Easy PDF

Professional Messaging for Microsoft Dynamics 365 Business Central

Administration Guide

Note: This is a living document – check back periodically for updates.

Last update: 2023-09-17

About this Document

This document provides detail for installation, setup, and administration of Easy PDF.
For readability it may be lacking in detail on certain topics – in which case the "Getting Started" guides are provided.

Guides are available on the website at: https://easypdf365.com/guides

About the Product

Easy PDF is a productivity tool.
It strives to add compelling enhancements to Business Central Messaging.

Business Central Messaging = Sending digital communications (email, fax, or print) from Business Central.

Easy PDF has the following main features:

1. **HTML Messaging** - Enhancements to enable customized HTML email and integration into the Business Central User Interface to simplify messaging.
2. **Batch** - A (popular) feature that enables automated queuing of documents for print and delivery (e.g.., Posted Sales Invoice, Customer Statement, etc.).
3. **History** – An audit trail of all messages initiated from Easy PDF.
4. **Mail Account Management** – With Easy PDF an unlimited number of mail accounts can be defined. This feature can be used to *brand* email (e.g., From: Sales Dept, Contoso, From: Purchasing Dept, Contoso, etc.)
5. **Address Book** – Easy PDF supports email distribution lists on a per Customer/Vendor/Contact, or per Document basis.

It has many other features that mostly fall into the integration category.

See: https://easypdf365.com/features

Historical note: Easy PDF has been sold as a Dynamics NAV Add-on since 2007 (NAV 3.7) and has evolved significantly over the years. There are hundreds of companies/ thousands of users using Easy PDF on a daily basis.

Before You Start

Of course, a certain level of understanding of the product is assumed.
We recommend first performing the basic setup below then walking thru the Getting Started User guide.

A General Note

Easy PDF fields and controls on pages have a short description that should provide some guidance.

A Helpful Hint

You can use the following accelerator to quickly access Easy PDF dialogs from Tellme search:

In Tellme search type "ezp" + the first letter of the dialog
Example: ezpa --> Easy PDF Administration dialog
Type "ezp" to see a list of all the Easy PDF dialogs.

Table of Contents

Basic Setup

Installation

Cloud:

Installation in the cloud is simple – install from AppSource as with any extension app.

To upgrade versions use the Business Central administrative console to upgrade the app. Please see: Managing Apps - Business Central | Microsoft Docs

Onprem:

Note: For onprem the Easy PDF module must be added to the onprem license. Ask your Business Central Partner to contact us so we can coordinate updates to your license. We do not have access to your license so we cannot do this for you.

For onprem installation use one of the runtime packages available from the download page on the website – https://easypdf365.com/download.

Fresh Install:

Publish-NAVApp -ServerInstance BC -Path EasyPDF_<version>_runtime_<platform>.app

Install-NAVApp -ServerInstance BC -name 'Easy PDF Email, Print, Batch'

Upgrade Install:

Publish-NAVApp -ServerInstance BC -Path EasyPDF_<version>_runtime_<platform>.app

Sync-NAVApp -ServerInstance BC -Name 'Easy PDF Email, Print, Batch' -Version <version>

Start-NAVAppDataUpgrade -ServerInstance BC -Name 'Easy PDF Email, Print, Batch' -Version <version>

** If installing into a multi-tenant environment include the flag "-Tenant <tenant>".

<version> is the Easy PDF version number, e.g., 3.1.0.0

<platform> is the target platform, e.g., 22.0 (major.minor)

** runtime packages are designed to work on platform versions matching the major version and equal to or less than the minor version. Thus, a target platform of 22.0 will work on all 22.x platforms. A target platform of 22.5 will work on platforms 22.5, 22.6, …

Post Installation

When Easy PDF installs it does the following:

- Runs upgrade code
- Creates the "EZP_EASYPDF_USER" and "EZP_EASYPDF_ADMIN" permission sets
- Initializes first time Easy PDF setup records (General Setup, Document Setup, Mail Setup)
- If first time initialization, creates a new Easy PDF Mail Setup record – the "NULL" account

During installation, the app purposely does not try to reach out to the web to self-register or download content – that would result in a web request permissions popup which may cause some trepidation. Instead, all external data access is deferred to the configuration dialogs (see below).

First Time Setup

The following steps should be performed after installing Easy PDF for the first time:

1. Register for a free 30-day trial
2. Add Easy PDF permissions and users
3. Install Easy PDF message templates

There are a series of videos that walk thru the above steps on the website at:
https://easypdf365.com/implement
so we won't go into excruciating detail here (we will defer that until later in this document).

We do need to explain a few things, so here goes ...

Assisted Setup

There is an Assisted Setup Wizard which **we highly recommend** for initial setup – it will save you significant time and effort.

The Assisted Setup Wizard is self-explanatory – but there is a step-by-step guide for reference.

The sections below expand upon the manual approach to the steps that the Assisted Setup Wizard will guide you through.

Registration

You will need a registration (a.k.a. license) to use Easy PDF.
Note: The Setup Wizard manages trial registration – we suggest this approach.

To obtain a registration you must start a 30-day trial, no exceptions.
The trail registration process will allocate a "Customer Key" and register it with the product.

To start a 30-day trial:

- Open the Easy PDF Administration dialog by entering "Easy PDF Administration" (or "ezpa") into Tellme search and selecting the Easy PDF Administration page link.
- In the Administration dialog, click the "Registration" button, the Registration dialog will display.
- In the Registration dialog, click the Registration/Start 30-day Free Trial button.
- If the web request permissions dialog displays, select the "Allow Always" option.

  Note: It is important that you select Allow Always because Easy PDF will need to make web requests to manage various features – such as sending email.

  Easy PDF will contact the website and download a 30-day trial registration.

- After downloading a registration for the first time you will need to close both the Registration and the Administration dialogs, then reopen the Administration dialog.
  (Because, without a registration the Administration dialog opened in read-only mode and you need to reopen it in edit mode for the next step).

To purchase a permanent registration please follow the steps in the Registration Guide.

If a 30-day trial is not sufficient please contact us: Easy PDF Support

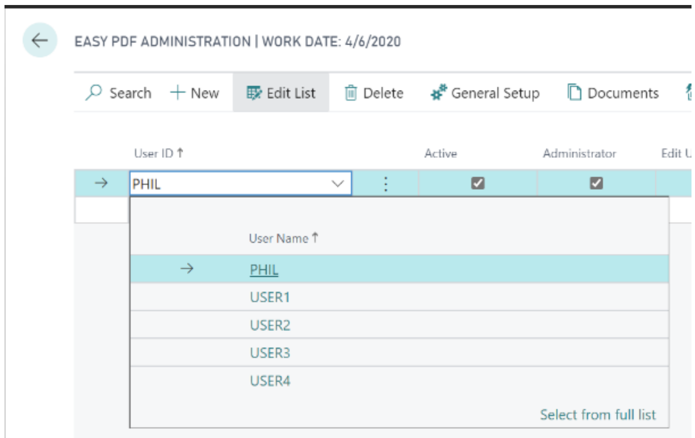
Add Easy PDF Users & Permissions

With a valid registration installed we now need to give users access to Easy PDF features.

To do that we need to do two things:

1. Assign the "EASY PDF" permission set to the user
2. Allocate a "reservation" (a.k.a., user license) for the user (not required when in trial mode)

In the Administration dialog, adding a user to the Persistent Reservation Pool will take care of both those steps for you.



We will describe in more detail users, permissions, and reservations later. For now, just add yourself and anyone who will use Easy PDF into the list and mark the user *Active* as in the above picture.

Note: Since you are currently using a trial registration there are no limits to the number of Easy PDF users. Later we will describe managing users when using a non-trial registration.

Installing Easy PDF Templates

A compelling feature of Easy PDF is support for email message templates – predefined templates that are field merged prior to insertion into the email message body.

Creating high quality HTML or Plain Text templates is a non-trivial task, generally beyond the reach of the average user.

Fortunately, Easy PDF provides a feature to facilitate the installation and management of templates. It is called a *Theme* and there are predefined Themes that can be easily installed from the website.

We will discuss Templates and Themes in detail later in this document but, for now, let's just install a simple Theme so users will be able to send nice looking email with little effort.

Note: The Setup Wizard manages template installation – we suggest this approach.

To install the "Classic HTML" Theme follow these steps:

1. Open the Administration dialog.
2. Click the "Manage Themes" button - the (empty) Themes dialog will display.
3. Click the "Import/Export" / "Theme Library" button – the Themes Library dialog will display.

4. Select the “Classic HTML” theme line, then press the Manage/Install button.
   If there are no preexisting templates when installing a Theme, it will immediately become Active – i.e., it will be added to each Document Setup. If there are existing templates when you download a Theme, then you will need to manually activate it in the Themes dialog.
5. Return to the Themes dialog – you should now see the Classic HTML theme
   You can view the Theme content by clicking the “Document Code” column for each entry.

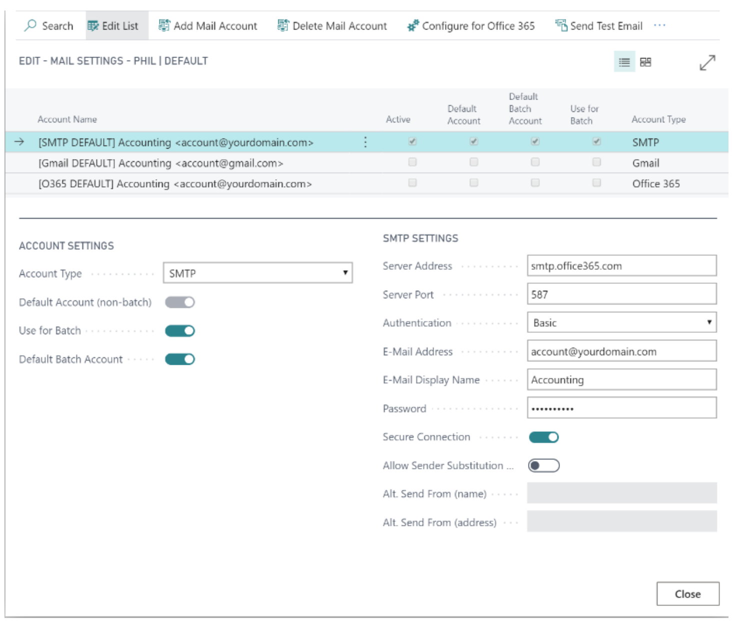
Mail Accounts Setup

To use Easy PDF, you will need at least one active mail account.
Here we will walk through the steps to configure a SMTP mail account.

About the NULL mail account:

The NULL mail account **does not deliver email** – ever.
It was created at installation -- it is a test tool and requires no configuration.
It walks and talks like a real email account, however it simply discards any email sent thru it.
It can be removed or deactivated if desired.

Open the Easy PDF Administration dialog, then press the Mail Setup action.
The Mail Setup dialog will display.



In this screenshot three Mail Accounts are defined.

1. SMTP, sending via the Office 365 SMTP server
2. Gmail, sending via the Gmail API
3. O365, sending via the Office 365 API (Graph)

You may define as many accounts as you wish.
You might set the Display Name or the Alt. Sender info to “brand” the account as desired.

Note: There are limitations to the use of the Display Name or Alt. Sender Name/Address that depend upon the type of account and the mail provider – please see the online help for more detail.

In the screenshot we have not yet "authorized" the Office 365 or Gmail accounts yet – so they are not 'Active'. (Authorization is the process of verifying your identity with the mail provider – see below).

Other Mail Account Settings

Default Account (non-batch)

Prioritizes the account for use with interactive mail (i.e., email previewed before sending).
The Default Account will prepopulate into the From field in the Email Dialog when it opens.

Use for Batch

Indicates that the account is enabled for sending from batch.
We recommend using SMTP accounts when sending mail from batch. Some providers impose limitations on mail sent via their API. SMTP service providers are generally more lenient.

Default Batch Account

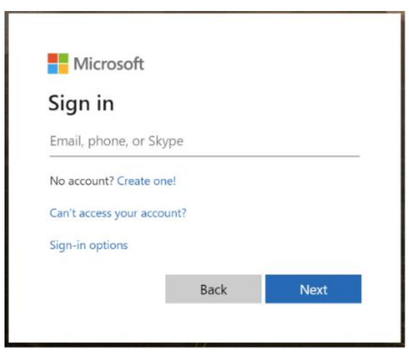
Identifies the account as the default account to use when sending mail from batch.
This account will prepopulate into the Mail Account field on the Batch dialog.

Mail Account Authorization (for Office 365 or Gmail API accounts)

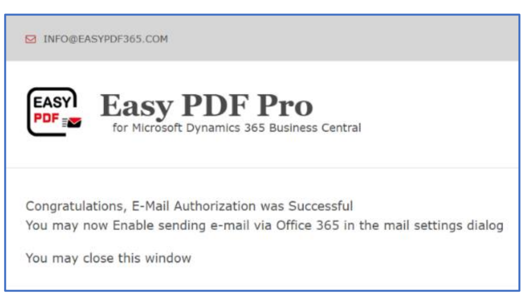
To send email through an Office 365 or Gmail account (but not SMTP) we use the provider's "API". The API requires authorization to use the mail account (a.k.a., OAuth2 authentication).

To initiate authorization, first enter account settings then click the Account Authorization link.

A web dialog to the provider's authorization flow will display – here is the Office 365 dialog



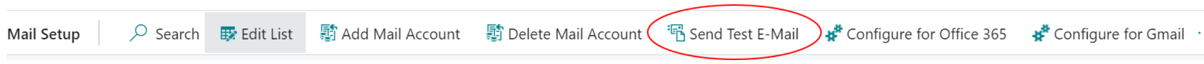
When the flow is completed the Easy PDF authorization confirmation web page – as below.



You may close this web page.
The authorization token has been cached on the website.
In the Mail Account dialog click the “Enable Authorization” toggle – Easy PDF will retrieve the authorization token from the web site and the account will be authorized.

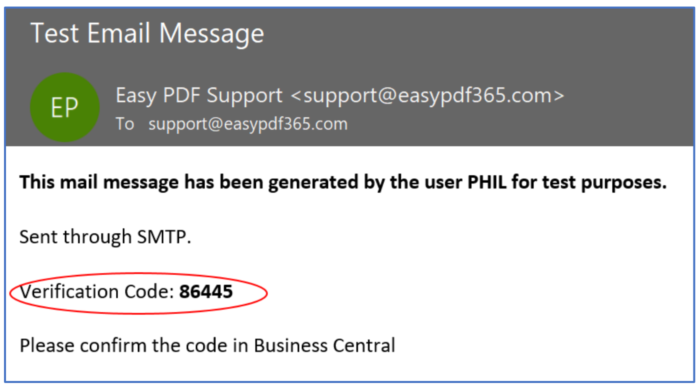
The last step is to verify that email can be sent using the account.

Press the “Send Test Email” action



Then select or enter your email address – you will need to receive the email to verify the account.

Send the test message and, when received, open it then copy the verification code.



Enter the code into the Verification Code field, then press the Tab key to force it to validate.

You may now use the account to send mail.

Basic Setup Complete

Congratulations, you have completed Basic Setup and can now begin using Easy PDF.

After Basic Setup, Next Steps

In the sections below we will do a deeper dive into a few areas that are common administration tasks. Where appropriate we will also refer to additional documentation for further detail.

- We will start by describing Easy PDF terminology … it's always smart to speak the same language
- Settings, Setups and Scope are important for administration, so we'll look at them.
- Managing users and reservations is next

Then we'll take a closer look at configuring

- General Setup
- Mail Setup
- Document Setup
- Templates & Themes
- Batch, since that is used quite a bit and has a few intricacies
- History
- The Email dialog

So, let's jump in…

Terminology

Definition of terms used in our documentation.

Settings Categories	See the Settings, Setup & Scope help page for greater detail. Easy PDF has four categories of settings: General, Document, Report and Mail.
Setup	A Setup is the collection of records accessible to a user for a given category. For example, the collection of a user's Mail Account records is called their Mail Setup, the collection of a user's Document records is called their Document Setup.
Scope	You will see references to Scope when discussing settings. Scope is the level of accessibility for a Setup. There are two types of Scope: SHARED and USER. When a Setup has SHARED scope the settings are accessible to all other users. When a Setup has USER scope the settings are only accessible to the user assigned the scope (perhaps PRIVATE would have been a better name).
Document	The term, Easy PDF Document, refers to the record containing settings that govern how the corresponding Business Central namesake record will be processed. Easy PDF Documents are always capitalized, e.g., POSTED SALES INVOICE. Sometimes you will see reference to a phrase like "the Document Setup for the POSTED SALES INVOICE". This is not grammatically correct since a Setup refers to a collection of records and that phrase refers to one record – but you get the idea so please excuse the grammar.

Registration	Registration is synonymous with License.
	A registration is required to use Easy PDF.
	There are three types of registrations:
	
	Subscription
	
	    For Cloud or Onprem customers who subscribe to the product.
	    Renews periodically (monthly, quarterly, or annually).
	    The number of user reservations is defined when registered.
	    The size of the Transient Reservation Pool is defined when registered.
	
	Persistent
	
	    For customers who purchase the product.
	    Renews annually (requires an annual software maintenance contract).
	    Unlimited user reservations.
	    Transient Reservation Pool not applicable.
	
	Upgrade
	
	    For legacy customers upgrading from Dynamics NAV.
	    Otherwise, equivalent to a Persistent reservation.
	
	Partner
	
	    For Partners who need to stage the product for implementation.
	    Time limited, does not renew.
	    The number of user reservations can be adjusted.
	    The size of the Transient Reservation Pool can be adjusted.

Reservation	Reservation is synonymous with “User License”. There are two types of Reservations: Persistent and Transient.
Persistent Reservation	A Persistent Reservation, once allocated, never expires. The holder of the reservation has persistent access to Easy PDF features.
Transient Reservation	A Transient Reservation expires after a period of non-activity called the Transient Reservation Timeout (defined on the Administration page). Transient Reservations only apply if the Transient Reservation Pool has been enabled. The holder of a Transient Reservation has access to Easy PDF features while their reservation has not timed out.

Scope, Settings, and the Administration Dialog

In its previous life as Easy PDF for Dynamics NAV, Easy PDF evolved to support two levels of settings – DEFAULT and USER. DEFAULT was a shared access level; USER was a private access level. All user Setups (General, Document, Report and Mail) were grouped together and were given either DEFAULT or USER access.

The USER access level evolved because users wanted to customize their settings independent of other users. For instance, they might use a different mail template or different mail account.

The above approach worked but it also led to administration overhead when trying to satisfy a larger group of users who had divergent requirements – applying one level of access to all user settings was not sufficient.

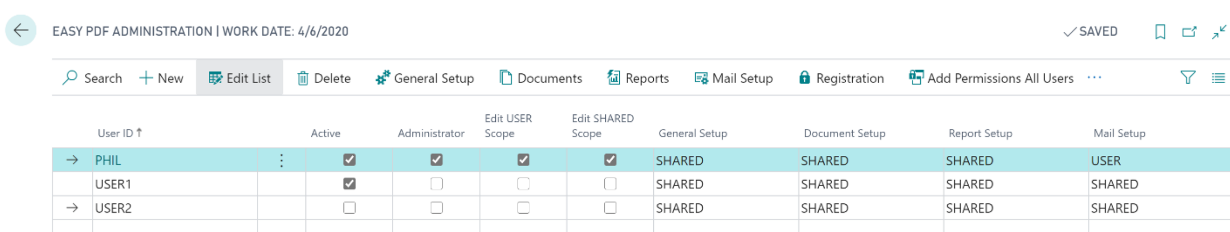
So, in Business Central, we have split the settings into four Setup categories and allowed access levels to be defined independently for each. We have formalized the name for the access level – it is now called Scope.

Another positive change in Easy PDF for Business Central is the introduction of the Administration and Settings dialogs. These two dialogs give, respectively, the administrator and the user access to the Easy PDF Setups while respecting Scope.

A helpful hint: Each user facing Easy PDF dialog contains a legend at the top that identifies the user and the scope – for instance, below is the legend on the General Setup dialog for the user PHIL. PHIL has been assigned SHARED Scope for the General Setup.

Manage Settings in the Administration Dialog

In the Administration dialog you can define the Scope for each user for each of the four Setups.



Here PHIL has been assigned USER Scope for the Mail Setup, and SHARED Scope for the other Setups.

USER1 and USER2 have been assigned SHARED Scope (the default) for all Setups.

To access a Setup for a particular user, select the user in the list then open the Setup using the buttons in the Action Bar at top.

Recommendation: We suggest that you start everyone off with SHARED scope for all Setups (which is the default). When you encounter the need to privatize settings for specific users you can then change the Scope for the Setups in question.

Editability

Note: Editability means the ability to modify, accessibility means the ability to access.

When logged into Business Central an Easy PDF Administrator will always be able to edit a user's Setup when it is opened from the Administration dialog.

You can grant a (non-administrator) user the ability to edit his/her Setups by selecting the "Edit USER Scope" and "Edit SHARED Scope" options.

When a user has been granted the "Edit USER Scope" option that user will be able edit Setups for which they are assigned USER Scope. Note: the "Edit USER Scope" option <u>does not</u> grant the ability to edit Setups in the SHARED Scope.

When a user has been granted the "Edit SHARED Scope" option that user will be able edit Setups for which they are assigned SHARED Scope. Note: the "Edit SHARED Scope" option <u>does not</u> grant the ability to edit Setups in the USER Scope.

<u>Important</u>: Because settings in a SHARED Scope affect all other users accessing that Scope, we <u>highly</u> recommend that you restrict edit access for the SHARED Scope only to users who fully understand the implications of modifying the settings.

Administrator Role

Lastly, in the Administration dialog, a user can be assigned the Administrator option. In this case the user will be granted the "EZP_EASYPDF_ADMIN" permission set and will have access to the Administration dialog and will be able edit all Setups for any user.

Note: Removing the Administrator option for a user also removes the "EZP_EASYPDF_ADMIN" permission set from their User Setup.

Of course, SUPER always has the Administrator permission.

Managing Users, Reservations, and the Pools

In Basic Setup we described how to allocate a reservation for a user, and in Terminology we defined the Persistent and Transient Reservations. Now we will make the connection between those.

First, we should note that during Trial there are no limitations on reservation quotas. This discussion only applies to post-Trial registrations. Also, Upgrade registrations only use the Persistent Reservation Pool.

As noted earlier, to use Easy PDF features the user must be allocated a reservation. In the Administration dialog, when a user is marked Active, they are allocated a reservation from the pool in which they reside.

When the Transient Reservation Pool is enabled a reservation may be moved between the Persistent and the Transient Pools (assuming there is space in each pool). The Transient Reservations are listed in the area at the bottom and are only visible if the Transient Reservation Pool is enabled.

When a user is “de-Activated” (i.e., marked not Active) the reservation allocated to the user is deallocated and is then available in the corresponding pool.

The Persistent Pool

The Persistent Pool is the default pool. Users who are allocated persistent reservations will always have access to Easy PDF features.

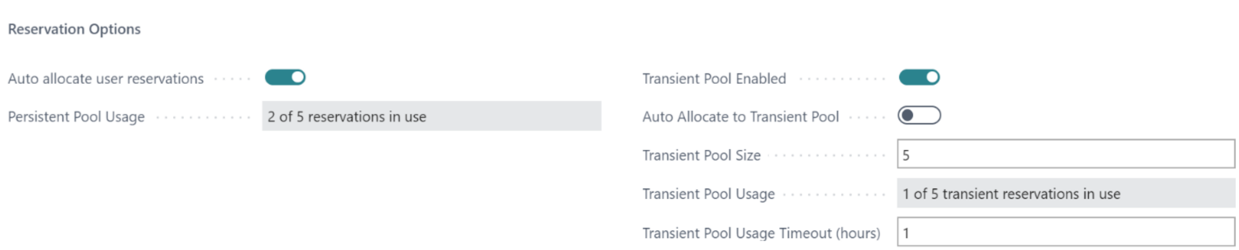
The Persistent Pool has a quota dependent upon the registration purchased and the size of the Transient Pool.

There is an option on the Administration page labeled “Auto allocate user reservations”. With this option enabled, users will be automatically allocated an active Easy PDF reservation one when they access Easy PDF features. This feature reduces the administrative burden of having to manually add users in the Administration dialog.

For the auto-allocate feature to work the EZP_EASYPDF_USER permission set must be pre-assigned to the user (else the Easy PDF features will not be visible to the user in Business Central). There is an action labeled “Add Permissions All Users”, that can be used to add the EZP_EASYPDF_USER permission set to all existing users with a User Setup (i.e., the list you will see if you expand the User ID dropdown).

The Transient Pool

The Transient Pool is optional. If you purchased a registration with a number of reservations exceeding the Transient Pool Threshold, then you will see the Transient Pool options in the Administration dialog.



In this picture the registration has a total of 10 reservations – 5 are allotted to the Persistent Pool and 5 are allotted to the Transient Pool. The Persistent Pool has allocated 2 (persistent) reservations and the Transient Pool has allocated 1 (transient) reservation.

Auto-allocate has been turned on for the Persistent Pool, so any auto-allocated reservations will be placed in the Persistent Pool. If Auto Allocate to Transient Pool was enabled, then auto-allocation would place the allocated reservations into the Transient Pool instead.

The Transient Pool Usage Timeout is set to 1 hour (the minimum) – which means that after 1 hour of inactivity the reservation allocated to the (1) transient user will be a candidate for deallocation. That means, if another Transient Pool user requires a reservation all idle reservations will be deallocated and one will be allocated to that user in need. (Which, in the pictured scenario, doesn't really matter since there are 4 unused reservations in the Transient Pool and hence, the user guaranteed to get a reservation).

Transitioning from Trial

When transitioning from a Trial registration to a purchased registration there may be more Active users than is supported by the quota of the purchased registration. To avoid conflict, Easy PDF always deactivates all user accounts when transitioning from a trial to a purchased registration. You will need to manually activate user accounts after the transition.

Configuration

In the next few sections, we will discuss common configuration tasks.

We suggest that you work thru these tasks when Easy PDF is first installed and before you add many users – that might give you some idea of how you might wish to manage things when the number of users starts to increase.

We recommended above that you start off all users with SHARED scope for all Setups. We will assume that is the case as we work thru the following sections.

When describing the settings in each Setup we will only describe those that differ from the default configuration or where some insight to the implications of changing the setting is important.

General Setup

For further General Setup details see the online help – here.

General Setup contains settings that impact multiple areas of Easy PDF (as opposed to, say, Mail Setup which strictly impacts mail delivery).

General

Preferred Language - Set to match your primary language.
At installation this setting is set equal to the current user language setting.
It is used as the default language for new messages created by Easy PDF.

Customer Delivery Method - Your preference
The default Delivery Method setting for new customer records.

Vendor Delivery Method - Your preference
The default Delivery Method setting for new vendor records.

Email

Silently ignore empty addresses – Enable this option
When set, Easy PDF will not show an error when there are no recipients to an email.
This will enable the Email Dialog to display even when no recipients are present.

Cc to Sender when email set – Your preference
Include the sender address as a Cc recipient

Show Email Confirmation – Your preference
Show a confirmation dialog when an email is successfully sent
When sending email without previewing this option provides indication of success.
Does not apply to email sent from batch.

FAX

Easy PDF supports FAX delivery by sending email with attachments to an online FAX service. To use FAX delivery, you will need to create an account with the FAX service provider of your choice.

FAX Server Domain – Set if using a FAX service
Set to the domain of the online FAX service. e.g., @efax.com

Show FAX confirmation – Your preference
Display a confirmation dialog when a FAX is successfully sent.

Batch

The default settings for batch should be sufficient to start.

Batch Mail Account – Leave blank for now
This field will populate onto the batch header for any batches created by the user. Similar to the discussion above for the Email Account, this setting allows you to override the Default Batch Account in Mail Setup.

Use Batch Mail Account for all Entries – Leave off for now
This field will populate onto the batch header for any batches created by the user. When set, the mail account specified in the batch header will be used for all batch lines when sending the batch, thus overriding any mail accounts specified on the batch lines.

Batch Name Template – the default value is usually sufficient.
This value will be used when naming new batches created by the user. See the online help for a description of the tokens.

Remove Batch after all entries are processed – Your preference
When enabled, batches will be removed when all entries are successfully processed.

Consolidate Email entries – Your preference
This value will populate onto the batch header for any batches created by the user.
When enabled, multiple batch lines to the same recipient will be consolidated to a single email with multiple attachments. Note, some email servers place limits on the size or number of attachments for a single email.

Merge PDF Attachments – Your preference
This value will populate onto the batch header for any batches created by the user.
When enabled, multiple PDF attachments for a single email will be merged into a single PDF attachment.

Continue on Error – Your preference
This value will populate onto the batch header for any batches created by the user.
When enabled, batch processing will attempt to continue if an error arises whilst processing a batch entry.

Allow USER Scope – Leave off for now
Only valid when the General Setup is USER scope.
In a nutshell, when off, the system does not allow USER Scope Mail Setups for batch. When enabled, USER Scope Mail Setups can be used for batch.
Because… batch is a considered a shared resource (everyone has access to a batch). If a USER Scope Mail Setup is assigned to a batch then the batch becomes dependent upon that user

setup – usually you do not want that dependency, but there are exceptions so we provide the option.

To fully grasp the implications of this option you should read the online help that describes Scope – About Settings, Setups, Scope and Editability.

Storage

Easy PDF supports sending batch from the Job Queue.
If a job queue batch generates printed collateral, then that collateral should be stored somewhere for subsequent access (else it is discarded).

Saas/Cloud: For this environment storing to an OneDrive folder is supported. If you enable this option then you will need to define the account and execute the Office 365 authorization flow.

Onprem: For this environment we provide a 'Filesystem' control add-in to enable storage to the filesystem of the host running the job.

History

You will only see the History settings when General Setup is SHARED Scope. Because History is a shared resource (everyone has access to it), for uniformity, only the settings in the SHARED scope are used.

The settings for History are self-explanatory, see the online help for details.

A point to note: If you are sending A LOT of email with large attachments and/or large message bodies (i.e., inline image heavy HTML) then you have the potential to bloat the Easy PDF History table. Easy PDF uses a compressed history table but, if you save A LOT of messages then it can use A LOT of space.

You can mitigate that issue by reducing the history retention period or turning off the saving of message bodies, attachments, or both.

Mail Setup

To familiarize with Mail Setup we suggest that you first read the help page for Mail Setup, here. It provides some insights to the use of mail accounts for branding purposes.

Important Note: Easy PDF Mail Accounts are independent of Business Central Mail Accounts. When first installed, Easy PDF will attempt to create an Easy PDF SMTP Mail Account from the default Business Central SMTP Mail Setup record if it exists. However, it is not possible to copy the password for the default SMTP Mail Setup so, to use the account, you will need to input the proper credentials and verify the account.

Account Types

Easy PDF currently supports SMTP and API based mail services. SMTP is the (long time) industry standard protocol for mail exchange (it's been around since the '70s). We recommend using SMTP accounts unless there is a compelling reason to use an API account. API accounts use a vendor proprietary interface for mail exchange. Each vendor API has its own idiosyncrasies so Easy PDF must implement compliance with that interface per the vendor requirements. Currently Easy PDF supports the Office 365 Graph, and Gmail API mail services (Yahoo and others will be added in the future).

Common Fields

When defining mail accounts Easy PDF allows you to set the following common fields on each account:

Default Account (non-batch) – when set, the account will be the preferred account for non-batch mail delivery. Which means, the account will be used to populate the Email Dialog From field when the dialog is displayed, or the mail account will be used to send email when preview is not enabled.

Preview before sending (non-batch) – when set,
When set, the Email Dialog will display when an email is initiated from a Business Central page. When it is not set, email will be delivered without preview.

Use for Batch – when set, the account can be used for batch mail delivery.
This setting must be enabled for an account to be available for batch mail delivery.

Default Batch Account – when set, the account will be the preferred account for batch mail delivery. Which means, the mail account will be used to populate the Mail Account field in the batch header when a new batch is created.

SMTP Accounts

When defining SMTP mail accounts, the SMTP fields are displayed. See the online help for a description of the fields. Similar to the SMTP Mail Setup dialog, Easy PDF provides actions to auto-fill the fields with values suitable for the Office 365, Gmail or Yahoo SMTP servers.

API Accounts

To use an API account (Office 365, Gmail) you will need to authorize Easy PDF to send email on your behalf. To initiate authorization, you must first enter the Email Address and Email Display Name for the account, then click the Authorize link. That will open a new browser tab and will start the vendor's authorization sequence. When you have successfully completed the authorization sequence you will see a confirmation page. You can then close the browser tab and return to the Mail Setup dialog. To begin using the account you will need to enable the **Activate this account** option. (That step retrieves an authorization token that is subsequently used when sending email).

Office 365 Graph API

One idiosyncrasy of the Office 365 Graph API is that it won't let you change the Email Display Name. You can put whatever you like in this field but Office 365 will ignore it. Instead, they will use the name associated with the account.

Other than the above, Office 365 is fairly liberal with their API. There are some throttling limits that you should be aware of if you use an Office 365 account for batch delivery. Office 365 Outlook also plays some games with HTML content if you use the **Send to Drafts** feature (they are not severe and you probably won't notice).

Lastly, to use the Alternate Sender Name/Address feature you will need to use the Office 365 Admin Center to grant the authenticating account (Email Address field) Send As permission to the Alternate Sender account.

Gmail API

The Gmail API interface is similar to the Office 365 Graph API interface with the following differences.

- It does not have the Email Display Name limitation – you can use any name you like (which is good for branding).
- It has more restrictive throttling limits (Easy PDF uses the messages.send Method) so it is not a good candidate for batch delivery.
- It completely mangles the message HTML if using the Send to Drafts feature (the drafts.create Method).
- The quota limit for the Send to Drafts feature is so low (10/day) that it is worthless.

Because of those last two issues we have disabled the Send to Drafts feature for Gmail.

Other APIs

The Yahoo API is on the docket to be added to Easy PDF.

If you have preference for any other mail APIs send a note to support@easypdf365.com and let us know. We will evaluate for inclusion in a future release.

Document Setup

The Easy PDF Document is core to Easy PDF.
Whenever an email is generated the Easy PDF Document is involved.

We recommend you at least skim through the field descriptions for the Document Setup – here.
In this section we will provide some insight and context to some of those settings.

General Group

Description – this field is used when naming HTML or TEXT templates for the document. It will be used to prefix the template name – e.g., "Sales Order HTML ENU".

Use SHARED Scope – this field is only visible when the Document Setup has USER scope.
The field provides a way to "disable" or "ignore" a USER scope document. You might use this option if you wish to configure the user's Document Setup with a limited number of "customized" documents. In that case you would assign USER scope for the Document Setup and enable this option for all documents except those requiring customizations.

Additional Attachments – with this option you can add documents to be attached to all email based on this document type. For example, adding a generic Terms & Conditions document for all sales or service communications.

Report Group

Report ID – this field identifies the Business Central report to be printed and attached to the email. You can specify any Business Central report but it only makes sense to select a report based on the underlying table for the document in question.

For example, with the Sales Order a report based on the Sales Header makes sense. When Easy PDF prints the report, it will pass a record from the Sales Header table to the report. When Easy PDF formats the message body for the email it will use that record to perform field merge.

Attachment Filename – this field contains a template for the name given to the printed attachment. This field can contain token expressions that will be field merged.
e.g., Sales Order Confirmation [[No.]]

Save as Format – specified the format for the printed report.
Business Central supports printing any report to one of these formats: PDF, Word (.docx), Excel (.xlsx) and XML. In practice though, only reports designed for each format will print well to that format. So, select accordingly.

Delivery Options Group

Sell-to Customer Type – only visible when the document type is a sales document.
Sales documents have both a Sell-to and Bill-to customer reference. This option lets you specify which customer reference to use when finding recipients for the document.

Sell-to Vendor Type – only visible when the document type is a purchase document.
Similar to the above this option lets you specify which vendor reference to use when finding recipients for the document.

Ship-to Addressing – this field applies to documents that support a Ship-to Address reference.
The options are:

" " (blank):	do nothing
Exclusive:	Send only to the email address on the Ship-to Address card
AddTo:	Add the Ship-to Address card email address to the To: recipients
AddCc:	Add the Ship-to Address card email address to the Cc: recipients
AddBcc:	Add the Ship-to Address card email address to the Bcc: recipients

When Easy PDF encounters a document with a Ship-to Address (sales, purchase or service documents) it inspects the Ship-to Address Email field – if it has a value then it will use that address according to the precedence set by this field.

Deliver-to Search Order – this field determines the priority of the email address on a Customer/Vendor Card relative to an associated Contact Card.

Batch Group

This group will only be visible for those document types that support batch delivery (Customer Statement, Posted Sales Invoice/Credit Memo/Shipment, Posted Service Invoice/Credit Memo/Shipment, Issued Reminder, Issued Finance Charge Memo, Remittance Advice)

Send using this Mail Account – use this field to identify a Mail Account to be used when sending documents of this type from batch.

Use of this feature allows you to 'brand' email for a given document type. For example, for purchasing documents you may wish to define a Mail Account with a From address of:

Purchasing Department <purchasing@yourcompany.com>

Print hardcopy when Sent – use this option if you must have a physical print of the document when it is sent from batch.

Batch when Posted/Exported/Issued,
Send when Posted/Exported/Issued – these two options are mutually exclusive, they allow you to identify when Easy PDF should automatically add the document to a batch or send it immediately at the time that it is posted, exported (remittances) or issued (reminders or finance charge memos).

History Group

This group will only be visible when the Document Setup has SHARED scope.
The fields in this group are relatively self-explanatory.

Email Template Group

This group contains fields used to customize the email message body when sending documents of this type. See the help file for a detailed description of each field. Here, we'll give some insight to the use of templates for email customization.

First, for any Easy PDF document type, you may define as many templates as you like. You might use different templates to support language dependent messaging (see help).

Note: A future version of Easy PDF will support selection of a template from the Email Dialog – allowing you to dynamically select the email body content from the available templates. We are also considering a rules-based approach for template selection – e.g., select a template based on the value of an order, etc.

In Easy PDF, the template content can be derived from HTML, Plain Text or a Business Central Report using a specified Custom Report Layout.

In the case of HTML or Plain Text, Easy PDF stores the raw content and runs it through field merge before adding it to the email message.

In the case of a Custom Report Layout the content is obtained by printing the Report to HTML using the specified report layout. Easy PDF does not perform field merge on templates of this type.

About Field Merge

Easy PDF supports token/field substitution within HTML or Plain Text templates.
The substitution is performed at the time when the email message body is being prepared.

Tokens within the template content are extracted and substituted with data from the field they reference in the associated document record (e.g., a Sales Header record for a Sales Order confirmation).

Field merge (a.k.a. token replacement) is described in detail in the online help – here.
For simple field merge examples the description below will be sufficient.
For more complex examples see the help page.

We'll give a few examples here to give you a taste for field merge.

A simple token might look like this:

Sales Order **[[No.]]** → (which yields) Sales Order 1001

Here, the token is the value "[[No.]]", which, in this context is a reference to the "No." field of the sales order (SalesHeader record). After token replacement it yields the value "1001"

A slightly more complex example:

Sales Order [[Order+Date;0;9]] → Sales Order 2020-05-30

The above token references the "Order Date" field of the sales order, and it is expanded using "XML format". (The "0;9" bits are passed to the Business Central AL Language "Format()" procedure which, for a date field, cause it to be formatted with "XML format").

A relatively complex example:

[[(u){Company+Information}Phone+No.;20;]] → %20%20%20%2B1%20%28123%29%20456-7890
which would display in HTML as: "   +1 (123) 456-7890"

This token references the "Phone" field of the "Company Information" table. It is expanded into a text string with a length of 20 characters. The resulting string is then URL encoded (you need to URL encode the string else the mail client's HTML viewer will translate the '+' to a space and strip the leading space).

We recommend that you review the "About Field Merge" help page if you need to use complex tokens (or contact us for guidance).

Report Setup

Field Merge

Templates & Themes

Batch

Email Dialog

-- This document is a continual work in progress, please check back for updates… --

-- End of Document --