

Give your customer more time by setting their Invoices to automatically email after posting a batch. Using the Mass Report (formally – Data Stream) Dynamics Report Manager (DRM) can be used to automatically email reports.

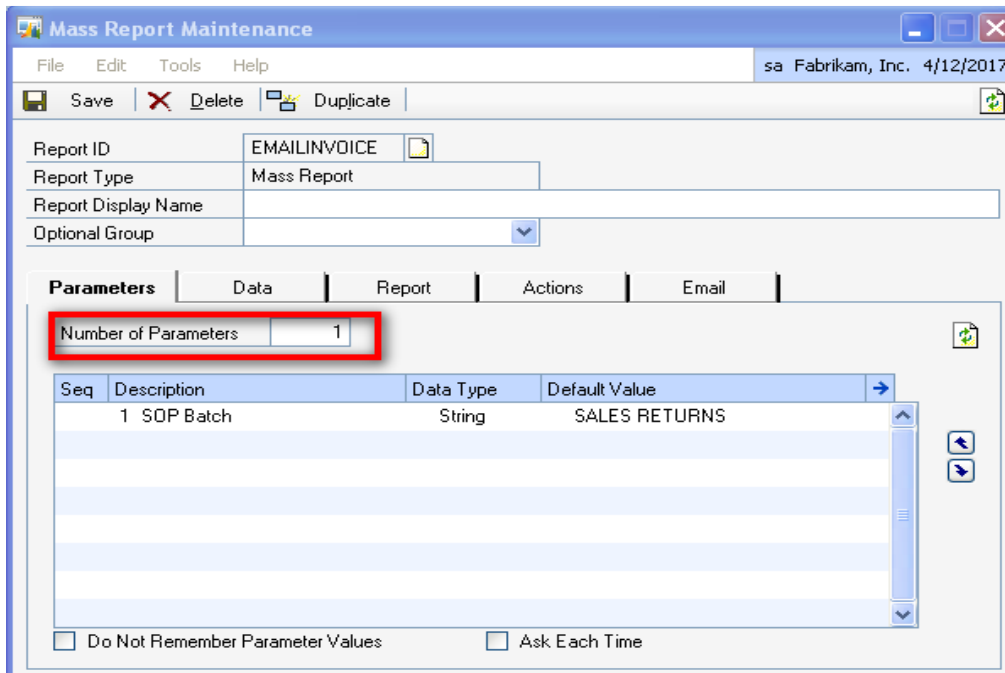
The following steps are for the Mass Report feature in DRM for Great Plains 10.

Steps :

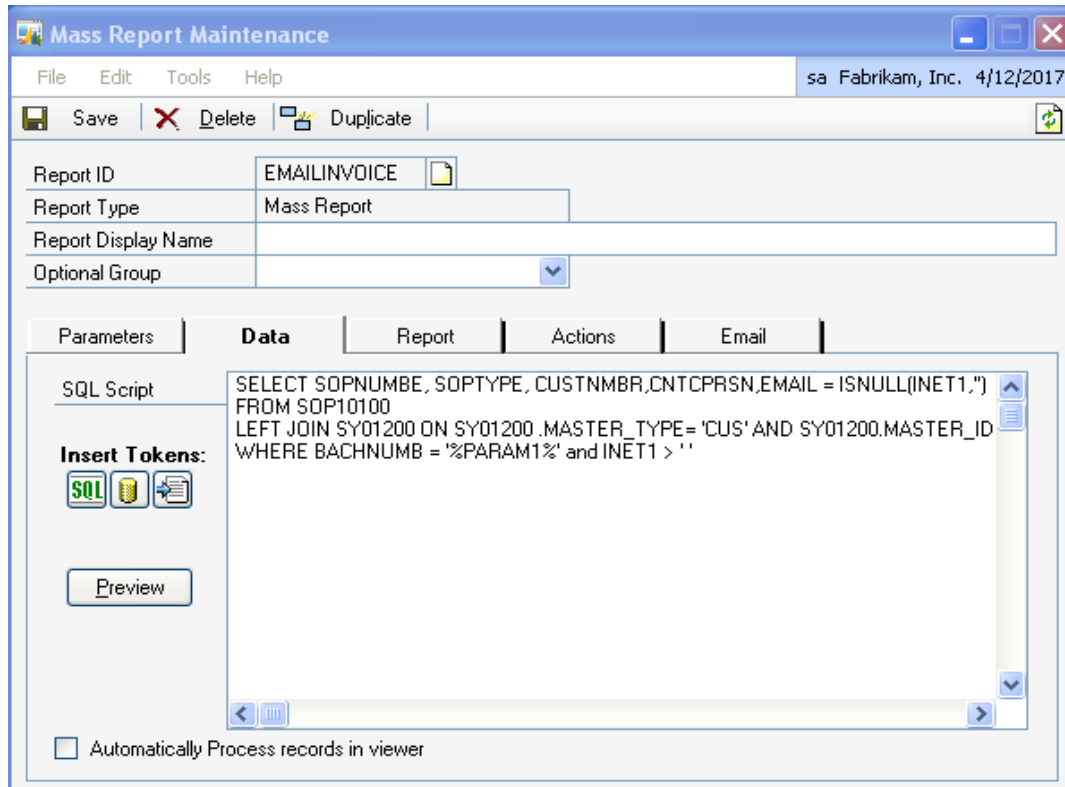
Mass Report Setup:

1. Create a Mass Report report ID (Admin View | Reports | New Report).
2. Under the Parameters tab create a parameter(s) you will use to group the reports you will be emailing (e.g. Batch ID, Sales person, etc.)

Below we have created a SOP Batch. To create a parameter(s) enter the number of parameters you would like to create in the Number of Parameters field.

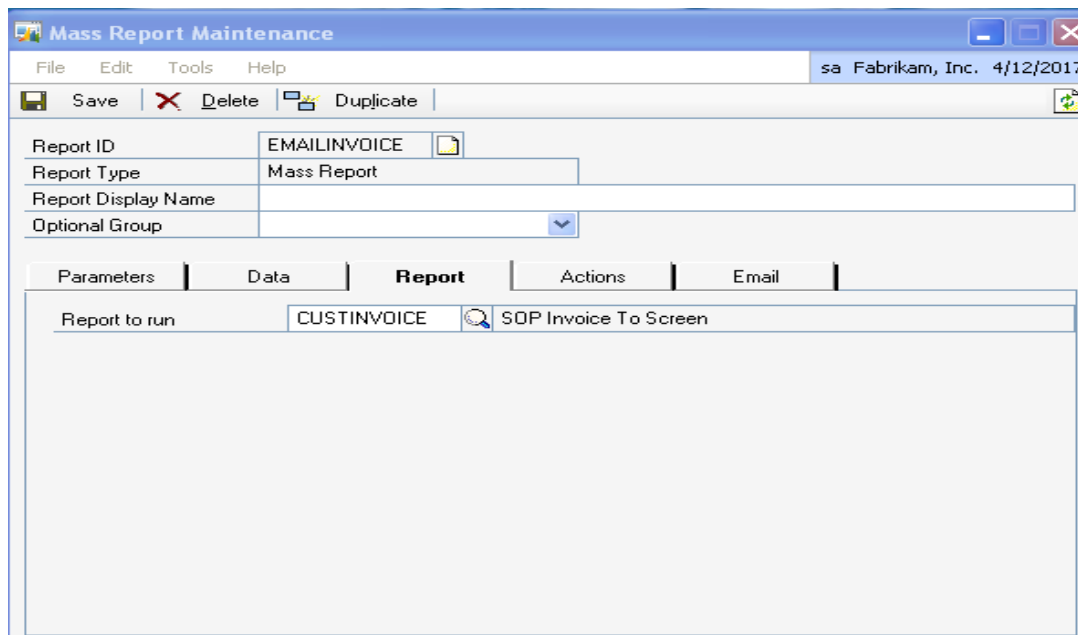


3. Under the Data tab create a SQL script to pull in the parameter values you will need to pass to your report. You can include additional fields as informational fields as well. In this example my SOP Invoice has a parameter of SOP Number and SOP Type.

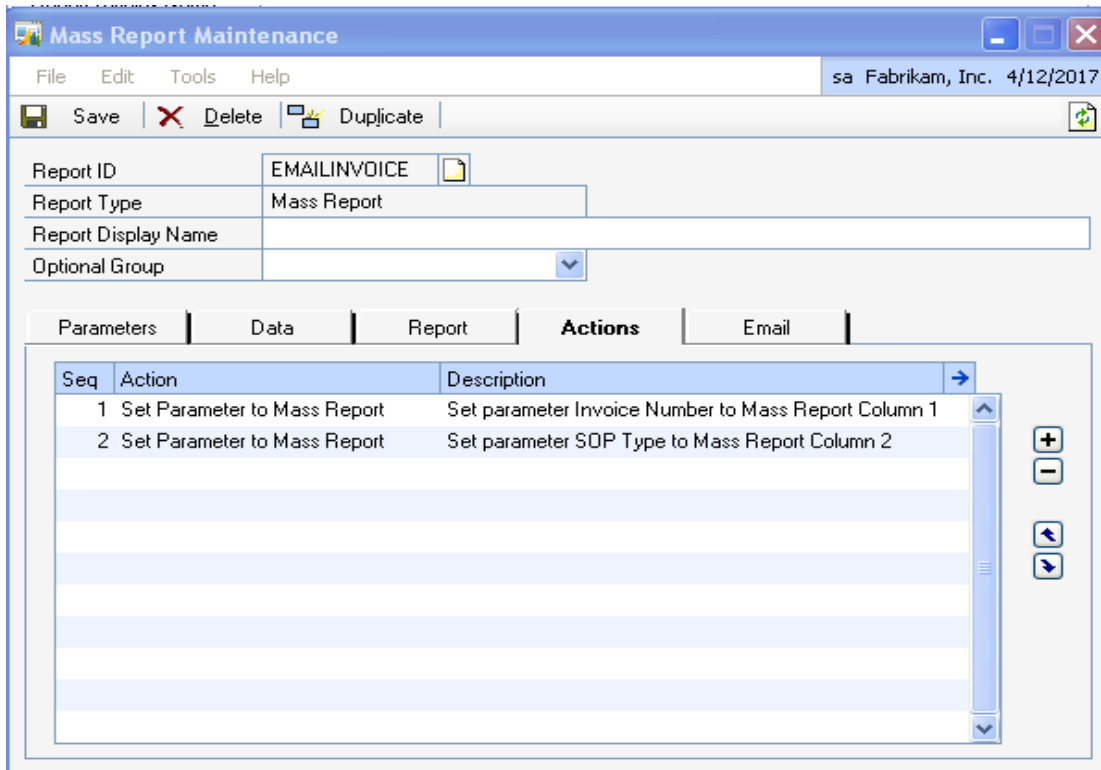


NOTE: The Insert Tokens and Preview button can be used to create and review your script.

4. Click on the Report tab and link the Invoice you would like emailed.



- Under the Actions tab is where we will link the data results from the Data tab to the parameters on the report we linked under the Report tab. When linking the values to the parameters we will be using the Column number they are found in the SQL script.



In this example you will notice, by looking back at the Data tab, the Invoice number is listed in column 1 and the SOP type is listed in column 2.

- The Email tab is where we will specify which email address(s) we will be emailing the invoice to. Using the Insert Tokens we can insert columns from our Data tab to insert the email address(s). You can also use column information to tailor your email message. In the example below you will see I've pulled the Invoice number (column 1 from Data tab) into the Subject line and have included the contact name (column 4 from Data tab) in the email message.

Mass Report Maintenance

File Edit Tools Help sa Fabrikam, Inc. 4/12/2017

Save Delete Duplicate

Report ID: EMAILINVOICE

Report Type: Mass Report

Report Display Name:

Optional Group:

Parameters | Data | Report | Actions | **Email**

To Address: %COLUMN5%

CC Address:

BCC Address:

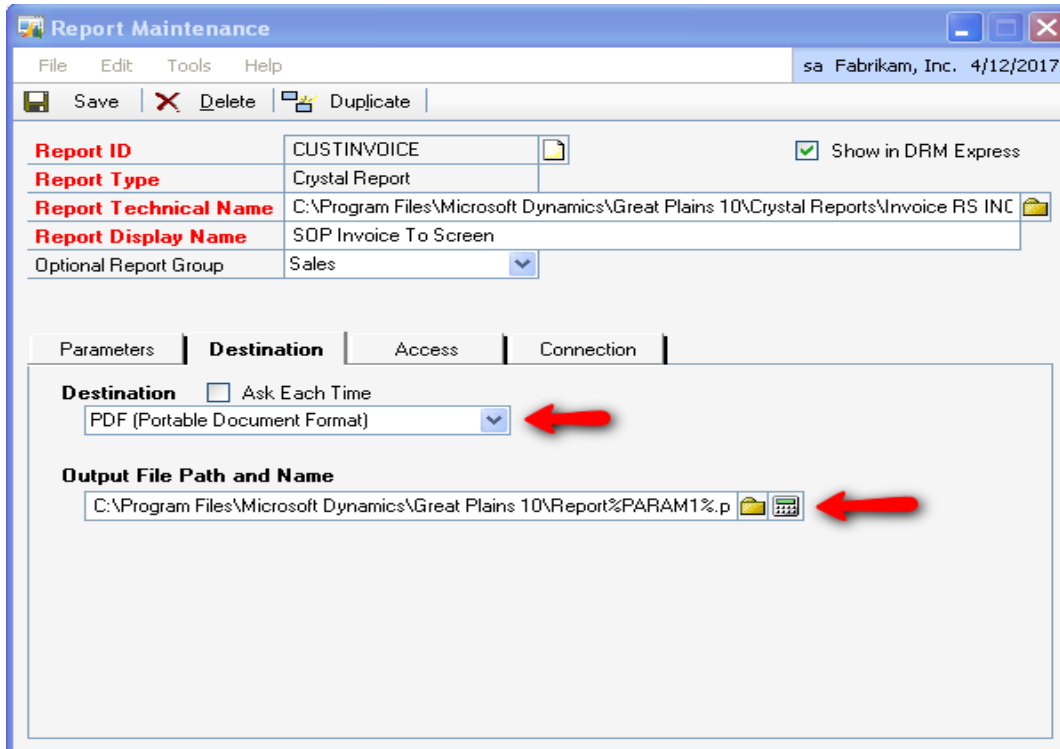
Email Subject: Invoice %COLUMN1%

Email Message: Hello %COLUMN4%,
Attached you will find your current invoice.
Please direct all invoice questions to our accountant department at
accounting@company.com.
Sincerely,
Pilar

Insert Tokens:

Crystal or SRS Report:

1. In order to email a report the Destination will need to be set to PDF. The file name, in the Output File Path and Name, will need to be unique. Use the Output File Builder to create unique file name.



Launch Point Setup (Optional): Use the Launch Point feature of DRM to automatically start the email process when a batch is posted.

1. Under the Settings tab add a Field Change trigger to the Print Icon on the Sales Batch Entry window.

Launch Point Maintenance

File Edit Tools Help sa Fabrikam, Inc. 4/12/2017

Save Delete Duplicate

Launch Point ID SOPBATCHPRIN

Launch Point Type Window Field or Button

Description Print SOP Batch and Email

Optional Group Sales

Settings Reports Access Actions

Trigger Type Field Changed

Attach Type Before and After original script

Product Microsoft Dynamics GP

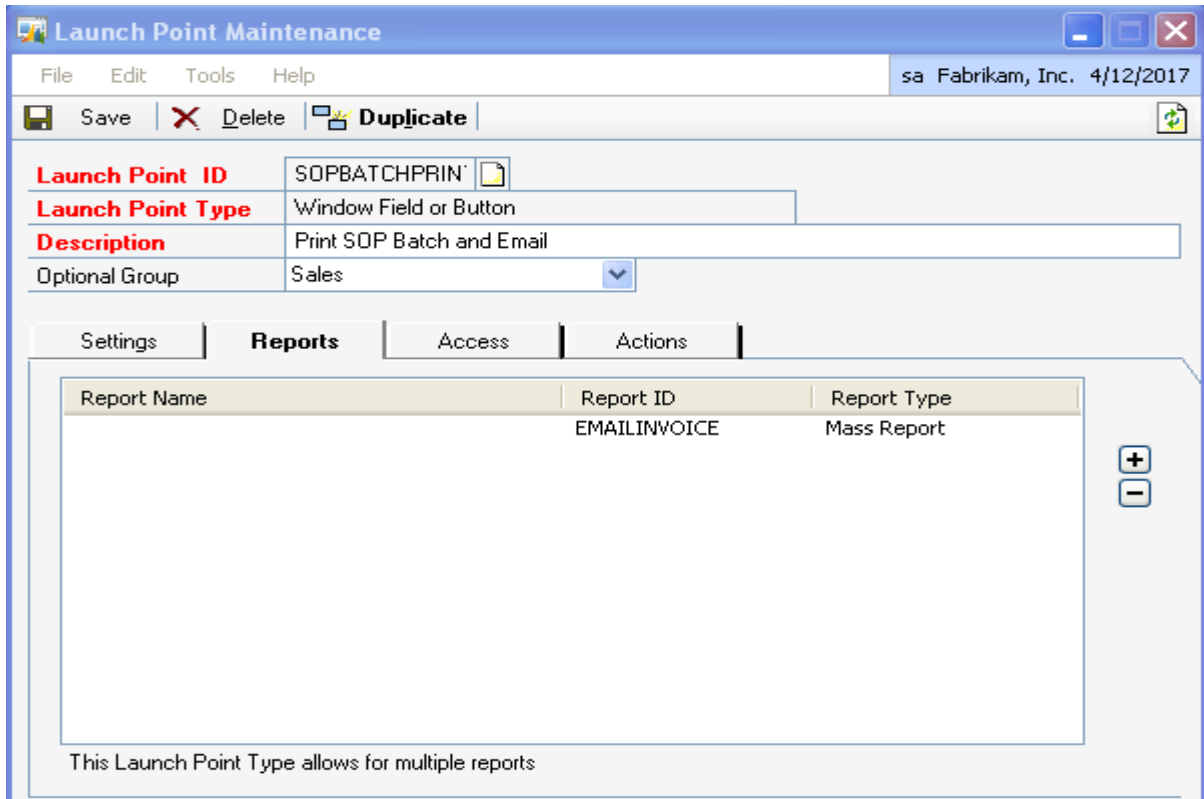
Series Sales

Form Sales Batch Entry

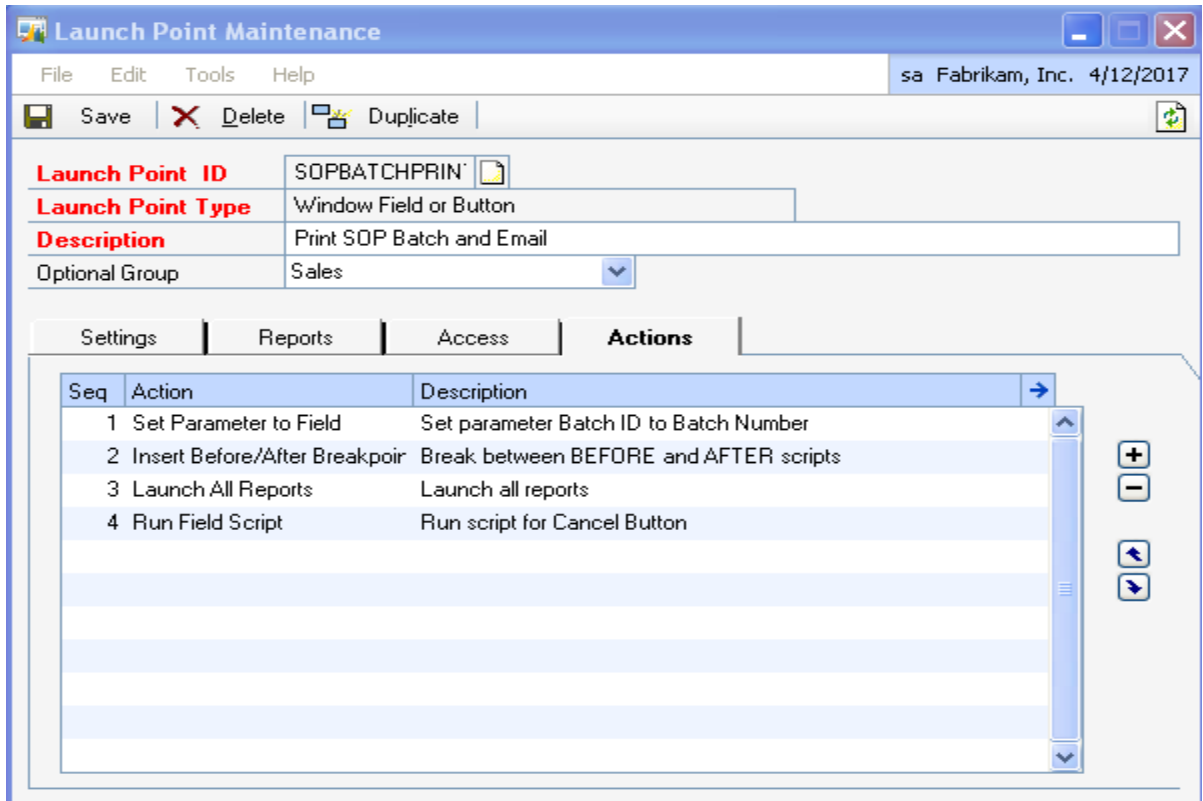
Window Sales Batch Entry

Field WindowPrint

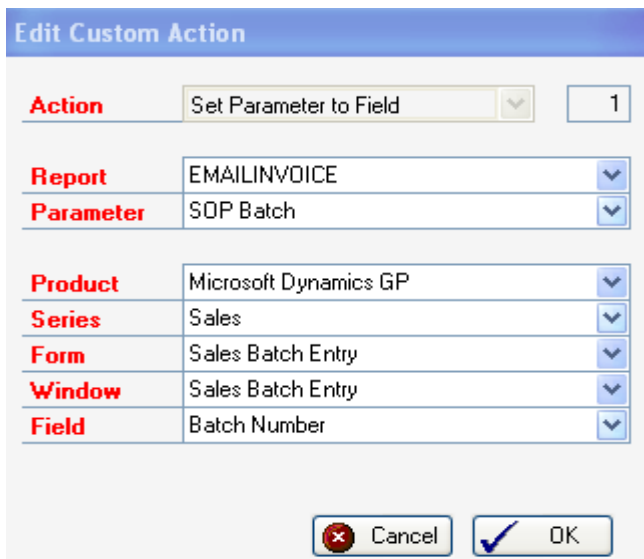
- Under the Reports tab attach the Mass Reports ID you created in the first section of this document.



3. Under the Actions tab setup an action to scrub the SOP Batch number from the Sales Batch Entry window and pass it to the report.



a. Details of Action 1:



2. We will also need to add a Break between Before and After scripts and Launch all reports action (see screen shot above).
3. (Optional): You can also add an action to have DRM close out of the Sales Document Print Options window automatically.

Edit Custom Action

Action	Run Field Script	4
Product	Microsoft Dynamics GP	▼
Series	Sales	▼
Form	Sales Document Print Options	▼
Window	Sales Document Print Options	▼
Field	Cancel Button	▼

 Cancel  OK