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Improved Emailing and Document Archiving in D365F0

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Motivation

- ❖ How to send business documents in personalized emails to all customers?
- ❖ How to find the documents and conversation later?
- ❖ How to track and solve errors?

DEMO

Agenda

❖ Emailing

- Interactive vs. non-interactive (batch)
- Synchronous vs. Email processing
- Documents (reports)
- Email templates
- Hardcoded emails

❖ Print archive

- Find documents
- Document storage
- PDF/A

❖ Emailing configuration and troubleshooting

❖ Standard vs. improvements (from Docentric Free Edition)

DEMO

Emailing documents

STANDARD

Print destination settings

Print archive
Screen
Printer
File
Email

Save in print archive?
 No

To
 Edit

Cc
 Edit

Subject

File format
HTML4.0
CSV
Microsoft Excel
HTML4.0
Image
MHTML
PDF
XML
Word

- ❖ Email tokens

IMPROVED

- ❖ Additional fields
- ❖ Email body editor
- ❖ Placeholders
- ❖ Additional attachments
- ❖ Email token redirection
- ❖ Email templates
- ❖ Open email before sending
- ❖ Allows reliable personalized massive emailing

Print archive

- ❖ Long term archive of business documents should be
 - Searchable
 - Store documents in archive format

STANDARD

- ❖ PDF
- ❖ On default Azure storage
- ❖ No metadata (hard to search)

IMPROVED

- ❖ PDF/A and email
- ❖ Also SharePoint (and other DocuType-s)
- ❖ Search by DocumentID, Account, Order, Journal, .etc
- ❖ Download multiple documents

Email templates

STANDARD

- ❖ System/organizational email templates
- ❖ HTML email body (no editor)
- ❖ Basic placeholders
- ❖ Sent from code

IMPROVED

- ❖ HTML editor
- ❖ ETH classes
- ❖ More placeholders
- ❖ Send test email

DEMO

Email processing

- ❖ **Outgoing queue for reliable email sending**
 - Email sent by Email distributor batch job
 - Recommended for massive sending

STANDARD

- ❖ **Retry mechanism (automatic & manual)**
- ❖ **Email history (shows all sent emails)**

IMPROVED

- ❖ **Download emails**
- ❖ **Update emails (in bulk)**
- ❖ **Search by DocumentID, Account, Alert rule, NotificationID, .etc**
- ❖ **Sending log**

Emailing configuration

STANDARD

- ❖ Exchange and SMTP email providers
- ❖ SMTP options
 - Authenticated (just one sender account)
 - Email relay (*@mydomain.com) (trust on application level)
- ❖ No CID embedded images (just inline)
- ❖ Email throttling

IMPROVED

- ❖ Additional email sender accounts
 - Third party massive SMTP provider
 - Fake SMTP for testing
- ❖ CID embedded images (with SMTP)
- ❖ Custom display name
- ❖ Send test email

Summary

❖ Emailing

- Interactive vs. non-interactive (batch)
- Synchronous vs. Email processing
- Documents (reports)
- Email templates

❖ Print archive

- Find documents and emails
- Archive storage
- PDF/A

❖ Emailing configuration and troubleshooting

❖ For shown improvements use Docentric Free Edition or ask your developers to do it.

Questions, Ideas, Discussion

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