E-Mail Setup

The E-Mail setup defines general E-Mail options for sending Aproda Documents Automation reports via E-Mail.
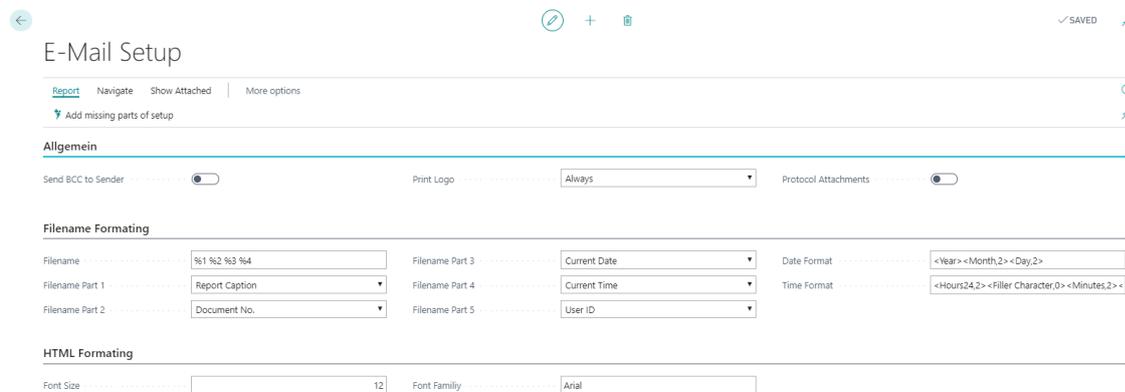
1.1 General

- *Send BCC to Sender:*
  Specifies whether a copy of the E-Mail is always sent to the sender.
- *Print Logo*
  There is a choice:
    - *Always*: The logo is printed on all documents.
    - *Never*: The logo is not printed on any document.
    - *Report Configuration*: The logo is printed for each document according to the information in the report configuration
- *Protocol Attachments:*
  Specifies whether the attachments should be logged in the e-mail log (see chapter 1.3). If = true, the sent E-Mail attachment is also documented in the log. If = false, the E-Mail is documented without attachment.

1.2 Filename Formating

- *Filename*
  Placeholder for the file name of the e-mail attachment.
- *Filename Part 1 – 5*
  Values that make up the file name
- *Date Format*
  To define if the date is part of the file name.
- *Time Format*
  To define if the time is part of the file name.

Note: Date and time format correspond to the Microsoft Dynamics standard formats.

1.3 E-Mail Protocol

Since there is no mailbox in BC for sent E-Mails, Aproda Documents Automation provides an E-Mail protocol.

The log lists all relevant information about the sent E-Mails. If Log attachments = true is selected in the E-Mail setup, the attachment is documented in the info area.

It is possible to delete individual entries from the e-mail log via Manage > Delete.

1.4 HTML Formating

- *Font size in pixels:* define the font size of the e-mail text
  Note: the values correspond to the pixel size and not the unit point (Pt.).
- *Font:* Corresponds to the fonts known from Microsoft Office. The font must be installed on the server to be selected.

1.5 Process E-Mail sending

Note: The E-Mail sending does not distinguish between test and live database. If live data and real E-Mail addresses are used, debtors / creditors may receive test E-Mails.

Documents can be sent by E-Mail via Print/Send > Send [document] as a PDF attachment by E-Mail:

SALES ORDER | WORK DATE: 27.01.2022

1001 · Gilde Jupiter Versicherungs AG

Process   Release   Posting   Prepare   Order   Request Approval   Print/Send   Navigate   Show Attached | Actions   Nav

📧 Email Confirmation...   🖨 Print Confirmation...

General

An E-Mail editing window opens, which is either empty or the following information is already pre-filled, depending on the configuration of the E-Mail texts:

- Sender E-Mail
- Recipient E-Mail (To)
- Subject according to documenttext setup and configuration
- E-mail text according to documenttext setup and configuration

Click Send to send the E-Mail to the selected recipient. With dots to the right of the To- and Cc-field you can select an E-Mail address of a contact. For this purpose, an E-Mail address must be assigned to the contact.

Notes:

- In the contact list, the filter in the No. column must be deleted so that you can select from the entire contact list.
- Only one E-Mail address can be stored per recipient field.

Via Alternatives Reports an additional attachment can be selected if they are defined in the documenttext configurations. For example, a proforma invoice can be attached to an order confirmation.

With Attach Document you can attach files from your drive and also send them by E-Mail.

All selected attachments are displayed on the right (you may need to display the notification area using the arrow):

If the window is closed without the E-Mail having been sent, a message box will point to this:

The E-Mail was not sent.
Dou you want to send the E-Mail now?

Yes   No