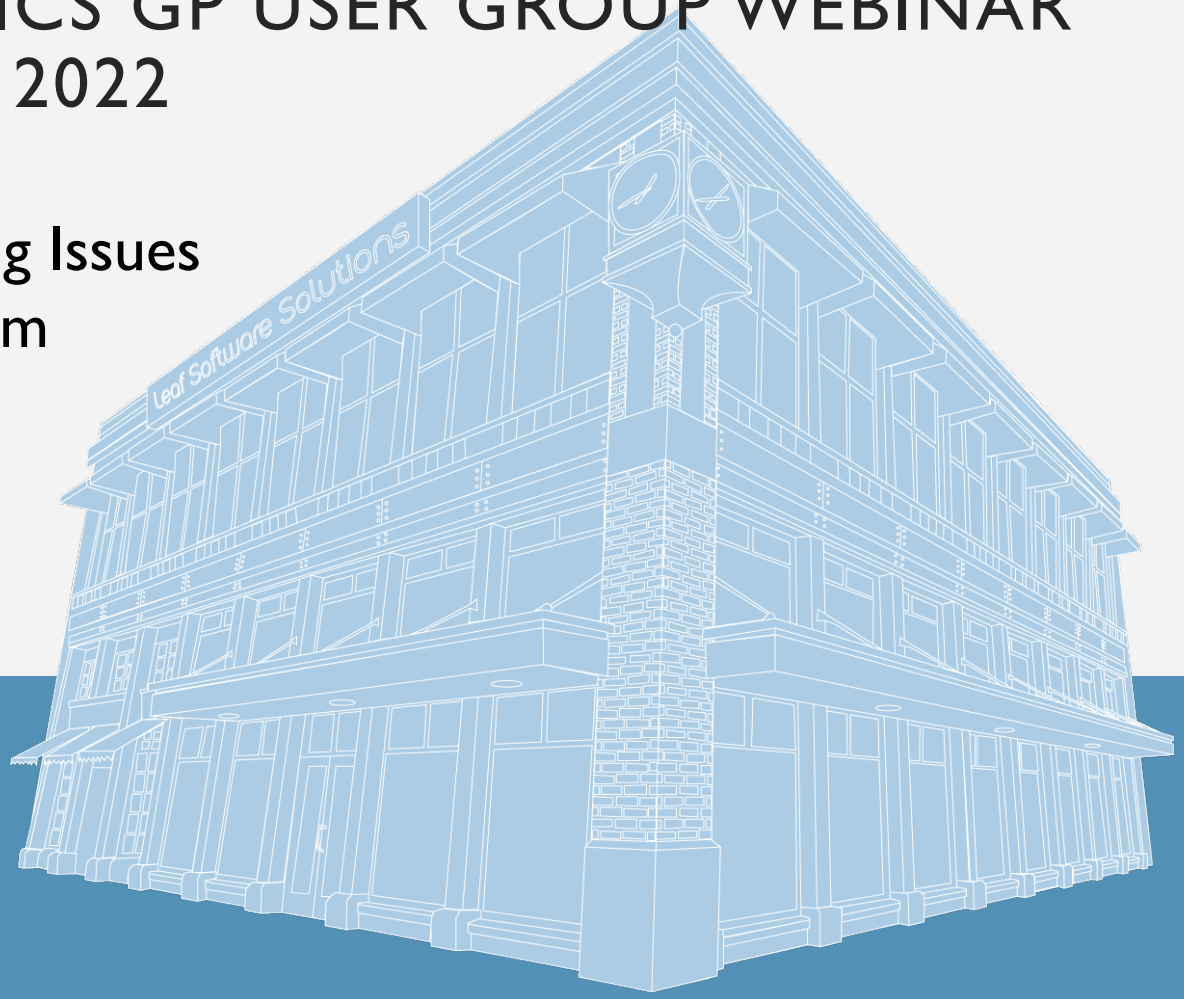
DYNAMICS GP USER GROUP WEBINAR
MAY 24, 2022

GP Emailing Issues

Chad Sriram



May 24, 2022

EMAILING ISSUES

- Dynamics GP Version and Exchange Security Protocol Change Related Issues
  - TLS 1.0 vs TLS 1.2
  - GP 18.3 version significance
  - October 2022 deadline
- Dynamics GP Configuration Related Issues
  - Exchange Issues
  - Company Settings Related
  - Module Specific Issues
  - Word Template related issues

AUTHENTICATION PROTOCOLS IMPACT ON GP USERS

- Security Changes to Office 365 servers and Exchange Online
  - Starting **October 2022**, Basic Authentication will be replaced with a new modern protocol to secure Hosted Office 365 and Exchange Online from cyber attacks
  - **Email and Workflow functionality** impacted in older versions of Dynamics GP with intermittent email and workflow functionality.
  - Basic Authentication, which is TLS 1.0, is an outdated industry standard. Utilizing Basic Authentication opens the client up to phishing emails, compromised files, ransomware attacks, and more.
  - Modern Authentication, which is TLS 1.2, helps increase your organizations security because it uses modern encryption of keys. It also supports features such as multi-factor authentication (MFA) .
  - If you're currently on Dynamics GP 18.3 or higher, you will not be impacted by this change because the Modern Authentication is already operational in GP 18.3 or later.

OPTIONS AVAILABLE TO MINIMIZE IMPACT

- **If you use Email for documents**

  OPTION 1:

  1. **Till October 2022, you can change Dynamics GP to look for TLS 1.2**
     1. Add 3 lines of code in the dynamics.exe.config file in the GP install folder right before the </configuration> line
        1. <runtime>
        2. <AppContextSwitchOverrides value="Switch.System.Net.DontEnableSystemDefaultTlsVersions=false"/>
        3. </runtime>
     2. This ensures that the application is using TLS 1.2 wherever it's available as part of the move towards modern protocol.
     3. Sometimes, you have to additionally enable Basic Authentication using Office 365 Administration

OPTIONS AVAILABLE TO MINIMIZE IMPACT

- **If you use Email for documents**

  OPTION II:

  1. **Till October 2022, you can change GP to use MAPI instead of Exchange**
     1. This requires that the users use a 32-bit version of Outlook client
     2. Also implement ClickYes Pro (this software prevents you from having to say yes, yes, yes, yes to every email going out) should trust issues happen between GP and Outlook (can also be handled using Trust Center Settings in Outlook and Registry Setting changes)
     3. Authenticates using Outlook which already uses Modern Authentication
     4. One disadvantage is that if you have multiple users on the same server/workstation, every user must have their individual profile set up on Outlook for this to work.

OPTIONS AVAILABLE TO MINIMIZE IMPACT

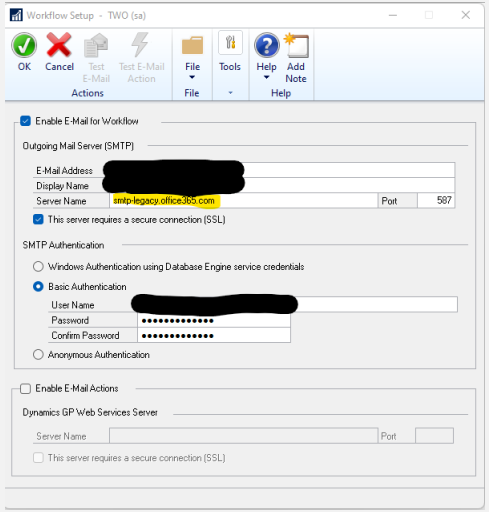
If you use Email for workflow

1. **Workflow uses SMTP as the transport for sending the emails.**
    1. Copiers, printers etc. use SMTP endpoints, hence Microsoft will not disable SMTP authorization like it will with Basic authentication. However, you can opt in to the legacy TLS endpoint till October 2022 for Workflow related emailing.
    2. For Dynamics GP you will need to follow the steps to Opt in to the client legacy endpoint (legacy TLS as in TLS 1.0) in your Office 365 tenant. Connecting to your Exchange tenant using Powershell is beyond the scope of this presentation **but once connected** you would run the following powershell command
        1. **Set-TransportConfig -AllowLegacyTLSClients $true**
        2. And to view the status would be the following command
        3. **Get-TransportConfig | Format-List AllowLegacyTLSClients**

OPTIONS AVAILABLE TO MINIMIZE IMPACT

If you use Email for workflow

1. Once the PowerShell Opt in has been set the only other part in GP that needs to be updated is the SMTP server in the Workflow setup window. Microsoft Dynamics GP>> Tools>>Setup>>System >> Workflow Setup



RECAP OF EXCHANGE PROTOCOL RELATED ISSUES

- Recommendation is always to upgrade to the latest version of GP (18.4 right now)
- Workarounds exist but none will keep working starting October 2022

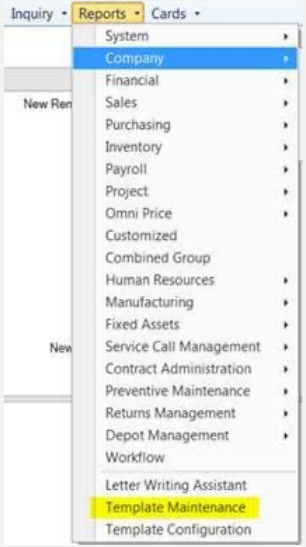
GP CONFIGURATION RELATED EMAIL ISSUES

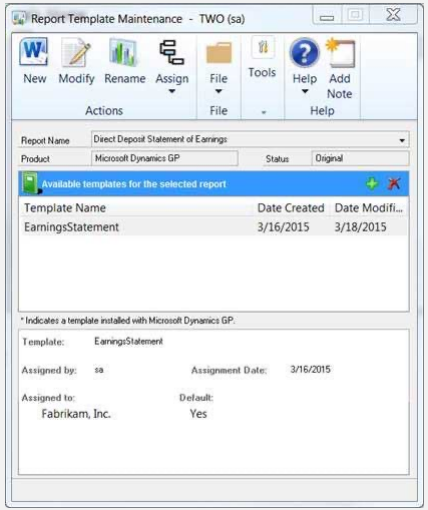
The configuration for emailing documents falls into three categories:

1. Company Settings
2. Module Settings
3. Customer/Vendor Settings

GP CONFIGURATION RELATED EMAIL ISSUES

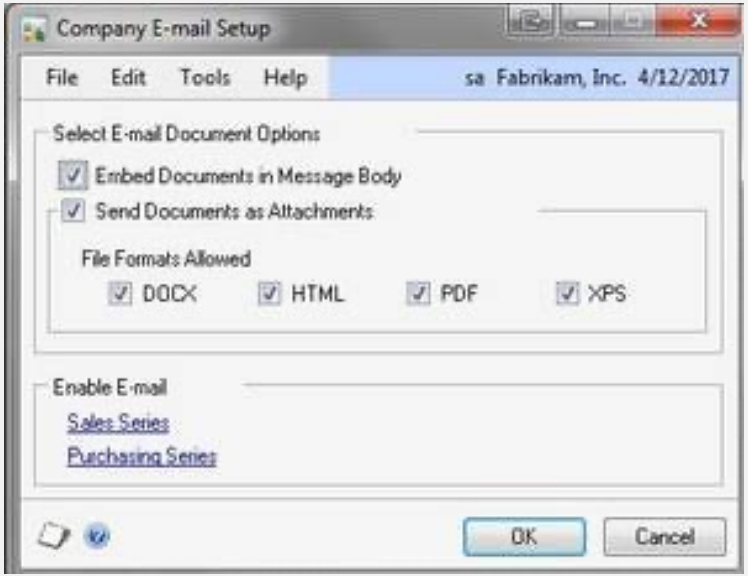
- A suggested prerequisite to emailing documents from Dynamics GP is to [complete the Word Template Configurations.]





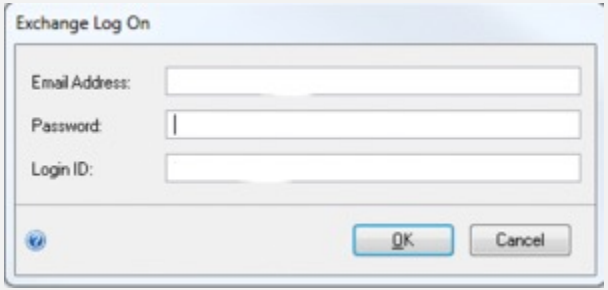
GP CONFIGURATION RELATED EMAIL ISSUES

Company E-mail Setup window
Microsoft Dynamics GP | Tools | Setup | Company | E-mail Settings



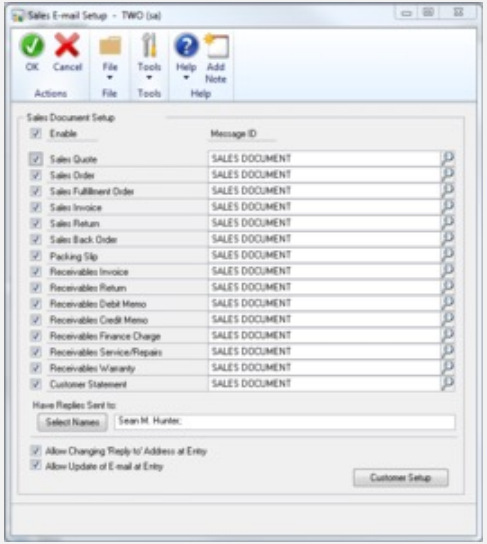
GP CONFIGURATION RELATED EMAIL ISSUES

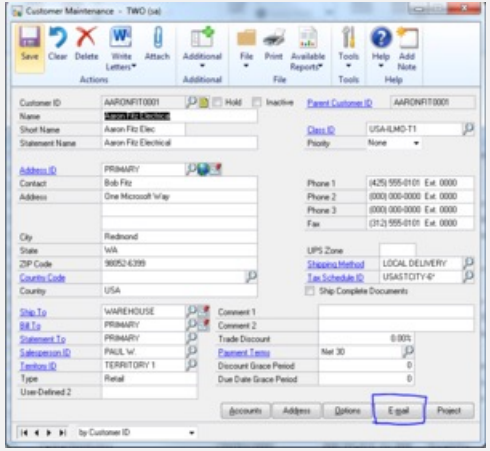
- You then go into the Sales or Purchasing Series typically after Company Email Setup
- The first time accessing these windows you may be prompted for your login information. After entering the information you will move to the next window.
- If the first time, you run into issues, confirm that Autodiscover is working. You can do this by removing the user from the SY04920 table (Dynamics/System database) and attempting to login again. If this table does not repopulate, then there are Autodiscover issues in the system (or the user doesn't work).
- If it is a version prior to GP 18.3, make sure MFA is disabled and Basic Authentication is enabled

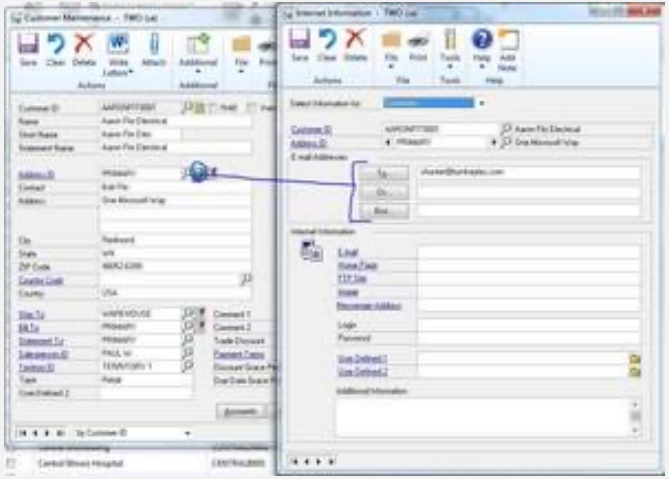


GP CONFIGURATION RELATED EMAIL ISSUES

- Sales Email Setup

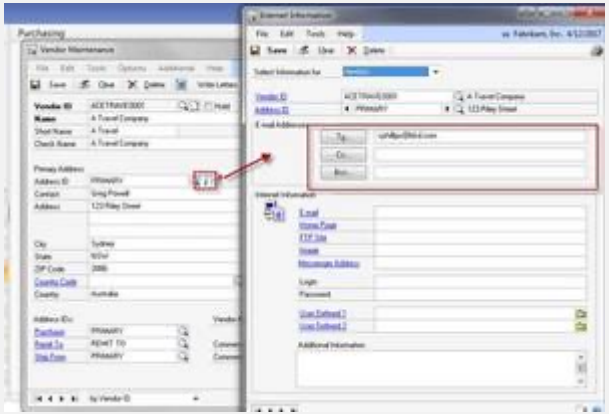






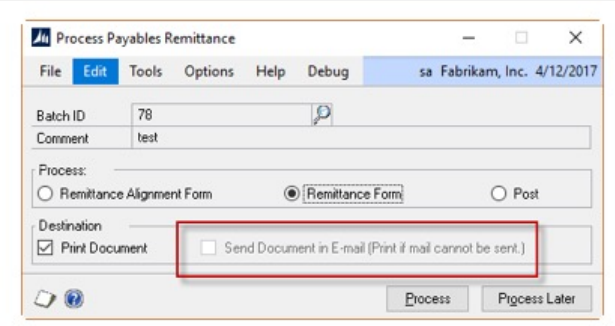
GP CONFIGURATION RELATED EMAIL ISSUES

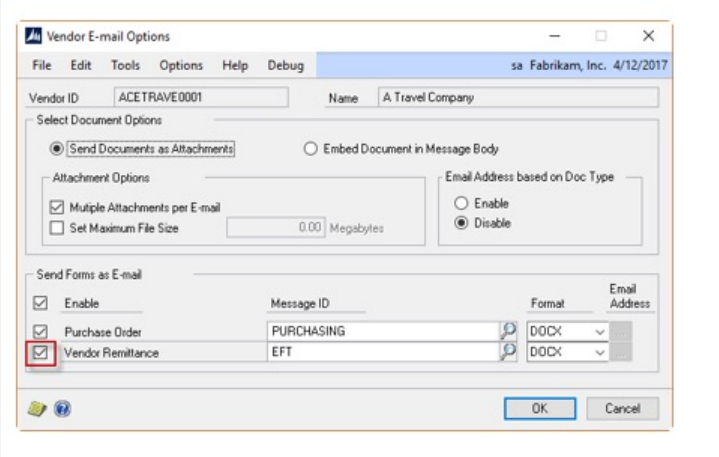
- Purchasing Email Setup



GP CONFIGURATION RELATED EMAIL ISSUES

- **Send Documents in email check box is grayed out when trying to send a PM Remittance**
  - Send Documents in email check box is grayed out when trying to send a Remittance

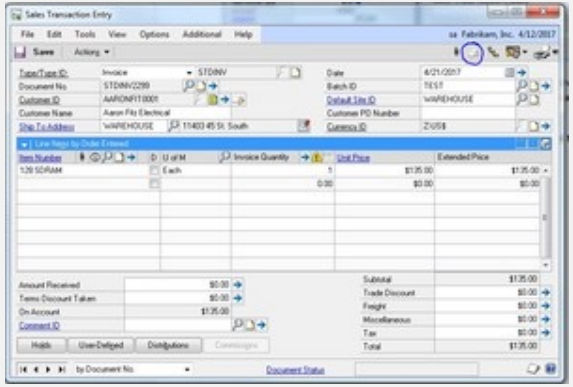




Check to see if the vendor is setup to allow for emailing: Go to Purchasing >> Cards >> Vendor >> select a vendor >> E-mail. In the Send Forms as Email section, confirm Vendor Remittance check box is checked. If using Mekorma MICR, go to Microsoft Dynamics GP | Tools | Setup | System | Mekorma MICR | System Options. Choose the **Enable Email Remittance** field, and then click Save.

GP CONFIGURATION RELATED EMAIL ISSUES

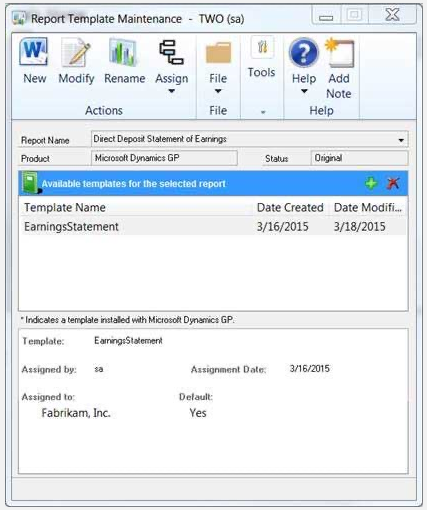
- **Email Button is grayed out in Sales Order Processing**



1.Go to: Sales >> Setup >> Sales Order Processing >> Sales Document Setup button >> Select the Document Type they are trying to send (quote, order, invoice etc)
2.Make sure the Format is set to Blank Paper

GP CONFIGURATION RELATED EMAIL ISSUES

- **A word template must be assigned before sending this document**



1. Use the Standard report in the Alternate/Modified Forms and Reports setup window Tools -> setup -> System -> Alternate/Modified Forms and Reports
2. Create a modified template using the New button on the Template Maintenance window
3. Reports -> Template Maintenance

Don't forget to assign the template for either option by using the Assign button on the Template Maintenance window (Reports -> Template Maintenance)

RECAP OF GP CONFIGURATION RELATED EMAIL ISSUES

The configuration related Dynamics GP email issues are always best tackled in the order of:

1. Company Email Setup
2. Module Specific Email Setup
3. Customer / Vendor Specific Email Setup