

Acumens e-Mailing Functionality

Versions:

Dynamics BC 24

Prepared & developed by

SBC Dynamics ERP

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	11-07-2023		Document Prepared
2.0	07-15-2024		Version functionality update

Table of Contents

1	Acumens e-Mailing	4
1.1	Sales Orders	4
1.2	Sales Return Order	9
1.3	Sales Invoice	10
1.4	Sales Quote.	11
1.5	Sales Credit memo	12
1.6	Posted Sales invoice.	13
1.7	Posted Sales Shipment.	14
1.8	Posted Sales Credit Memo.	15
1.9	Issued Reminders.	16
1.10	Issued Finance Charge Memo.	17
1.11	Purchase Order	18
2	Monthly Statements	19
2.1	Sample Monthly Batch Statement	19
2.2	Sample Email Received by Customer	20
3	Send Invoice batch.	21
3.1	Sample Invoice Batch Statement	21
3.2	Sample Email Received by Customer	22
4	Acumens e-Mailing Setups.....	23
4.1	Custom layouts	23
4.2	E-Mail Cards	25
4.3	Default e-Mail Cards	26
4.4	Send from Lists.....	27
4.5	Document Merge	28
4.6	Document Attachment Options.....	29

1 Acumens e-Mailing

Acumens e-Mailing Allows you to send emails based on customizable templates to customers from different functionality areas in business central. Below are the various areas that this feature is applicable and sample emails sent out.

1.1 Sales Orders

- a) On the sales order card, you can send an email to the customer via three actions.
 - i. Send e-Mail – This will send an email to the customer based on a default template that has been set for all sales orders.

The screenshot shows the Dynamics 365 Business Central interface for a Sales Order card. The URL in the browser is https://businesscentral.dynamics.com/Sandbox3?company=CRONUS%20USA%2C%20Inc.&page=42&dc=0&bookmark=27_JAAAAACLAQAAAAJ7. The page title is "Sales Order" and the order number is "S-ORD101059 · Adatum Corporation". The navigation bar includes "Home", "Prepare", "Print/Send", "Request Approval", "Order", "Report", "Acumens ePayments", "Acumens eMailing" (highlighted), and "Acumens Customer ePortal". The "Send e-Mail" button is highlighted with a red box. Below the navigation bar, the "General" section is expanded, showing customer details, delivery dates, and e-payment options.

General		Show less	
Customer No.	10000	Order Date	1/20/2024
Customer Name	Adatum Corporation	Due Date	1/30/2024
Sell-to		Requested Delivery Date	
Address	192 Market Square	Promised Delivery Date	
Address 2		External Document No.	
City	Atlanta	Your Reference	
Sell-to State	GA	Acumens ePayments	
ZIP Code	31772	Apply Credit No.	
Country/Region Code	US	Salesperson Code	JO
Contact No.	CT000001	Campaign No.	
Phone No.		Opportunity No.	
Mobile Phone No.		Responsibility Center	

- ii. Send custom e-Mail – This allows you switch the template at the document level. The field shown below is used to determine the format that you can use to send the email.

Dynamics 365 Business Central

←

Sales Order

S-ORD101059 · Adatum Corporation

Home

Prepare

Print/Send

Request Approval

Order

Report

Acumens ePayments

Acumens eMailing

Acumens Customer ePortal

Send Custom e-Mail

Send e-Mail

Send Test e-Mail

Add Attachments

Contact No.

CT000001

...

Phone No.

Mobile Phone No.

Email

customerservice@sbcdynamicserp.cc

Contact

Robert Townes

...

No. of Archived Versions ..

0

Document Date

1/20/2024

Posting Date

1/20/2024

Order Date

1/20/2024

Opportunity No.

▼

Responsibility Center

▼

Assigned User ID

▼

Status

Open

Customized e-Mail Card ..

EC0001

▼

Bill-to Customer No.

10000

▼

Work Description

- iii. Send Test E-mail – This is used when the user wants to test the email to their account instead of the customer email account. There are setups that are done to ensure that this works as expected.

Dynamics 365 Business Central

←

Sales Order

S-ORD101059 · Adatum Corporation

Home

Prepare

Print/Send

Request Approval

Order

Report

Acumens ePayments

Acumens eMailing

Acumens Customer ePortal

Send Custom e-Mail

Send e-Mail

Send Test e-Mail

Add Attachments

Contact No.

CT000001

...

Phone No.

Mobile Phone No.

Email

customerservice@sbcdynamicserp.cc

Contact

Robert Townes

...

No. of Archived Versions ..

0

Document Date

1/20/2024

Posting Date

1/20/2024

Order Date

1/20/2024

Opportunity No.

▼

Responsibility Center

▼

Assigned User ID

▼

Status

Open

Customized e-Mail Card ..

EC0001

▼

Bill-to Customer No.

10000

▼

Work Description

5

- b) You can add additional Attachments that will be attached alongside the document printout. The additional document could be something like Terms and conditions or a flyer with season greetings and such like. These documents will either be merged with the main document or sent as separate attachments.

← S-ORD101059 - Attachments ✓ Saved

+ New Edit List Delete Download Upload

Document No. ↑	AQD Report ID	Name	File Type	Attached Date
→ S-ORD101059	0	test 1.pdf	PDF	7/16/2024 5:48 AM

- c) Once you click on any of the two actions, the user will get a Preview if that has been specified in the emailing setup. Below is the Sample Email preview.

Dynamics 365 Business Central

Sales Order | Work Date: 10/18/2023

1001 · The Cannon Group PLC

Process Report Release

Send Email Discard Draft Use Word Template Show Source

From: CRONUS Armada Rental, Inc. (CustomerService@sbcdynamicserp.com)

To: Customer@sbcdynamicserp.com

Subject: Sales Order # 1001

Message

Date: 11/07/23

To: **The Cannon Group PLC.**

Please find attached a confirmation for your order #1001 placed on 01/26/23.
Should you have any questions regarding your order please contact us.


Thank you for your business.







Regards
CRONUS Armada Rental, Inc.

Close


d) The customer will receive the email and document attachment as shown below.


Sales Order # 1001


 SBC Customer Service
To: Gideon

  Reply  Reply All  Forward  

Tue 11/7/2023 5:00 PM

 If there are problems with how this message is displayed, click here to view it in a web browser.

 OrderNo1001.pdf
34 KB




Date: **11/07/23**

To: **The Cannon Group PLC,**

Please find attached a confirmation for your order **#1001** placed on **01/26/23**.
Should you have any questions regarding your order please contact us.

Thank you for your business.

Regards
CRONUS Armada Rental, Inc.



7

e) Sample Merged attachment received by customer.

Current Month		January 12, 2023	
No.	Description	Quantity	Unit Price
1920-S	ANTWERP Conference Table	4	Piece 647.80
			2,461.64
			Subtotal 2,461.64
			Invoice Discount 0.00
			Total Tax 172.31
			Total USD 2,633.95

Amount Subject to Sales Tax	2,461.64
-----------------------------	----------

Amount Exempt from Sales Tax	0.00
------------------------------	------

[Home Page](#)

Phone No.
+1 425 555 0100

Email
developer@sbedynamicserp.c
om

Sample Terms and Conditions Template

Terms and Conditions ("Terms")

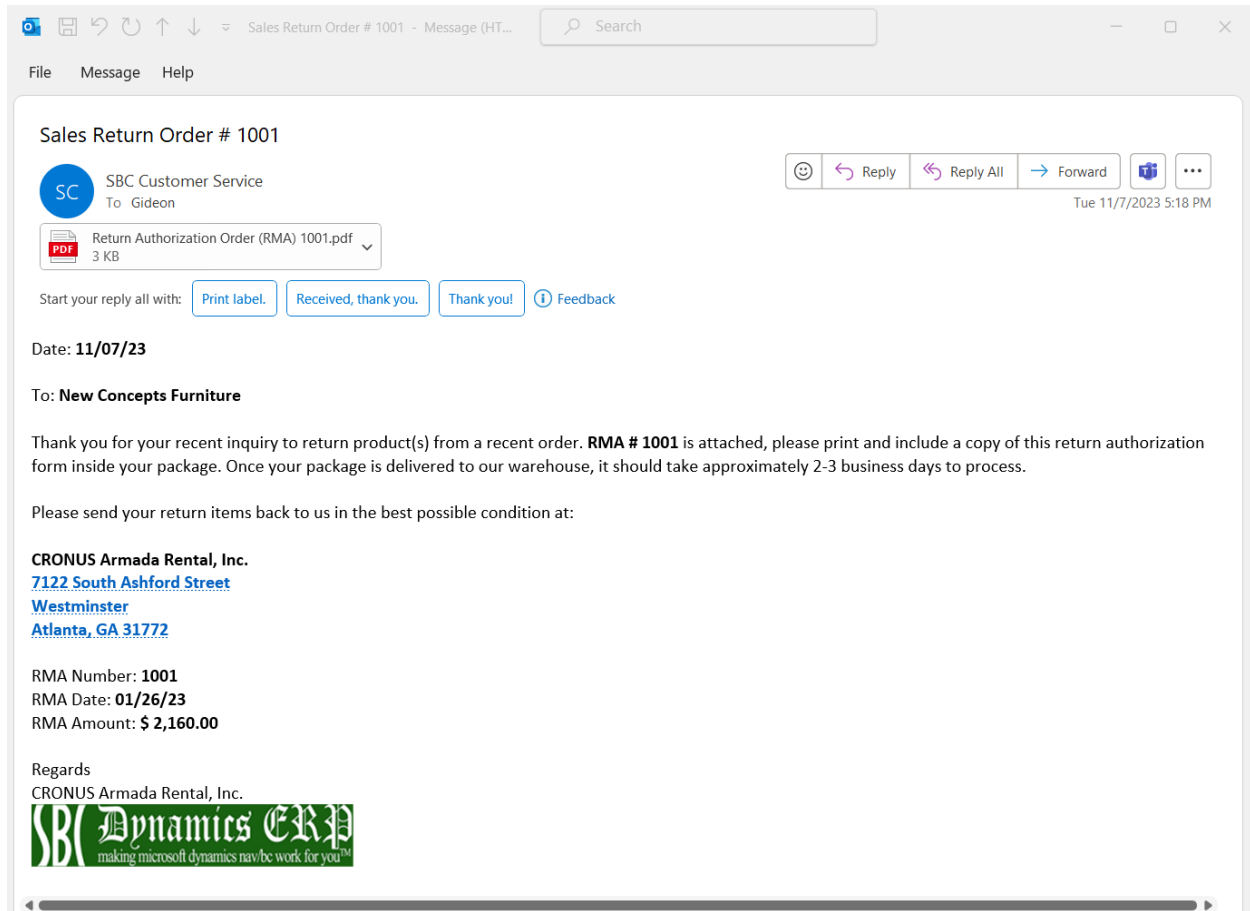
Our Terms and Conditions were last updated on [DATE].

Please read these terms and conditions carefully before using Our Service.

The process above applies to the following documents:

1.2 Sales Return Order

Below is the sample email received by a customer for the sales return order document.



1.3 Sales Invoice

Below is the sample email received by a customer for the Sales Invoice document.

Sales Invoice #

SC

SBC Customer Service
To: Gideon

☺

↩ Reply

↩ Reply All

➡ Forward

📧

⋮

Tue 11/7/2023 5:25 PM

📄 PDF

DraftInvoiceNo103004.pdf
33 KB

Document Data

Your Ref #:		Customer ID #:	50000
Our Reference #:	103004		

Bill to:
Guildford Water Department
Mr. Jim Stewart
25 Water Way
Atlanta, GA 31772
USA


Shipped to:
Guildford Water Department
Mr. Jim Stewart
25 Water Way
Atlanta, GA 31772
USA

Item SKU	Item Name	Ord.	Avail.	BO	Price	Total
1001	Touring Bicycle	3	0.00	0.00	4,000.00	10,800.00

Product Total
Sales Tax
Shipping Cost
Discount
Coupon Discount
Surcharge
Grand Total
Balance / Credit
Due

10,800.00
0.00
0.00
0.00
0.00
0.00
10,800.00
10,800.00

Regards
CRONUS Armada Rental, Inc.



1.4 Sales Quote.

Below is the sample email received by a customer for the Sales Quote document.

Sales Quote

SC

SBC Customer Service

To: Gideon

🗨️

🔄 Reply

🔄 Reply All

➡️ Forward

📧

⋮

Tue 11/7/2023 5:30 PM

📎

Quote No. 1001.pdf

35 KB

▼

To: The Cannon Group PLC,

Thank you for allowing us the opportunity to handle your pricing needs. Please see below for details on your quote. It is good for 45 days. All items and quantities listed on this quote must be ordered to receive the special pricing. If products and/or quantities need to be adjusted, a new quote must be requested. **When you are ready to complete this order please contact our sales department at CustomerService@sbcdynamicserp.com or give us a call at +X XXX XXX 0100 with your quote I.D. number.**

If you have any additional questions, please contact our Large Order Department via email at CustomerService@sbcdynamicserp.com or via phone at +X XXX XXX 0100.

Quote ID #	1001
Quote Date:	10/18/23
Shipping Method:	EXW

Shipping Address:
The Cannon Group PLC
Mr. Andy Teal
192 Market Square
test2
USA

Item SKU	Item Name	Avail.	Price	Total
1896-S	ATHENS Desk	2	1,000.80	2,001.60
1001	Touring Bicycle	1	4,000.00	4,000.00

Product Total:

6,451.60

Sales Tax:

219.06

Shipping:

185.30

Grand Total:

6,855.96

1.5 Sales Credit memo

Below is the sample email received by a customer for the Draft Sales Credit memo document.

Draft Sales Credit Memo

SC

SBC Customer Service

To Gideon

☺

↩ Reply

↩ Reply All

➡ Forward

📧

⋮

Tue 11/7/2023 5:46 PM

📘

If there are problems with how this message is displayed, click here to view it in a web browser.

PDF

DraftCreditMemoNo104004.pdf

6 KB

▼

To Klubben,

Please review the attached draft sales credit memo before we issue the same.

Document Date:	01/27/23	Payment Type:	
External Document No #:		Customer ID #:	47563218
Our Reference #:	104004		

Bill to:

Klubben
Thomas Andersen
Skogveien 3
NO-1344 Haslum
Norway

Shipped to:

Yellow Warehouse
Jeanne Bosworth
Main Bristol Street, 10
Bristol, GB-BS3 6KL
USA

Item SKU	Item Name	Ord.	Avail.	BO	Price	Total
766BC-C	CONTOSO Storage System	1	0.00	0.00	9,202.46	9,202.46
1001	Touring Bicycle	2	0.00	0.00	25,295.643	45,532.16

Product Total

54,734.62

Sales Tax

460.12

Shipping Cost


0.00

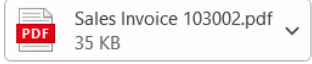
12

1.6 Posted Sales invoice.

Below is the sample email received by a customer for the Posted Sales Invoice document.

CRONUS Armada Rental, Inc. - Sales Invoice # 103002

SBC Customer Service
To: Gideon

Sales Invoice 103002.pdf
35 KB

Start your reply all with:

[Thank you!](#)

[Received, thank you.](#)

[Great, thank you so much!](#)


[Feedback](#)

Hello,

We delivered! This email contains a copy of your sales invoice for order #
Received your order and need to make a return? Please reach out to us.

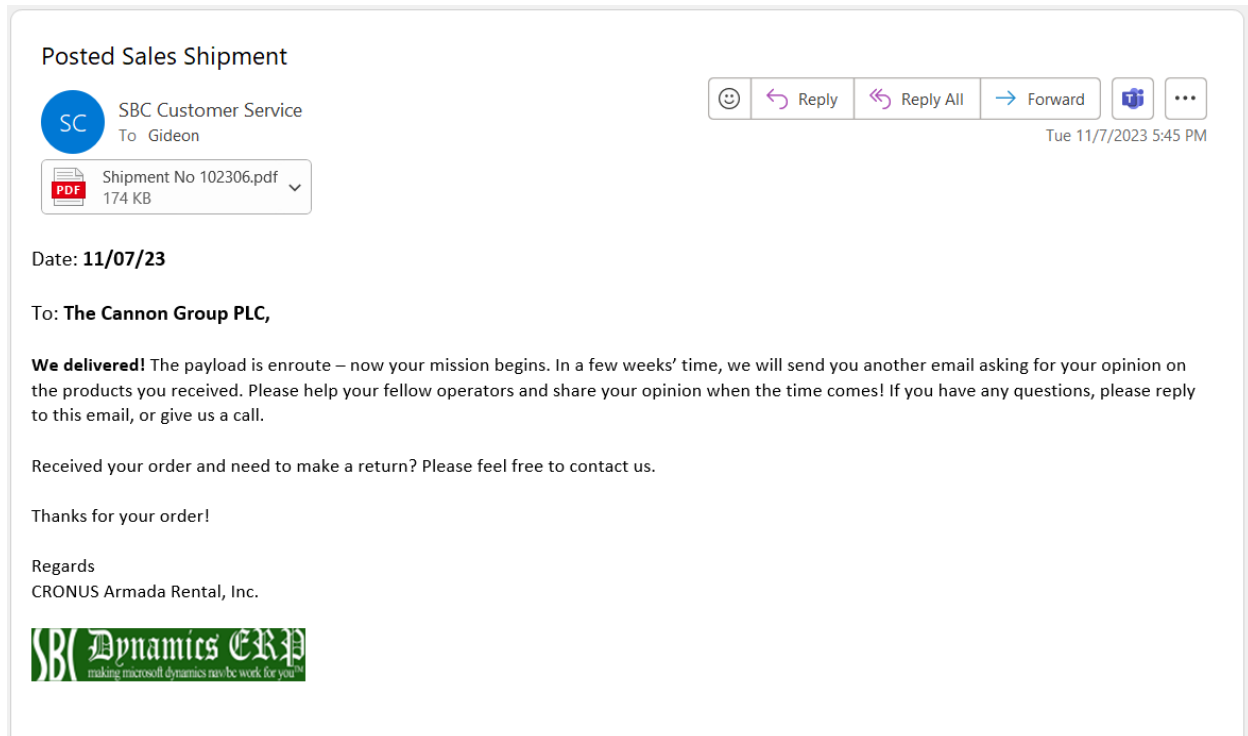
Thank you for your order!

Regards
CRONUS Armada Rental, Inc.



1.7 Posted Sales Shipment.

Below is the sample email received by a customer for the Posted Sales Shipment document.



1.8 Posted Sales Credit Memo.

Below is the sample email received by a customer for the Sales Credit memo document.

Sales Credit Memo #

SC

SBC Customer Service
To: Gideon

☺

↩ Reply

↩ Reply All

➡ Forward

📧

⋮

Tue 11/7/2023 5:50 PM

PDF

Sales Credit Memo 104007.pdf
34 KB

Start your reply all with:

Thank you!

Received, thank you.

Great, thank you so much!

📘

Feedback

Date: 11/07/23

To: The Cannon Group PLC

We have attached credit memo # 104007 in the amount of \$ 13.00 for your reference.
Please feel free to contact us via email at CustomerService@sbcdynamicserp.com.
You can also reach us on phone at +X XXX XXX 0100.

Thank you for your business.

Regards
CRONUS Armada Rental, Inc.


SBC Dynamics ERP

making microsoft dynamics nav/bc work for you™

1.9 Issued Reminders.

Below is the sample email received by a customer for the issued reminder document.

Issued Reminder # 105002

 SBC Customer Service
To: Gideon Rono

📄

Issued Reminder Documents 105002.pdf
35 KB

😊

↩ Reply

↩ Reply All

➡ Forward

⋮

Tue 11/7/2023 5:55 PM

To: **Guildford Water Department,**


You are receiving this email to formally notify you that payment owed by you is past due.

The payment was due on 11/18/23.

Document No.	Document Type	Description	Due Date	Remaining Amount
103030	Invoice	Invoice 1002	12/18/22	822.00
		Additional Fee		7.70
		Total		829.70

Regards


CRONUS Armada Rental, Inc.



1.10 Issued Finance Charge Memo.

Below is the sample email received by a customer for Finance Charge Memo document.

Finance Charge Reminder # 106039


SBC Customer Service
To: Gideon Rono

🗨️

↩️ Reply


↩️ Reply All

➡️ Forward



⋮

Tue 11/7/2023 5:59 PM

Issued Finance Charge Documents 106039.pdf
35 KB

To: **Guildford Water Department,**


You are receiving this email to formally notify you that payment owed by you is past due.

The payment was due on 11/18/23.

Document No.	Document Type	Description	Due Date	Remaining Amount
103030	Invoice	1.5% finance charge of 8,329.60	12/18/22	822.00
		Additional Fee		15.50
		Please pay the total of 962.44.		
		Total		837.50

Regards

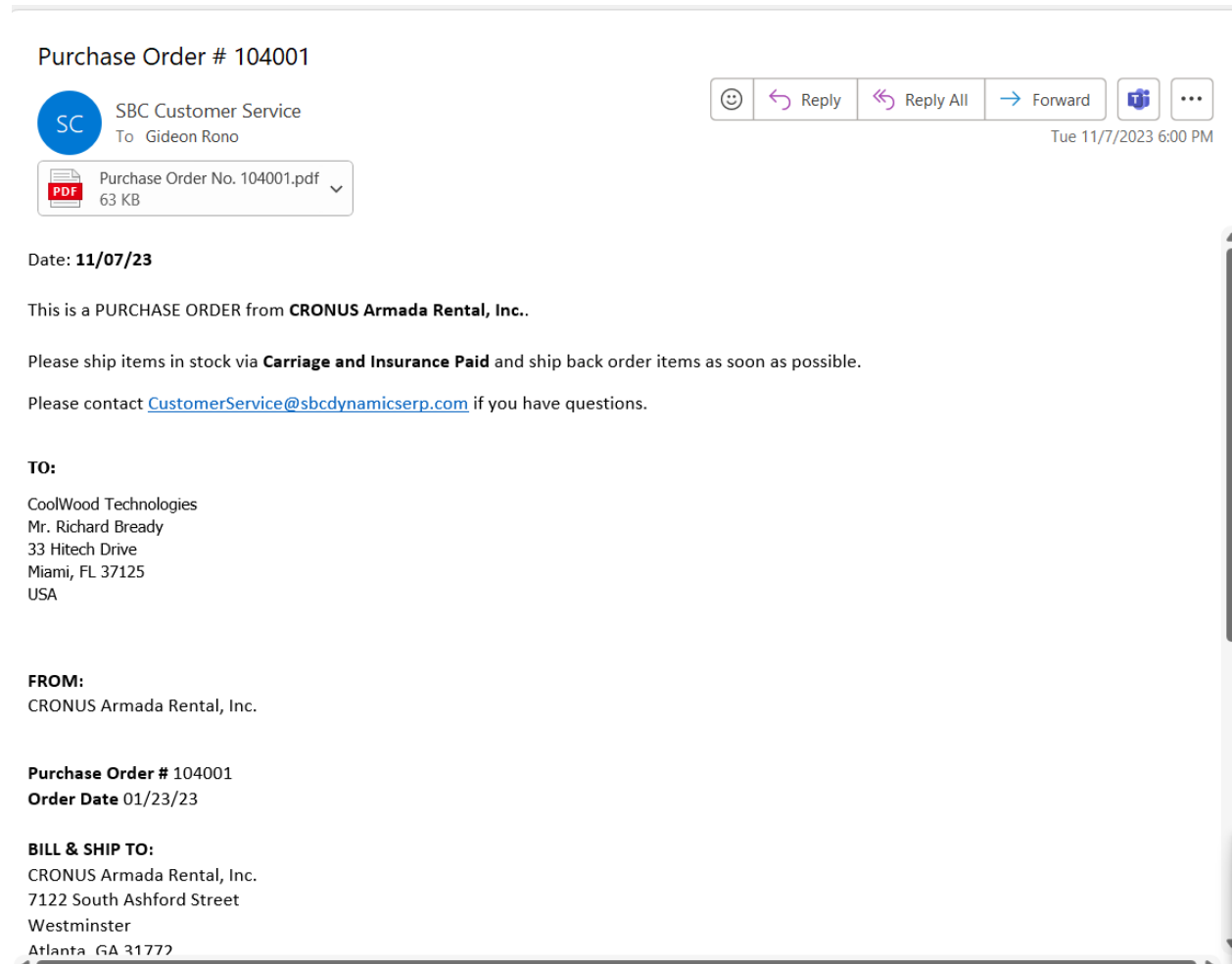
CRONUS Armada Rental, Inc.



17

1.11 Purchase Order

Below is the sample email received by a customer for the Purchase Order document.



2 Monthly Statements

On a monthly basis, users can generate statements in a batch for all or selected customers and send them at their desired time.

2.1 Sample Monthly Batch Statement

SBS business Central

←

←

E-MAIL BATCH | WORK DATE: 2/9/2023

+

✓ SAVED

43

Process

Report

Show Attached

More options

Options

Batch ID

EB005

Batch Description

November 2023

Frequency Code

11-2023

Additional Attachments

0

Queue

Manage

DOCUME... CODE	DOCUME... NO.	RECIPIENT NO.	RECIPIENT NAME	RECIPIENT ADDRESS	DATE CREATED	CREATED BY	DE...	DATE DELIVER...	DELIVER... BY	ATTACHMEN...
StandardEm...	C00010	C00010	John Roberts Construction...		11/10/2023	SBC\GIDEON	<input type="checkbox"/>			0
StandardEm...	C00020	C00020	Conwat Buildings Ltd		11/10/2023	SBC\GIDEON	<input type="checkbox"/>			0
StandardEm...	C00030	C00030	Lombards Buildings Ltd		11/10/2023	SBC\GIDEON	<input type="checkbox"/>			0

2.2 Sample Email Received by Customer

Your Account Statement



Business Central Developer
To: Gideon Rono



StandardEmailCustStmnt-C00020.pdf
44 KB

Start your reply all with:

[Received, thank you.](#)

[Thank you for the statement.](#)

[Thank you!](#)

[Feedback](#)

Date: **11/10/23**

To: **Conwat Buildings Ltd**

Please find attached your statement of account and supporting invoices/credit memos.

Thank you for your business.

Regards,

WHITESTARUSA\KMATHENGE

CRONUS Armada Rental, Inc.



3 Send Invoice batch.

User can generate Invoice batches for all or selected customers and send them at their desired time.

3.1 Sample Invoice Batch Statement

Dynamics 365 Business Central

← e-Mail Batch | Work Date: 11/9/2023

172

Process Report Actions Fewer options

Options

Batch ID EB037 Batch Description December 2023

Frequency Code 12-2023 Additional Attachments 0

Queue | Manage

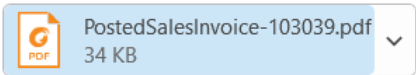
Document Code	Document No.	Recipient No.	Recipient Name	Recipient Address	For Credit Level	Reminder Emailing Criteria	Date Created	Created By	Delivered	Date Delivered
→ Posted Sale...	103041	C00010	John Roberts Construction...	gideon@sbcdynamicserp.com		Aging	12/5/2023	WHITESTAR...	<input type="checkbox"/>	
Posted Sale...	103039	10000	The Cannon Group PLC	gideon@sbcdynamicserp.com		Aging	12/5/2023	WHITESTAR...	<input type="checkbox"/>	
Posted Sale...	103043	C00030	Lombards Buildings Ltd	gideon@sbcdynamicserp.com		Aging	12/5/2023	WHITESTAR...	<input type="checkbox"/>	
Posted Sale...	RI100246	10000	The Cannon Group PLC	gideon@sbcdynamicserp.com		Aging	12/5/2023	WHITESTAR...	<input type="checkbox"/>	
Posted Sale...	RI100240	10000	The Cannon Group PLC	gideon@sbcdynamicserp.com		Aging	12/5/2023	WHITESTAR...	<input type="checkbox"/>	
Posted Sale...	RI100236	10000	The Cannon Group PLC	gideon@sbcdynamicserp.com		Aging	12/5/2023	WHITESTAR...	<input type="checkbox"/>	

3.2 Sample Email Received by Customer

Sales Invoice # 103001



Business Central Developer
To Gideon Rono



Invoice

Date: **12/05/23**

To: **Mr. Andy Teal,**

Your invoice(s) is attached to this message.

Invoice Number	Customer PO Ref. 1	Customer PO Ref. 2	Due Date	Total USD
103001			02/23/2023	11,776.25

Thank you for your business.

Regards,

KMathenge

CRONUS Armada Rental, Inc.

4 Acumens e-Mailing Setups.

Users can Configure different setups to ensure that emails are sent out as per their preferences. Below are the main available setups Customizations.

4.1 Custom layouts

The system uses word layouts to define email body. The user can therefore export the layout as a word document and redesign all the allowable sections.

a) Different Layouts defined.

Custom Report Layouts - 117 Reminder | Work Date: 10/18/2023

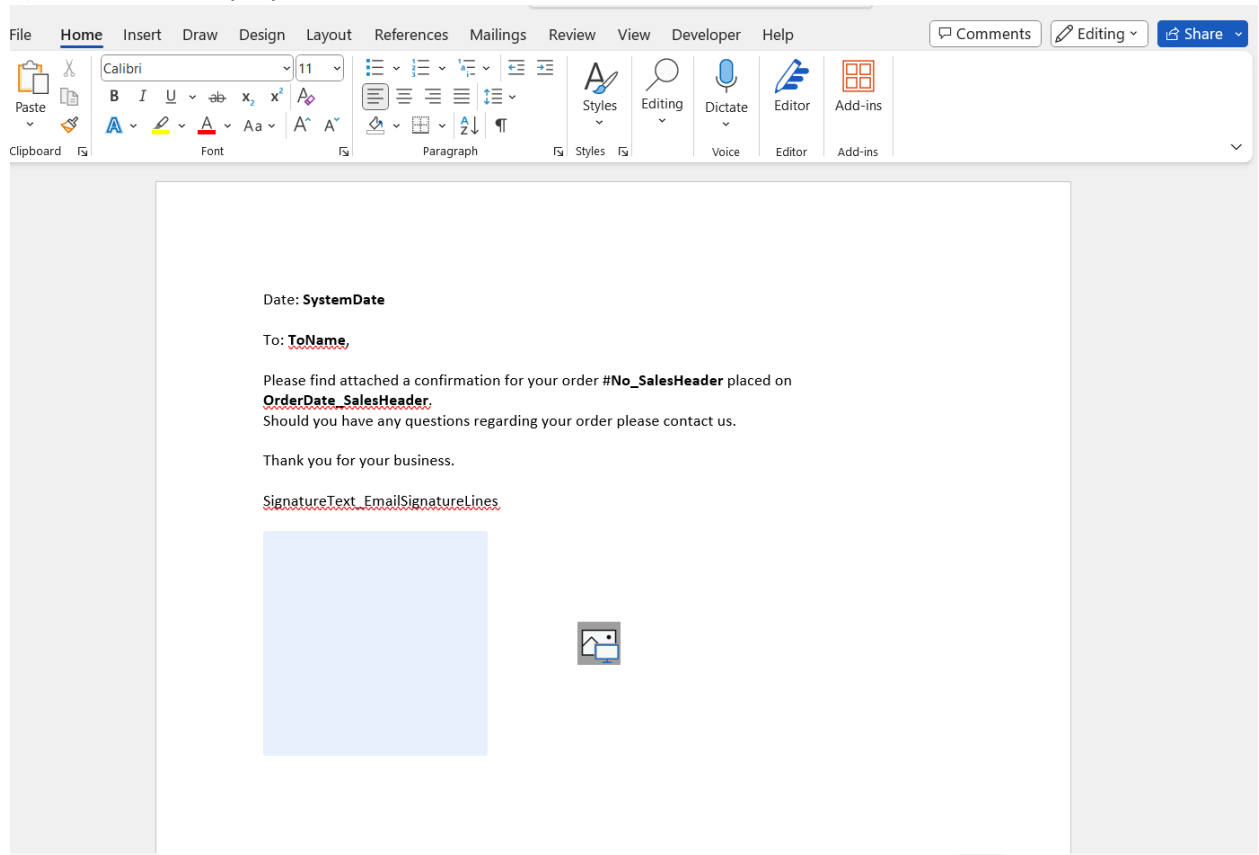
✓ Saved

Custom Report Layouts

Search New Edit List Delete Process Layout

Report ID ↑	Report Name	Description	Company Name ↑	Built-In	Type ↑
11383	Export Electronic Payments	US Vendor Remittance - Defaul...		<input checked="" type="checkbox"/>	Word
70504	Past Due e-Mails	Copy of Built-in layout		<input type="checkbox"/>	Word
70512	Initial Invoice Reminder	Copy of Built-in layout		<input type="checkbox"/>	Word
70523	PO e-Mail	Copy of Built-in layout		<input type="checkbox"/>	Word
70525	SalesReturnOrder SendbyEmail	Copy of Built-in layout		<input type="checkbox"/>	Word
70526	SalesOrder Confirm.SendbyEmail	Copy of Built-in layout		<input type="checkbox"/>	Word
70527	PostedSales Inv. SendbyEmail	Copy of Built-in layout		<input type="checkbox"/>	Word
70528	PostedSales CM. SendbyEmail	Copy of Built-in layout		<input type="checkbox"/>	Word
70529	PostedSales Shpmnt SendbyEm...	Copy of Built-in layout		<input type="checkbox"/>	Word
70531	RFQ New	Copy of Built-in layout		<input type="checkbox"/>	Word
70534	Customer Statement e-Mail Body	Copy of Built-in layout		<input type="checkbox"/>	Word
70535	Sales Invoice Confirm e-Mail	Copy of Built-in layout		<input type="checkbox"/>	Word
70536	Draft Sales Credit Memo Email	Copy of Built-in layout		<input type="checkbox"/>	Word
70537	Sales - Draft Credit Memo	Copy of Built-in layout		<input type="checkbox"/>	Word
70538	EQM Docs Default e-Mail Body	Copy of Built-in layout		<input type="checkbox"/>	Word
70545	Cust. Aging Reminder Current	Copy of Built-in layout		<input type="checkbox"/>	Word
70551	P3 Sales Invoice - Default Email...	Copy of Built-in layout		<input type="checkbox"/>	Word
70552	Customer Statement Reminder ...	Copy of Built-in layout		<input type="checkbox"/>	Word

b) The Email Body layout can be edited in MS word as shown below.



4.2 E-Mail Cards

These are used to define and differentiate how different documents emails are generated and sent to the users/ customers. Below is a sample setup of an email card

←

e-Mail Card | Work Date: 10/18/2023

+

✓ Saved

EC0001

New

Process

More options

General

Code

EC0001

Description

Sales Order

Document Type

Sales Order

e-Mail Subject

Sales Order # [No.]

Template Type

Full Word Template

e-Mail Body Report ID

70526

e-Mail Body Report C...

SalesOrder Confirm.SendbyEmail

e-Mail Body Report L...

70526-000001

Preview in NAV

Edit Email In Outlook...

Send From e-Mail Ad...

CustomerService@sbcdynamicse

Send-to Recipients

Send-to Address

Send-to CC Address

Send-to BCC Address

CC Sales Manager on

e-Mail Attachments

Attach Document

Attach Document For...

PDF

Attach Report ID

1305

Attach Report Caption

Sales - Confirmation

No of Additional Atta...

0

Testing

Test Document No.

Test e-Mail Address

Test Mode

Test Mode

Test e-Mail

developer@sbcdynamicserp.com

25

4.3 Default e-Mail Cards

You can specify the default email card for each document type supported by this feature. This will enable the user to send the email without choosing a template.

Default e-Mail Cards by Document Work Date: 10/18/2023												
<div> <div>←</div> <div>Search</div> <div>+ New</div> <div>Edit List</div> <div>Delete</div> </div> <div> <div>🔍</div> <div>🔼</div> <div>🔽</div> </div>												
Document Type ↑	e-Mail Card	Batching Frequency	One Batch Per Month	Don't Send Zero Amount	Batch Generation Report Id	Enable History Resend	Posting Document Action	Activate Custom e-Mail	Activate Report Packet	Enable Test Menu Actions	Enable Email Action	
→ Purchase Order	EC0009	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Purchase Invoice	EC0038	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Posted Purchase Invoice	EC0039	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Sales Quote	EC0011	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Sales Order	EC0001	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Sales Invoice	EC0003	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Sales Cr. Memo	EC0007	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Posted Sales Invoice	EC0004	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Posted Sales Cr. Memo	EC0005	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Posted Sales Shipment	EC0006	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Sales Return Order	EC0002	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
StandardEmailCustStmt	EC0010	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
EQM Rental Contract	EC0012	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
EQM Posted Shipment	EC0013	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
EQM Rental Order	EC0014	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
EQM Rental Sales Cr. Memo	EC0015	Monthly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
EQM Posted Rental Invoice	EC0016	Monthly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
EQM Posted Rental Cr. Memo	EC0021	Daily	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input checked="" type="checkbox"/>	No Action	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
EQM Rental Shipment Order	EC0017	Monthly	<input type="checkbox"/>	<input checked="" type="checkbox"/>	0	<input type="checkbox"/>	No Action	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

4.4 Send from Lists

This allows users to specify different sender details and signature. It can be based on company setup or the user performing the action.

←

e-Mail Send-from Card | Work Date: 10/18/2023

+

ES001

General

Code

ES001

Locations

0

Setup For

Sender

Dimensions 1

0

User ID

WHITESTARUSA\KMATHENGE

Dimensions 2

0

Send From e-Mail

CustomerService@sbcdynamicserp.com

Responsibility Centers

0

Send From Name

CRONUS Armada Rental, Inc.

e-Mail Signature Lines

Manage

	Code ↑		Line No ↑	Signature Text	Line Has Logo	Logo
→	ES001	⋮	10	Regards,	<input type="checkbox"/>	+
	ES001		20	WHITESTARUSA\KMATHENGE	<input type="checkbox"/>	+
	ES001		30	CRONUS Armada Rental, Inc.	<input type="checkbox"/>	+
	ES001		40		<input checked="" type="checkbox"/>	
						+

4.5 Document Merge

Email attachments can be merged using an API before sending to a client. Below is how to specify the API details and enable the feature.

Dynamics 365 Business Central

Work Date: 7/25/2022

Acumens e-Mailing Setup

Delete Acumens e-Mailing Setups | Reset Document Series | e-Mail Cards | Default e-Mail Card by Document Type | e-Mail Sender Address & Signature

Backorder e-Mail 60D Template		Mail Account Name	
Discontinued Item Template		Mail Server Name	
Pick Up e-Mail Template		Test Mode	
Tracking No. e-Mail Template		Test Mode	<input checked="" type="checkbox"/>
EDI Posted Sales Invoice Tracking e-Mail		Test e-Mail	
PreOrder e-Mail Card		Documents Merge	
		Merge Enabled	<input checked="" type="checkbox"/>
		API Url	https://v2.convertapi.com/convert/pdf/to/merge
		API Secret	ffffsdsdsd

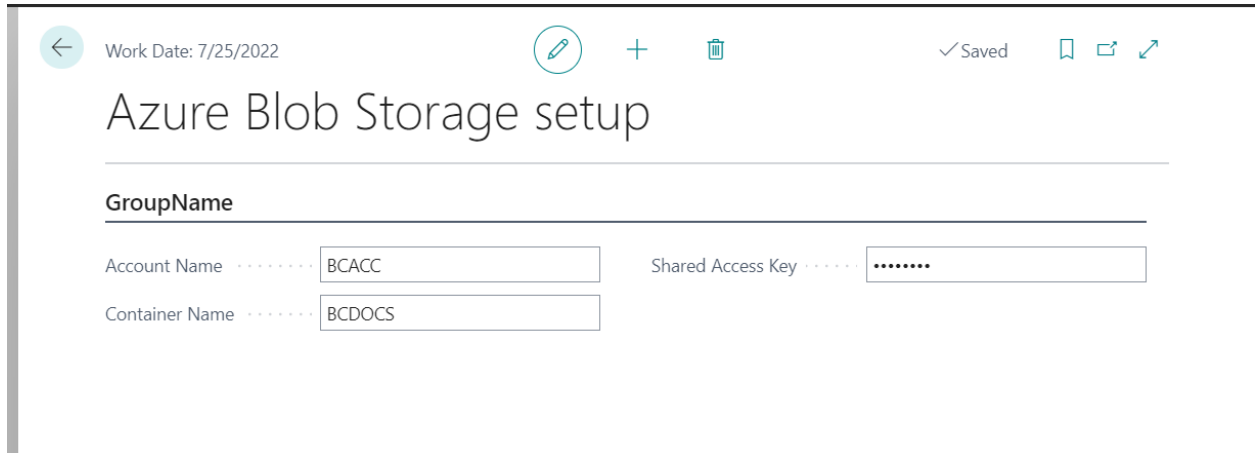
Number Series

e-Mail Batch ID Nos	EB	e-Mail Send-From Nos.	ESS
e-Mail Nos.	EC	Business Unit Template Nos.	BU

4.6 Document Attachment Options

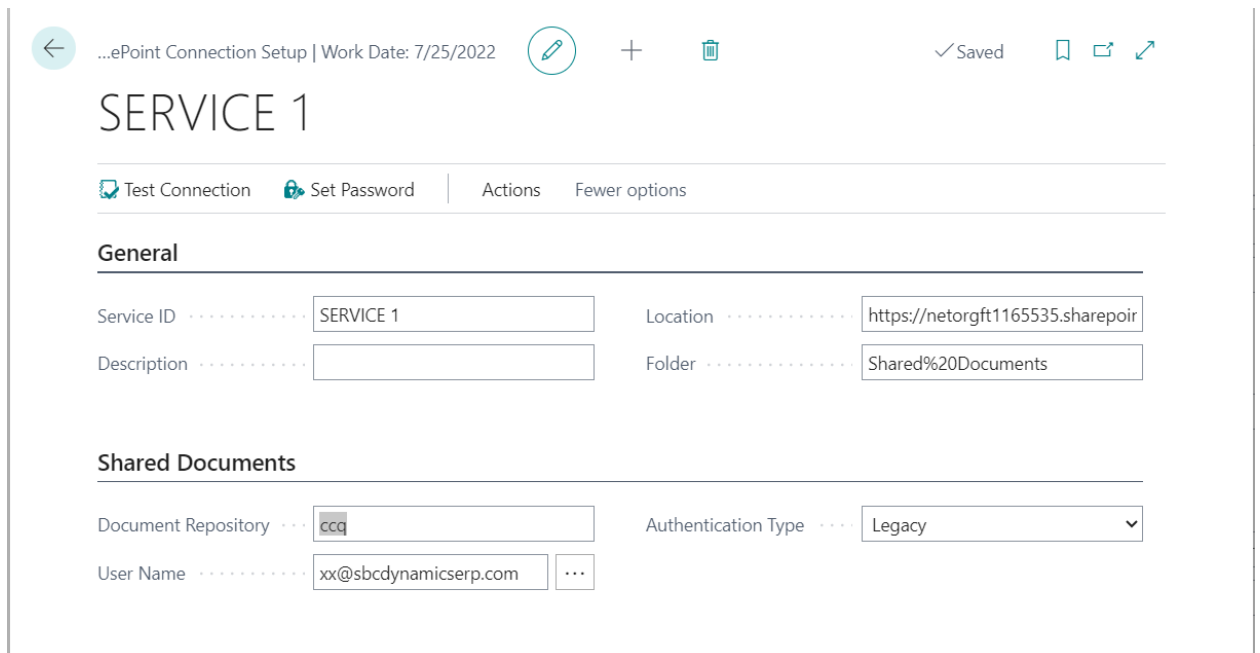
You can attach documents from external Storages listed below.

i. Azure blob storage



The screenshot shows the 'Azure Blob Storage setup' page. At the top, there is a navigation bar with a back arrow, 'Work Date: 7/25/2022', a pencil icon, a plus icon, a trash icon, and a 'Saved' status with a bookmark, copy, and share icon. The main title is 'Azure Blob Storage setup'. Below it, there is a section for 'GroupName'. The form includes two rows of input fields: 'Account Name' with the value 'BCACC' and 'Shared Access Key' with a masked value '.....', and 'Container Name' with the value 'BCDOCS'.

ii. One drive



The screenshot shows the 'One drive' connection setup page. The navigation bar at the top includes a back arrow, '...ePoint Connection Setup | Work Date: 7/25/2022', a pencil icon, a plus icon, a trash icon, and a 'Saved' status with a bookmark, copy, and share icon. The main title is 'SERVICE 1'. Below the title, there is a row of buttons: 'Test Connection', 'Set Password', 'Actions', and 'Fewer options'. The 'General' section contains two rows of input fields: 'Service ID' with the value 'SERVICE 1' and 'Location' with the value 'https://netorgft1165535.sharepoir', and 'Description' (empty) and 'Folder' with the value 'Shared%20Documents'. The 'Shared Documents' section contains two rows of input fields: 'Document Repository' with the value 'ccq' and 'Authentication Type' with a dropdown menu set to 'Legacy', and 'User Name' with the value 'xx@sbcdynamicserp.com' and a dropdown menu.