

Mail Inbox Setup

Quick start reference:

To use the Mail Inbox functionality, follow the following steps:

1. Enter the provided login details that were provided by AAS At Work B.V. and the email address of the email account that should be considered as the Inbox
2. Connect to the Mail Inbox
3. Retrieve the email and check if the email is assigned to the correct contact and document(s)
4. Indicate whether the attachments are main or sub-attachments
5. Process the mail

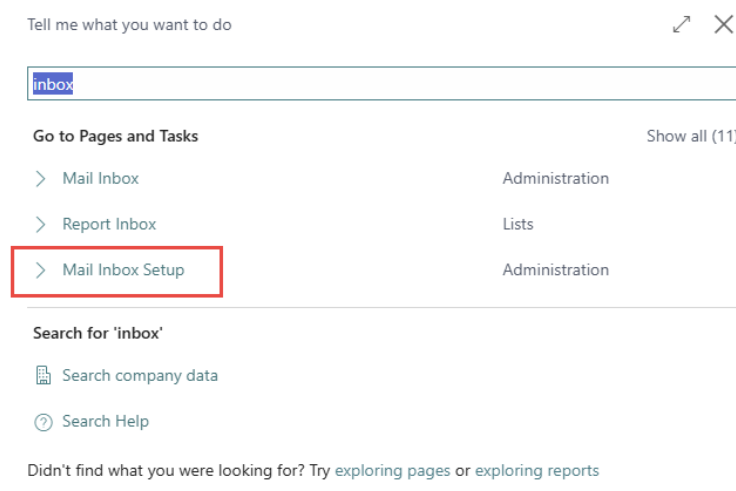
Prerequisites

The mailbox that you want to use must be a delegated mailbox (with a password) and NOT a shared mailbox (without a password).

By adding different users to this delegated mailbox, they can view this mailbox in Outlook, retrieve it in AAS Mail Inbox, and see what has already been read and what has not been read. To read the email, a setup must first be performed via Mailbox

Enter the provided login details

To enter the Mail Inbox Setup, go to Tell Me:  and type Inbox or Postvak IN. Select Mail Inbox Setup.



In the Mail Inbox Setup Screen, enter the following fields:

The screenshot shows the 'Mail Inbox Setup' interface. At the top, there is a navigation bar with a back arrow, an edit icon, a plus icon, a trash icon, and a 'Saved' status. Below the title 'Mail Inbox Setup', there is a 'General' tab. The form contains several fields: 'Email Address Inbox' (with a red circle 1), 'ClientId' (with a red circle 2), 'ClientSecret' (with a red circle 3), 'OAuthAuthorityUriTxt' (containing 'https://login.microsoftonline.com/'), 'RedirectURLTxt' (containing 'https://businesscentral.dynamics.c'), 'Last Synced' (containing '12-12-2024 16:10'), 'Last Synced by' (containing 'ALBERT'), 'Remove lines after pr...' (a toggle switch), 'Max. number of emails' (containing '100'), 'Min. Size Attachment...' (containing '0'), and 'Use authorization fro...' (a dropdown menu set to 'No').

Email Address Inbox: enter email address that you want to read

ClientId: enter the value that was provided. This should be ffde3561-3db4-44ce-839a-d7b896e5d351

ClientSecret: enter the value that was provided by AAS At Work B.V.

OAuthAuthorityUriTxt: this value will be entered automatically.

RedirectURLTxt: this value will be entered automatically.

Remove lines after processing: this is initially set to yes. Removing the lines means removing the processed lines in Business Central and not in the original mailbox.

Max. Number of emails: here you can define how many email messages that you want to retrieve in one retrieval action. The default setting is to retrieve a maximum of 100 emails. This can be increased to a maximum of 1000.

Min. Size Attachments: Logos in email messages can be treated as (small) attachments. To ignore the logos, enter a value in kB. All attachments with a size below this value will be ignored.

Use authorization from cache: this can have two values:

No: every time you want to retrieve messages, you have to enter credentials

Yes: the credentials are stored in cache and you don't need to enter them every time you want to retrieve messages. The only moment you have to re-enter the credentials is when the authorization codes are expired. In that case you might need to change the value to No. After this action the value can be set to Yes again.

Steps to connect to the mailbox

To import mail into the Mail Inbox, communication with Graph (a part of Microsoft) is required. After entering the Client ID, Client Secret, and Redirect URL, an authorization code can be requested by clicking “Import mail” in the OCRDocs Inbox. When you do this for the first time (or when the authorization code has expired), you will see some login screens.

Note:

All mail will be retrieved the first time; mail that should not be retrieved must first be removed from the Inbox (e.g., to archive). Alternatively, this mail can be read and then deleted within Business Central.

First-time steps:

1. Click “Import mail”
2. A login page will open.
3. Enter the email address of the invoice Inbox with the password. A page will open requesting permissions:
4. Click Accept
5. The mail will now be imported, taking into account the last synchronization date.

Note:

All mail will be retrieved the first time, unless you specify the “last synchronization date” in the mail Inbox screen; if the last synchronization date is filled in, only mail after this date will be imported. Therefore, it is advisable to clean up the original mailbox so that only the mail that needs to be imported is imported; old emails can be removed from the Inbox (e.g., to archive). Alternatively, if all mail is imported (including mail that was not needed), it can be deleted within Business Central; this does not affect the original mailbox itself.

Mail screen:

The mail screen consists of an overview of the read mail, including whether there is an attachment and the number of attachments. It also indicates whether the email has already been processed.

The number of attachments is displayed in color:

Black: there is no attachment and the email is marked as processed.

Red: there are multiple attachments in the email and it has not yet been indicated which attachment is the main attachment; if the document type is invoice or credit memo, an incoming document will be created together with main and supporting attachments.

Green: at least one attachment is marked as the main attachment

✓ Saved
📄
📧
🔍

Mail Inbox

🔄 Clear Synchronization State
📧 Import Mail
⚙️ Process Mail
⚙️ Mail Setup
More options

Synchronization

Last Synced 12-12-2024 16:10:00
 Laatste synch 12-12-2024 16:10 📅

Last Synced by ALBERT

Inbox Items
🗑️ Delete Line
📄
📧

Received At ↓	From	Subject	Atta...	No. of Attach...	Suggested Relation Type	Suggested relation No.	Suggested relation Name	Linked to Purchase Document	Linked to Purchase Document No	Line Sal Do
→ 13-12-2024 12:36	timspts@treystudy.com	Enquiry for invoice 103209	<input type="checkbox"/>	0	Customer	20000	Trey Research			Po
12-12-2024 16:10	puckske@schooloffinearts.pl	Surprise party for John	<input type="checkbox"/>	0	Employee	HW	Hessel Wanders			
12-12-2024 12:36	timspts@treystudy.com	Additional information for blanket ord...	<input type="checkbox"/>	0	Customer	20000	Trey Research			Bl
14-11-2024 11:10	albert@mycompany.nl	Demo OCRDocs MyCompany	<input checked="" type="checkbox"/>	9	Customer	K00100	MyCompany			
30-10-2024 10:26	John@graphicdesigninstitute.c...	Invoice 108191 relation 1670992)	<input checked="" type="checkbox"/>	3	Vendor	30000	Graphic Design Institute	Posted Inv...	108191	
30-10-2024 10:25	Kelly@worldwideimporters.nl	Quote furniture	<input checked="" type="checkbox"/>	1	Vendor	40000	Wide World Importers	Quote	1001	
26-8-2024 18:09	diana@firstupconsultants.be	Specifications order 106002	<input checked="" type="checkbox"/>	1	Vendor	20000	First Up Consultants	Order	106002	

Inbox Attachments
🗑️ Delete Line
📄 Open

If there is only one attachment in an email, it is automatically assigned the ‘Main Attachment’ attribute. When the main attachment is selected in the attachment screen, the other lines are immediately linked in the ‘Belongs to’ field. These lines are displayed as ‘supporting attachments’. Such a line can also be marked as the main attachment if desired. This allows an email with, for example, 5 attachments (2 invoices and 3 attachments) to be processed correctly. The invoices must be marked as ‘Main Attachment’, and the attachments must be linked to the main attachment.

Procedure for processing mail:

1. By pressing the ‘Import mail’ button, all unsynchronized emails are retrieved. The ‘Last synchronization’ field is updated. Remove email lines and/or attachment lines that should not be processed if necessary. These will NOT be retrieved during the next synchronization (step 1) UNLESS the ‘Last synchronization’ field is cleared via the ‘Clear synchronization status’ button. Tip: make sure to clean up the mailbox before synchronization takes place.
2. If there are multiple attachments: select the main attachment on the subpage.

Note:

All mail will be retrieved the first time; mail that should no longer be retrieved must first be removed from the Inbox (e.g., to archive). Alternatively, this mail can be read and then deleted within Business Central

Using the Mail Inbox functionality:

With the Mail Inbox functionality you can assign incoming email to any contact that you want.

The mail Inbox functionality tries to find the correct contact based on the “From” email addresses

If there is reference text to any of the related documents of the relation, the system proposes this document in the “Linked to purchase document no.” or “Linked to sales document no.” field. The proposed relations and documents can be modified if desired.

Mail Inbox

Clear Synchronization State Import Mail Process Mail Mail Setup More options

Synchronization

Last Synced 12-12-2024 16:10:00 Last Synced by ALBERT

Laatste synch 12-12-2024 16:10

Inbox Items Delete Line

Received At	From	Subject	Atta...	No. of Attach...	Suggested Relation Type	Suggested relation No.	Suggested relation Name	Linked to Purchase Document	Linked to Purchase Document No	Link Sal Do-
13-12-2024 12:36	timspts@tresearch.com	Enquiry for invoice 103209	<input type="checkbox"/>	0	Customer	20000	Trey Research			Po
12-12-2024 16:10	puckskke@schooloffinearts.pl	Surprise party for John	<input type="checkbox"/>	0	Employee	HW	Hessel Wanders			Bl
12-12-2024 12:36	timspts@tresearch.com	Additional information for blanket ord...	<input type="checkbox"/>	0	Customer	20000	Trey Research			Bl
14-11-2024 11:10	albert@mycompany.nl	Demo OCRDocs MyCompany	<input checked="" type="checkbox"/>	9	Customer	K00100	MyCompany			
30-10-2024 10:26	John@graphicdesigninstitute.c...	Invoice 108191 relation 1670992)	<input checked="" type="checkbox"/>	3	Vendor	30000	Graphic Design Institute	Posted Inv...	108191	
30-10-2024 10:25	Kelly@worldwideimporters.nl	Quote furniture	<input checked="" type="checkbox"/>	1	Vendor	40000	Wide World Importers	Quote	1001	
26-8-2024 18:09	diana@firstupconsultants.be	Specifications order 106002	<input checked="" type="checkbox"/>	1	Vendor	20000	First Up Consultants	Order	106002	

Inbox Attachments Delete Line Open

Besides the suggested relation and document no., there is also a field “No. of attachments.”. This field indicates the number of attachments that were in the mail.

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Inbox Items Delete Line

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13-12-2024 12:36	Enquiry for invoice 103209	<input type="checkbox"/>	0	Customer	20000	Trey Research			Posted Inv...	103209	<input type="checkbox"/>
12-12-2024 16:10	Surprise party for John	<input type="checkbox"/>	0	Employee	HW	Hessel Wanders					<input type="checkbox"/>
12-12-2024 12:36	Additional information for blanket ord...	<input type="checkbox"/>	0	Customer	20000	Trey Research			Blanket Or...	1001	<input type="checkbox"/>
14-11-2024 11:10	Demo OCRDocs MyCompany	<input checked="" type="checkbox"/>	9	Customer	K00100	MyCompany					<input type="checkbox"/>
30-10-2024 10:26	Invoice 108191 relation 1670992)	<input checked="" type="checkbox"/>	3	Vendor	30000	Graphic Design Institute	Posted Inv...	108191			<input type="checkbox"/>
30-10-2024 10:25	Quote furniture	<input checked="" type="checkbox"/>	1	Vendor	40000	Wide World Importers	Quote	1001			<input type="checkbox"/>
26-8-2024 18:09	Specifications order 106002	<input checked="" type="checkbox"/>	1	Vendor	20000	First Up Consultants	Order	106002			<input type="checkbox"/>

Inbox Attachments Delete Line Open

Start the “Process mail” function

Running the Process mail function will do the following:

1. For email lines **without** a link to purchase or sales documents, but with a link to a relation, the line is activated with this relation and can be viewed from het Card screen of this relation. This also counts for the attachments and sub attachments that were part of the mail message.
2. For email lines **with** a link to purchase or sales documents, the email will be linked to the relation and the attachments will be linked to the document that was entered in “Linked to purchase document no.” field or “Linked to sales document no.” field. For invoices or credit memo’s an incoming document will be created.
An error message will be given if there are still email lines for which the main attachment has not been indicated.