and content before it's being emailed.

Please contact SimCrest or your partner to have them extend the functionality of the Auto Email App.