Dynamics Shop

User Guide for Microsoft Dynamics 365 Business Central

Product: SD Bulk Mailer

Release: D365 BC V21+

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2 Getting Started

SD Bulk Mailer allows you to distribute your standard Microsoft Dynamics 365 Business Central document outputs, in bulk, to multiple recipients via Email. SD Bulk Mailer facilitates direct communications to the correct point of contact and allows your customers self-service for copy documents via web services on your website.

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

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

3 Security Setup

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

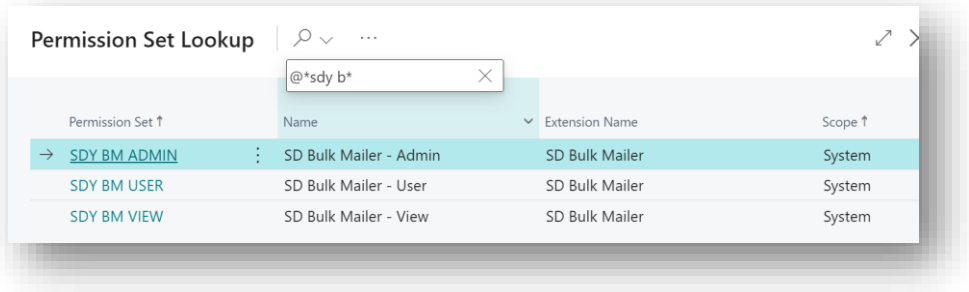

Figure 3-1

We have also created extensions on the following standard Microsoft Dynamics 365 Business Central Permissions:

- Exten. Mgt. - Admin includes SDY BM ADMIN permissions.
- D365 BUS FULL ACCESS includes SDY BM USER permissions.
- D365 BASIC includes SDY BM VIEW permissions

4 Installing SD Bulk Mailer

SD Bulk Mailer is available to download from AppSource or you can install the App from within Business Central using Extension Marketplace.

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_9.1.10.0.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).*

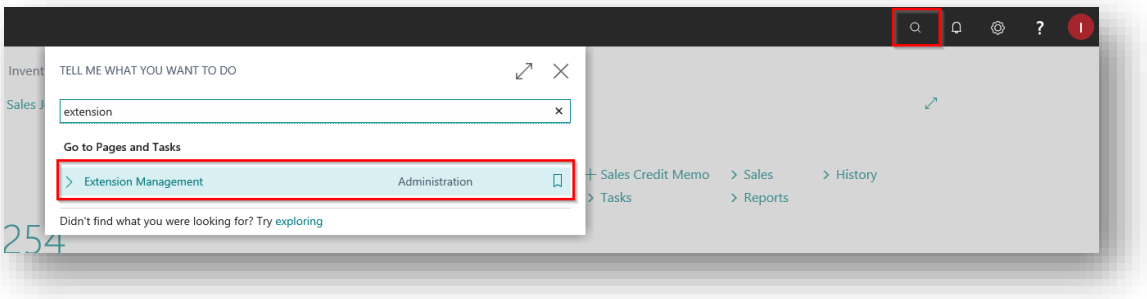

Figure 4-1

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

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. The **Allow HttpClient Requests** option is automatically enabled on install of SD Bulk Mailer.

1. In the Business Central **Extension Management** list, you should see the **SD Bulk Mailer** App installed. Select the **SD Bulk Mailer App** record and from the menu, select the **Manage** group, and choose **Configure** *(Figure 4-2).*

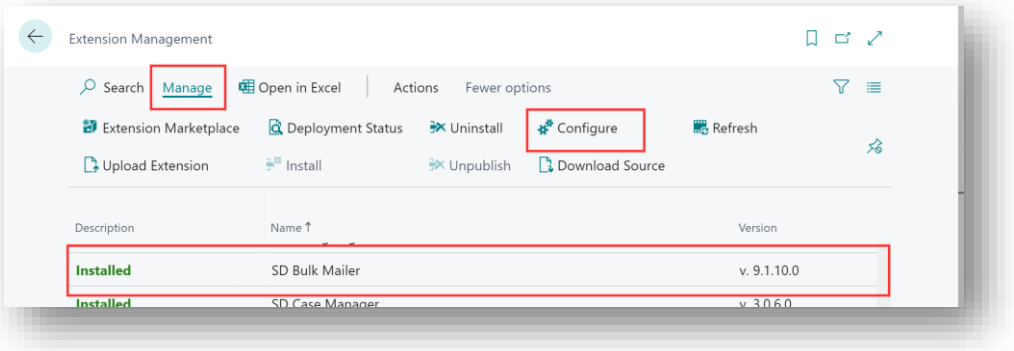

Figure 4-2

2. Choose to allow the **Allow HttpClient Requests** option *(Figure 4-3).*

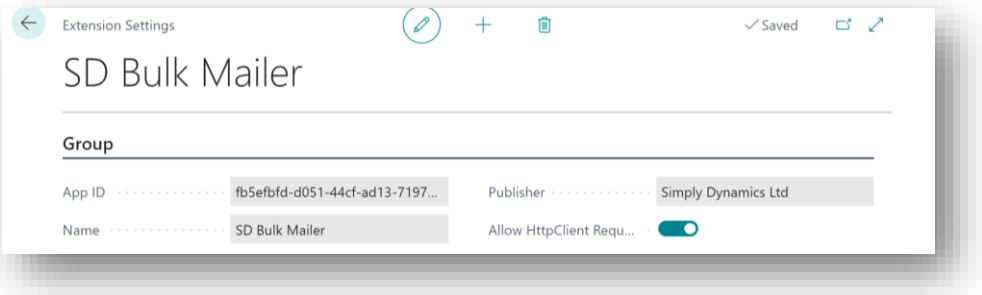

Figure 4-3

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 4-4)*.

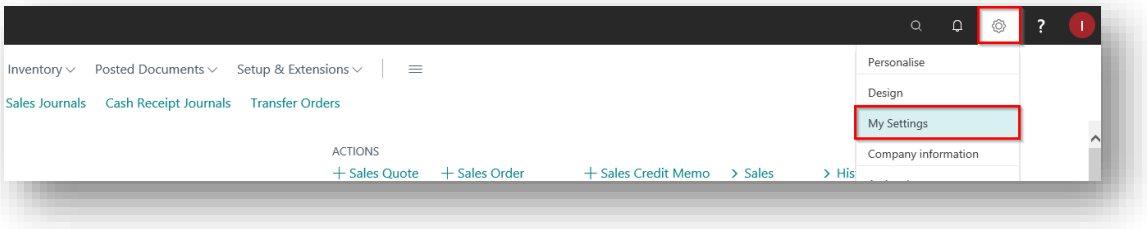

Figure 4-4

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon *(Figure 4-5)*.

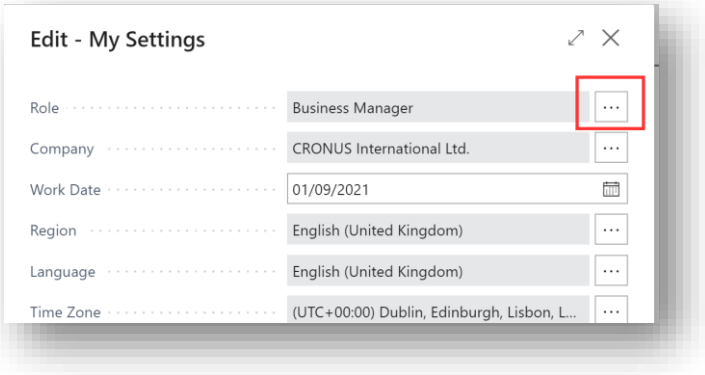

Figure 4-5

3. You should see **SD Bulk Mailer** in the list of Roles *(Figure 4-6)*. Choose **SD Bulk Mailer** and click **OK**.

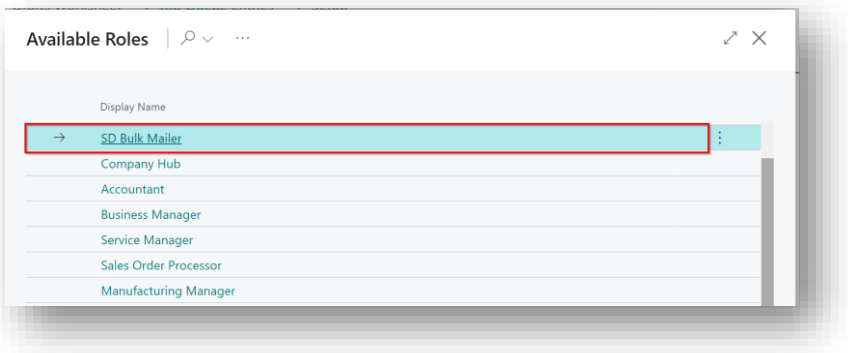

Figure 4-6

4. The **SD Bulk Mailer** Role should now be displayed in the **Role** field. Click **OK** to close the **My Settings** page *(Figure 4-7)*.

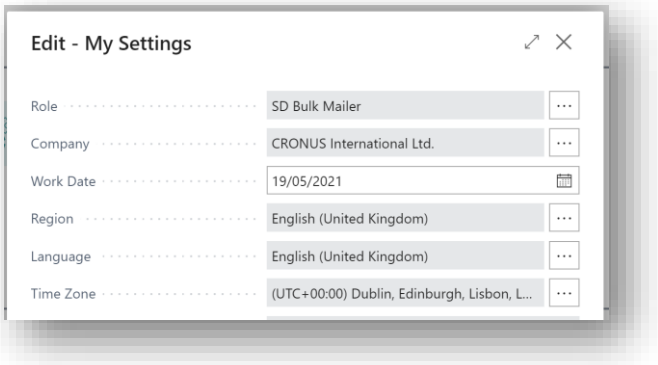

Figure 4-7

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 4-8)*.

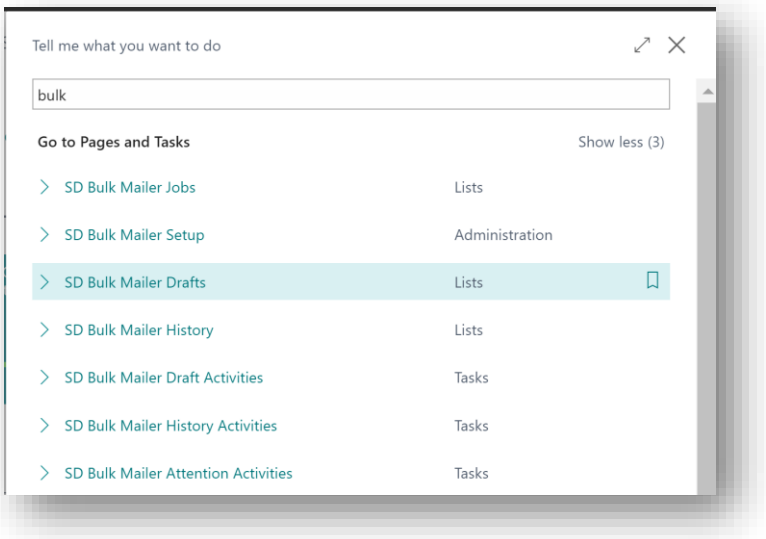

Figure 4-8

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** opens, you will be prompted that "Your SD Bulk Mailer license needs to be validated." Choose **Yes** *(Figure 4-9)*.

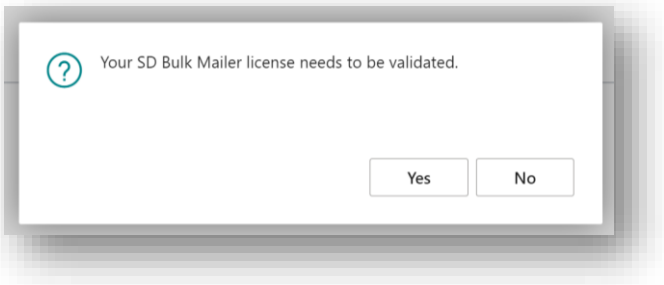

Figure 4-9

3. You will then see the **Activate your product** page.

4.4.1 Activating the SD Bulk Mailer Licence with a Product Key

In the **Activate your Product** page:

1. Enter your company name in **Company Name**

2. Enter your company email in **Email**

3. Paste the supplied product key into the **Product Key** field. **Tab off the Product Key field to validate the contents of the field and to enable the Activate key**. *(Figure 4-10)*

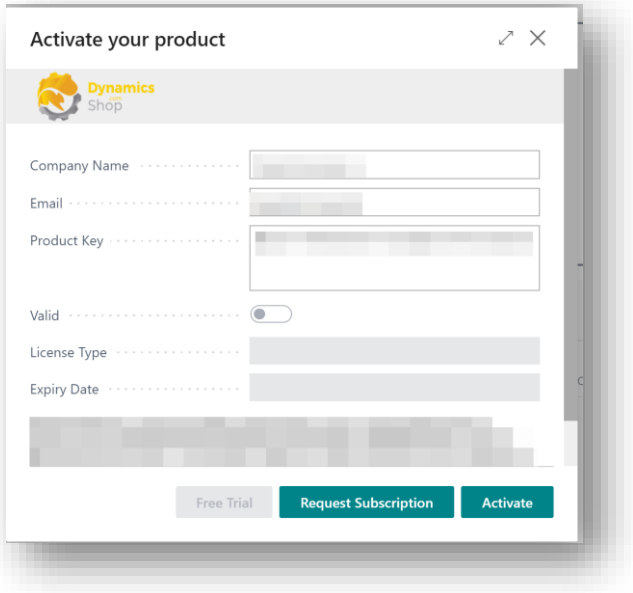

Figure 4-10

4. Choose **Activate.**

5. 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.

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 (assuming you have not already availed of a free trial), in the **Activate your Product** page:

1. Enter your company name in **Company Name**

2. Enter your company email in **Email**

3. Choose **Free Trial** *(Figure 4-11)*.

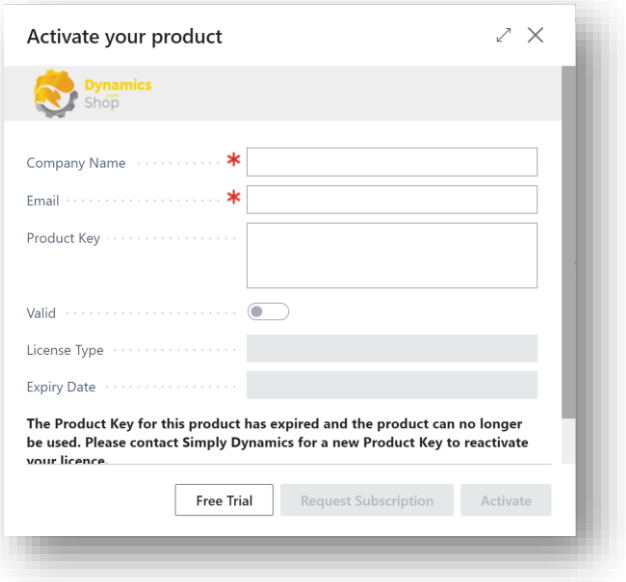

Figure 4-11

4. You are then prompted to choose **Yes** to activate your free trial. Choose **Yes** *(Figure 4-12)*.

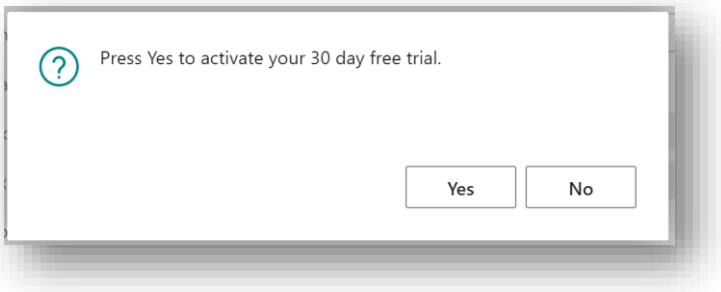

Figure 4-12

5. 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 4-13)*.

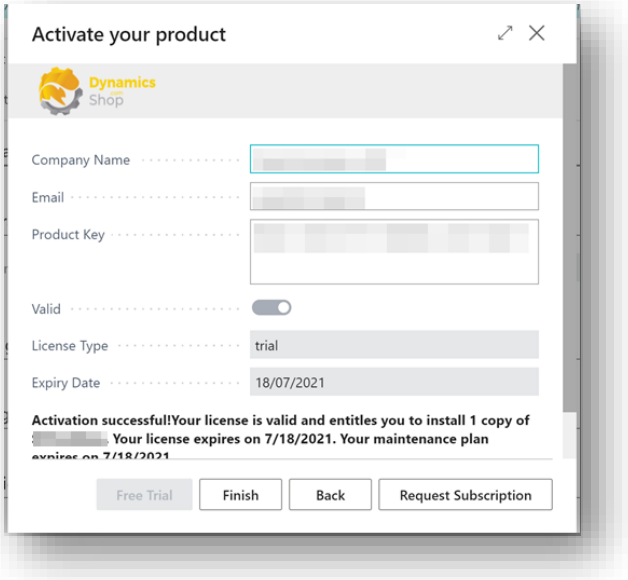

Figure 4-13

6. Choose **Finish** to exit the page.

7. When your Free Trial has expired, choose **Request Subscription** to request a Product Key from Simply Dynamics.

5 Uninstalling SD Bulk Mailer

1. Navigate to the **Extension Management** list, you should see the **SD Bulk Mailer** App installed.

2. Select the **SD Bulk Mailer** App and choose the **Uninstall** action *(Figure 5-1)*.

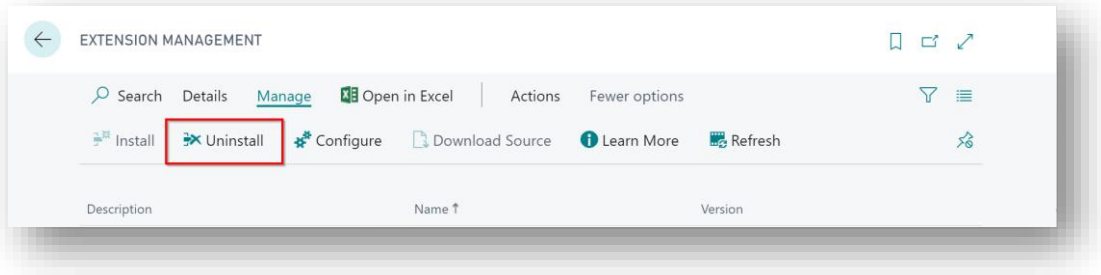

Figure 5-1

6 Upgrading SD Bulk Mailer

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

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)*:

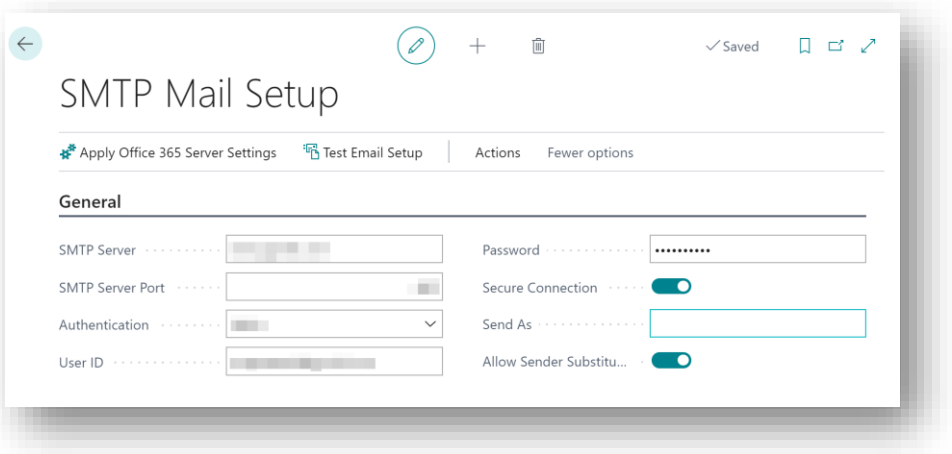

Figure 6-1

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)*:

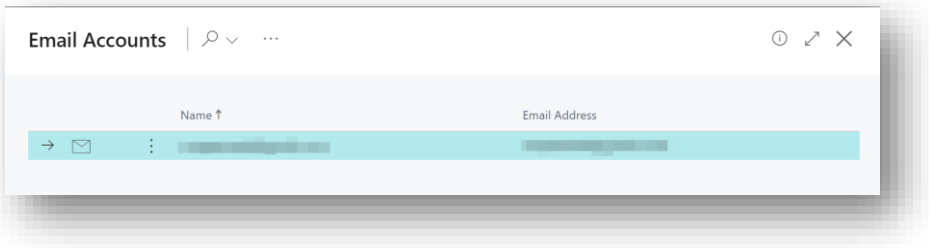

Figure 6-2

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)*.

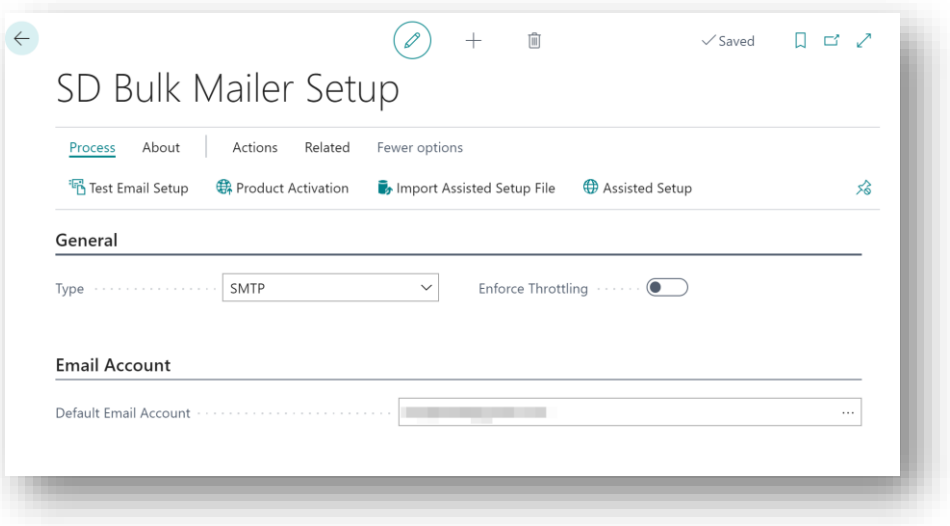

Figure 6-3

6.2 Upgrading SD Bulk Mailer from v9.1.5 and above to v9.1.10 and above

In version 9.1.10 of SD Bulk Mailer the SD Bulk Mailer permission sets were changed from XML file objects to Permission Set Objects. When upgrading from SD Bulk Mailer v9.1.5 and above to SD Bulk Mailer v9.1.10 and above, you will need to re-set permissions as SD Bulk Mailer is now using Permission objects rather than XML files for user setup.

Please refer to the section on **Security Setup** above.

6.3 Upgrading SD Bulk Mailer to v9.1.13 and above

In version 9.1.13 of SD Bulk Mailer, the logic used to update the Search From Entry No on the SD Bulk Mailer Job Cards was changed. Therefore, it is recommended that before upgrading to this version that any undelivered drafts are delivered.

6.4 Upgrading SD Bulk Mailer to v10.0.0 and above

In version 10.0.0 of SD Bulk Mailer, users can now choose to send mails via Microsoft Graph.

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**, from the menu choose the **Home** group, and then **Assisted Setup** *(Figure 7-1)*.

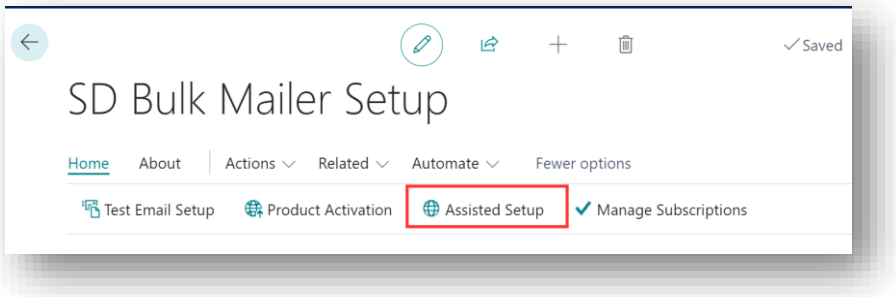

Figure 7-1

2. You are prompted that “Importing setup may modify some of the existing records 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)*.

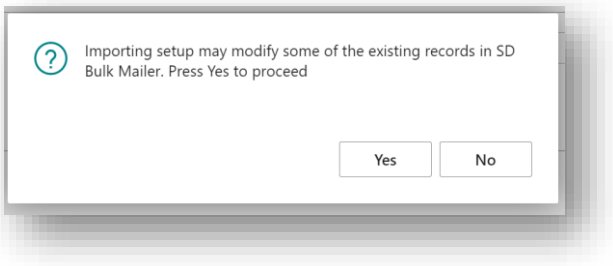

Figure 7-2

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

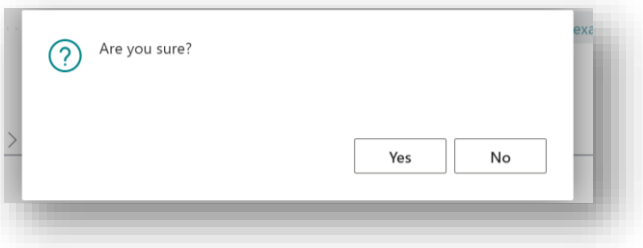

Figure 7-3

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

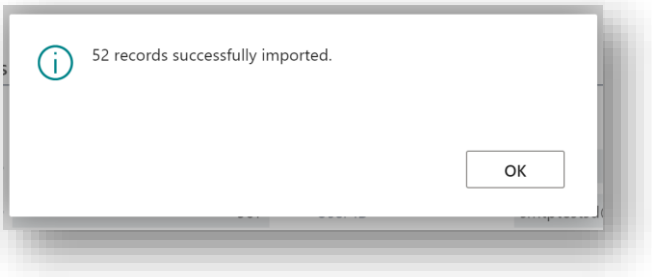

Figure 7-4

7.2 How to Use Microsoft Graph to Send emails in SD Bulk Mailer

To use Microsoft Graph to send emails in SD Bulk Mailer, you must firstly register an App in Azure. To register an App in Azure:

1. Log into your Azure portal
2. Search for and navigate to “App Registrations”.
3. Choose “Register an Application” to create a new App.
4. Give your App a name.
5. In the “Supported account types” section, choose the first option, “Accounts in this organizational directory only”.
6. Select “Register “

Once you have registered the App in Azure, you are brought to the page for your newly created App. In this page:

1. Take note of the Application (client) ID.
2. Choose the Certificates and Secrets tab and choose “New client secret” to create a new secret.
3. Take a note of the Client Secret.

You then need to give your App certain API permissions. From the same page:

1. Navigate to the API permissions tab and choose “Add permission”.
2. Choose “Application permissions”
3. From the list of “API/Permissions name”, select Mail.Send
4. Set “Admin consent required” to yes.

Back in SD Bulk Mailer, in the SD Bulk Mailer Setup Card, set the **Type** to **Graph** and enter the **Application (client) ID** and the **Client Secret**.

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 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 is 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, will be delivered automatically unless there is an issue with the Draft. 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)*:

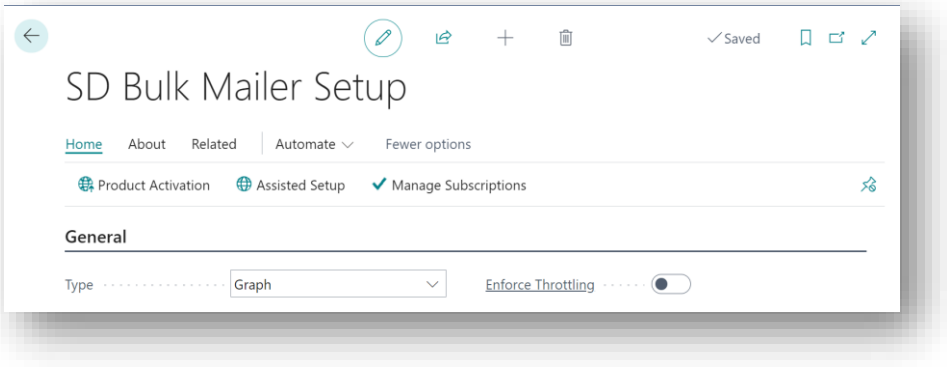

Figure 9-1

- **Type** – This field specifies the type of Email Server. Choose from **SMTP** or **Graph**. Please see the section in this document for details on how to use Graph to send emails in SD Bulk Mailer.

- **Delete History Attachments After –** Specify when you want to delete attachments from the SD Bulk Mailer History. The history details of the issued drafts are not deleted. Initially set to Inherited on the Setup Card and on the individual SD Bulk Mailer Job Cards. The value you set on the Setup Card will be inherited by the individual Jobs unless you specify a different value on the SD Bulk Mailer Job Card. Choose the **Purge History Attachments** action on the Setup Card to remove attachments. You can also create a job in the job queue entries to delete history attachments for all SD Bulk Mailer Jobs (Note: The Job Code filter is ignored on the Job Queue Entry Card).

- **Enforce Throttling** – Using SMTP may cause errors due to a limitation in Office 365 to reject email streams of over 30 mails per minute. Using Microsoft Graph, you can send 150 unique emails every 15 minutes (tenant limit). This field allows you to turn on throttling in SD Bulk Mailer which, if turned on, sends emails through your SMTP Server or via Microsoft Graph 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 or via Microsoft Graph. This field defaults to a rate of 25 Emails per minute.

If you selected **SMTP** as **Type**, the **Email Account** FastTab is displayed. From here you can choose your email account to use to send emails in SD Bulk Mailer as per standard Dynamics 365 Business Central Email Accounts *(Figure 9-2)*.

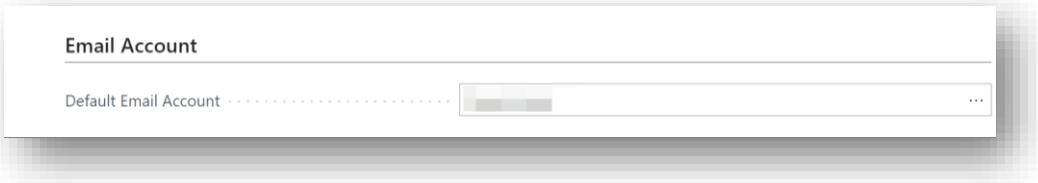

Figure 9-2

If you selected **Graph** as **Type**, the **Connection Settings** FastTab is displayed. Enter the Application (client) ID and the Client Secret for the app that you registered in Azure to send emails in SD Bulk Mailer using Microsoft Graph *(Figure 9-3)*.

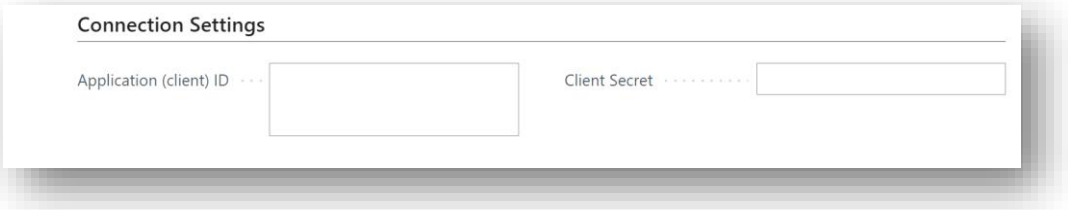

Figure 9-3

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

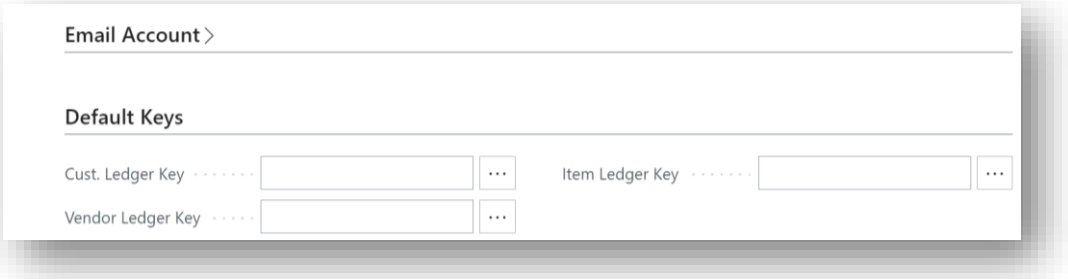

Figure 9-4

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** list is accessed from the Bulk Mailer **Setup**. From the **Related** group, choose **Jobs** *(Figure 10-1)*. The **Jobs** can also be accessed from the **Drafts** list.

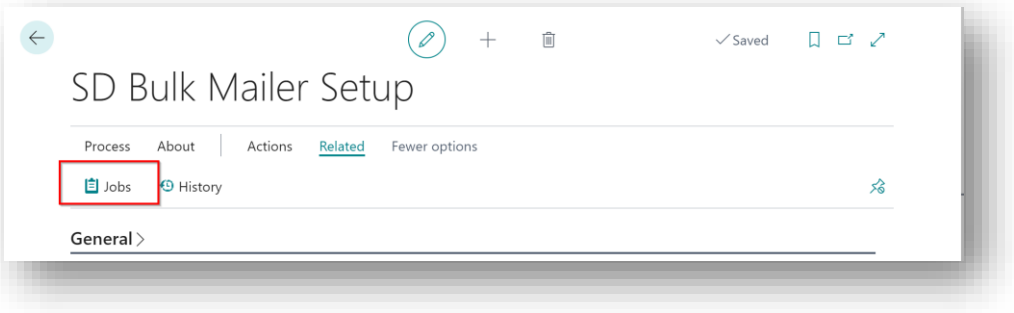

Figure 10-1

The **Job Card** is accessed by selecting **New**, **Edit** or **View** from the **Jobs** list *(Figure 10-2)*.

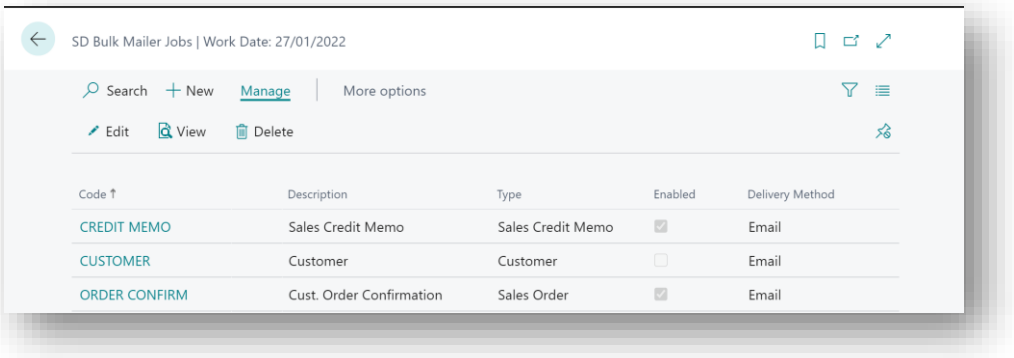

Figure 10-2

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 10-3)*:

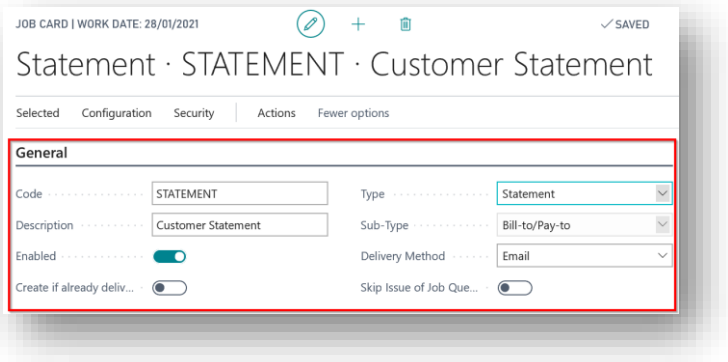

Figure 10-3

- **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, Customer Payment Receipt, Purchase Invoice** or **Open Sales Invoice**.

  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
Purchase Invoice	Vendor Ledger Entry	Vendor
Open Sales Invoice	Cust. Ledger Entry	Sales Invoice Header

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 Job Queues. This allows users to choose to auto generate the Drafts, review the generated Drafts, and then manually issue the Drafts.

- **Delete History Attachments After –** Specify when you want to delete attachments from the SD Bulk Mailer History. The history details of the issued drafts are not deleted. Initially set to Inherited on the Setup Card and on the individual SD Bulk Mailer Job Cards. The value you set on the Setup Card will be inherited by the individual Jobs unless you specify a different value on the SD Bulk Mailer Job Card. Choose the **Purge History Attachments** action on the Setup Card to remove attachments. You can also create a job in the job queue entries to delete history attachments for all SD Bulk Mailer Jobs (Note: The Job Code filter is ignored on the Job Queue Entry Card).

Expand the **Security** FastTab of the Job Card *(Figure 10-4)*.

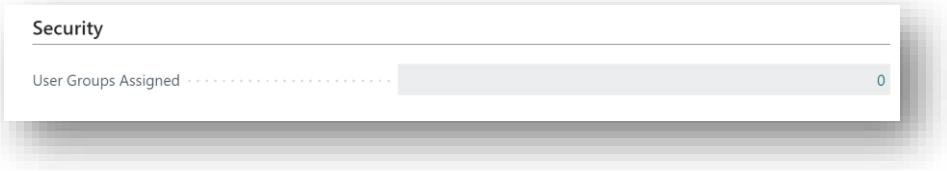

Figure 10-4

- **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 10-5)*.

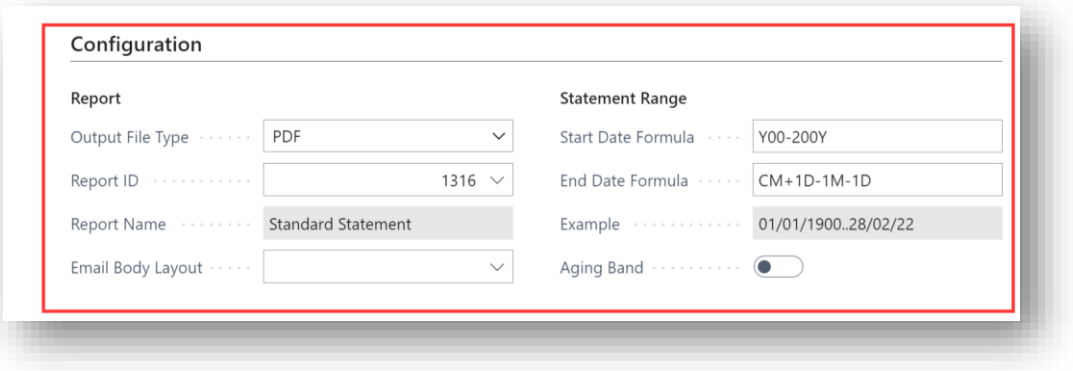

Figure 10-5

- **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 17.2**) containing the record upon which it should run.

- **Report Name** – Displays the report name of the specified **Report ID**.

- **Email Body Layout** – Selecting an Email Body Layout of **Type Word** for the Report that is chosen in Report ID allows you to use the Email Body Layout in place of the SD Bulk Mailer Template that has been defined for the Job when generating the Email Subject and Body for the Draft.

- **Attach Document** - If you select an **Email Body Layout** of **Type Word** you have the option to attach the Document or not to the Draft.

- **Attach Linked Files** – Applicable for Job Types of **Sales Quote**, **Sales Order**, **Sales Invoice**, **Sales Credit Memo**, **Purchase Order** or **Purchase Invoice**. Choose this option to attach documents that are on the transaction record to the generated Draft.

- **Search From Entry No.** – Applicable for all Job Types, except for the Open Sales Invoice, whose Search Table (listed above and in **Appendix 17.1**) is a Ledger Entry Table. This field contains the Ledger Entry No. from which the Job will start looking for new documents to generate and deliver. When a Draft is issued, the **Search From Entry No.** is updated to the Ledger Entry of the issued Draft. If the Ledger Entry of the issued Draft is less than the **Search From Entry No.** that is already stamped on the Job Card, then the **Search From Entry No.** is not updated. When drafts are next generated

for the Job again, SD Bulk Mailer starts looking for new documents to generate and deliver from the updated **Search From Entry No.**

- **Payment Method Filter** – Applicable for Jobs of **Type Customer – Payment Receipt**. This field allows you to apply a Payment Method filter to the Customer Ledger Entry table.

- **Document Type Filter** - Applicable for Jobs of **Type Customer – Payment Receipt**. This field allows you to apply a Payment Method filter to the Customer Ledger Entry table.

- **Start Date Formula** - For Jobs of **Type Statement**, this is the date formula used to calculate the start date to be applied to the **Date Filter** field on the Customer table.

- **End Date Formula** - For Jobs of **Type Statement**, this is the date formula used to calculate the end date to be applied to the **Date Filter** field on the Customer table.

- **Example** - For Jobs of **Type Statement**, this displays an example of the filter that will be applied to the **Date Filter** field on the Customer table, based on the contents of the **Start Date Formula** and **End Date Formula**.

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

- **Due Date Formula** - For Jobs of **Type Open Sales Invoice**, the Customer Ledger Entry table is searched for Open entries of Type Invoice with a Due Date of today minus the value in the Due Date Formula.

- **Resend Interval Days** - For Jobs of **Type Open Sales Invoice**, enter the number of days to wait before generating drafts for the Open Sales Invoices again.

- **Multiple Invoices per Email** - For Jobs of **Type Open Sales Invoice**, choose whether to create Drafts for each of the customer's individual Open Sales Invoices or to create one Draft per customer with all the customer's qualifying invoices attached.

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

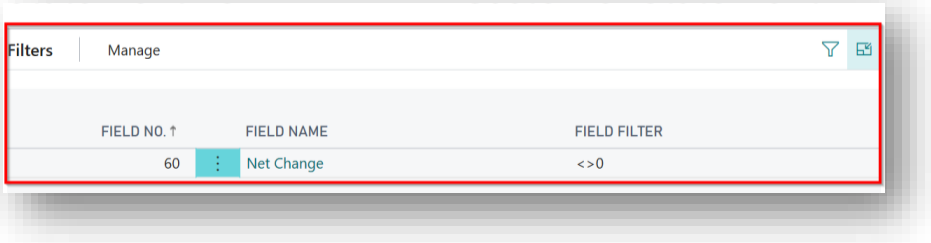

Figure 10-6

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).

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 .
- **Field Name –** Displays the name of the field in **Field No.**
- **Field Filter** – Enter the filter to apply. If filtering on values with special characters place single quotes around the value.

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

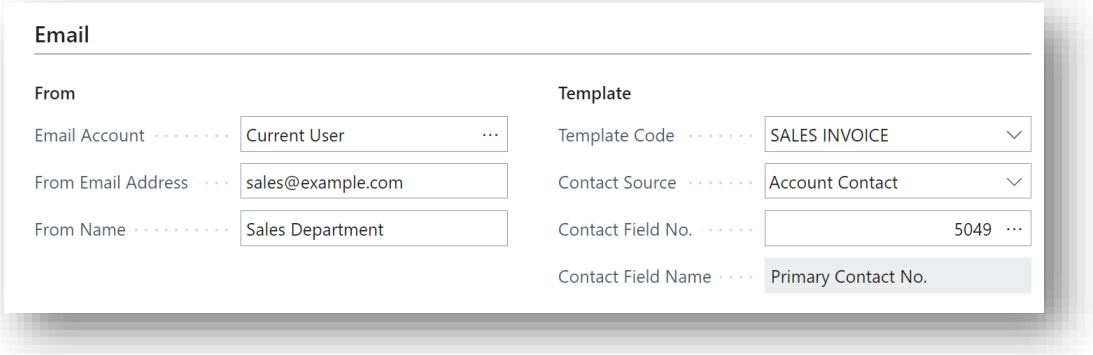

Figure 10-7

- **Email Account** – Applicable if using **Type** of **SMTP**. Select an email account from the Email Accounts defined in Business Central to send the drafts from.

- **From Email Address** – Not applicable if using **Type** of **SMTP**. This field specifies the Email address that is used as the from and reply-to address for the Email.

- **From Name** – Not applicable if using **Type** of **SMTP**. 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 17.2**).

- **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 *(Figure 10-8).* This is a list of all the Recipients to be added to the Draft when it is sent as an Email.

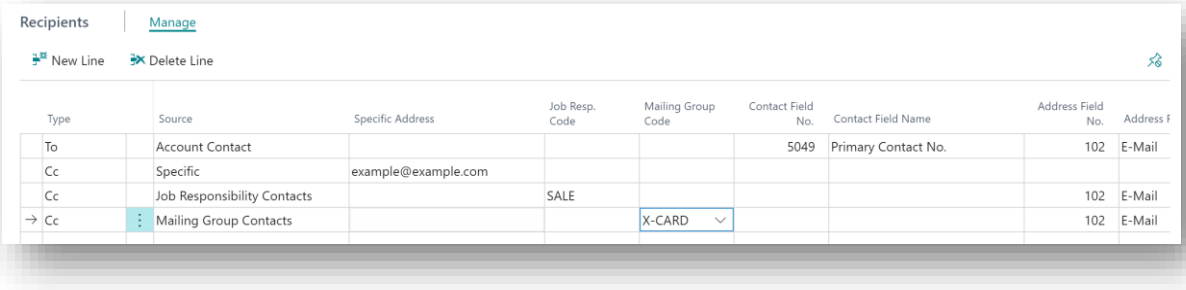

Figure 10-8

- **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 17.2**).

  Document Contact: A Contact record whose No. is stored on the Document Table for the Job Type (listed above and in **Appendix 17.2**).

  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 10-9)*:

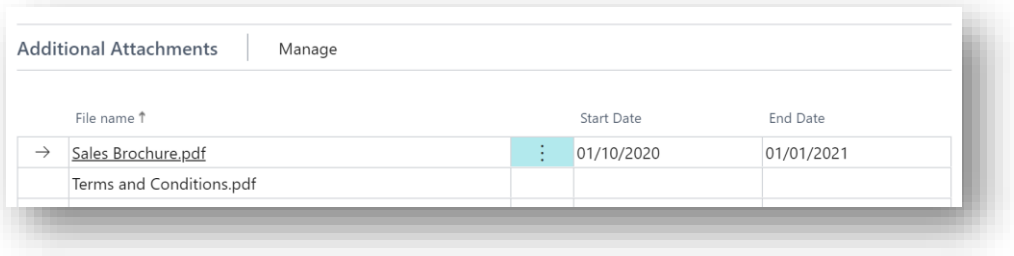

Figure 10-9

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 10-10)*:

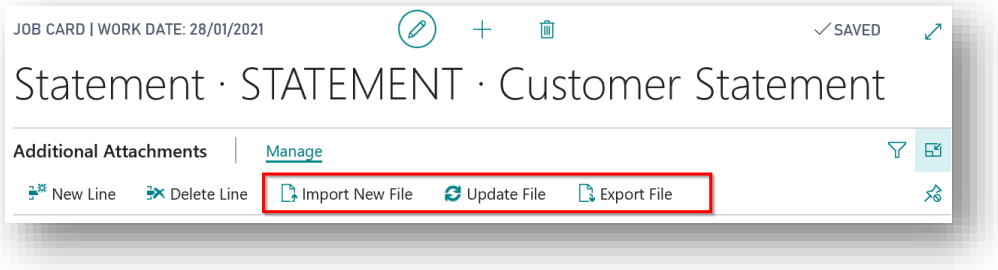

Figure 10-10

- **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 **Home** group in the Job Card *(Figure 10-11)*:

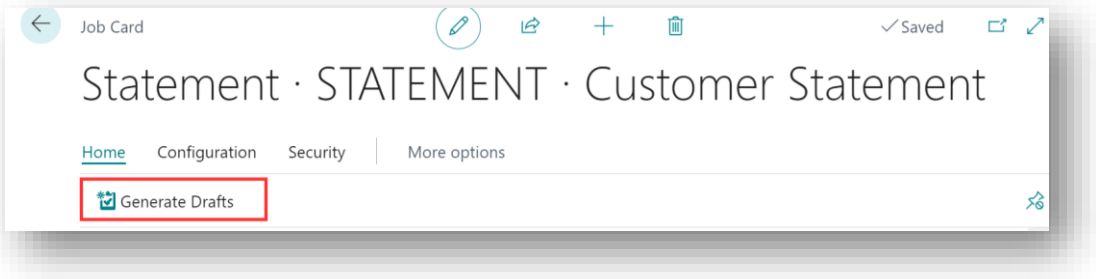

Figure 10-11

- **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 10-12)*:

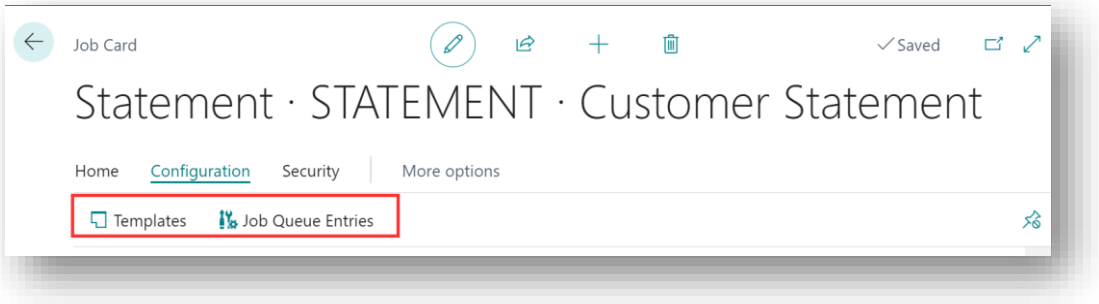

Figure 10-12

- **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 10-13)*:

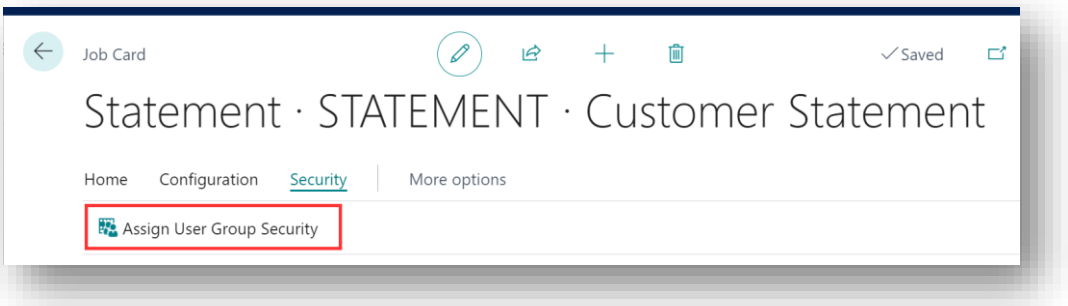

Figure 10-13

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

A Template in SD Bulk Mailer 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.

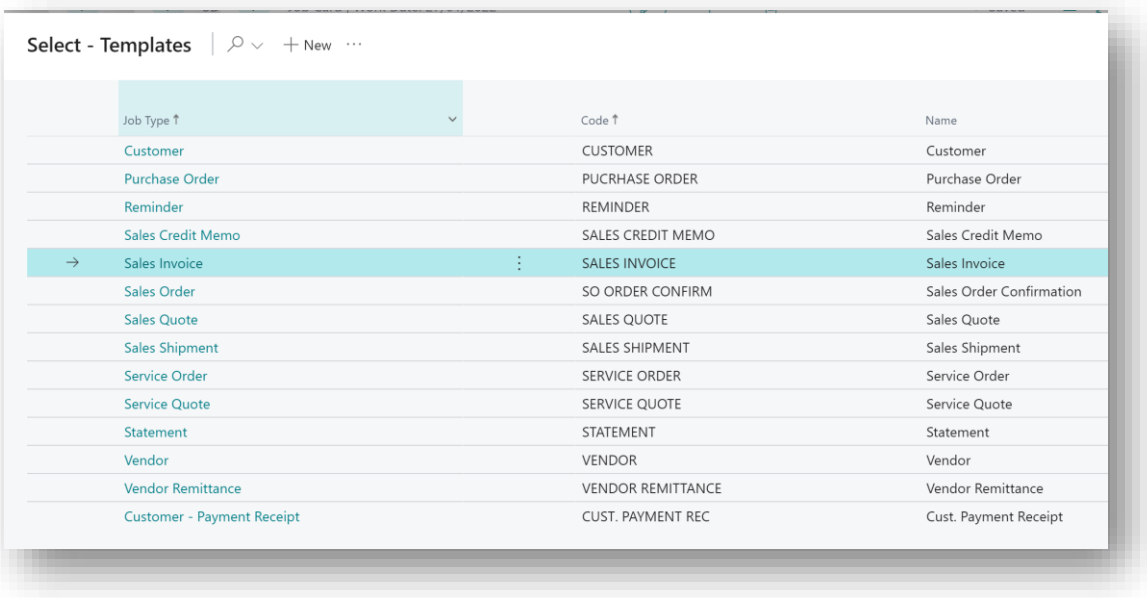

Figure 11-1

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

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):*

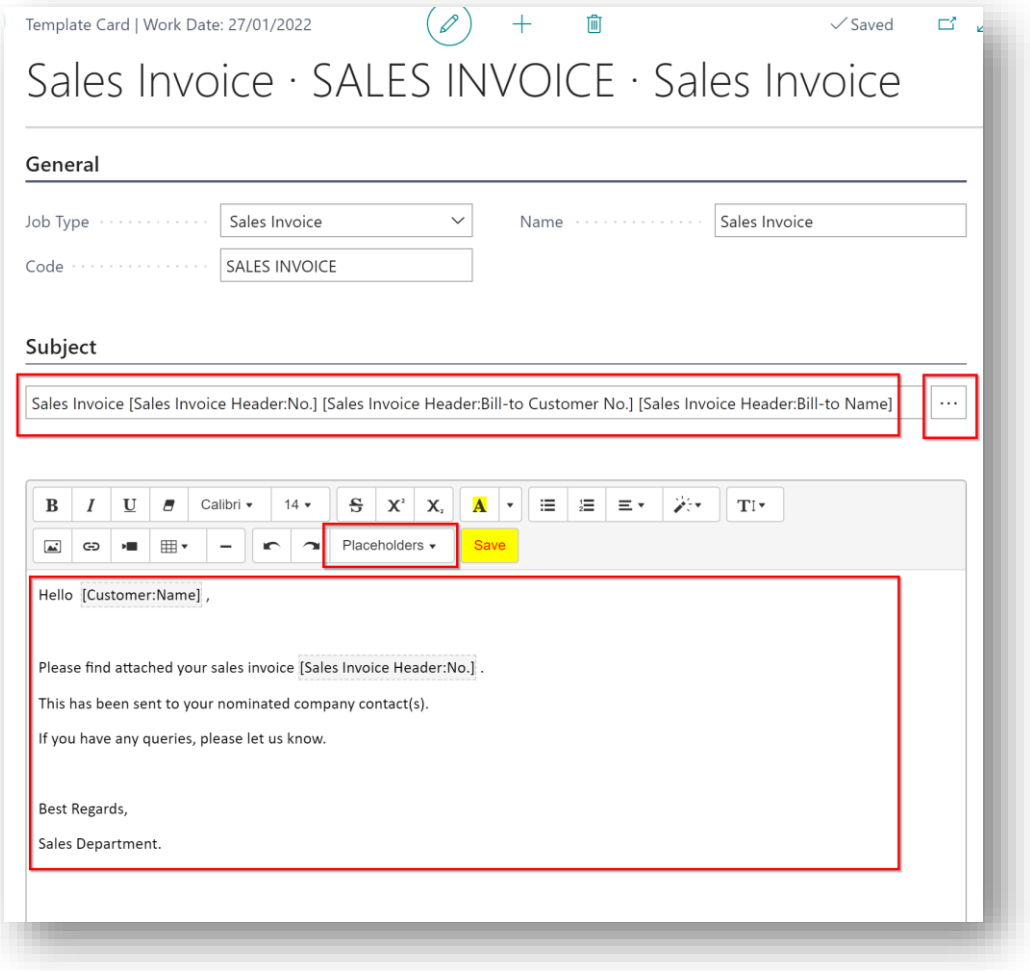

Figure 11-2

- **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, Customer Payment Receipt, Purchase Invoice** or **Open Sales Invoice**.

- **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*).

  Note: Care must be taken when copying and pasting text into the Body from another source as hidden characters may cause issues when rendering the Body in the generated Drafts.

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
Purchase Invoice	Vendor	Contact	Purchase Invoice Header
Open Sales Invoice	Customer	Contact	Sales Invoice Header

Table 2

12 Using SD Bulk Mailer - Drafts

12.1 Generating Drafts Manually

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

From the **Drafts** list, choose the **Generate Drafts** action in the **Drafts** group *(Figure 12-1):*

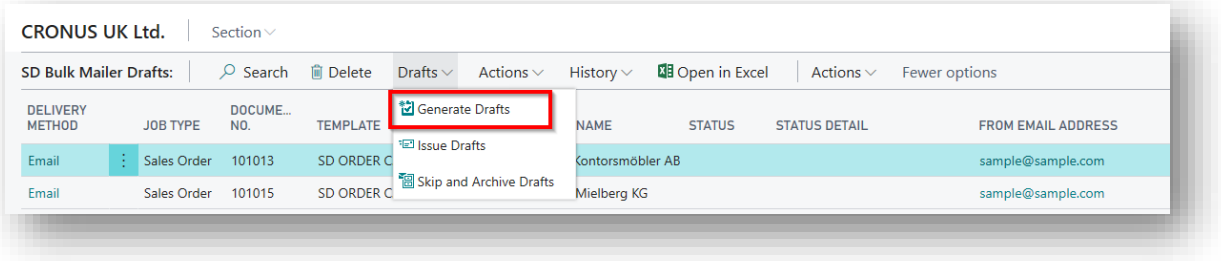

Figure 12-1

- **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)*.

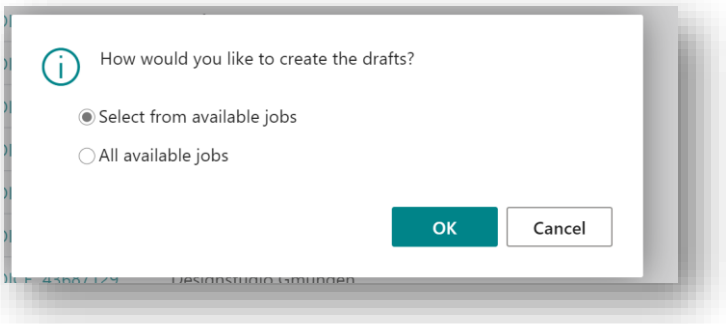

Figure 12-2

If you choose to create the Drafts from **select from available Jobs**, you are brought into the Jobs list 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):*

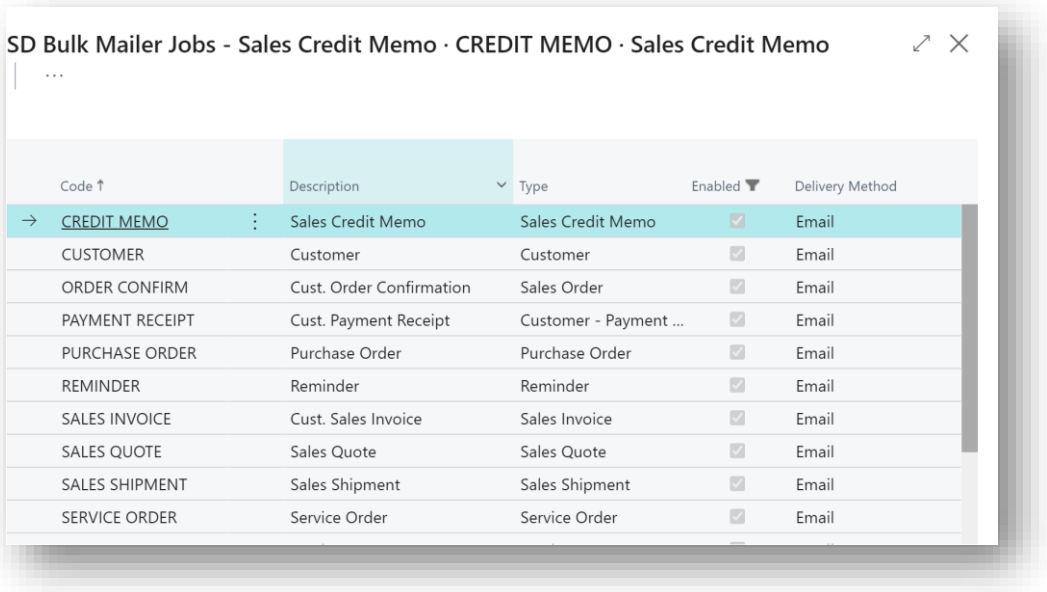

Figure 12-3

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 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 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 *(Figure 12-4).*

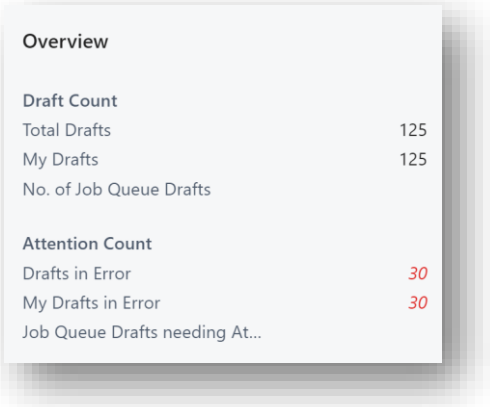

Figure 12-4

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

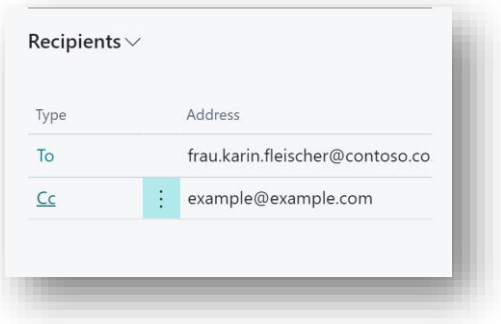

Figure 12-5

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

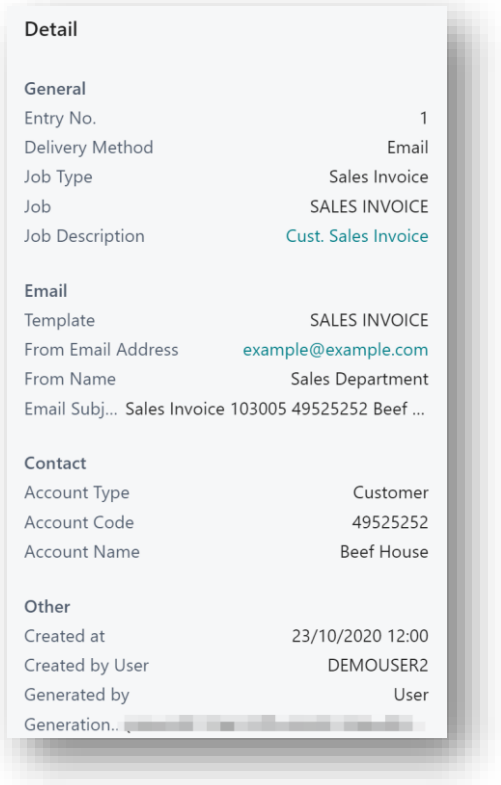

Figure 12-6

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

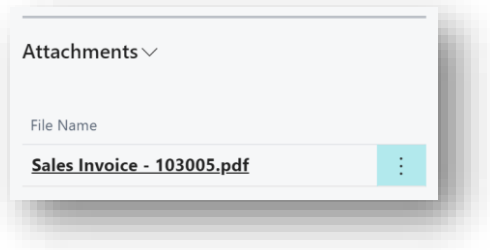

Figure 12-7

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

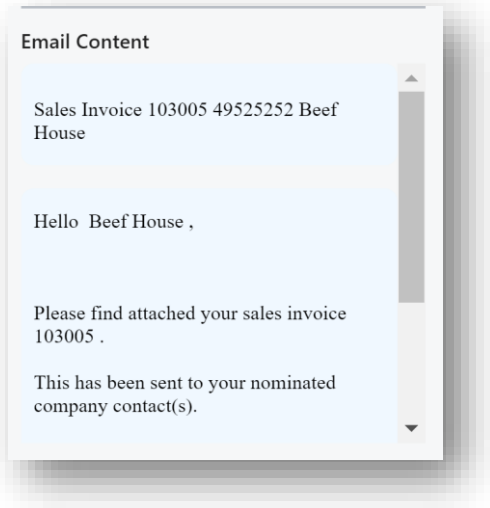

Figure 12-8

Selecting an individual line in the Drafts list will bring you into the **Draft Card** *(Figure 12-9)*. In the Draft Card, you can modify certain fields for the selected Draft. For example, you choose a new Template for the Job Type or modify the Recipients Email Address.

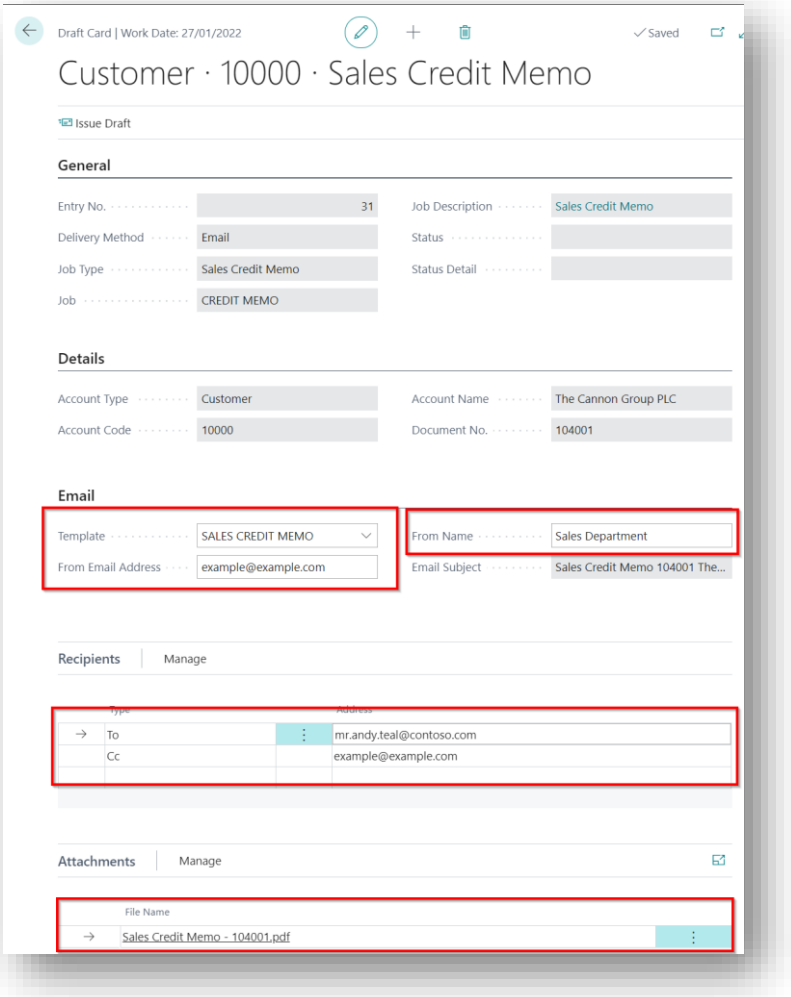
Draft Card | Work Date: 27/01/2022
Saved
Customer · 10000 · Sales Credit Memo
Issue Draft
General
Entry No. 31
Delivery Method Email
Job Type Sales Credit Memo
Job CREDIT MEMO
Job Description Sales Credit Memo
Status
Status Detail
Details
Account Type Customer
Account Code 10000
Account Name The Cannon Group PLC
Document No. 104001
Email
Template SALES CREDIT MEMO
From Email Address example@example.com
From Name Sales Department
Email Subject Sales Credit Memo 104001 The...
Recipients
Manage
To mr.andy.teal@contoso.com
Cc example@example.com
Attachments
Manage
File Name
Sales Credit Memo - 104001.pdf

Figure 12-9

12.1.1 Issuing the Drafts

When your Drafts have generated, you can then send the Drafts to their recipients. If you do not want to issue the draft and do not want the draft to generate again, you can also choose to skip the delivery of a Draft and archive the Draft to History.

To deliver the Drafts, from the **Drafts** list, in the **Drafts** group, choose the **Issue Drafts** action *(Figure 12-10).*

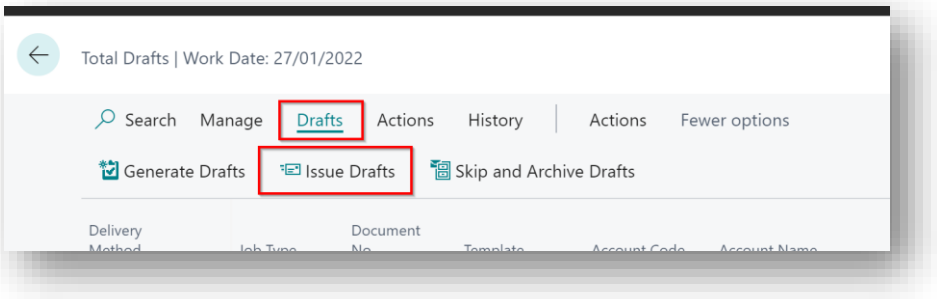

Figure 12-10

- **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 print to a file.

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

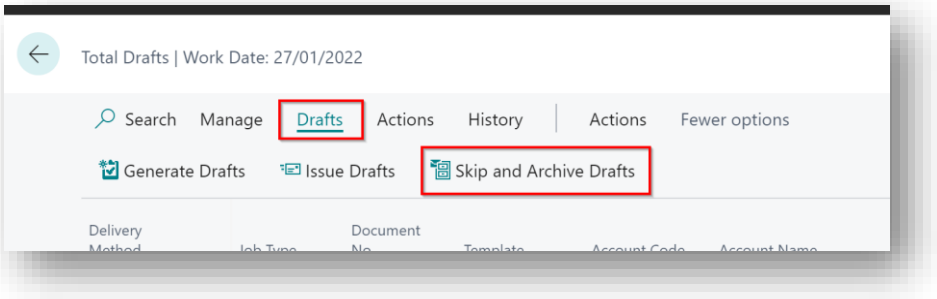

Figure 12-11

- **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.

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 *(Figure 12-12).*

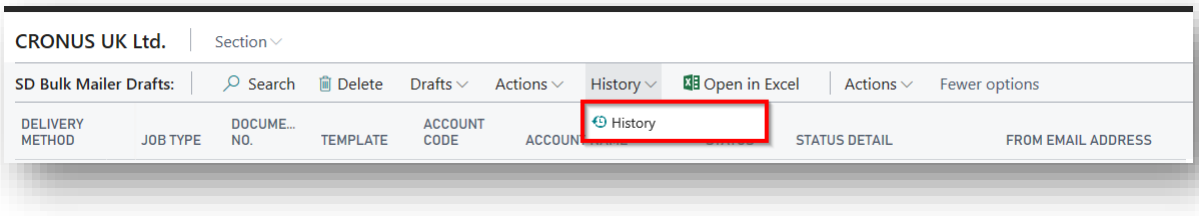

Figure 12-12

The **History** list 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 list to limit the number of documents you are searching for *(Figure 12-13).*

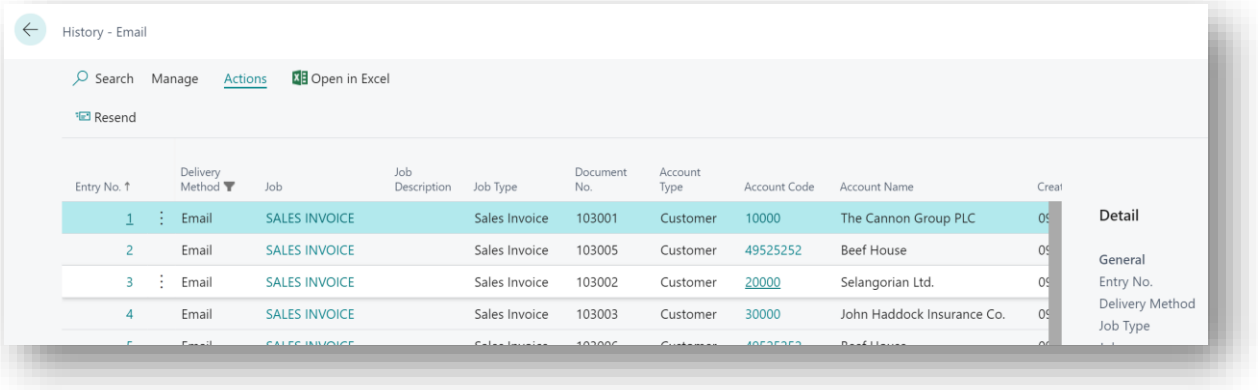

Figure 12-13

You can review each document in the History list 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 Resending a Document from History

You can resend 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).*

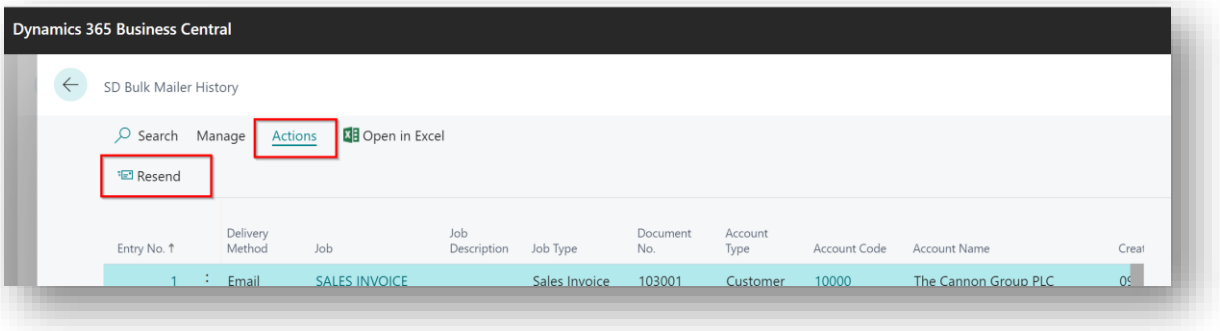

Figure 12-14

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.

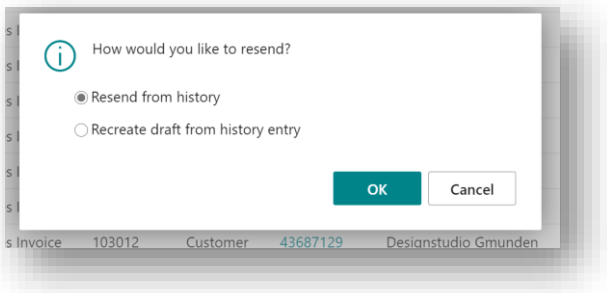

Figure 12-15

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

12.2 Generating Drafts Automatically Using Job Queue Entries

You can set Drafts to automatically generate and deliver from SD Bulk Mailer by using Job Queue Entries.

Note: If creating multiple Job Queue Entries to automatically generate and deliver Drafts, you must use a different time for the **Earliest Start Date/Time** for each Job Queue Entry you set up to run to ensure that the Job Queue Entries do not all start at once. Otherwise, an error will be raised when the Job Queue for the SD Bulk Mailer Jobs are run.

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

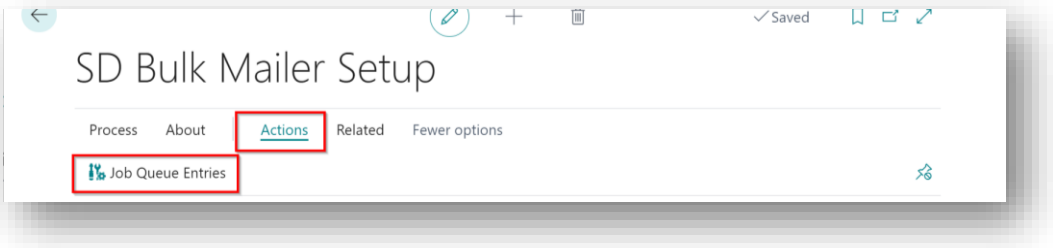

Figure 12-16

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).*

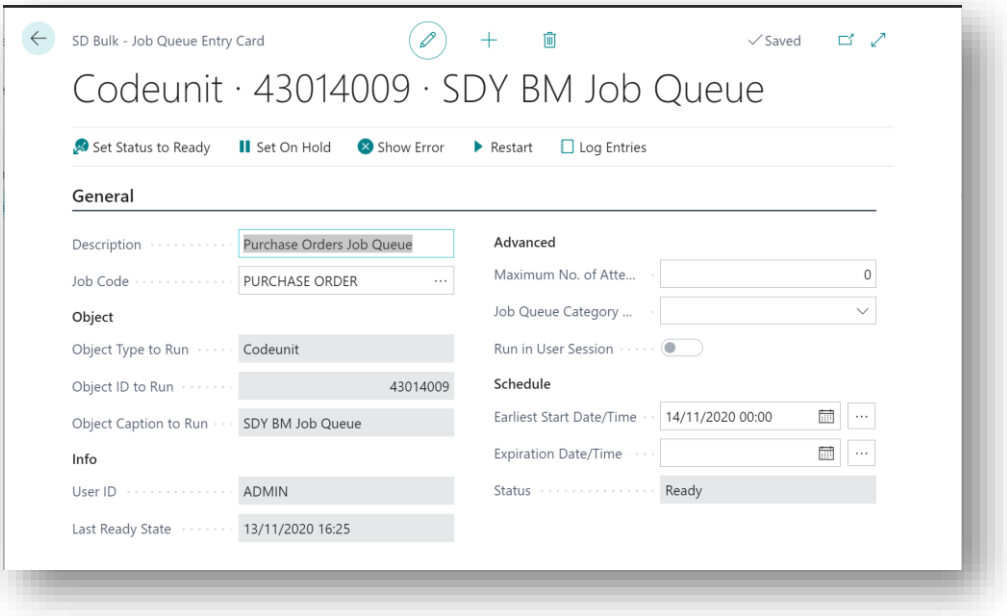

Figure 12-17

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 will 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 will 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.

     Note: If creating multiple Job Queue Entries to automatically generate and deliver Drafts, you must use a different time for the **Earliest Start Date/Time** for each Job Queue Entry you set up to run so that the Job Queue Entries do not all start at once. Otherwise, an error will be raised when the Job Queue for the SD Bulk Mailer Jobs are run.

   - **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.

13 Using the SD Document Pack Open Items Statement Report, ID 43006016, in a Job

1. Our **SD Document Pack 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 Document Pack 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 Document Pack 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 Using the SD Document Pack Cust Receipt with Allocations Report, ID 43006019, in a Job

1. Our **SD Document Pack Customer Receipt with Allocations Report** (Report ID **43006019**) is designed to be run for Jobs of Type Customer – Payment Receipt where the Document Type Filter is set to Payment.

15 Published Events in SD Bulk Mailer

We have published events in the following codeunits that can be subscribed to by event subscribers to implement any custom functionality if required.

- Codeunit 43014008 “SDY BM TableRecord Ref” to allow for extensions to SD Bulk Mailer to filter on the Posted Document Range in SD Bulk Mailer Jobs with filters other than a Search From Entry No.

```
    [BusinessEvent(false)]
    local procedure OnApplySearchFilter(var SDYBMJob: Record "SDY BM Job"; JobType: Option; SearchFromEntryNo:
Integer; var SearchRecordRef: RecordRef; var IsHandled: Boolean)
    begin
    end;

    [BusinessEvent(false)]
    local procedure OnApplySDYBMJobFilter(SDYBMJob: Record "SDY BM Job"; AsOfDate: Date; var SDYBMCustomFilterTemp:
Record "SDY BM Custom Filter Temp"; var DocumentRecordRef: RecordRef; var IsHandled: Boolean)
    begin
    end;

    [BusinessEvent(false)]
    local procedure OnSearchRecordRefToDocumentRecordRef(SDYBMJob: Record "SDY BM Job"; AsOfDate: Date;
var SDYBMCustomFilterTemp: Record "SDY BM Custom Filter Temp"; SearchRecordRef: RecordRef; var DocumentRecordRef:
RecordRef; var IsHandled: Boolean)
    begin
    end;
```

```
    begin
        OnBeforeApplyReportFilter(_SDYBMJob, JobType, DocumentNo, AccountCode, FromEntryNo, ToEntryNo, StartDate, EndDate, ReportRecordRef, Ishandled);
        if Ishandled then
            exit;
```

- Codeunit 43014006 “SDY BM Recipient”

```
    localprocedure AddDocument(Draft: Record "SD-BM Draft"; JobRecipient: Record "SD-BM Job Recipient")
    var
        DocumentRef: RecordRef;
        IsHandled: Boolean;
    begin
        OnBeforeAddDocument(Draft, JobRecipient, IsHandled);
        if IsHandled then
            exit;
```

- Codeunit 43014000 “SDY BM Job”

```
    localprocedure DraftExists(Draft: Record "SD-BM Draft") Result: Boolean
    var
        TestDraft: Record "SD-BM Draft";
    begin
        OnBeforeTestDraftExists(Draft, TestDraft);
```

```
FieldRef.SETFILTER(Draft."Account Code");

OnSetDraftReportFilter(Draft, SearchRef, LastEntryRecordRef, FieldRef);

if LastEntryRecordRef.FINDLAST() then
```

16 Appendix

16.1 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
Purchase Invoice	Vendor Ledger Entry	Vendor
Open Sales Invoice	Customer Ledger Entry	Sales Invoice Header

Table 3

16.2 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
Purchase Invoice	Vendor	Contact	Vendor
Open Sales Invoice	Customer	Contact	Sales Invoice Header

Table 4

Dynamics Shop

IT Simply Makes Business Sense with Microsoft Dynamics 365

Simply Dynamics has been delivering complex and custom Dynamics 365 Projects and Support since 2007. Now servicing clients in over 18 countries.

DynamicsShop delivers Dynamics 365 enhancements through App's and as SAAS solutions to bring next level automation to your Dynamics 365 Solution.

DynAzure delivers cloud only, low cost & standardised model rapid deployment Dynamics 365 Projects and support utilising standard features and enhanced Apps.

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