



ebs-plus

Product Brief

File/Version:

0.1

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1 Introduction

ebs-plus is a utility for NAV 2013 R2 (Cumulative Update 8) users. It provides batch emailing and printing of the following two standard NAV reports to Vendors and Customers.

- a. Vendor - Payment Receipt
- b. Customer Statement

1.1 Target Users

The solution has been designed for the customers in the **Australian Market** and is not intended or designed to be used by other countries or regions.

1.2 Solution Version

The current version of ebs-plus is **1.0.0**.

1.3 License

The solution requires **Microsoft Dynamics NAV 2013 Starter Pack license**.

1.4 Dynamics NAV Version

The solution requires **Microsoft Dynamics NAV R2, Cumulative Update 8**.



2 Batch Emailing Customer Statement and Vendor Remittance

This customization provides a utility to users to send the customer statements through email directly from within Dynamics NAV. It generates the output of standard customer statement report as PDF and send them as attachments to the selected customers.

Similarly it generates the output of standard vendor payment receipt report as PDF and send them as attachments to the selected vendors.

The user can setup, for each customer and vendor, the email address to which the statement/payment receipt will be sent and the preferred method to receive the documents i.e. by email or printed hard copy.

2.1 How it works

On the Communication tab of the Customer card set the preference of the customer for receiving the statement, you can set it to either **E-mail** or **Hard Copy**. Then the batch process is run (described later in the document) system uses this field to determine whether to send the Statement by E-mail or print it to the default printer. Also there is a special **Accounts Email** field. This field will be the to-address for the email.

Similar settings are available on Vendor card.

Once you have the above settings configured on all your customers and vendors, you can use the batch processes to send the emails and print statements and remittances.

To send customer statements run the following report from the NAV menu.

[Departments / Financial Management / Receivables / Documents / Send Customer Statement by Email](#)

This report has the standard customer statement request page with one additional option called **E-mail Only**. When the **E-Mail Only** flag is checked no statements will be generated or printed for customers with an **Accounts Correspondence Type** of **Hard Copy**, and only emails will be sent.

For Vendor Remittances run the following report from NAV menu.

[Departments / Financial Management / Payables / Documents / E-Mail / Send Vendor Remittance by Email](#)

Just like customer statements, this report has the standard vendor payment receipt request page with the additional **Email Only** option and has the same purpose.

When the statement or the remittance run is complete, the Communicator Log is shown, with a list of all documents generated during the run, and any errors that occurred during the process.

This list of emails sent and hard copies printed can be accessed later on via

[Departments / Administration / IT Administration / General / Communicator Log](#)



2.2 Setting up Emails:

You can customize the emails that are sent to customers and vendors. EBS Plus provided a way to setup email templates and then tell the system which template to use for statements and remittances. You can have as many template in the system as you like but there can only be one active template for Customer Statements and one for Vendor Remittances.

Email templates can be created or modified from:

[Departments / Administration / IT Administration / General / E-Mail Setup List](#)

For each template you can define the following:

Field	Description
Code	A unique identifier for this template
Description	The description of the template
From E-Mail Address	The From E-mail Address that will be used when sending e-mails with this template
From Sender Name	The name of the sender that is used on e-mails sent using this template; if this is left blank the From E-Mail Address is used
CC From Address on E-Mails	Include the From E-Mail Address on all e-mails sent using this template. Since the bulk e-mail feature uses SMTP, the e-mail does not go into a Sent Items folder; this therefore assures that a copy of the e-mail sent to each recipient is kept
Standard Text Code	The Standard Text Code that is used to generate the Subject and Body text of the e-mail for this template
Standard Text Name	Shows the name of the Standard Text record relating to the code selected above.

The Standard Text Code and the Extended Text Lines related to the standard text are used to format the subject and body of the e-mails in selected areas.

The **Description** on the Standard Text Code is used to create the subject of the e-mail. There are two placeholders for the e-mail subject:

%1 = Document No.

%2 = From the Company Information screen, the **Name** (and **Name 2** if specified) fields

If a Standard Text Code is not supplied for a particular e-mail type, the subject on the e-mail will be set as the name of the PDF file attached to the e-mail.

The e-mail body is generated based on the Extended Text Lines specified against the Standard Text Code. These are entered in the Standard Text Codes screen, via the Extended Texts button on the Navigate tab. The General section can be left blank.

The Lines section is where the Body text of the e-mail is entered. Each line can only take a limited number of characters, but each line is appended to the last and added to the body of the e-mail. The
 placeholder



indicates a line break, as the Body of the e-mail uses HTML. Other HTML code can also be used in this area to format the font and other aesthetic elements of the e-mail text.

Once you have created the templates you need to tell the system which ones to use. To do that run the **EBS Plus Setup** from:

[Departments / Administration / IT Administration / General / EBS Plus Setup](#)

Select the template for Customer Statement and Vendor Remittance on this screen.

Note that this feature uses the SMTP settings from NAV, these settings can be configured at:

[Departments / Administration / IT Administration / General / SMTP Mail Setup](#)

For more details on SMTP setup refer to the NAV manuals.