User Guide for Microsoft Dynamics 365 Business Central

Product: SD Document Sender

Release: D365 BC V24+

Revision: May 2024

1 Contents

2 Getting Started

SD Document Sender manages automated scheduled or manual emailing and printing of your standard Microsoft Dynamics 365 Business Central documents.

SD Document Sender facilitates direct communications to the correct point of contact and documents can be emailed to multiple recipients. Using flexible Email templates with a rich HTML editor users can easily achieve professional and consistent Email communications.

You can also easily attach multiple additional documents, based on scheduled dates, to your documents allowing you to include items such as terms and conditions, or special promotions, with your automated outbound Emails.

SD Document Sender can also be configured to direct documents to a print output or to Azure Blob Storage. Documents can be generated as PDF, Electronic Documents, Word, or Excel.

A Job in SD Document Sender 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 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 Accounts, Email API, Print or Azure Blob Storage.

A Template in SD Document Sender 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 placeholder data taken from fields on the Document, Account (Customer or Vendor) and Contact tables for the particular Job e.g., Document No., Customer Name, Customer Address, Contact Name, Contact Address etc.

Each Job in SD Document Sender 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.

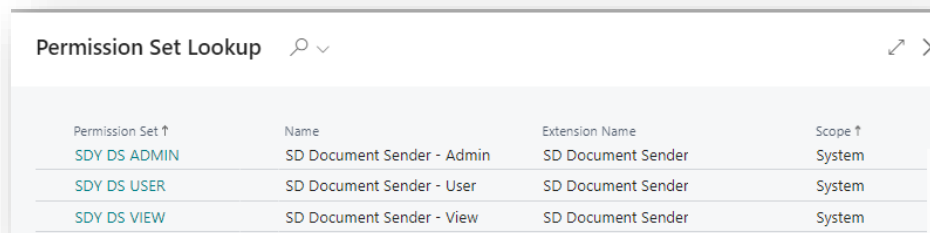A full history of the documents issued is maintained.

3 Installing SD Document Sender

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

The **Allow HttpClient Requests** option is automatically enabled on install of SD Document Sender. Switching on the **Allow HttpClient Requests** option for SD Document Sender in **Extension Management** allows SD Document Sender 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.

3.1 Security Setup

We have provided the following permission sets for SD Document Sender: SDY DS ADMIN, SDY DS USER and SDY DS 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 DS ADMIN permissions.
- D365 BUS FULL ACCESS includes SDY DS USER permissions.
- D365 BASIC includes SDY DS VIEW permissions.

3.2 Choosing the SD Document Sender Role

1. From your Dynamics 365 Business Central Web Client, in the app bar, select the **Settings** icon and then select **My Settings** *(Figure 3-2)*.
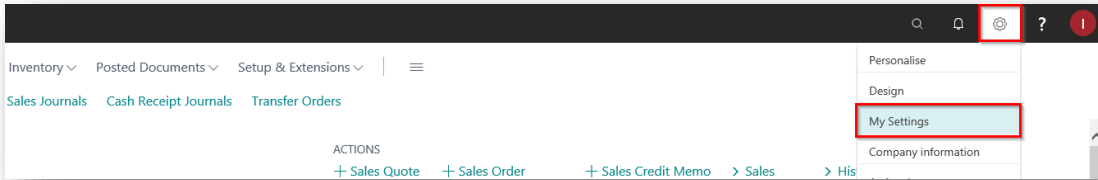

Figure 3-2

2. In the **My Settings** page, on the **Role** field, select the **AssistEdit** icon *(Figure 3-3)*.

Figure 3-3

3. You should see **SD Document Sender** in the list of Roles *(Figure 3-4)*.
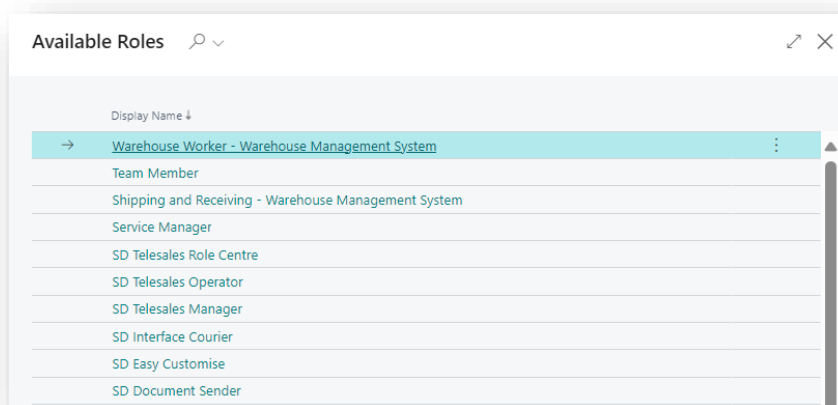
Figure 3-4

4. Choose **SD Document Sender** and click **OK**.

5. The **SD Document Sender** Role should now be displayed in the **Role** field. Click **OK** to close the **My Settings** page *(Figure 3-5)*.
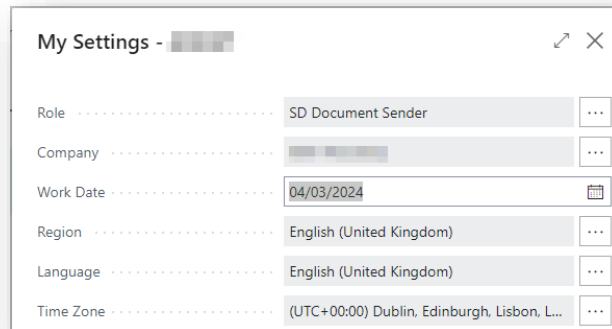

Figure 3-5

3.3 Accessing the SD Document Sender Pages

Use the **Tell Me** to search for **SD Document Sender** pages. Begin typing **SD**, or **doc** to see a list of the SD Document Sender pages *(Figure 3-6)*.
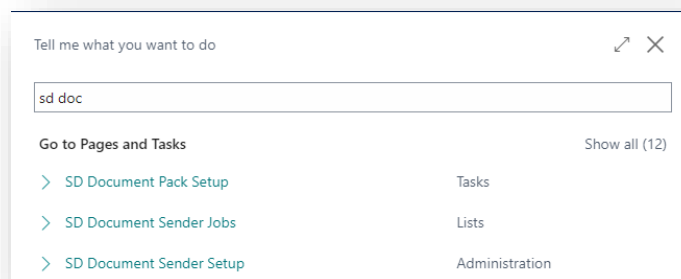

Figure 3-6

3.4 Activating the SD Document Sender Licence

To use SD Document Sender, you must activate the licence.

1. From the Tell Me, search for and select the **SD Document Sender Setup** page. When the **SD Document Sender Setup** opens, you will be prompted that "Your SD Document Sender license needs to be validated." Choose **Yes** *(Figure 3-7)*.
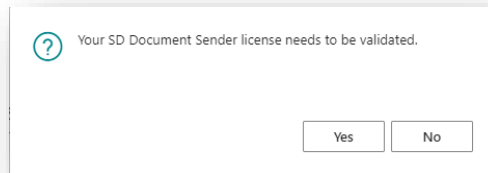
Figure 3-7

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

3.4.1 Activating the SD Document Sender Licence with a Free Trial

If you have not received a Product Key from Simply Dynamics Ltd. and want to avail of a free 30 day trial:

1. In the **Activate your Product** page *(Figure 3-8)*:
   Enter your company name in **Company Name.**
   Enter your company email in **Email.**
   Choose **Free Trial.**

Figure 3-8

2. You are then prompted to choose **Yes** to activate your free trial *(Figure 3-9)*.

Figure 3-9

3. 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 3-10)*.

Figure 3-10

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

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

3.4.2 Activating the SD Document Sender Licence with a Product Key

Take the following steps if you have received a Product Key from Simply Dynamics Ltd.:

1. In the **Activate your product** page *(Figure 3-11)*

   Enter your company name in **Company Name.**
   Enter your company email in **Email.**
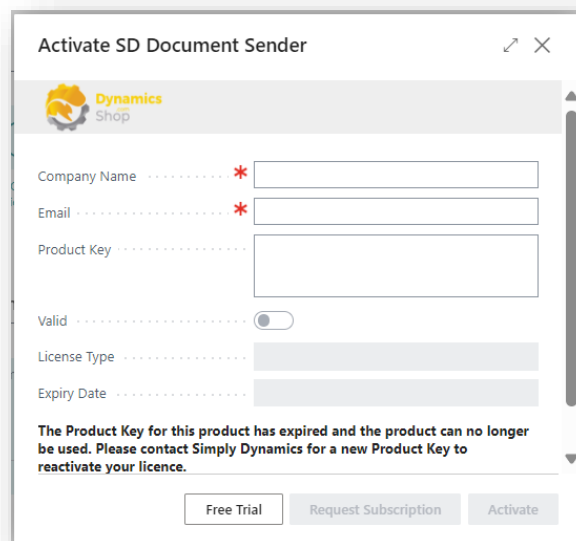   Paste the supplied product key into the **Product Key** field. **Tab off the Product Key field to validate the contents of the field and to enable the Activate key**. Choose **Activate**.
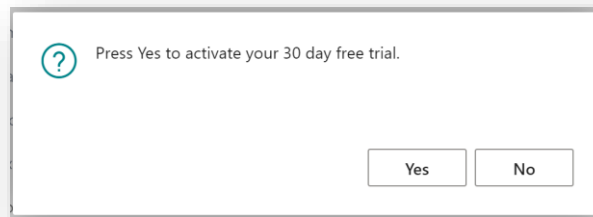

Figure 3-11

2. 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.
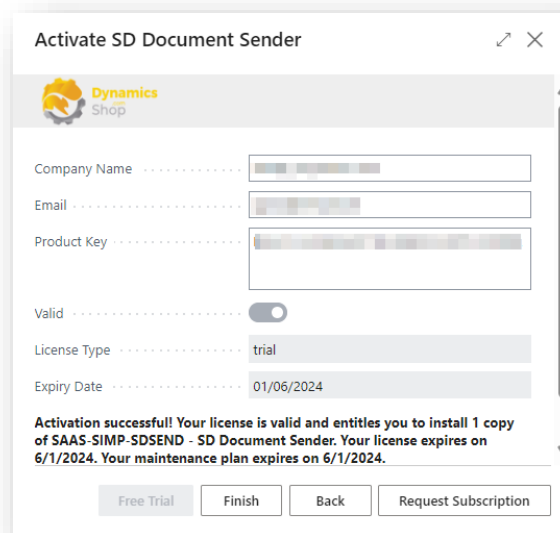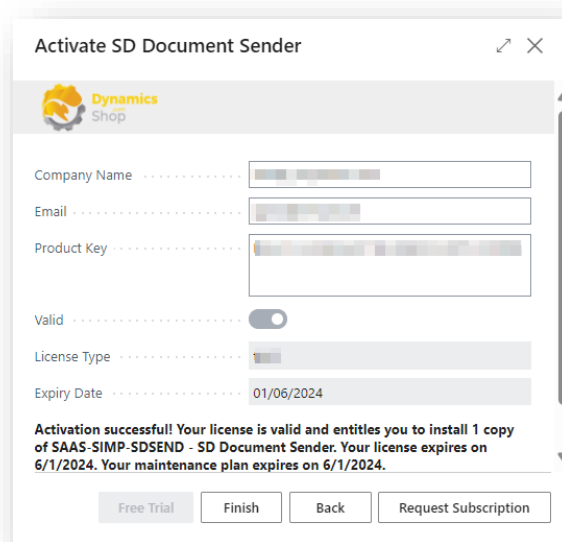
3. Choose **Finish** to exit the page.

3.5   Setup and Configuration

3.5.1   SD Document Sender Assisted Setup

You can easily import default setup for SD Document Sender using the **Assisted Setup** action on the **SD Document Sender Setup** page.

1. In the **SD Document Sender Setup**, from the menu choose the **Home** group, and then **Assisted Setup** *(Figure 3-12)*.
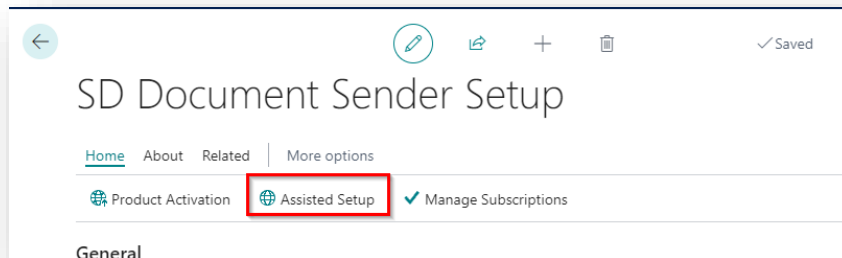

Figure 3-12

2. You are prompted that "Importing setup may modify existing data in SD Document Sender. Press Yes to proceed." Choose **Yes** if this is your first time to use SD Document Sender and you have not already created any setup in SD Document Sender *(Figure 3-13)*.
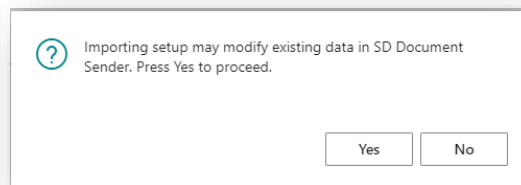
Figure 3-13

3. You are then prompted, "Are you sure?" Choose **Yes** *(Figure 3-14)*.
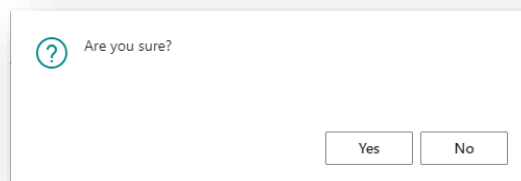
Figure 3-14

4. You will see a prompt similar to the below when the default setup has imported. Choose **OK** *(Figure 3-15)*.
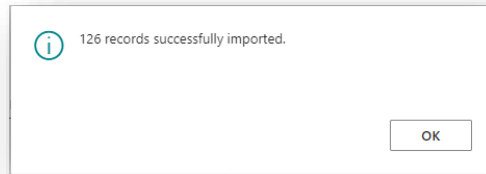
Figure 3-15

3.5.2   Upgrading from SD Bulk Mailer to SD Document Sender

If you are upgrading from SD Bulk Mailer to SD Document Sender, you can import existing Jobs, Templates and History before you run any Jobs or issue any drafts in SD Document Sender.

In the **SD Document Sender Setup** Card chose the **Related** Menu and choose the **Import Data from SD Bulk Mailer** action *(Figure 3-16)*.
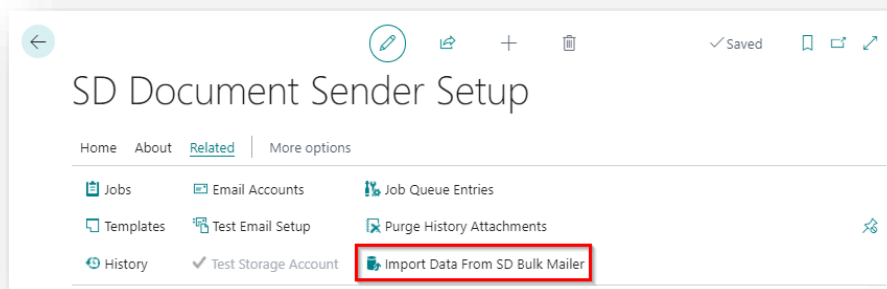
Figure 3-16

Follow the steps in the wizard to import the data from SD Bulk Maier into SD Document Sender *(Figure 3-17)*.

Figure 3-17

Choose the tables that you want to import and choose **Import** *(Figure 3-16)*.
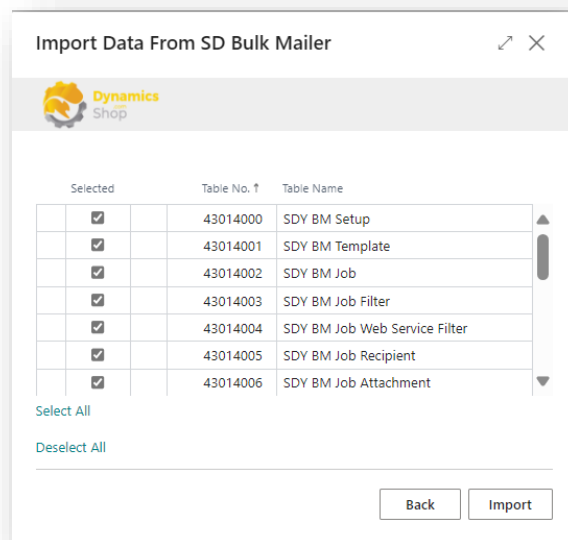
Figure 3-18

Any formatting made in the imported Templates from SD Bulk Mailer will have to be reapplied in SD Document Sender.

3.5.3   How to Use Microsoft Graph to Send emails in SD Document Sender

To use Microsoft Graph to send emails in SD Document Sender, 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.
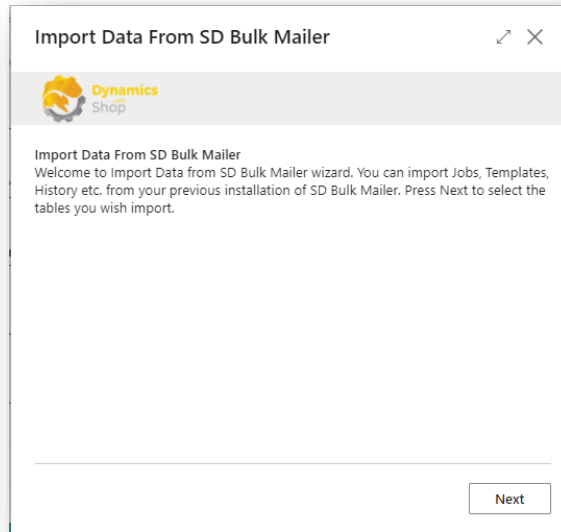4. Give your App a name.
5. In the "Supported account types" section, choose the first option, "Accounts in this organizational directory only".
6. Select "Register "

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.

4   Using SD Document Sender - Setup

The following fields are displayed in the **General** FastTab of the **SD Document Sender Setup** card *(Figure 4-1)*:
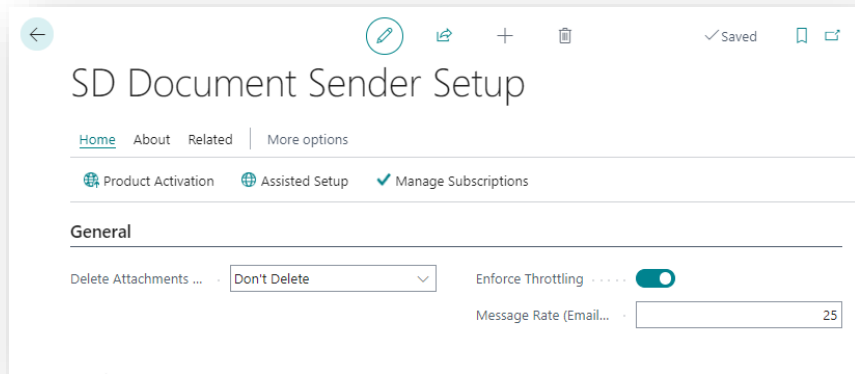

Figure 4-1

- **Delete History Attachments After –** Specify when you want to delete attachments from the SD Document Sender History. The history details of the issued drafts are not deleted, only the attachments. This field is initially set to Inherited both on the Setup Card and on the individual SD Document Sender 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 Document Sender Job Card.

  Choose the **Purge History Attachments** action on the Setup Card to remove the attachments. You can also create a job in the job queue entries to delete history attachments for all SD Document Sender Jobs (**Note**: The Job Code filter is ignored on the Job Queue Entry Card and history attachments are deleted for all jobs).

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

In the **Email Account** FastTab you choose the email account to use to send emails in SD Document Sender as per standard Dynamics 365 Business Central Email Accounts *(Figure 4-2)*. If you are not going to send the drafts via an Email Account you can leave this field blank.
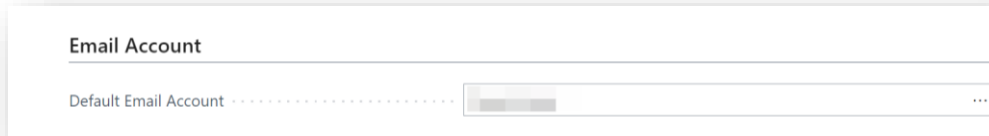

Figure 4-2

In the **Email API Connection Settings** FastTab, enter the Application ID and the Client Secret for the app that you registered in Azure to send emails in SD Document Sender using Microsoft Graph *(Figure 4-3)*.
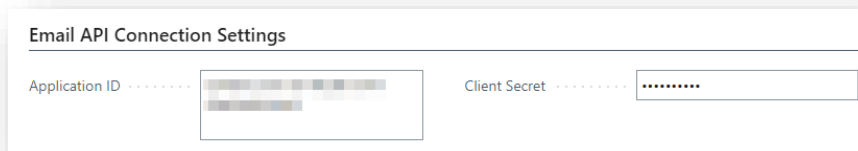
Figure 4-3

In the **Blob Storage Setup** FastTab you enter the details of the storage account that you want to send the draft attachments to *(Figure 4-4)*. From your **Azure Portal** you will need your **Azure Storage Account Name**, **Container Name.** From this Storage Account, navigate to the Access keys and take note of the **API Key**.
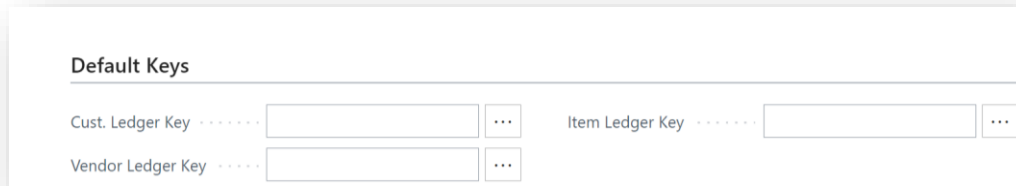
Figure 4-4

- **Storage Account Name** – Enter your Azure Blob Storage Account Name.

- **Container Name** – Enter the Container Name to store the blob files on your Azure Blob Storage Account. Container names must be lowercase and should not contain any special characters in the name.

- **API Key** – Enter the Access Key

In the SD Document Sender **Setup**, expand the **Default Keys** FastTab *(Figure 4-5):*

Figure 4-5

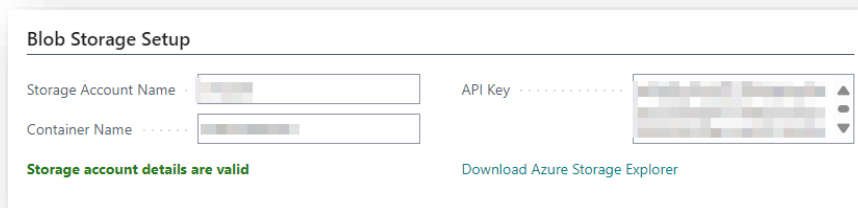By default, SD Document Sender will use the primary key when searching the Ledger Entry Tables to see if a Draft needs to be created for certain Job Types. This section allows the use of another index to be specified.

- **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.

5   Using SD Document Sender - Jobs

A Job in SD Document Sender 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 Document Sender 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 Accounts, Email API, Print or Azure Blob Storage.

The **SD Document Sender Jobs** list is accessed from the **SD Document Sender Setup**. From the **Related** group, choose **Jobs** *(Figure 5-1)*. The **Jobs** can also be accessed from the **Drafts** list.
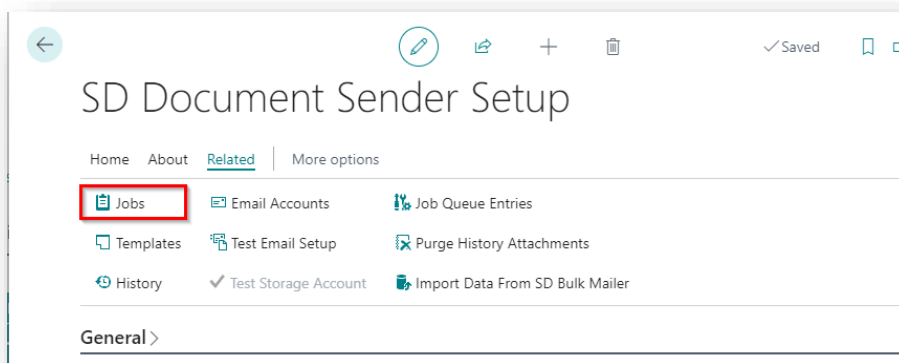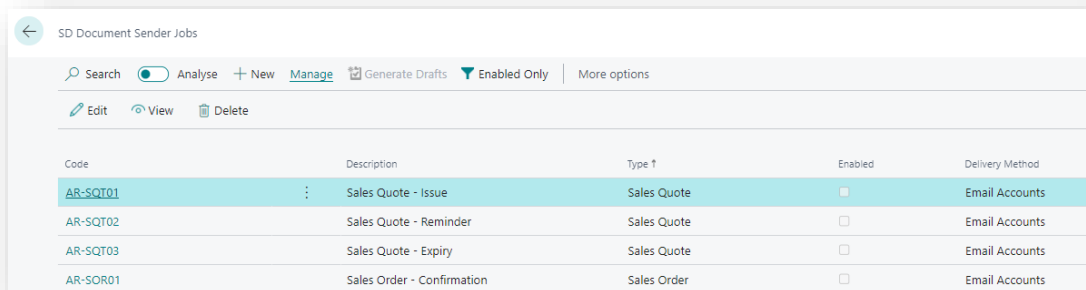

Figure 5-1

The **Job Card** is accessed by selecting **New**, **Edit** or **View** from the **Jobs** list *(Figure 5-2)*.

Figure 5-2

Taking the **Job Card** for a **Job Type** of **Statement** as an example, the **SD Document Sender Job Card** contains the following fields in the **General** FastTab (*Figure 5-3)*:
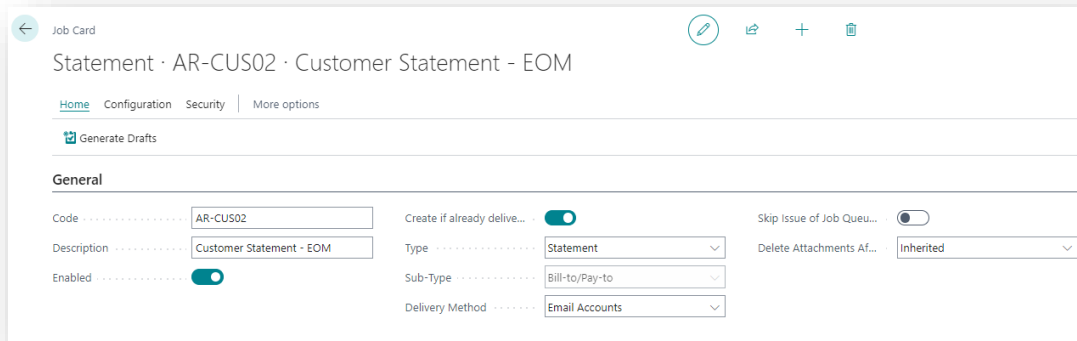
Figure 5-3

- **Code** – Enter a unique code to identify the Job.

- **Description** – Specify a user defined description of the Job.

- **Enabled** – Select this option to enable the Job. This field must be enabled to create Drafts of the Type associated with the Job. Jobs that are not enabled cannot be used to generate their document types in SD Document Sender.

- **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 with this Job Code exists in the History.

- **Type** – Options are **Sales Quote**, **Sales Order**, **Sales Shipment, Sales Invoice, Sales Invoice – Open, Sales Credit Memo**, **Customer Remittance, Statement**, Customer, **Reminder**, **Purchase Order**, **Purchase Invoice, Vendor Remittance, Vendor**, **Service Quote**, or **Service Order**.

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

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

Job Type	Search Table	Document Table
Sales Quote	Sales Header	Sales Header
Sales Order	Sales Header	Sales Header
Sales Shipment	Item Ledger Entry	Sales Shipment Header

Job Type	Search Table	Document Table
Sales Invoice	Cust. Ledger Entry	Sales Invoice Header
Sales Invoice - Open	Cust. Ledger Entry	Sales Invoice Header
Sales Credit Memo	Cust. Ledger Entry	Sales Cr. Memo Header
Statement	Customer	Customer
Customer Remittance	Cust. Ledger Entry	Customer
Customer	Customer	Customer
Reminder	Issued Reminder Header	Issued Reminder Header
Purchase Order	Purchase Header	Purchase Header
Purchase Invoice	Vendor Ledger Entry	Vendor
Vendor Remittance	Vendor Ledger Entry	Vendor
Vendor	Vendor	Vendor
Service Quote	Service Header	Service Header
Service Order	Service Header	Service 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 Accounts**, **Email API**, **Print** or **Azure Blob Storage**.

- **Skip Issue of Job Queue Generated Drafts** – Select this option to skip the automatic issuing of the generated Drafts when running the Document Sender Job using Job Queues. This allows users to choose to auto generate the Drafts, review the auto generated Drafts, and then manually issue the Drafts.

- **Delete History Attachments After –** Specify when you want to delete attachments from the SD Document Sender History. The history details of the issued drafts are not deleted, only the attachments. Initially set to Inherited both on the Setup Card and on the individual SD Document Sender 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 Document Sender Job Card.

  Choose the **Purge History Attachments** action on the **SD Document Sender Setup Card** to remove attachments. You can also create a job in the job queue entries to delete history attachments for all SD Document Sender Jobs (**Note**: The Job Code filter is ignored on the Job Queue Entry Card and history attachments are deleted for all jobs).

Expand the **Security** FastTab of the Job Card *(Figure 5-4)*.

Security

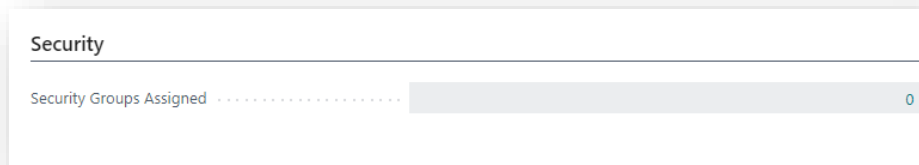Security Groups Assigned 0

Figure 5-4

- **Security Groups Assigned** - Displays a count of the security groups linked to the Job. If a security group has been assigned to the Job, then only users in the user group can view the Drafts associated with the Job.

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

Configuration

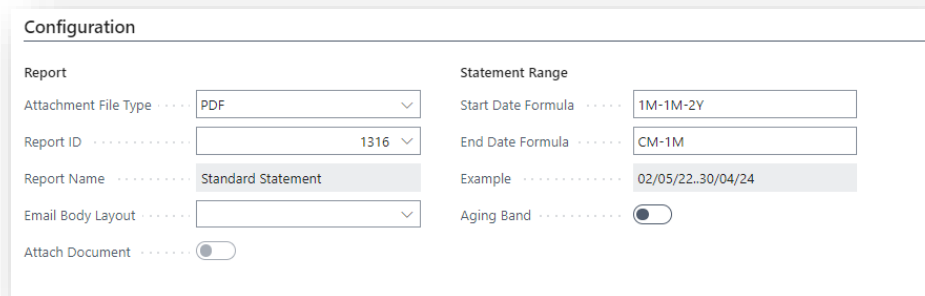| Report			Statement Range		
Attachment File Type	PDF		Start Date Formula	1M-1M-2Y	
Report ID		1316	End Date Formula	CM-1M	
Report Name	Standard Statement		Example	02/05/22..30/04/24	
Email Body Layout			Aging Band	◯	
Attach Document	◯				

Figure 5-5

- **Attachment File Type** – Specifies the type of file that the report will be exported as and attached to the Email. Options are **PDF**, **Word**, **Excel**, **Electronic Document** or **PDF & Electronic Document**.

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

  This field can be left blank for a Job of **Type Vendor** or **Customer**. If the **Report ID** is left blank you must select the **Disable Report Generation** option. This allows you to attach Additional Attachments such as a circular or promotional material for all or a filtered list of customers or vendors.

- **Report Name** – Displays the report name of the specified **Report ID**.
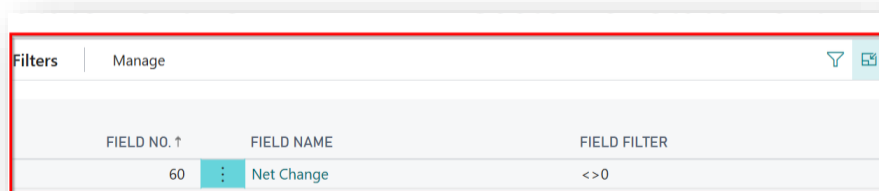
- **Email Body Layout** – Applicable for Jobs with a Delivery Method of **Email Accounts** or **Email API**. Selecting an Email Body Layout of **Type Word** for the Report that is chosen in Report ID allows you to use the Email Body Layout in place of the SD Document Sender Template that has been defined for the Job when generating the Email Subject and Body for the Draft.

- **Disable Report Generation** – Applicable for a Job of **Type Vendor** or **Customer**. If the **Report ID** is left blank you must select the **Disable Report Generation** field. This allows you to attach Additional Attachments such as a circular or promotional material for all or a filtered list of customers or vendors.

- **Attach Document** - If you select an **Email Body Layout** of **Type Word** you have the option to attach the Document to the Draft.

- **Electronic Document Format** – Applicable if you have specified an **Attachment File Type** of **Electronic Document** or **PDF & Electronic Document**. Select from a list of available documents in the standard Electronic Document Format worksheet.

- **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 any 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 11.1**) 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 <u>issued</u>, the **Search From Entry No.** is updated to the Ledger Entry of the <u>issued Draft</u>. 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 Document Sender 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 Remittance**. 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 Remittance**. This field allows you to apply a Document Type 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 that falls between 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 5-6)*.

Figure 5-6

This 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.

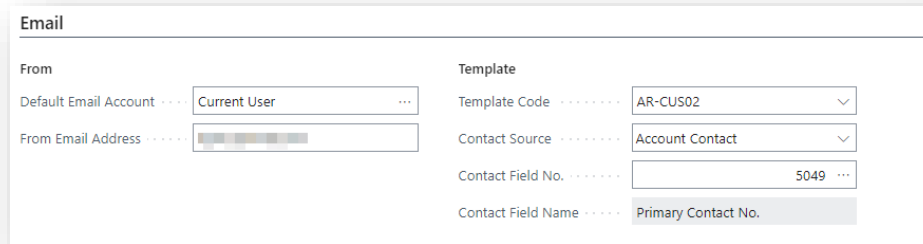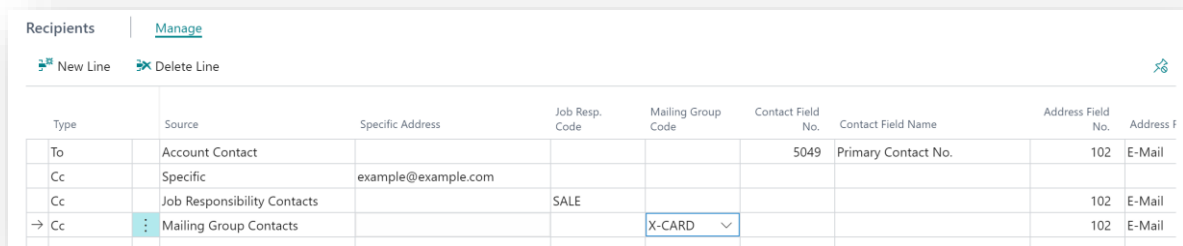Expand the **Email** FastTab of the Job Card *(Figure 5-7)*.

Figure 5-7

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

- **From Email Address** – If using a **Delivery Method** of **Email API** this specifies the Email address that is used as the from and reply-to address for the draft Email. if using a **Delivery Method** of **Email Accounts** this field displays the from email address of the email account.

- **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.

  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.

- **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 5-8).* This is a list of all the Recipients to be added to the Draft when it is sent as an Email.

Figure 5-8

- **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 in Table 1).

    Document Contact: A Contact record whose No. is stored on the Document Table for the Job Type (listed above in Table 1).

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

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

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

- **Specific Address** - Applies when **Source** is set to **Specific**. This field contains the specific address to add as a recipient to the Draft when it is sent as an Email.

- **Job Resp. Code** - Applies when **Source** is set to **Job Responsibility Contacts**. This field specifies the Job Responsibility Code that Account Contacts must have to be added as a recipient to the Draft when it is sent as an Email.

- **Mailing Group Code** - Applies when **Source** is set to **Mailing Group Contacts**. This field specifies the Mailing Group Code that Contacts must have to be added as a recipient to the Draft when it is sent as an Email.

- **Contact Field No.** - Applies when **Source** is **Account Contact** or **Document Contact**. This field specifies the Field No. of the table to be used as a Contact record.

- **Contact Field Name** – Displays the Name of the Field in **Contact Field No.**

- **Address Field No.** - Applies when **Source** is <u>not</u> set to **Specific**. This field specifies the field number that contains the Email address to add as the recipient to the Draft when it is sent as an Email.

- **Address Field Name** – The name of the field as specified in **Address Field No.**

Expand the **Additional Attachments** FastTab of the Job Card *(Figure 5-9)*:

Figure 5-9

This is a list of all the additional attachments to be added to the Draft when the **Delivery Method** is **Email Accounts** or **Email API**.

- **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 5-10)*:
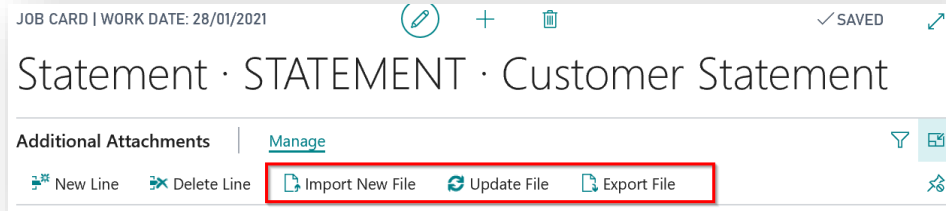
- **Import New File** – Select this action to import a new file to add as an additional attachment to the Drafts generated by the Job.

- **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.
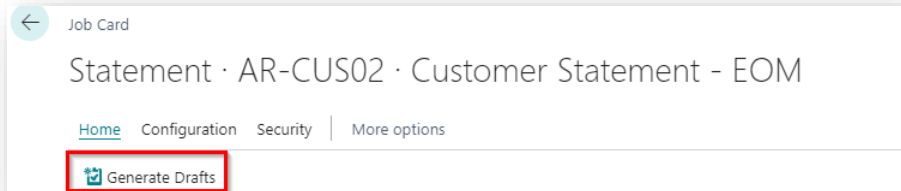
In the **Home** group in the Job Card *(Figure 5-11)*:

Figure 5-11

- **Generate Drafts** – Choose this action to generate the Drafts for the current Job.

In the **Configuration** group menu in the Job Card *(Figure 5-12)*:
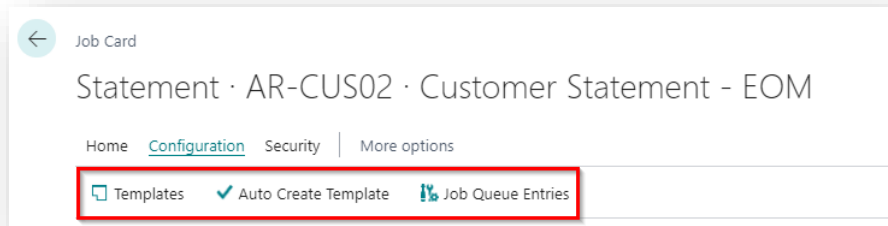
Figure 5-12

- **Templates** – Choose this action to display the Templates that are associated with the Job Type of the current Job.

- **Templates** – Choose this action to automatically create a Template with the same Template Code and Description as the current Job Code and Description.

- **Job Queue Entries** – Choose this action to open the SD Document Sender 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 5-13)*:
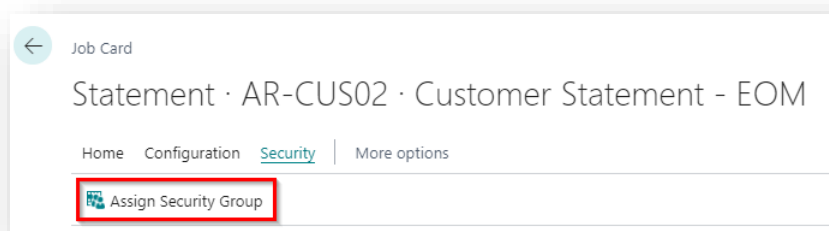
Figure 5-13
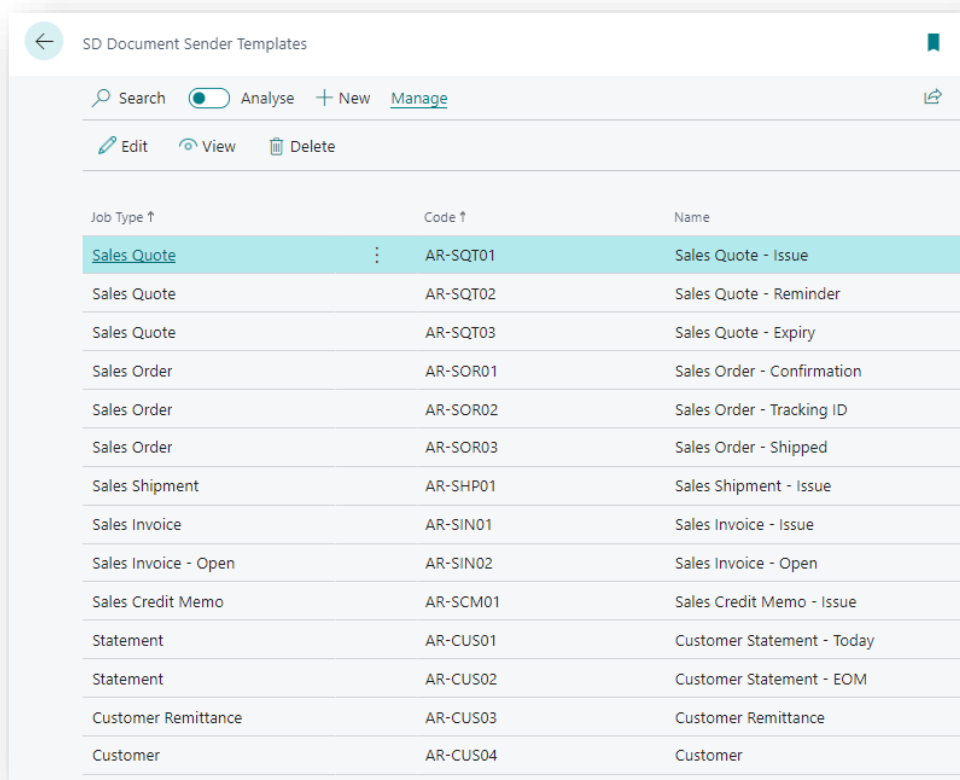
- **Assign Security Group** – Choose this action to assign available security groups for the current Job card. If a security groups is assigned to the Job, then only users in the security group can view the generated Drafts associated with the Job.

6 Using SD Document Sender - Templates

A Template in SD Document Sender 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.

The SD Document Sender **Templates** list *(Figure 6-1)* is accessed from the Document Sender **Drafts** list. From the **Actions** tab, in the **Configuration** group, choose **Templates.**
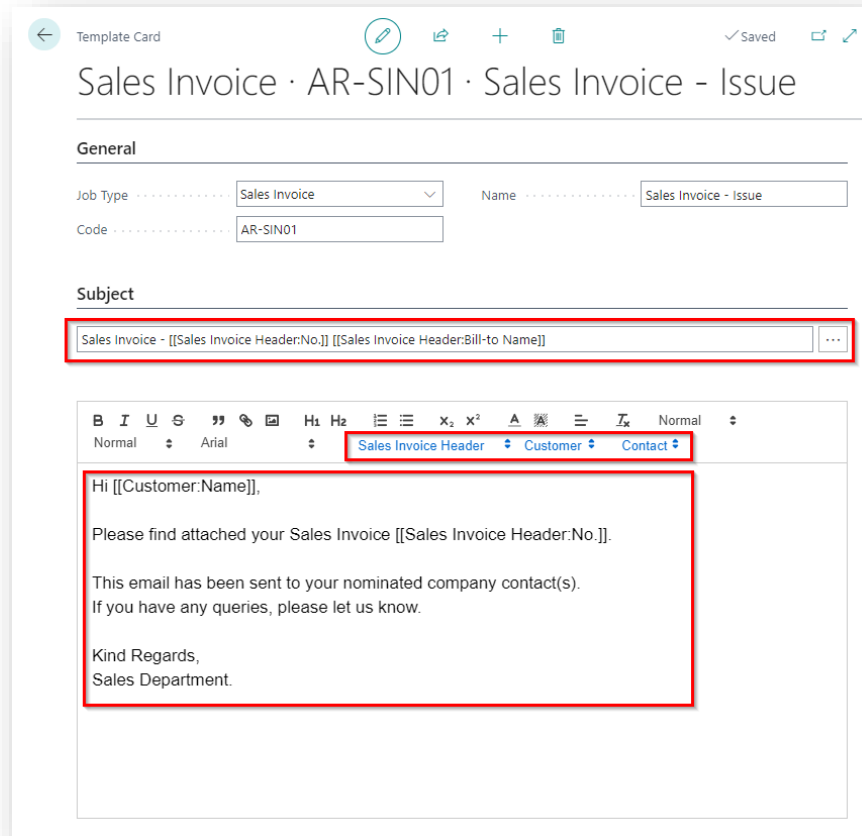
Figure 6-1

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 Document Sender – Template Card contains the following fields *(Figure 6-2):*

Figure 6-2

- **Job Type** – This field specifies the Job Type that the Template is created for. Options are **Sales Quote**, **Sales Order**, **Sales Shipment, Sales Invoice, Sales Invoice – Open, Sales Credit Memo**, **Customer Remittance, Statement**, Customer, **Reminder**, **Purchase Order**, **Purchase Invoice, Vendor Remittance, Vendor**, **Service Quote**, or **Service Order**.

- **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.

- **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.

  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.

7   Using SD Document Sender - Drafts

Each Job in SD Document Sender 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 Document Sender holds the History of all the Drafts that have been delivered.

7.1   Generating Drafts Manually

To generate and issue your documents by Email, Print or Azure Blob Storage, select the **Drafts Worksheet** menu item or drill through on the **Drafts** cue in the **SD Document Sender 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 7-1)*:
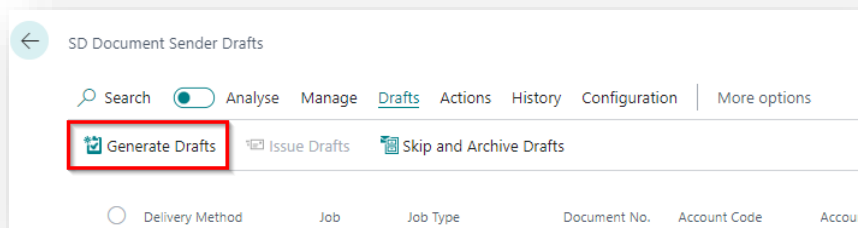
Figure 7-1

- **Generate Drafts** – Choose this action to create Drafts. You are prompted to choose to create Drafts by **selecting available Jobs** or running **all available Jobs** *(Figure 7-2)*.
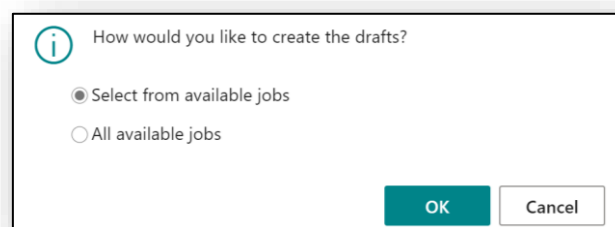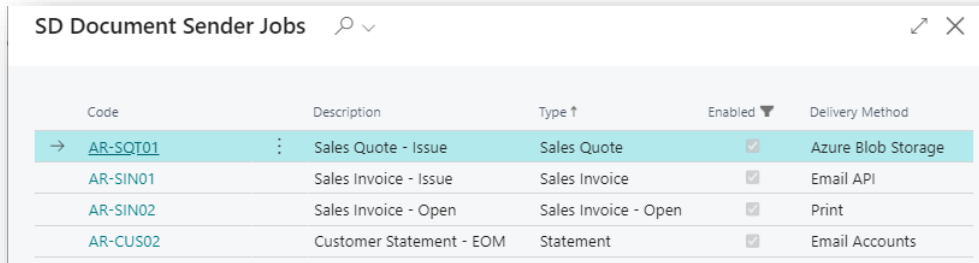
Figure 7-2

If you choose the **select from available jobs** option, you are brought into the Jobs list.

where you can see all the Enabled Jobs that are setup in SD Document Sender. Select the Job(s) for the documents that you wish to generate drafts for. Choose **OK** *(Figure 7-3):*
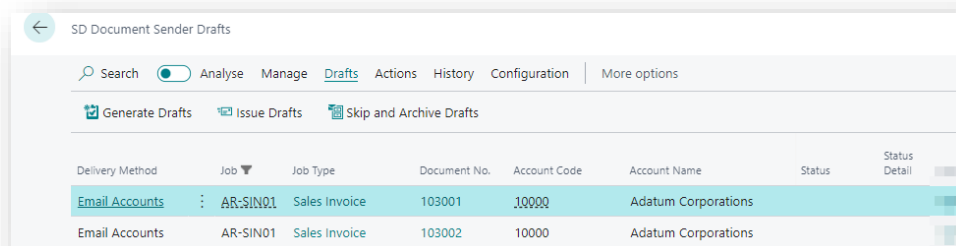

Figure 7-3

If you choose to create Drafts from **all available Jobs**, drafts will generate for all enabled Jobs in SD Document Sender.

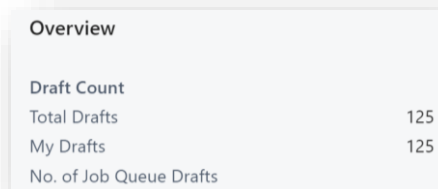The Drafts list contains the following fields *Figure 7-4):*

Figure 7-4

- **Delivery Method** - This specifies the sending method of the document whether it is via **Email Accounts**, **Email API**, **Print** or **Azure Blob Storage**..

- **Job Type** – This field indicates the Job Type for the line.

- **Document No**. - This field specifies the document number of the transaction.

- **Account Code** – This specifies the Account Code 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 status description.

- **From Email Address** - This field specifies what Email address the Email will be sent from.

- **Email Subject** - This field specifies the Email subject of the Email to be delivered.

- **Template** – Indicates the Template used by the Job to generate the Draft.

- **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 **Document**.

- **Generation ID** – Indicates the ID of the generated Draft. This is an internal field used by SD Document Sender.

Once the Drafts have generated, the FactBoxes in the Drafts list provide additional information about the individual Drafts. Some of this information is only created for those Jobs with a Delivery Method of Email Account or Email API.
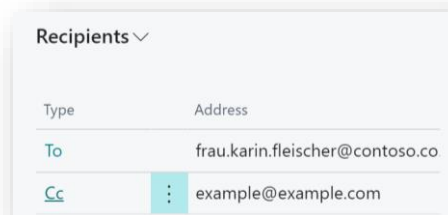
- **Overview** – An overview of all the lines in the Draft list *(Figure 7-5).*

Figure 7-5

- **Recipients** – Double click on a Recipient Address to easily edit or update the current Email Address *(Figure 7-6).*

Figure 7-6

- **Attachments** - Displays the attachments for the currently selected Draft. Double click on an Attachment to view *(Figure 7-7)*.

Figure 7-7

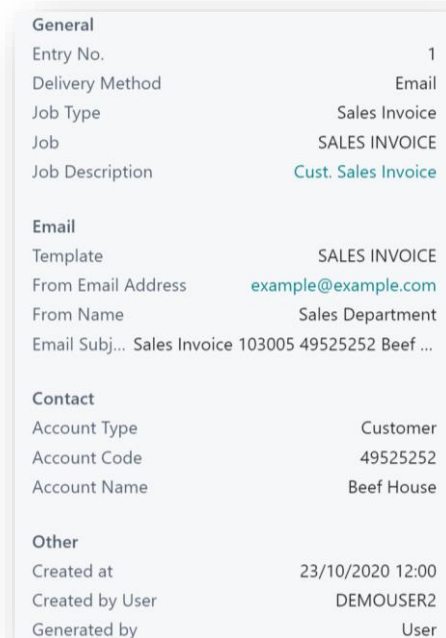- **Detail** – Displays fields relating to the currently selected Draft *(Figure 7-8)*.

Figure 7-8

- **Email Content** – Shows the Subject and Email Body content of the email *(Figure 7-9)*.
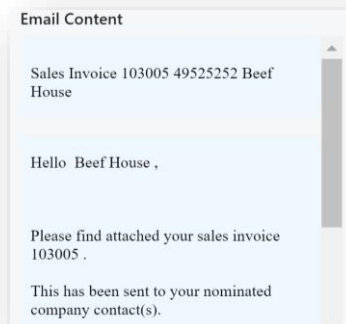

Figure 7-9

Selecting an individual line in the Drafts list opens the **Draft Card** *(Figure 7-10)*. In the Draft Card, you can modify certain fields for the selected Draft. For example, you can modify the Recipients Email Address and edit the email subject and body.
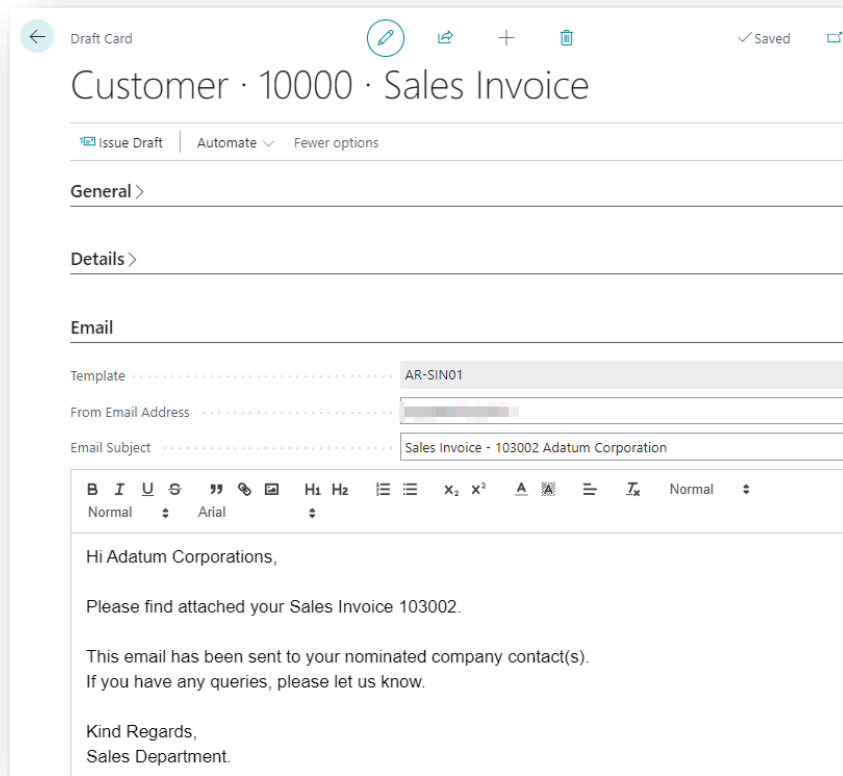

Figure 7-10

7.1.1   Issuing the Drafts

To deliver the Drafts, from the **Drafts** list, in the **Drafts** group, choose the **Issue Drafts** action *(Figure 7-11).*
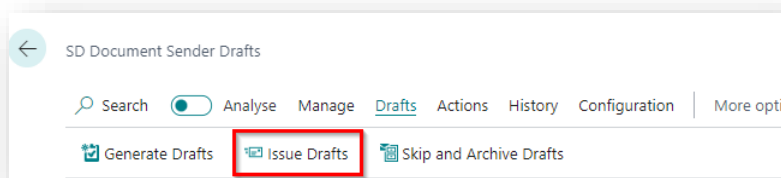

Figure 7-11

- **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.**

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, from the **Drafts** list, in the **Drafts** group, choose the **Skip and Archive Drafts** action *(Figure 7-12).*
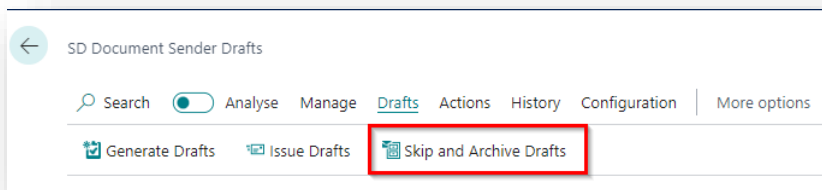

Figure 7-12

- **Skip and Archive Drafts** –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 Document Sender History** list.

7.1.2 Viewing Delivered Drafts

You can view the History of Drafts delivered, by selecting the **History** action in the **History** Tab of the **Drafts** list *(Figure 7-13).*
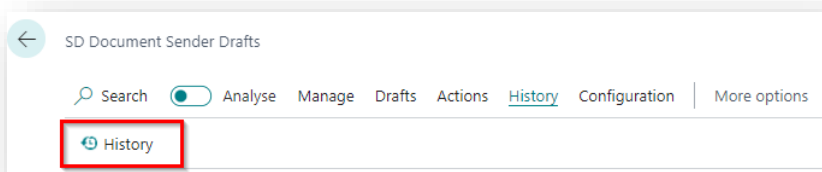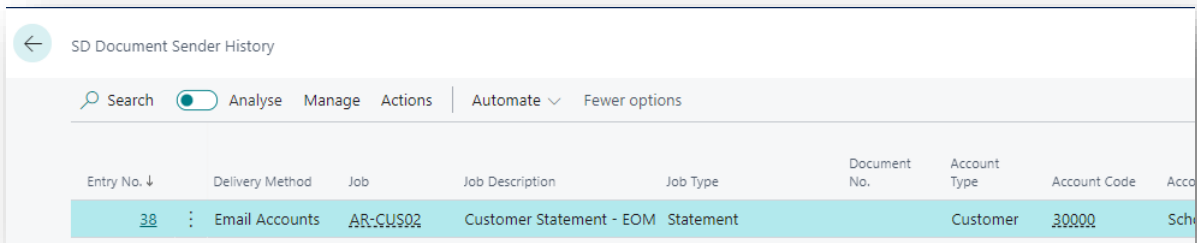

Figure 7-13

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 7-14).*

Figure 7-14

7.1.3   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 7-15).*
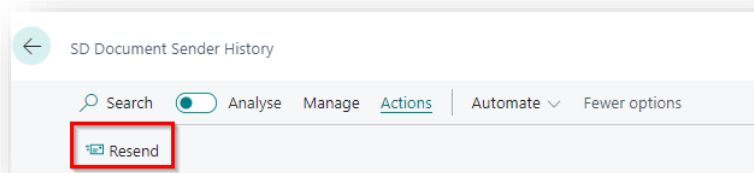

Figure 7-15

You are prompted whether to resend the draft form history or to regenerate the draft from history *(Figure 7-16).*
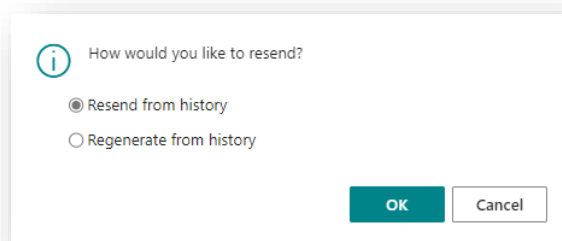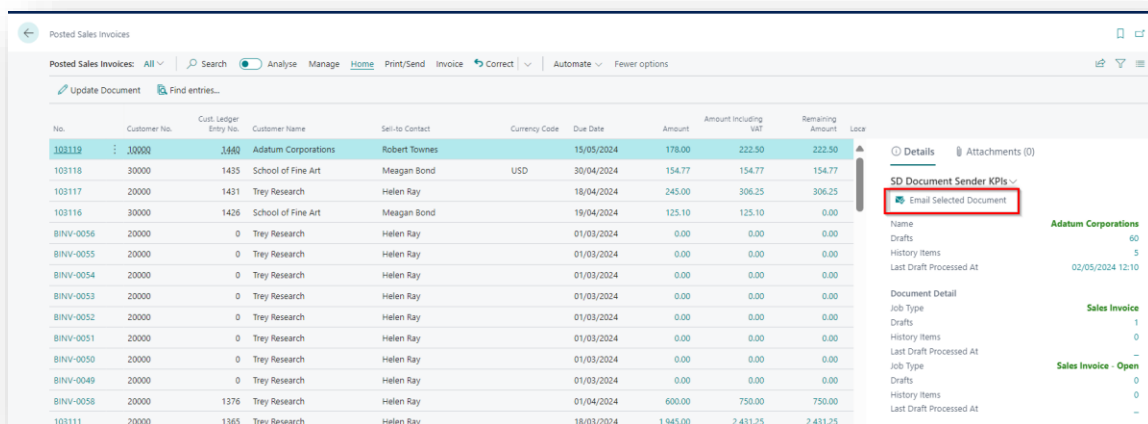

Figure 7-16

The Resend from History resends the document from the history log as is with the original recipients. The Regenerate from History is a full recreation of the document and its recipients.

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.

The Deliveries field on the History line will increment each time you choose to Resend from History and a new history entry will be created when you choose to regenerate from History.

7.2 Sending Individual Emails from the SD Document Sender KPI FactBox

The SD Document Sender KPIs FactBox has been surfaced on relevant lists and cards that correspond to the available Job Types in SD Document Sender. Select the individual transaction that you want to email and then choose the Email Selected Document action from the FactBox *(Figure 7-17)*.

Figure 7-17

7.3 Generating Drafts Automatically Using Job Queue Entries

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 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 Document Sender Jobs are run.

1. In the SD Document Sender **Setup**, choose **Job Queue Entries** in the **Related** groups *(Figure 7-18)*.

Figure 7-18

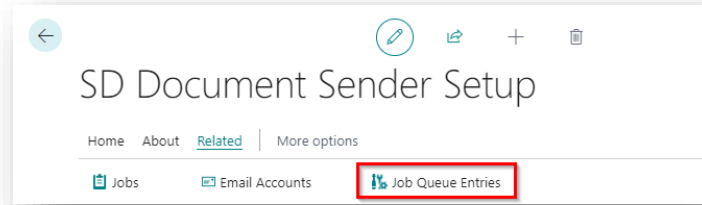2. From the Job Queue Entries list, create a New Job Queue Entry by selecting **New**. Select **Job Processor** from the prompt *(Figure 7-19)*.
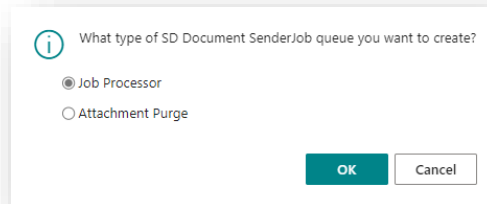

Figure 7-19

3. As an example, we will set up a Job Queue Entry to automatically generate and deliver Drafts for Purchase Order Documents. In the General FastTab of the Job Queue Entry Card, enter the following details *(Figure 7-20)*.
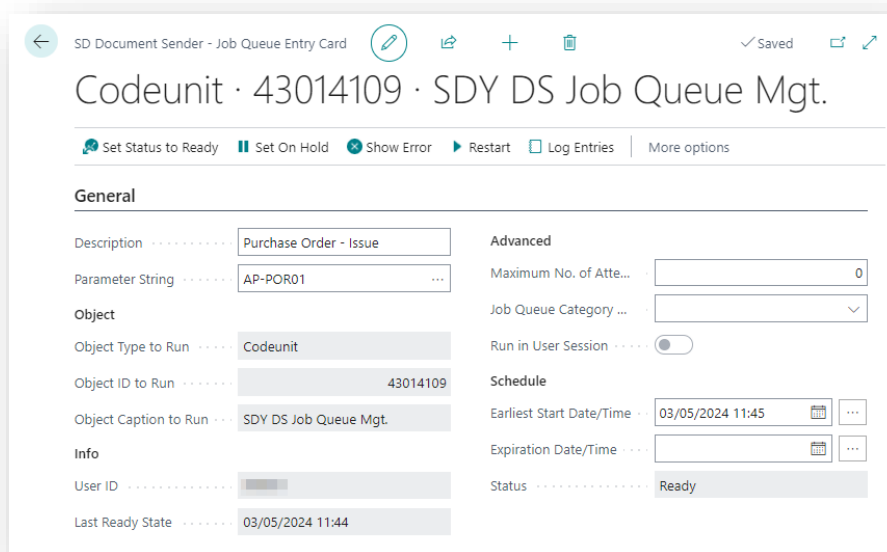

Figure 7-20

- **Description** – Enter a Description for the Job Queue Entry, in our example, we will enter a Description of BM Purchase Orders.

- **Parameter String** - Select a **Job Code** from the list of Jobs in SD Document Sender.

- **Object Type to Run** – Defaults to Codeunit.

- **Object ID to Run** - Defaults to an Object ID of 43014109, SDY DS Job Queue Mgt.

- **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.

- **Earliest Start Date/Time** – Specifies the earliest date and time on which the Job runs. Enter your required Schedule Details for the Job Queue Entry.

- **Expiration Date/Time** - Specifies the last date and time on which the Job runs. Enter your required **Schedule** Details for the Job Queue Entry.

- **Status** – This field specifies the Status of the Job Queue Entry. On creation, this field defaults to a Status of **On Hold**.

In the Recurrence FastTab of the Job Queue Entry Card, you can choose to setup **Recurrence** details for the Job Queue Entry.

1. Choose **OK** to save the Job Queue Entry.

2. When you have reviewed your Job Queue Entry, set the Status of the Job Queue Entry to Ready.

3. 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.

8   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**) <u>is not</u> designed to be run as a balance forward Statement but is designed and structured to be run from 0D to a user-specified End Date. All running totals and entries displayed and calculated in the Report with the assumption of having a Start Date of 0D.

    If you are setting up our SD Document Pack Open Items Statement Report (Report ID **43006016**) in your Document Sender 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 <u>is</u> designed to be run as a balance forward Statement with a user specified Start Date and End Date.

9   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 Remittance where the Document Type Filter is set to Payment.

10 Published Events in SD Document Sender

We have published several events in Codeunits that can be subscribed to by event subscribers to implement any custom functionality if required. The structure of SD Document Sender also allows for addition of other Job Types if needed.

An example of one such published event is the "SDY DS TableRecord Ref" procedure to allow for extensions to SD Document Sender to filter on the Posted Document Range in SD Document Sender Jobs with filters other than a Search From Entry No.

11 Uninstalling SD Document Sender

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

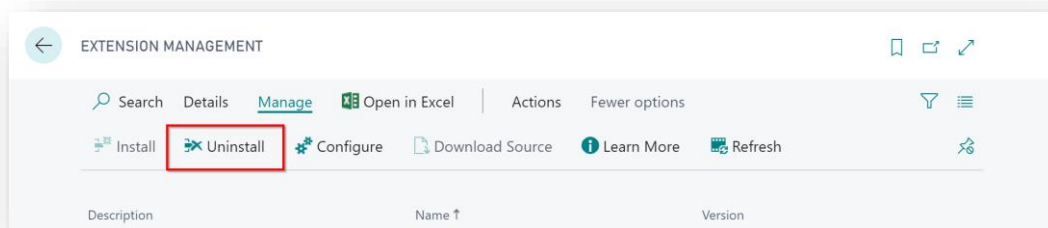2. Select the **SD Document Sender** App and choose the **Uninstall** action *(Figure 11-1)*.

Figure 11-1

Dynamics Shop

IT Simply Makes Business Sense with Microsoft Dynamics 365

Simply Dynamics

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

Dynamics Shop

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

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

Dublin Location

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Get Directions

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