



CONTINIA

# DOCUMENT OUTPUT

## Continia Document Output

User Guide

April 2017 - CDO 2.00

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## 1. Introduction

Document Output is an add-on for Microsoft Dynamics NAV that enables you to send Documents as attached PDF with an E-Mail Template for each document type.

PDF's can be setup to have a background and you can merge a PDF the created NAV PDF.

This manual introduces the basic configuration for Document Output to send Sales Quotes and Sales Invoice etc.

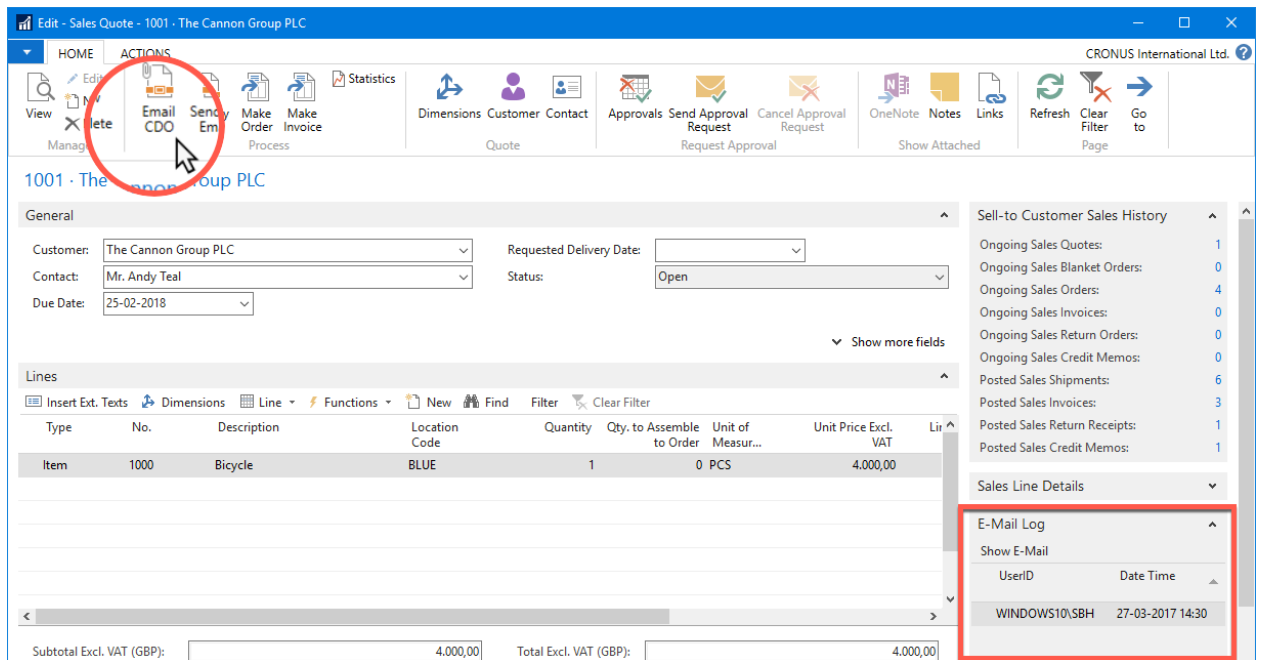
## 2. Daily use

### E-Mail Sales Quote

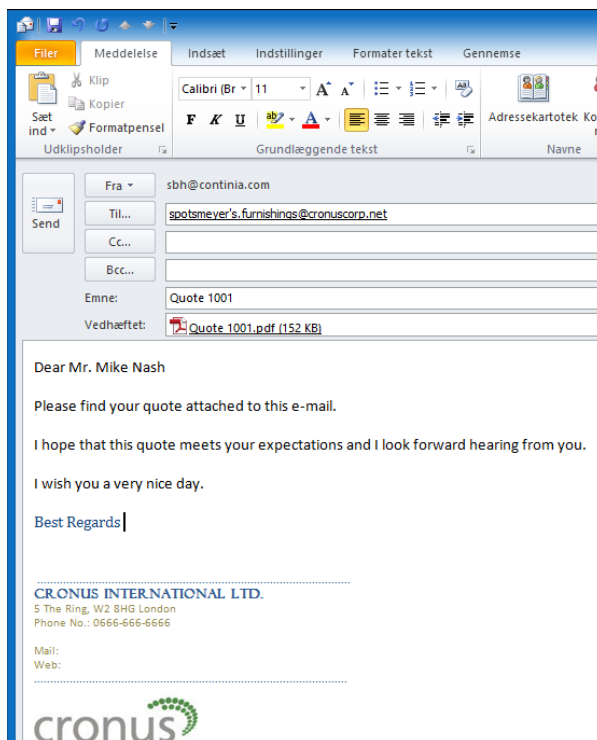
Open Departments, Sales & Marketing, Order Processing, Sales Quotes.

Open the Sales Quote.

From the Sales Quote, you can click the “Email CDO” button.



This will create the PDF file and open Outlook with the template.



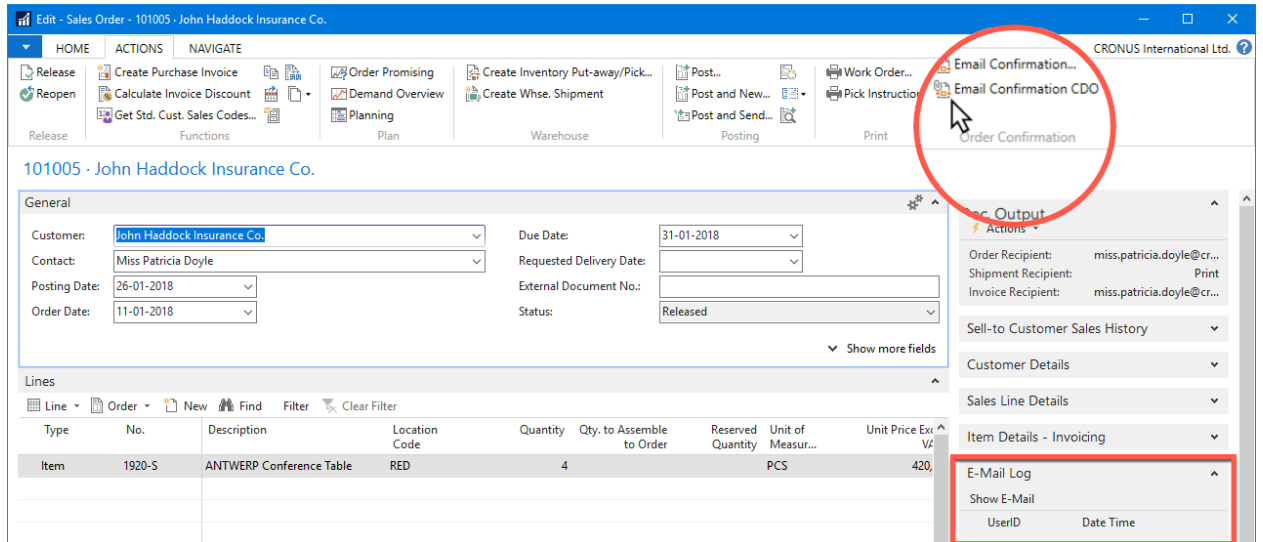
When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

### E-Mail Sales Order

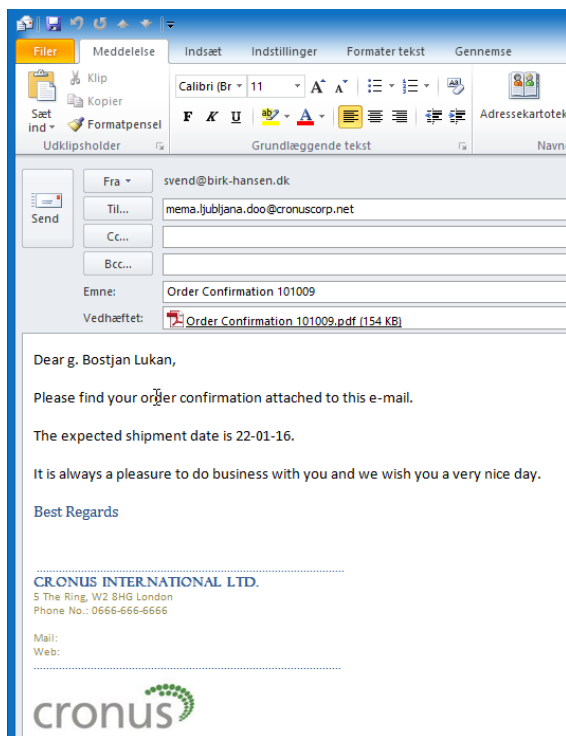
Open Departments, Sales & Marketing, Order Processing, Sales Order.

Open the Sales Order.

From the Sales Order, you can click the “Email Confirmation CDO” button.



This will create the PDF file and open Outlook with the template.



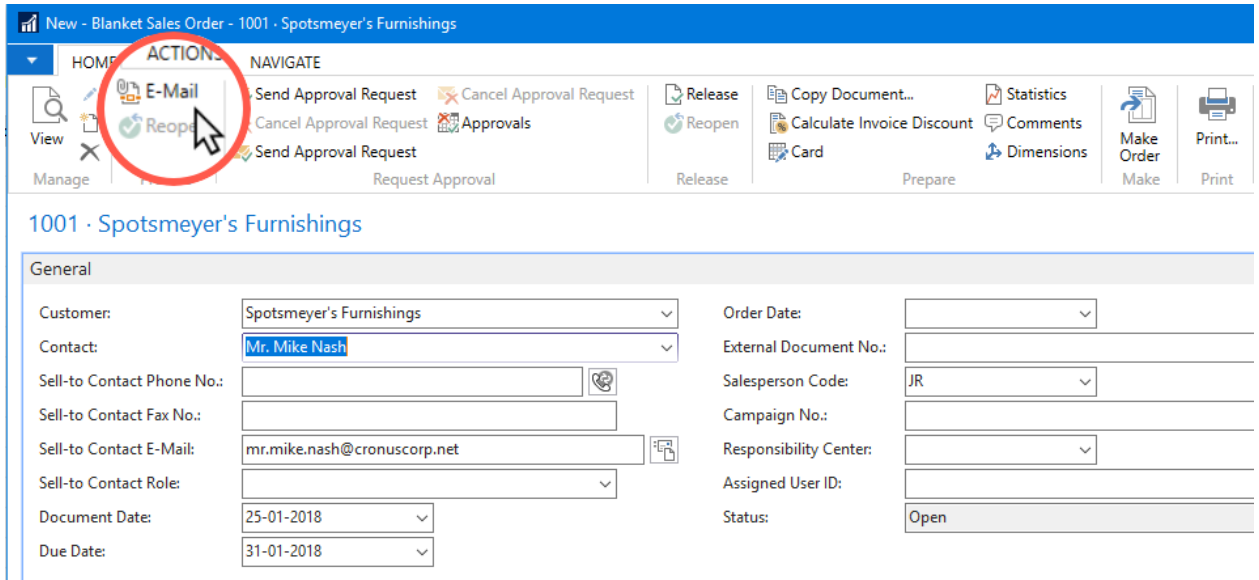
When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

## E-Mail Blanket Sales Order

Open Departments, Sales & Marketing, Order Processing, Blanket Sales Order.

Open the Blanket Sales Order.

From the Sales Order, you can click the “E-Mail” button.



The screenshot displays a software interface for a 'Blanket Sales Order' for 'Spotsmeyer's Furnishings'. The top navigation bar includes 'HOME', 'ACTIONS', and 'NAVIGATE'. The 'ACTIONS' menu is open, and the 'E-Mail' button is circled in red. Other visible buttons include 'Send Approval Request', 'Cancel Approval Request', 'Approvals', 'Release', 'Reopen', 'Copy Document...', 'Calculate Invoice Discount', 'Card', 'Statistics', 'Comments', 'Dimensions', 'Make Order', and 'Print...'. Below the navigation bar, the 'General' section contains the following fields:

Customer:	Spotsmeyer's Furnishings	Order Date:	
Contact:	Mr. Mike Nash	External Document No.:	
Sell-to Contact Phone No.:		Salesperson Code:	JR
Sell-to Contact Fax No.:		Campaign No.:	
Sell-to Contact E-Mail:	mr.mike.nash@cronuscorp.net	Responsibility Center:	
Sell-to Contact Role:		Assigned User ID:	
Document Date:	25-01-2018	Status:	Open
Due Date:	31-01-2018		

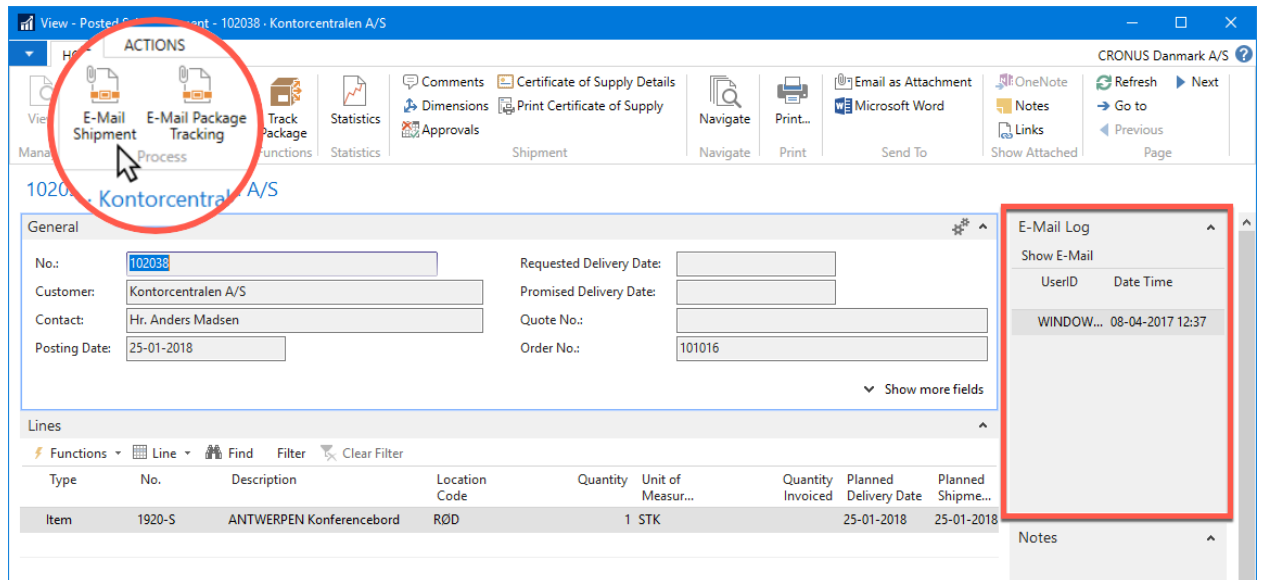
This will create the PDF file and open Outlook with the template.

## E-Mail Posted Sales Shipment

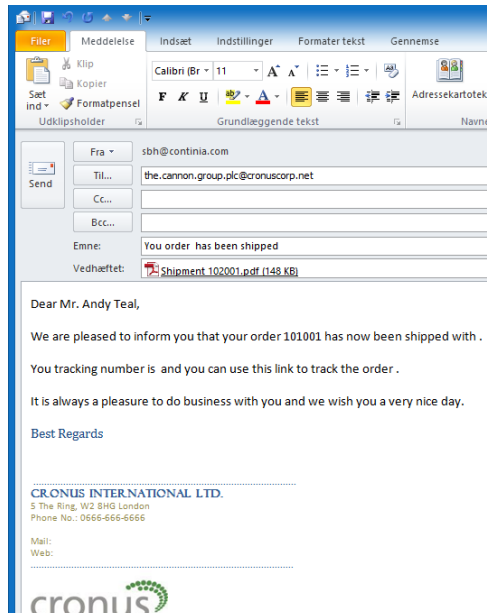
Open Posted Documents, Posted Sales Shipments.

Open the Posted Sales Shipment.

From the Posted Sales Shipment you can click the “E-Mail Shipment” button.



This will create the PDF file and open Outlook with the template.



When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

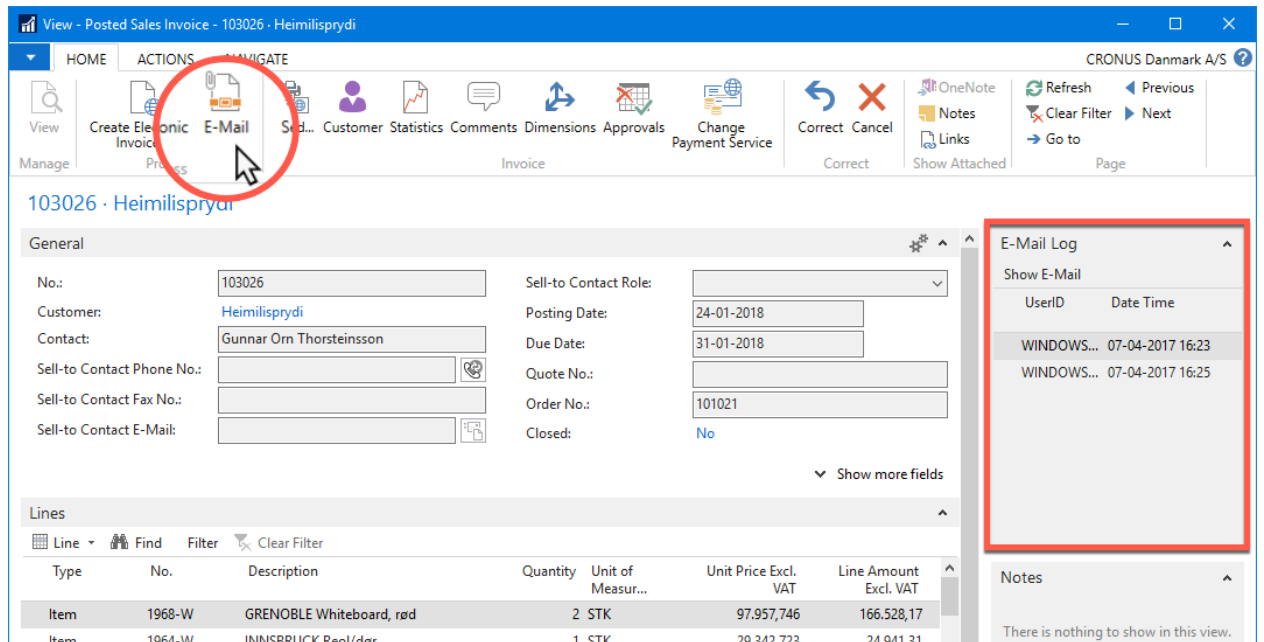


### E-Mail Posted Sales Invoice

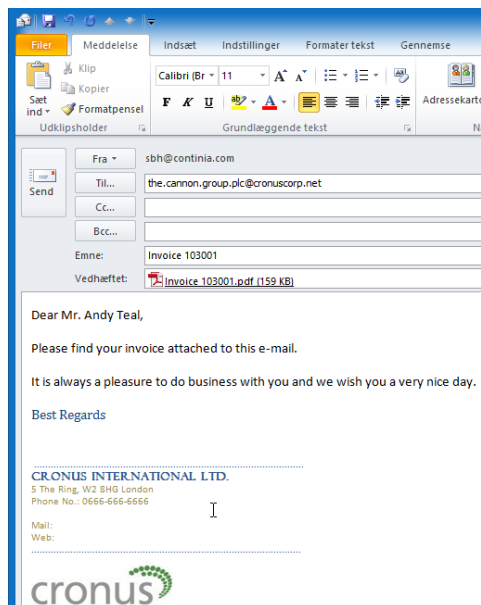
Open Posted Documents, Posted Sales Invoices.

Open the Posted Sales Invoice.

From the Posted Sales Invoice you can click the “E-Mail” button.



This will create the PDF file and open Outlook with the template.



When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

## E-Mail Posted Return Receipts

Open Posted Documents, Posted Return Receipts.

Open the Posted Return Receipt.

From the Posted Return Receipt you can click the “E-Mail” button.

The screenshot shows the 'Edit - Posted Return Receipt - 107004 · Autohaus Mielberg KG' window. The ribbon includes 'HOME' and 'ACTIONS'. The 'E-Mail' button in the 'ACTIONS' ribbon is circled in red. The 'E-Mail Log' panel on the right is highlighted with a red border, showing a table with columns 'UserID' and 'Date Time' and a message 'There is nothing to show in this view.'

**General**

No.:	107004	Sell-to Contact:	
Sell-to Customer No.:	49633663	Posting Date:	19-01-2018
Sell-to Contact No.:	E000084	Document Date:	19-01-2018
Sell-to Customer Name:	Autohaus Mielberg KG	Return Order No.:	
Sell-to Address:	Porschestraße 911	External Document No.:	
Sell-to Address 2:		Salesperson Code:	JR
Sell-to Post Code:	DE-22417	Responsibility Center:	
Sell-to City:	Hamburg 36	No. Printed:	0

**Lines**

Type	No.	Description	Return Reason Code	Location Code	Quantity	Unit Me:
Item	1896-S	ATHEN Skrivebord		RØD	1	STK

**E-Mail Log**

UserID	Date Time
There is nothing to show in this view.	

**Notes**

[Click here to create a new note.](#)

This will create the PDF file and open Outlook with the template.

The screenshot shows an Outlook email composition window. The 'To' field contains 'the.cannon.group.plc@cronuscorp.net'. The subject is 'Return Receipt 107001'. The attachment is 'Return Receipt 107001.pdf (1148 KB)'. The email body contains a message to Mr. Andy Teal.

**From:** sbh@continia.com

**To:** the.cannon.group.plc@cronuscorp.net

**Subject:** Return Receipt 107001

**Vedhæftet:** Return Receipt 107001.pdf (1148 KB)

Dear Mr. Andy Teal,

Please find your return receipt attached to this e-mail.

It is always a pleasure to do business with you and we wish you a very nice day.

Best Regards

CRONUS INTERNATIONAL LTD.  
5 The Ring, W2 8HG London  
Phone No.: 0666-666-6666

Mail:  
Web:

**cronus**

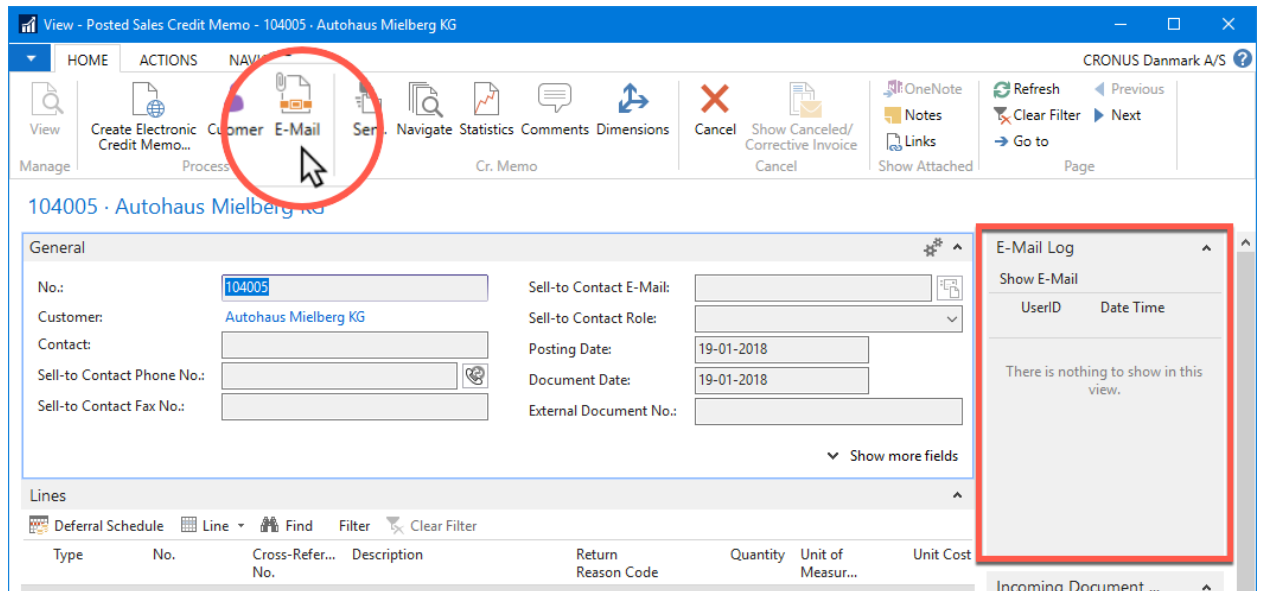
When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

### E-Mail Posted Sales Credit Memo

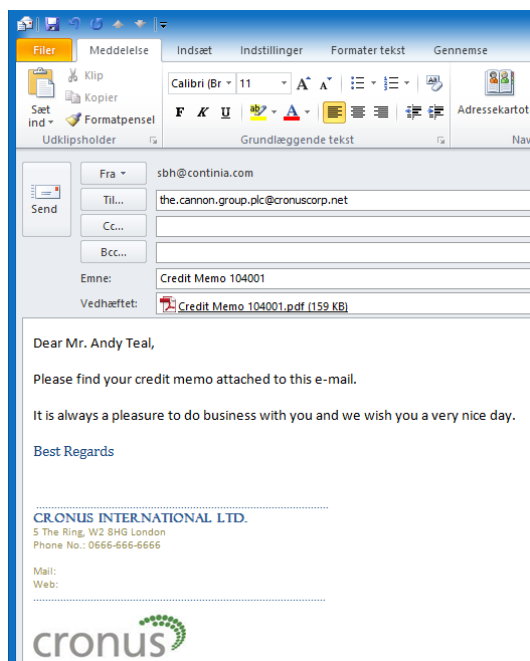
Open Posted Documents, Posted Sales Credit Memos.

Open the Posted Sales Credit Memo.

From the Posted Sales Credit Memo you can click the “E-Mail” button.



This will create the PDF file and open Outlook with the template.



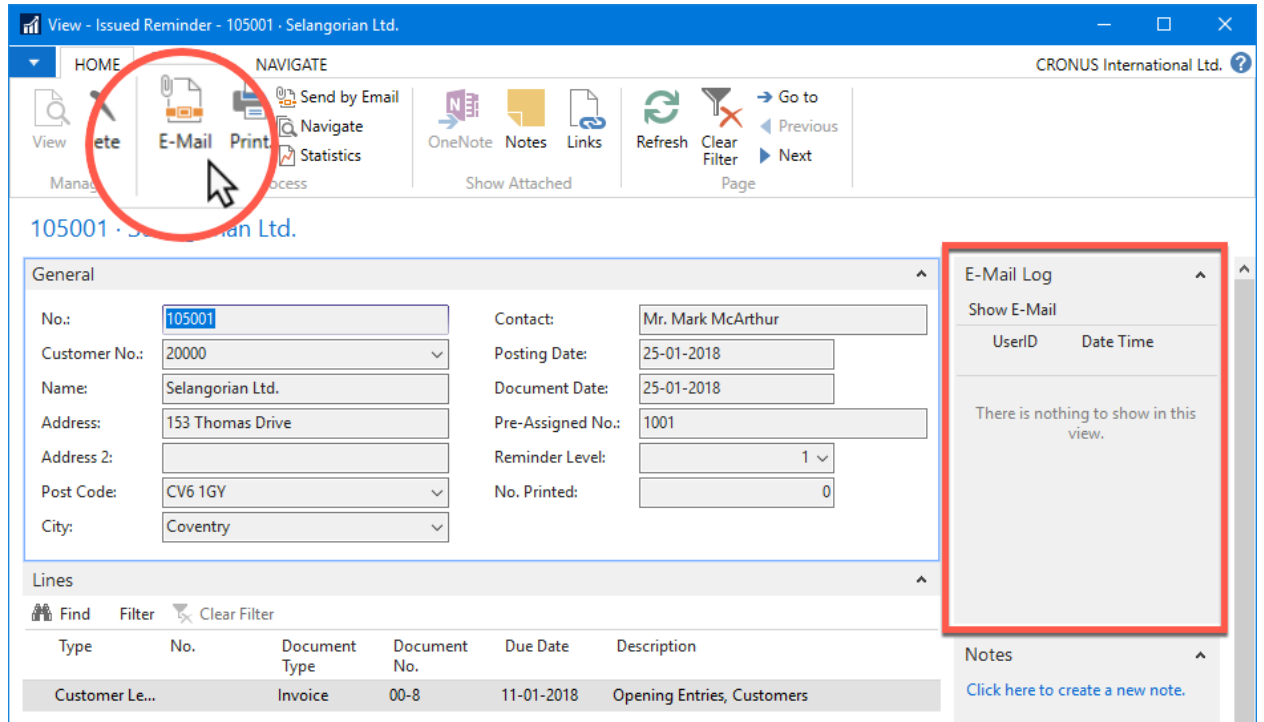
When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

### E-Mail Issued Reminder

Open Departments, Financial Management, Periodic Activities, Receivables, Issued Reminders

Open the Issued Reminder.

From the Issued Reminder you can click the “E-Mail” button.



This will create the PDF file and open Outlook with the template.

When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

## E-Mail Issued Finance Charge Memo

Open Departments, Financial Management, Periodic Activities, Receivables, Issued Finance Charge Memos

Open the Issued Finance Charge Memo.

From the Issued Finance Charge Memo you can click the “E-Mail” button.

The screenshot shows the 'View - Issued Finance Charge Memo' interface for '106001 · Selangorian Ltd.'. The interface includes a navigation bar with tabs for HOME, ACTIONS, NAVIGATE, and REPORT. The ACTIONS menu is open, and the 'E-Mail' button is highlighted with a red circle. The main content area displays the 'General' section with fields for No. (106001), Customer No. (20000), Name (Selangorian Ltd.), Address (153 Thomas Drive), Post Code (CV6 1GY), City (Coventry), Contact (Mr. Mark McArthur), Posting Date (25-01-2018), Document Date (25-01-2018), Pre-Assigned No. (1001), and No. Printed (0). Below this is the 'Lines' section with a table:

Type	No.	Document Type	Document No.	Due Date	Description
Customer Le...		Invoice	00-8	11-01-2018	1,5% finance charge of 23.231,35

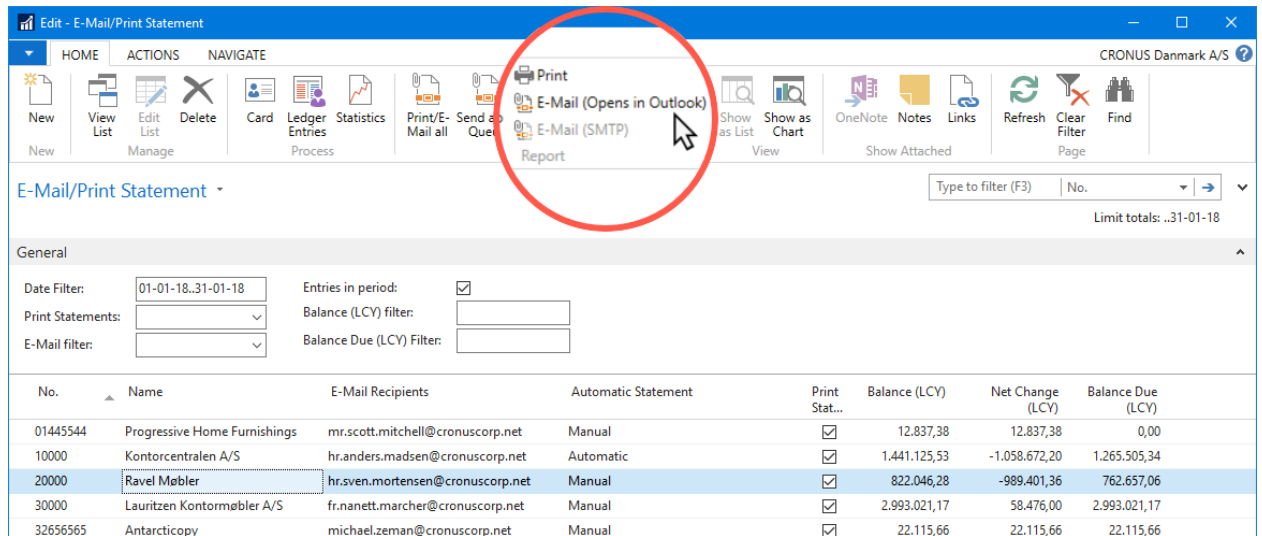
On the right side, the 'E-Mail Log' panel is visible, showing a 'Show E-Mail' button and a message: 'There is nothing to show in this view.' The panel also has columns for 'UserID' and 'Date Time'.

This will create the PDF file and open Outlook with the template.

When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

### E-Mail Statement for one customer

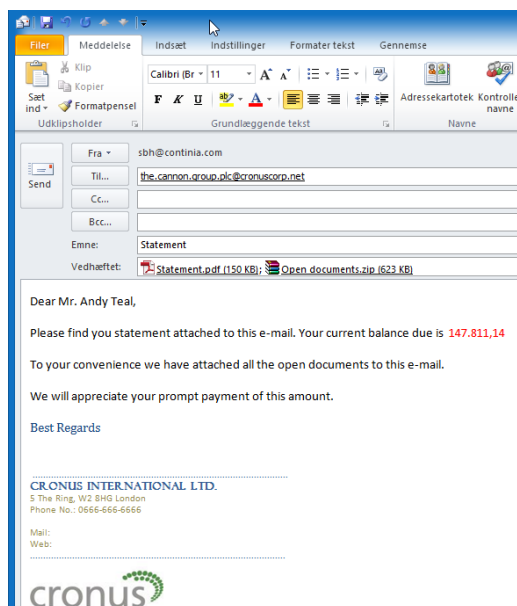
Open Departments, Financial Management, Periodic Activities, Receivables, E-Mail/Print Statement.



Set the "Date Filter".

Find the Customer you want to send a statement, Click "E-Mail (Opens in Outlook)".

This will create the PDF file and open Outlook with the template.



## E-Mail Statement for multiple customers

Open Departments, Financial Management, Periodic Activities, Receivables, E-Mail/Print Statement.

No.	Name	E-Mail Recipients	Automatic Statement	Print Stat...	Balance (LCY)	Net Change (LCY)	Balance Due (LCY)
01445544	Progressive Home Furnishings	mr.scott.mitchell@cronuscorp.net	Manual	<input checked="" type="checkbox"/>	12.837,38	12.837,38	0,00
10000	Kontorcentralen A/S	hr.anders.madsen@cronuscorp.net	Automatic	<input checked="" type="checkbox"/>	1.441.125,53	-1.058.672,20	1.265.505,34
20000	Ravel Møbler	hr.sven.mortensen@cronuscorp.net	Manual	<input checked="" type="checkbox"/>	822.046,28	-989.401,36	762.657,06
30000	Lauritzen Kontormøbler A/S	fr.nanett.marcher@cronuscorp.net	Manual	<input checked="" type="checkbox"/>	2.993.021,17	58.476,00	2.993.021,17
32656565	Antarcticopy	michael.zeman@cronuscorp.net	Manual	<input checked="" type="checkbox"/>	22.115,66	22.115,66	22.115,66
35451236	Gagn & Gaman	ragnheidur.k.gudmundsdottir@cronus...	Manual	<input checked="" type="checkbox"/>	7.511,40	7.511,40	7.511,40
35963852	Heimilispryði	gunnar.orn.thorsteinsson@cronuscorp....	Manual	<input checked="" type="checkbox"/>	17.330,65	17.330,65	17.330,65
42147258	BYT-KOMPLET s.r.o.	milos.silhan@cronuscorp.net	Manual	<input checked="" type="checkbox"/>	13.728,00	13.728,00	0,00
43687129	Desionstudio Gmunden	fr.biraite.vestohael@cronuscoro.net	Manual	<input checked="" type="checkbox"/>	117.569,18	117.569,18	0,00

Set the “Date Filter” and set the appropriate filters, like “Entries in period”.

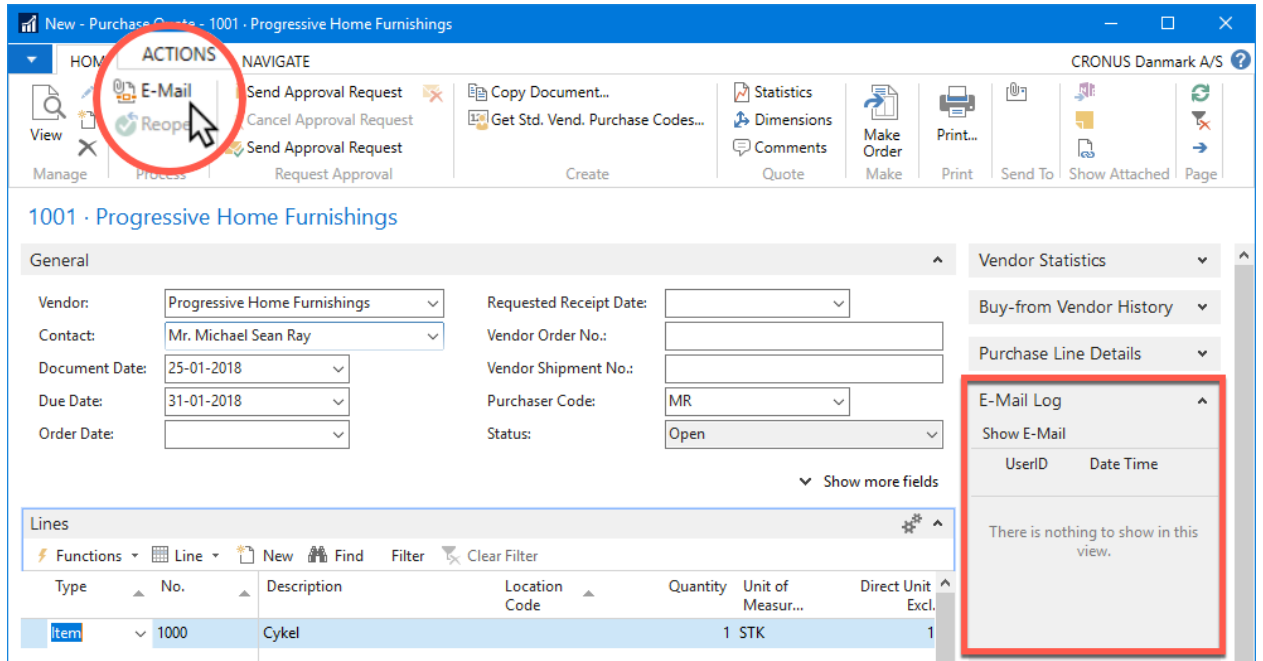
Click “Print/E-Mail all” or “Send all to Queue, this will send all statements to the customers with an e-mail address. Customers without an e-mail address will be printed.

### E-Mail Purchase Quote

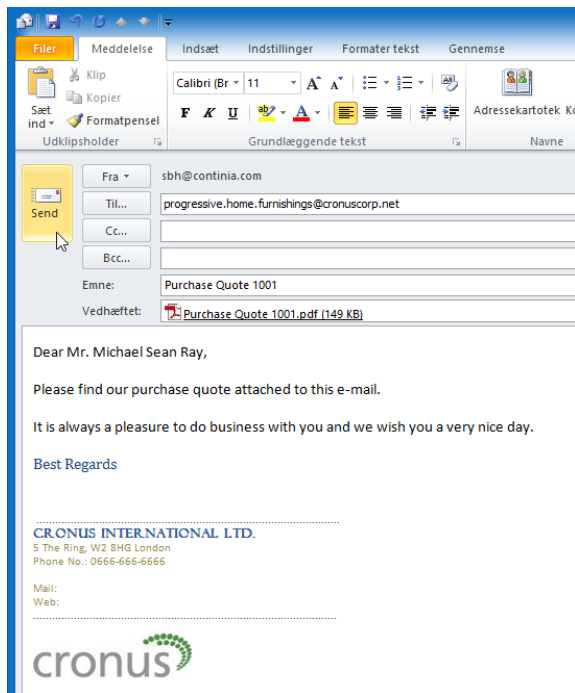
Open Departments, Purchase, Order Processing, Purchase Quotes.

Open the Purchase Quote.

From the Purchase Quote you can click the “E-Mail” button.



This will create the PDF file and open Outlook with the template.



When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.



## E-Mail Purchase Order

Open Departments, Purchase, Order Processing, Purchase Orders.

Open the Purchase Order.

From the Purchase Order, you can click the “E-Mail” button.

The screenshot shows the 'Edit - Purchase Order - 104001 - Schmeichel Møbler A/S' window. The 'E-Mail' button in the top ribbon is circled in red. The form displays the following details:

General	
Buy-from Vendor No.:	30000
Vendor:	Schmeichel Møbler A/S
Contact:	Hr. Rene Madsen
Document Date:	22-01-2018
Vendor Invoice No.:	D-303
Vendor Shipment No.:	
Status:	Open

The 'Lines' section contains the following table:

Type	No.	Description	Location Code	Quantity	Reserved Quantity	Direct Unit Cost Excl. VAT	Line
Item	LS-MAN-10	Brugervejledning t. højttalere	HVID	100		*	
Item	LS-75	Højttaler, kirsebær, 75W	HVID	10			

The right-hand sidebar shows the 'E-Mail Log' section, which is currently empty and contains the message: "There is nothing to show in this view."

This will create the PDF file and open Outlook with the template.

The screenshot shows an Outlook email template with the following content:

From: sbh@continia.com  
 To: coolwood.technologies@cronuscorp.net  
 Subject: Purchase Order 104001  
 Attachment: Purchase Order.104001.pdf (150 KB)

Dear Mr. Richard Bready,

Please find our purchase order attached to this e-mail.

It is always a pleasure to do business with you and we wish you a very nice day.

Best Regards

CRONUS INTERNATIONAL LTD.  
 5 The Ring, W2 3HG London  
 Phone No.: 0666-666-6666

Mail:  
 Web:

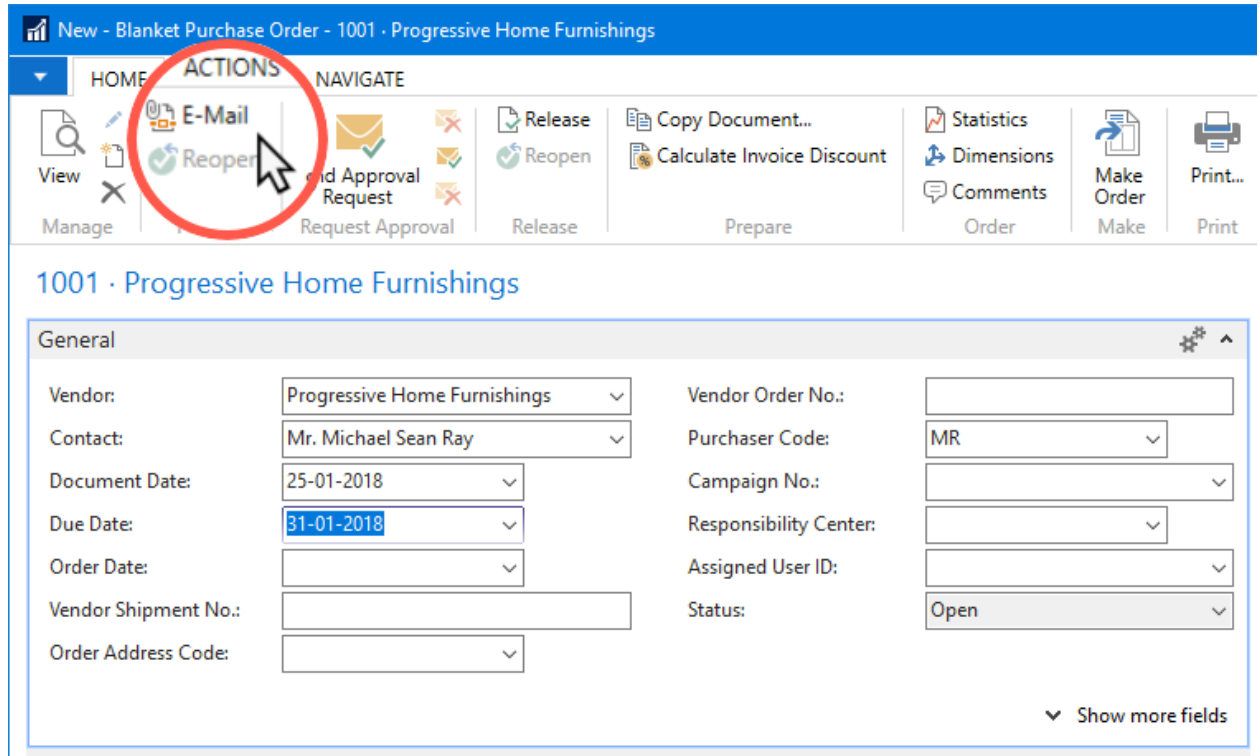
When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

### E-Mail Blanket Purchase Order

Open Departments, Purchase, Order Processing, Blanket Purchase Orders.

Open the Blanket Purchase Order.

From the Blanket Purchase Order you can click the “E-Mail” button.



This will create the PDF file and open Outlook with the template.

## Open E-Mails in Outlook

You can create a PDF mail that opens in Outlook from these places:

### Sales:

- Sales Quotes (see Document Output Setup)
- Sales Orders (see Document Output Setup)
- Blanket Sales Order
- Sales Return Order
- Posted Sales Shipment
- Posted Return Receipts
- Posted Sales Invoice
- Posted Credit Memo
- Issued Reminders
- Issued Finance Charge Memo

### Purchase:

- Purchase Quotes
- Purchase Orders (see Document Output Setup)
- Blanket Purchase Order

### Service:

- Service Contract
- Service Quote
- Service Order

Here is a sample from Sales Quotes.

The screenshot shows the 'Edit - Sales Quote - 1001 - The Cannon Group PLC' window. The 'ACTIONS' ribbon is visible, with the 'E-Mail' button highlighted by a red circle and a callout box stating: "Creates PDF and Opens Outlook with the Template and the PDF attached." The 'General' section contains the following fields:

- Customer: The Cannon Group PLC
- Contact: Mr. Andy Teal
- Due Date: 25-02-2018
- Requested Delivery Date: [Empty]
- Status: Open

The 'Lines' section displays a table with the following data:

Type	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Unit of Measur...	Unit Price Excl. VAT
Item	1000	Bicycle	BLUE	1	0	PCS	4,000.00

## Unhandled Documents (Sales and Service)

There are several pages from where you can batch print and e-mail documents.

### Sales:

- Posted Shipments
- Posted Return Receipts
- Posted Invoices
- Posted Credit Memos
- Issued Reminders
- Issued Finance Charge Memo

### Service:

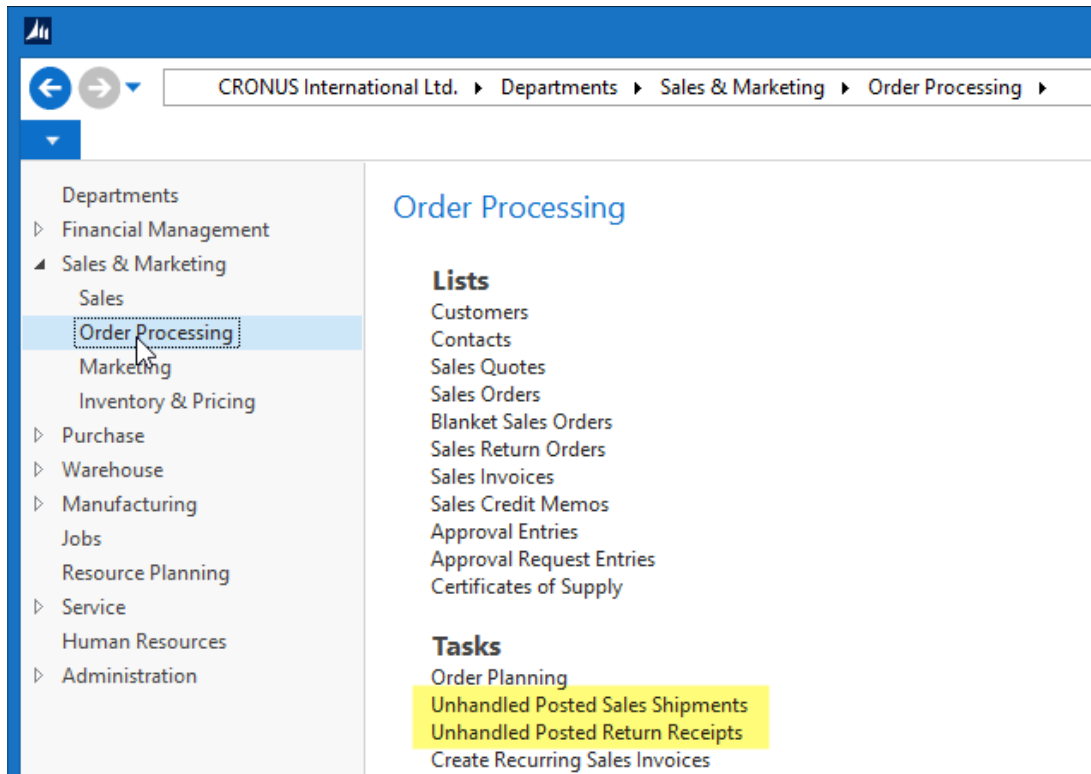
- Posted Service Shipments
- Posted Service Invoices
- Posted Service Credit Memos

On all unhandled pages, you have the following buttons:

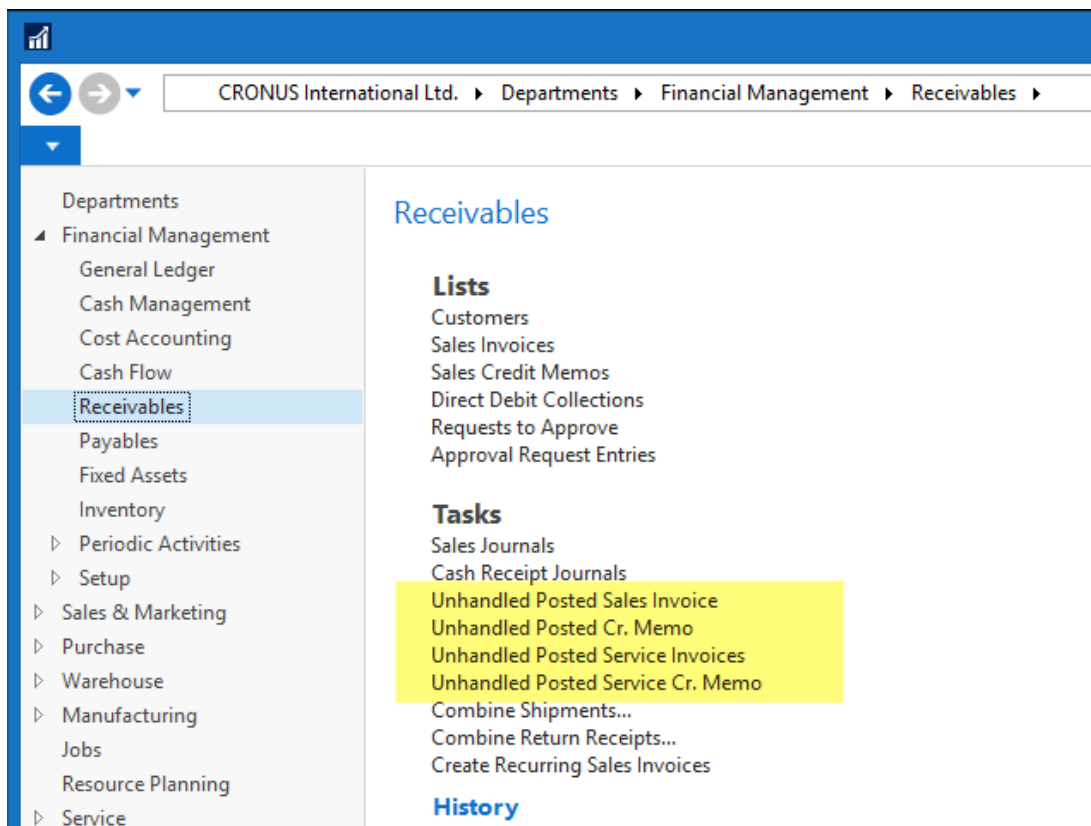


- **Print/E-Mail all:** This button prints/sends all the records within the filter. Records with e-mail address will be mailed with SMTP, records without e-mail address will be printed.
- **E-Mail (Opens in Outlook):** This button opens Outlook with the PDF attached. You can now edit the mail before sending.
- **Send all to Queue:** Sends all records to the E-Mail Queue.
- **Print/E-Mail (SMTP):** This button sends the current record with SMTP. Mostly used for testing SMTP connectivity.

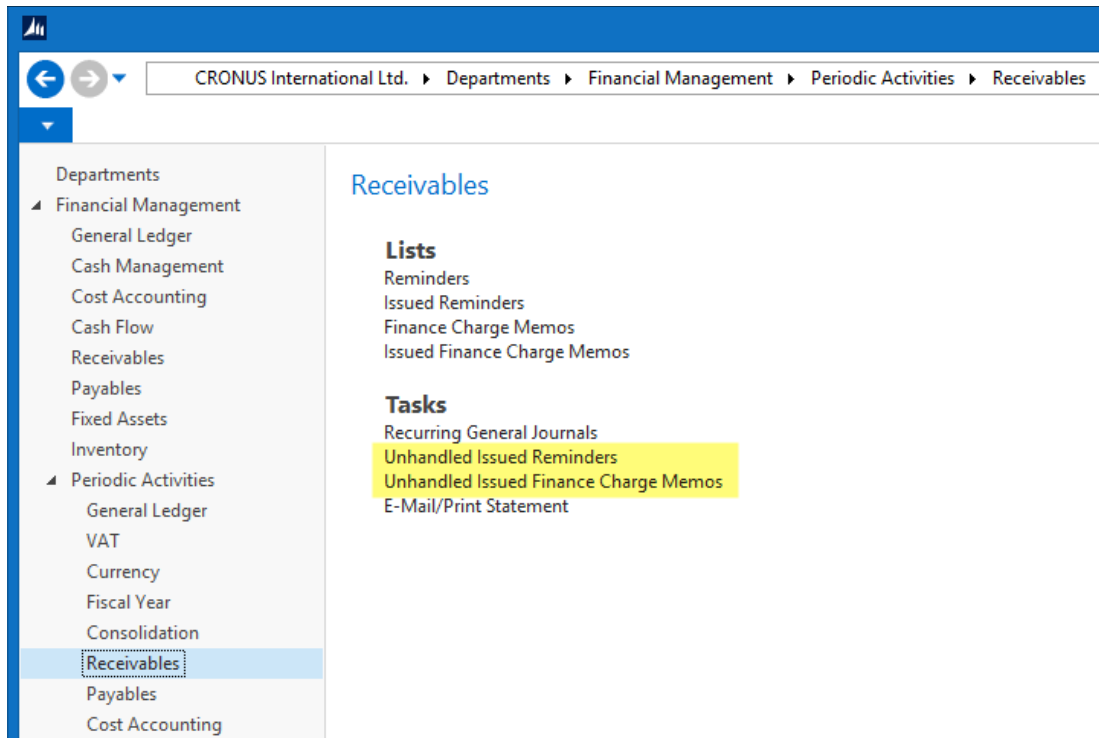
Choosing Departments, Sales & Marketing, Order Processing. You find Unhandled Posted Shipments, and Unhandled Posted Receipts:



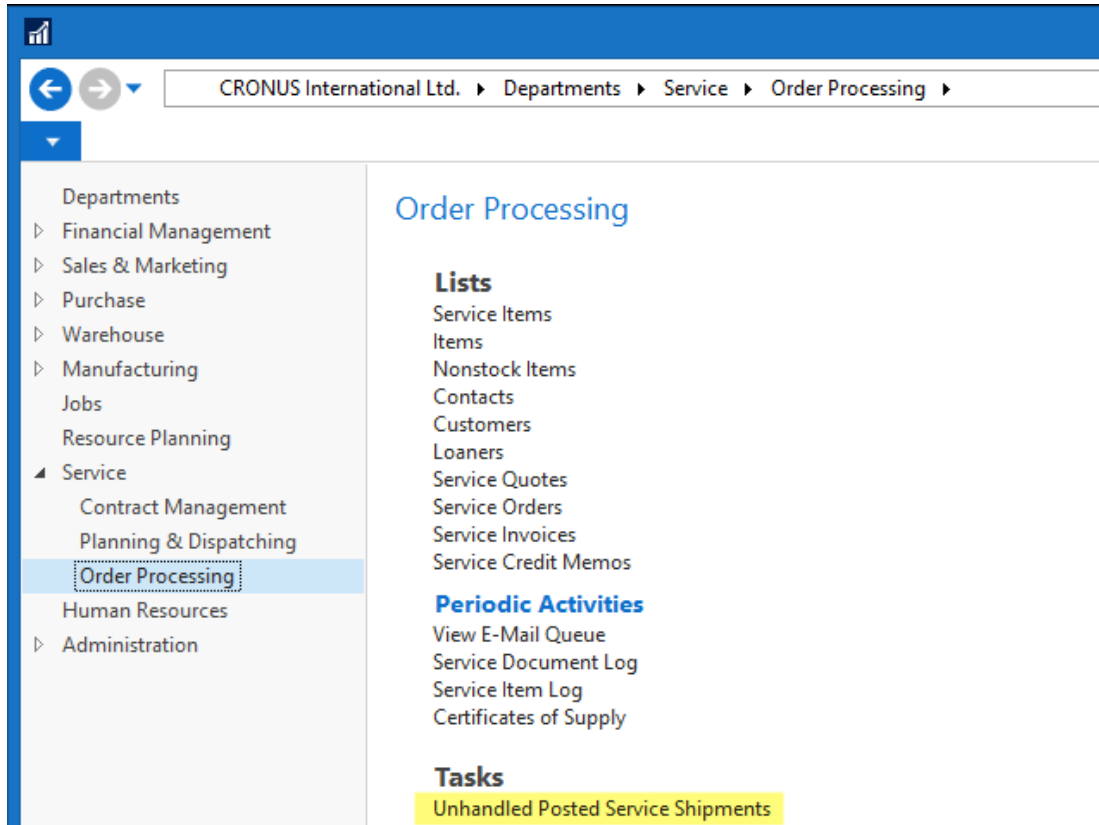
Choosing Departments, Financial Management, Receivables. You find Unhandled Posted Sales Invoice, Unhandled Posted Cr. Memo, Unhandled Posted Service Invoice and Unhandled Posted Service Cr. Memo:



Choosing Departments, Financial Management, Periodic Activities, Receivables. You find Unhandled Issued Reminder and Unhandled Issued Finance Charge Memo:



Choosing Departments, Service, Order Processing. You find Unhandled Posted Service Shipments:



## Customer Statements

You can e-mail or print statements to customer from the “E-Mail/Print Statement” page. The page shows all customers if you don’t have any filters.

Under Departments, Financial Management, Periodic Activities, Receivables you find the “E-Mail/Print Statement”

The screenshot shows the Microsoft Dynamics NAV interface. The title bar reads "Receivables - Microsoft Dynamics NAV". The breadcrumb navigation path is "CRONUS International Ltd. > Departments > Financial Management > Periodic Activities > Receivables". The left-hand navigation pane is expanded to show "Receivables" under "Periodic Activities". The main content area is titled "Receivables" and contains two sections: "Lists" and "Tasks".

**Lists**

- Reminders
- Issued Reminders
- Finance Charge Memos
- Issued Finance Charge Memos

**Tasks**

- Recurring General Journals
- Unhandled Issued Reminders
- Unhandled Issued Finance Charge Memos
- E-Mail/Print Statement
- Customer Statement Journal

You get this page:

No.	Name	E-Mail Recipients	Automatic Statement	Print Stat...	Balance (LCY)	Net Change (LCY)	Balance Due (LCY)
01445544	Progressive Home Furnishings	mr.scott.mitchell@cronuscorp.net	Manual	<input checked="" type="checkbox"/>	1.499,03	1.499,03	0,00
10000	The Cannon Group PLC	mr.andy.teal@cronuscorp.net	Automatic	<input checked="" type="checkbox"/>	168.364,41	-123.611,99	147.811,14
20000	Selangorian Ltd.	mr.mark.mcarthur@cronuscorp.net	Automatic	<input checked="" type="checkbox"/>	96.408,46	-115.168,63	89.078,21
30000	John Haddock Insurance Co.	miss.patricia.doyle@cronuscorp.net	Manual	<input checked="" type="checkbox"/>	350.611,35	7.856,48	349.615,40

#### Filters:

- **Date Filter:** Sets the date filter for ledger entries.
- **Print Statement:** Filters on the Customers "Print Statement" field.
- **Only with E-Mail:** Shows only lines where there is an e-mail address.
- **Entries in period:** If checked only customers with ledger entries are shown.
- **Balance (LCY) filter:** Filters on the "Balance (LCY)" field. See picture above for sample.
- **Balance Due (LCY) filter:** Filters on the "Balance Due (LCY)" field. See picture above for sample.

#### Buttons:

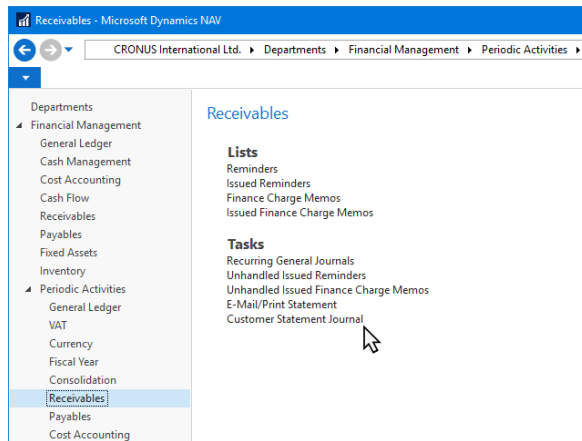
- **Print/E-Mail all:** Creates a Queue entry for all the records within the filter. Then each entry from the queue will be printed if there is no e-mail and mailed if there is an e-mail address. If for some reason the batch process is stopped (Internet connection is broken etc.), then you can restart the batch from Document Output Queue.
- **Send all to Queue:** Sends all records to the E-Mail Queue.
- **E-Mail (Opens in Outlook):** This button opens Outlook with the PDF attached. You can now edit the mail before sending.
- **E-Mail (SMTP):** This button sends the current record with SMTP. Mostly used for testing SMTP connectivity.

If the batch process sending/printing is interrupted you can restart the batch from Document Output Queue.

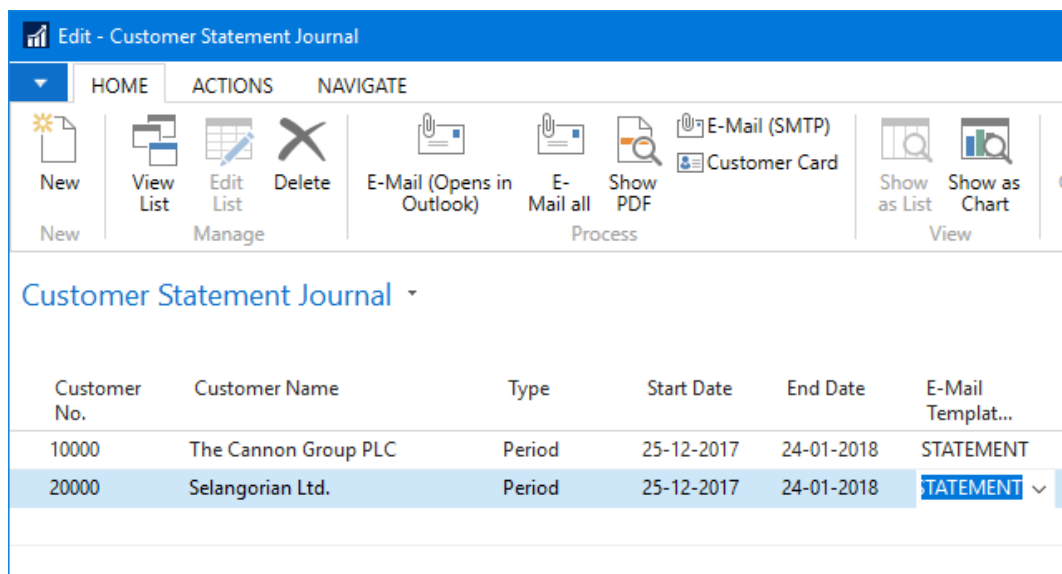


## Customer Statement Journal (Automatic Generated Statements)

Customer Statement Journal, can be found in Departments/Financial Management/Periodic Activities/Receivables



The Customer Statement Journal is normally generated on a daily basis, and will hold all the statements to send out today. Who to receive the statements is setup on the Customer, see Customer Setup.

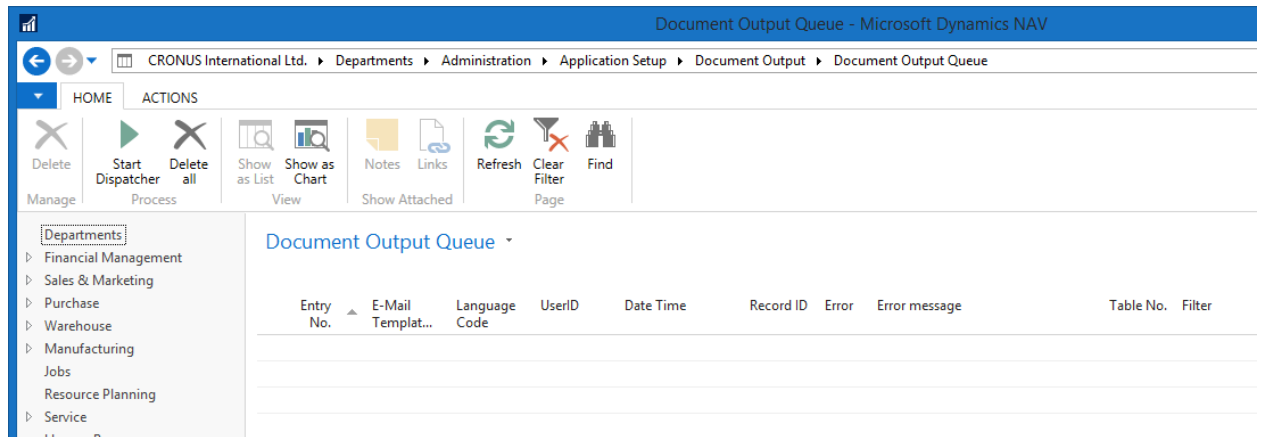


**Buttons:**

- **E-Mail (Opens in Outlook):** Opens the current statement in Outlook.
- **E-Mail all:** Sends all the statements in the Journal.
- **Show PDF:** Opens the pre-generated Statement PDF.
- **E-Mail (SMTP):** Sends the current statement using SMTP. Mostly used for testing SMTP connectivity.

## Document Output Queue

From all the Unhandled pages and from E-Mail/print Statements, you can send print/e-mail requests to the “Document Output Queue”, the queue will normally be processed automatically. See **Error! Reference source not found.**



### Buttons:

- **Start Dispatcher:** Restarts sending/printing from the queue.
- **Delete all:** This button deletes all the lines.

### Fields:

- **Entry No.:** Unique number for the record.
- **E-Mail Template Code:** The Template code this this mail.
- **Language Code:** The language code to find the correct template.
- **UserID:** The user who wants to send this mail.
- **Date Time:** The Date and time the user created this mail.
- **Record ID:** The NAV Record ID for the record to this mail.
- **Error:** If there is a checkmark the mail failed.
- **Error Message:** The error message if the mail failed.
- **Table No.:** The Table No. for the mail to be send.
- **Filter:** The filters for the record to send.

### Customer Setup

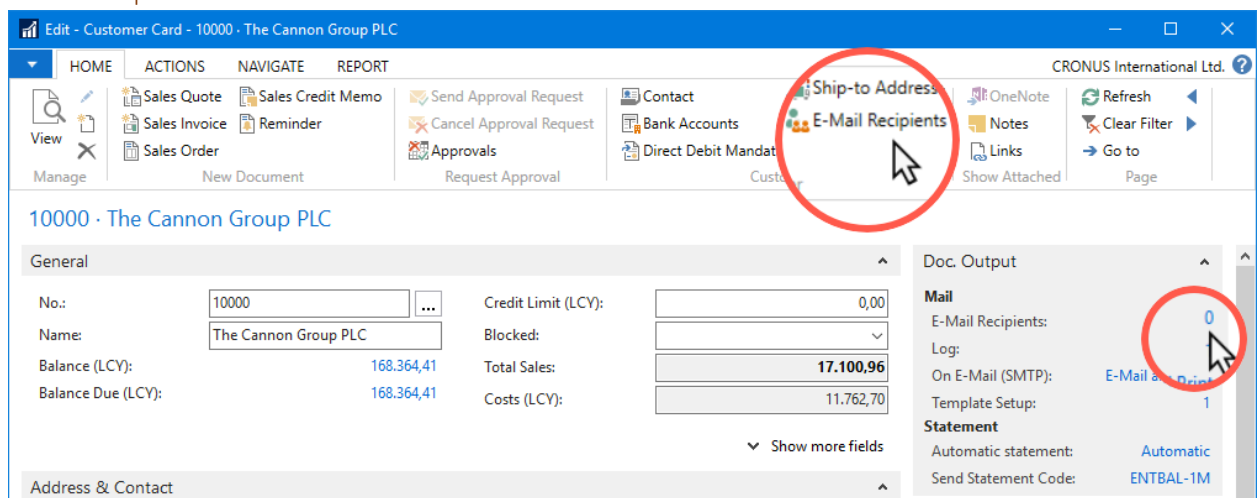
Customer setup can be found in Departments/Sales & Marketing/Sales/Customers

Open Customer Card

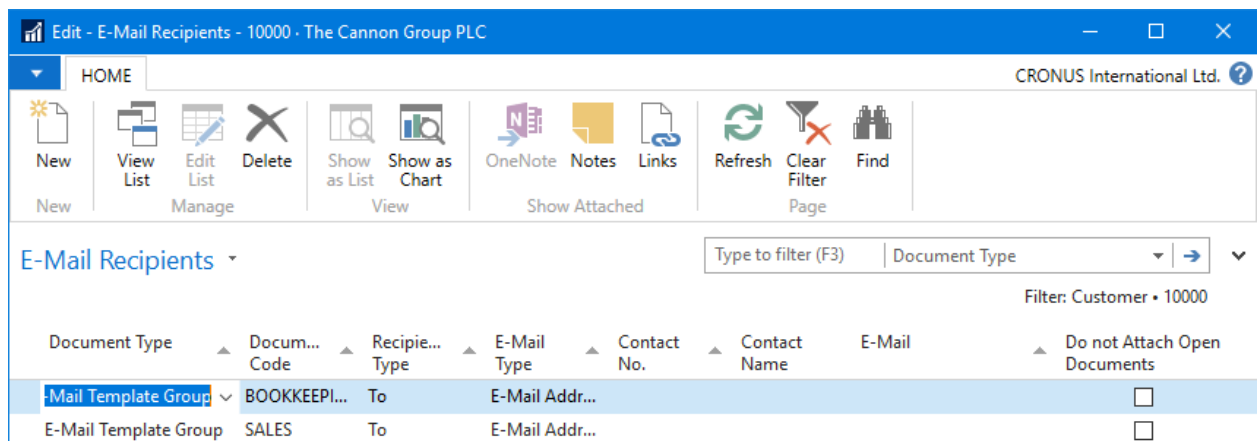
On the Customer Card, you can setup:

- E-Mail Recipients
- E-Mail or Print
- Automatic Statement

### E-Mail Recipients

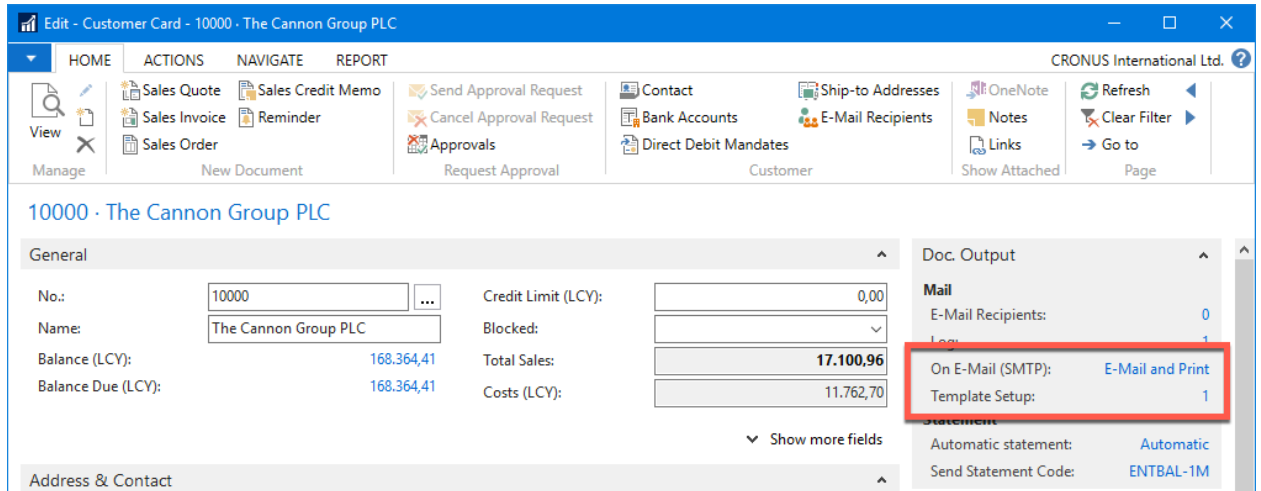


From the Customer Card you can open E-Mail Recipients.



Her you can enter the e-mail addresses used to send your PDF's. See E-mail recipients

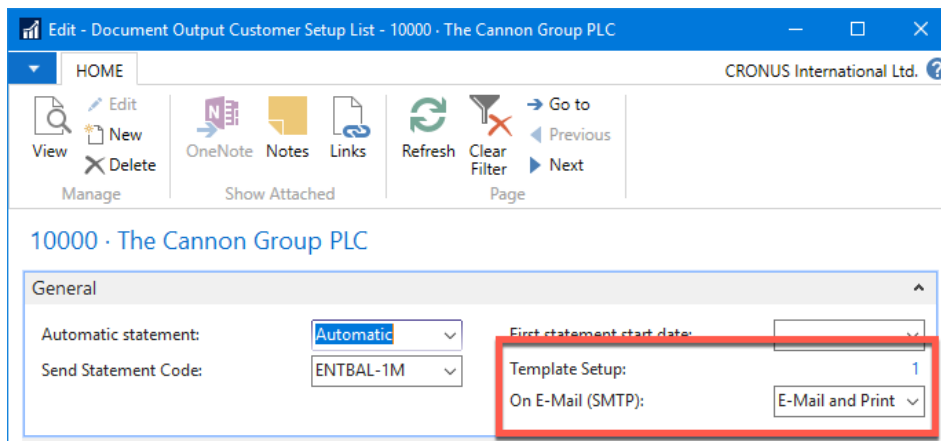
E-Mail or Print



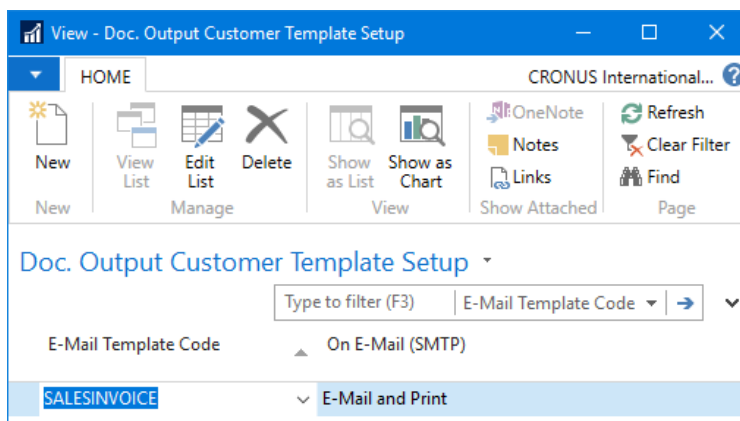
Normally Doc. Output will send e-mails to customers with an e-mail address, this behavior can be changed by clicking on “On E-Mail (SMTP)” or “Template Setup”.

If you want the behavior changed for all templates used with this Customer you change “On E-Mail (SMTP)”. If you only want to change it for some Templates you can open “Template Setup”.

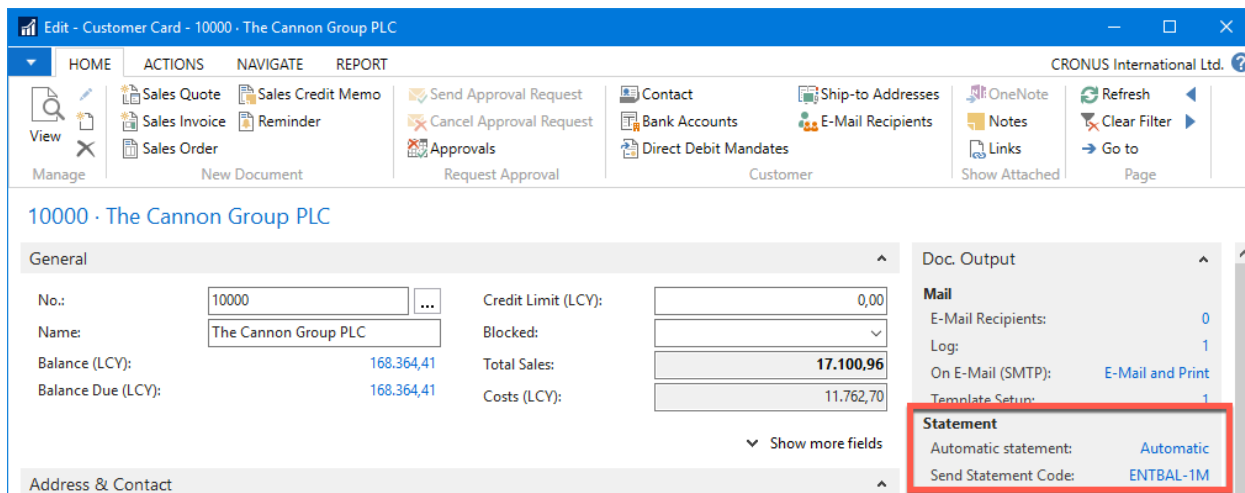
**On E-Mail Setup:**



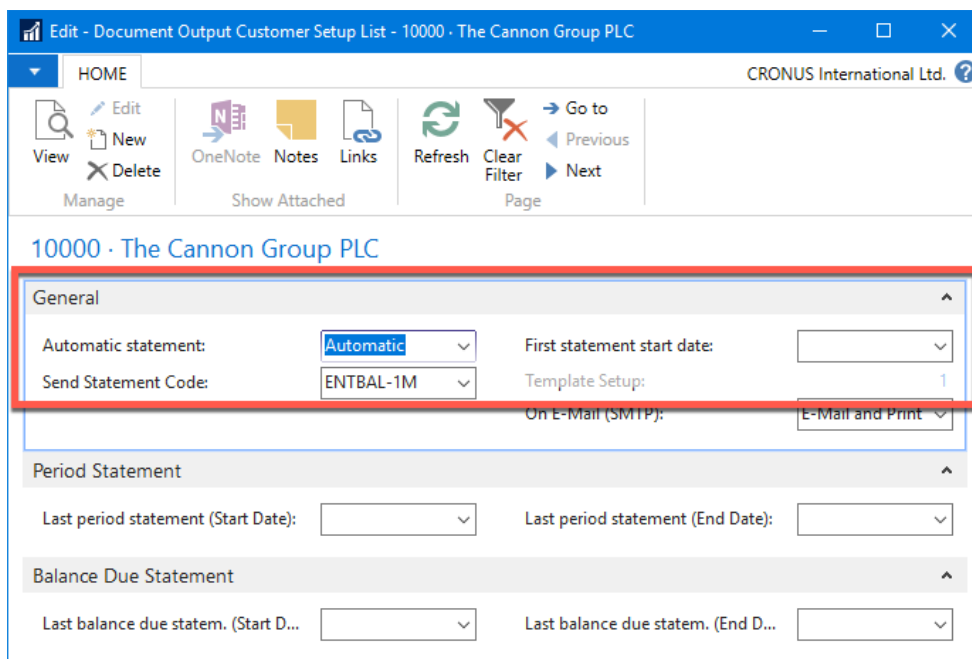
**Template Setup:**



Automatic Customer Statements



From the Customer Card you can open “Doc. Output Customer Setup”.



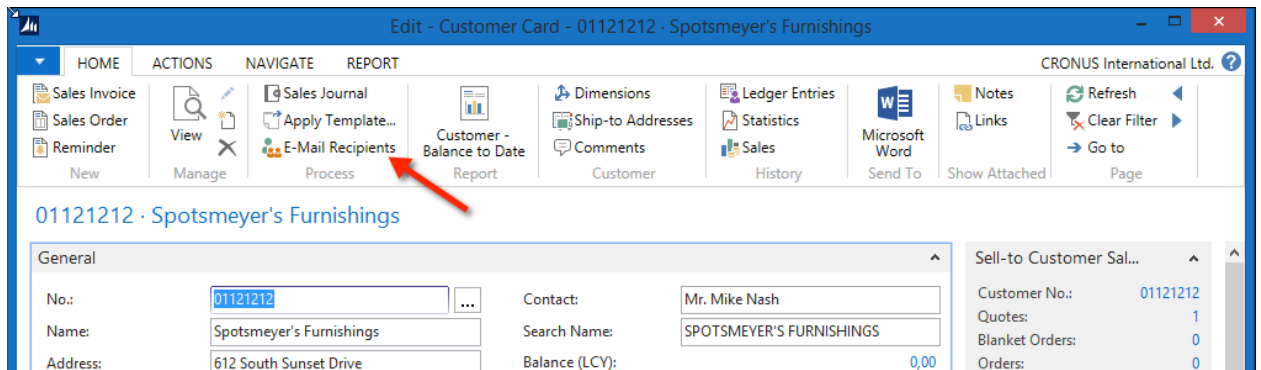
Fields:

- **Automatic Statement:** Choose between Manual or Automatic.
- **Send Statement Code:** Choose how often you customer should receive a statement. See Automatic Customer Statements Setup
- **First statement start date:** Enter a start date for the first statement to this customer.

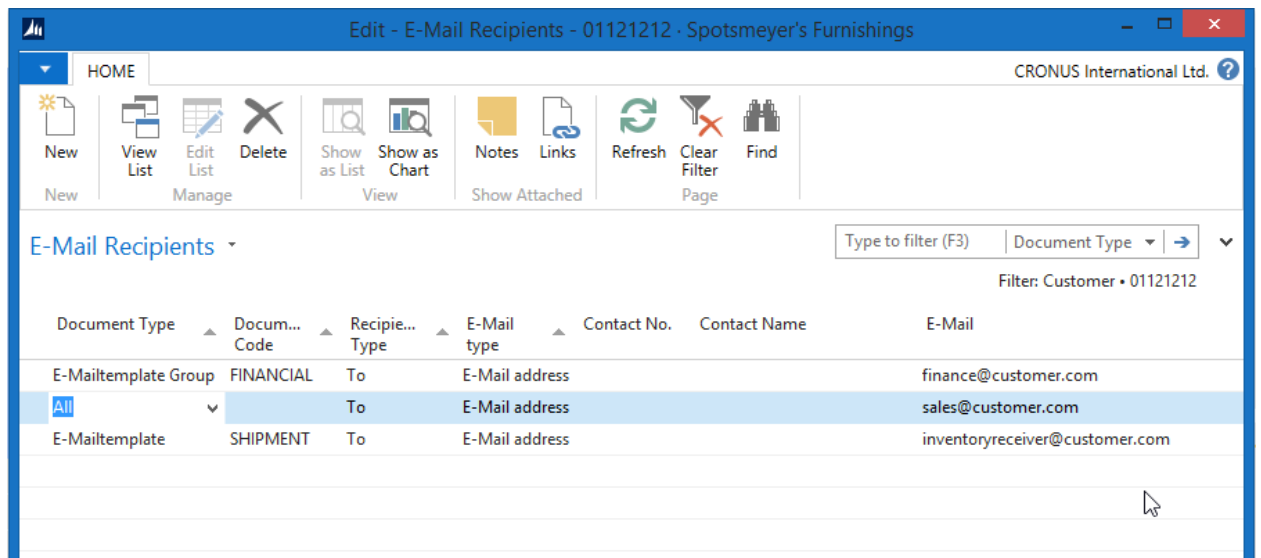
### E-mail recipients

E-mail Recipients can be used to define who should receive E-Mails from Document Output. The template defines how to search for E-Mail addresses.

You can setup E-Mail recipients for Customers, Vendors, Contacts and Banks.

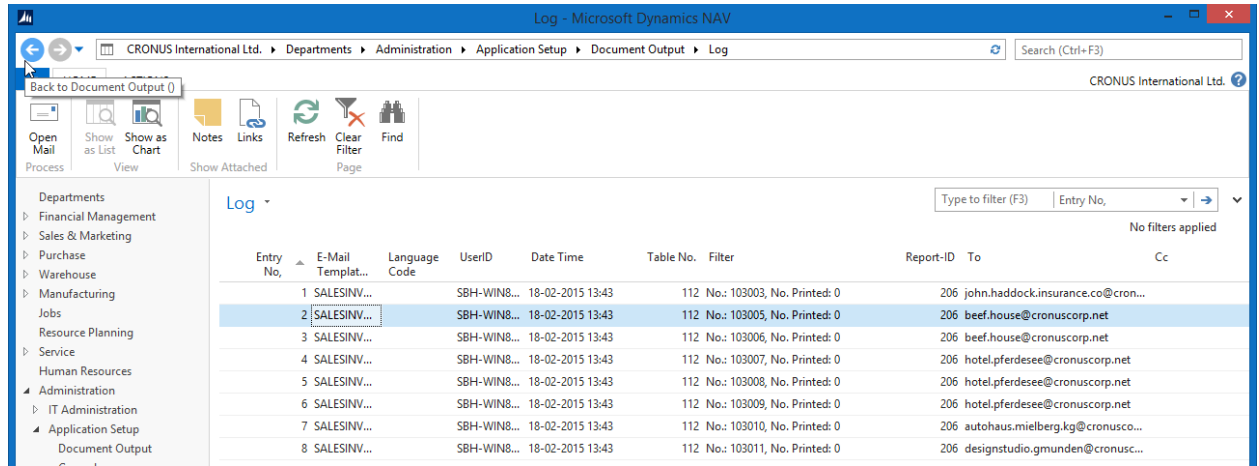


### Customer sample:



## E-Mail log

In the E-Mail Log you can see all mail sent with SMTP or with Outlook (Outlook only if dll's are installed on clients)



### Buttons:

- **Open Mail:** Opens the e-mail including the PDF.

### 3. Setup

#### E-Mail Template Setup

##### E-Mail Templates

You can setup one template for each report in NAV. You can also setup templates without link to a report. "E-Mail templates" is used for setting up the text for Subject and body of the E-Mail.

The screenshot shows the 'Templates' page in Microsoft Dynamics NAV. The navigation pane on the left is expanded to 'Administration' > 'Application Setup'. The main area displays a table of templates with the following columns: Code, Document Group, Report-ID, and Report Name. The 'STATEMENT' template is highlighted in blue.

Code	Document Group	Report-ID	Report Name
FINCHRGMEMO	BOOKKEEPING	118	Finance Charge ...
PACKAGETRACK	SALES		
PURCHORDER	PURCHASE	405	Order
PURCHQUOTE	PURCHASE	404	Purchase - Quote
REMINDER	SALES	117	Reminder
RETURNORDER	SALES	6631	Return Order Co...
RETURNRECEIPT	SALES	6646	Sales - Return Re...
SALESCRMEMO	BOOKKEEPING	1307	Standard Sales - ...
SALESINVOICE	BOOKKEEPING	1306	Standard Sales - ...
SALESORDER	SALES	1305	Standard Sales - ...
SALESQUOTE	SALES	1304	Standard Sales - ...
SERVCONTRACT	SALES	5970	Service Contract
SERVCRMEMO	BOOKKEEPING	5912	Service - Credit ...
SERVINVOICE	BOOKKEEPING	5911	Service - Invoice
SERVITEM	SALES	5936	Service Item Wo...
SERVORDER	SALES	5900	Service Order
SERVQUOTE	SALES	5902	Service Quote
SERVSHIPMENT	SALES	5913	Service - Shipme...
SHIPMENT	SALES	208	Sales - Shipment
STATEMENT	BOOKKEEPING	1316	Standard Statem...

##### Buttons:

- **View/Edit:** Opens the E-Mail Template Card Page.
- **Merge Fields:** Opens the Merge Fields Page.
- **Copy Template:** Use this function to copy a template. Templates can also be copied from another Company.
- **Download Template:** Downloads and imports templates from Continia Online.
- **Import Template:** Imports template(s) from an xml file.
- **Export Template:** Exports selected template(s) to an xml file.
- **Log:** Shows the E-Mail log for this template.



## E-Mail Template Card (Page)

## Header fields:

- **Code:** The unique code for this template.
- **Report-ID:** The report number this template should be linked to.
- **First Table in Report:** The first table used in the report, this is the table you can set filters on from C/AL code.

## Recipients:

- **Document Group:** You can group templates in document groups.
- **E-Mail Recipients Field:** IF you want to use recipients from the “E-Mail recipient Table” you need to setup a Field No. for Customer, Vendor or Contact here:
- **E-Mail Address Field:** Here you setup how to find an e-mail address from the Customer Card, Vendor Card, Contact Card or similar. It can also be an e-mail field your NAV dealer has added to your NAV solution.
- **E-Mail is mandatory:** Should be checked if you do not want the user to be able to open a PDF in Outlook with no e-mail address.
- **Fixed Cc Recipient(s):** An e-mail address that always receives the mail as cc.
- **Fixed Bcc Recipient(s):** An e-mail address that always receives the mail as cc.
- **Test Recipient:** You can specify a test recipient here. When used all mails will be sent to this e-mail address instead of the normal e-mail address.

**From E-Mail**

- **From E-Mail:**
  - **Fixed:** A fixed "From E-Mail Address" setup on the template or on SMTP Setup.
  - **User Setup:** E-Mail address from User Setup.
  - **Salesperson from User Set.** E-Mail address from salesperson, found with the Salesperson code on User Setup.
- **From E-Mail Address:** From E-Mail address used. This will work with both Outlook (If setup in Outlook) and SMTP.
- **From Email Name:** Name of the person in "From E-Mail Address".

**Linked To** (Used to set customer or vendor no. in e-mail log.):

- **Linked to:** Customer or Vendor.
- **Linked to Field No.:** From which field to find the customer or vendor no.
- **Linked to Field Caption:** The caption of the field in "Linked to Field No.".

**Advanced:**

- **Document Folder:** You can setup a network folder where Document Output stores the PDF files. Merge fields can be used here. Example: \\server1\Saved PDF\%2\Invoice\
  - **Use Document Output in Std. NAV actions:** Set this to yes if you want to use the standard buttons/actions in NAV for Document Output.
  - **Log E-Mails:** When checked e-mail are saved in the E-Mail Log table.
  - **Engine:** Specifies how to generate the attachment to the e-mail.
    - NAV-PDF
    - NAV-Excel (Only NAV 2013 and forward)
    - NAV Word (Only NAV 2015 and forward)
    - Document Output Setup (Uses the "Default engine" from "Document Output Setup")
  - **SMTP Server:** If you have more the one SMTP server you can choose which should be used for this template.

**Header Buttons:**

- **Merge Fields:** Shows Merge Fields (Page)
- **Copy Template:** Use this function to copy a template. Templates can also be copied from another Company.
- **Log:** Opens the Log for this template.

**Line fields:**

- **Enabled:** Here you enable the line.
- **Language Code:** Language Code for this template line.
- **Template Variant Value Code:** If the template is setup with a Variant field or a Dimension Code you can enter the code here.
- **File Name:** The file name for the PDF file, you can specify %no. for merge fields.
- **From E-Mail Address:** If you want the template to be send from the same sender every time. You can enter the E-Mail Address here. This will work with both Outlook (If setup in Outlook) and SMTP.
- **From E-Mail Name:** Name of the person in "From E-Mail Address".
- **Show Request Page:** When checked the request page on the report is opened every time the PDF is created.
- **Saved Request Page:** Shows a checkmark if a Request Page is attached.
- **Background PDF:** Shows a checkmark if a Background PDF is attached.
- **Merge PDF File:** Shows a checkmark if a Merge PDF is attached.
- **Attach Open Documents:** When checked open documents in a zip file will be attached to the e-mail.
- **Attach Open Doc. File Name:** The filename used for the zip file.

**Available fields:**

- **Mail format:** Choose the mail format (HTML, Plain Text or RTF).
- **Mail Importance:** Choose the importance of the mail (Low, Normal or High).

**Line Buttons:****E-Mail Template**

- **Edit E-Mail Template:** Opens Outlook so you can edit the template, and add attachments.
- **Delete E-Mail Template:** Deletes the template created in Outlook.
- **Attachments:** Shows the attachments you added in Outlook.

**Background PDF**

- **Set Background PDF:** Sets the Background PDF, this can be a letterhead or similar.
- **Show Background PDF:** Shows the Background PDF saved on the line.
- **Delete Background PDF:** Deletes the Background PDF saved on the line.

**Merge PDF**

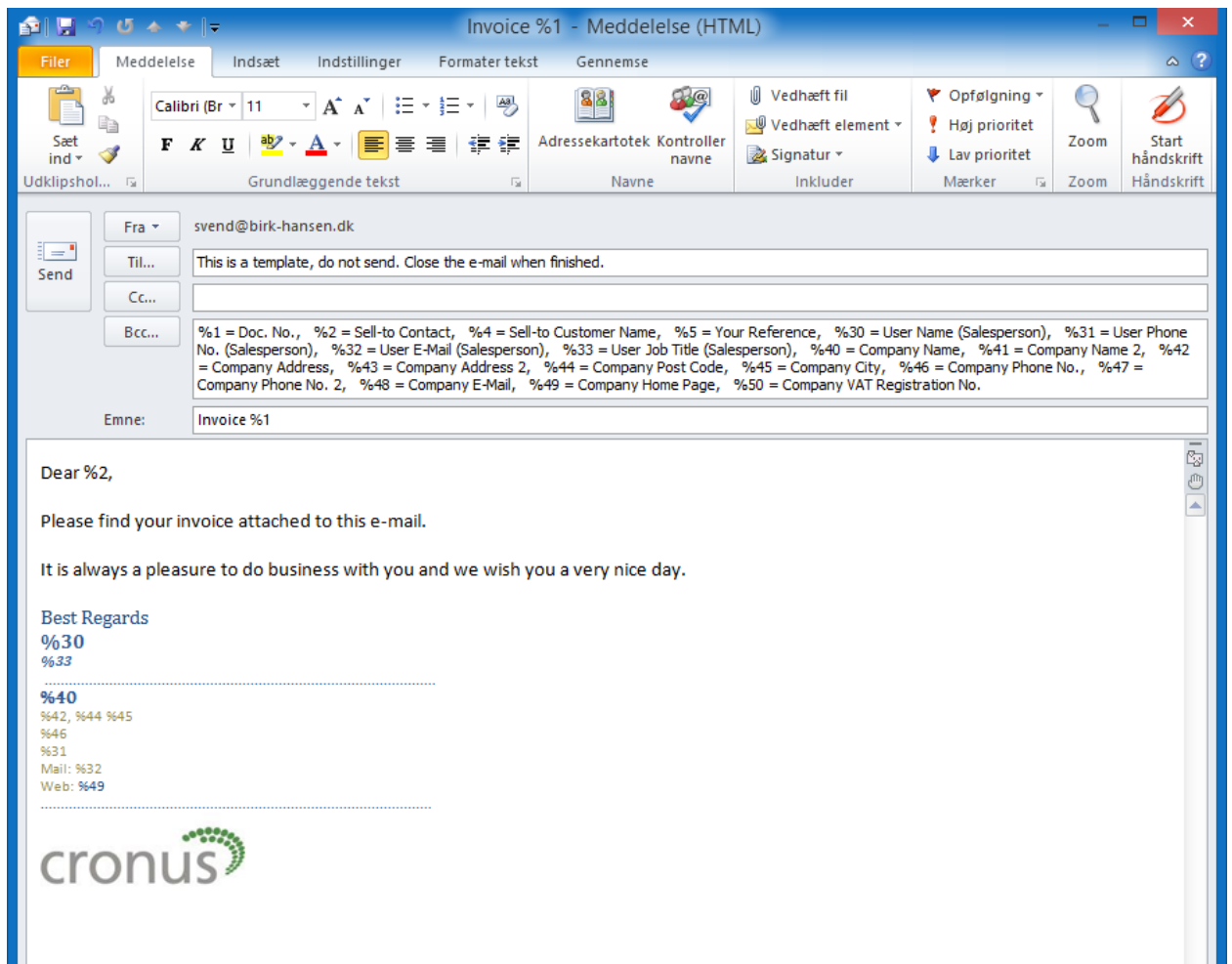
- **Set Merge PDF File:** Set the Merge file PDF, this can be sales and delivery terms or similar.
- **Show Merge PDF File:** Shows the Merge PDF saved on the line.
- **Delete Merge PDF File:** Deletes the Merge PDF saved on the line.

**Request Page (NAV 2015 and forward)**

- **Set Request Page:** Opens the request page for the specified Report-ID.
- **Delete Request Page:** Deletes the request pages saved on the line.

### Edit E-Mail Template (In Outlook)

When the button “Edit E-Mail Template” is pressed Outlook opens with the current template.



In Outlook you can now edit your template.

All the merge fields that are setup are shown in the Bcc field.

You can attach files to the template, and insert pictures logos etc., if you want.

### Merge Fields (Page)

On the “Merge Fields” page you setup all the fields you need for merging information into the created e-mail.

Number	Description	Type	Get Field From	Get From Table	Get From Field	Web Address
1	Doc. No.	Text	Table	36 (Sales Header)	3 (No.)	
2	Sell-to Contact	Text	Table	36 (Sales Header)	84 (Sell-to Contact)	
3	Version No.	Text	Table	36 (Sales Header)	5043 (No. of Archived Versions)	
4	Sell-to Customer Name	Text	Table	36 (Sales Header)	79 (Sell-to Customer Name)	
5	Your Reference	Text	Table	36 (Sales Header)	11 (Your Reference)	
6	Shipment Date	Text	Table	36 (Sales Header)	21 (Shipment Date)	

#### Fields:

- **Number:** The unique number for this merge field.
  - **Description:** Description of the merge field.
  - **Type:**
    - Text (Text merge field)
    - Hyperlink (The merge field is a link to webpage)
    - Link to E-Mail address (The merge field is a link to an e-mail address)
  - **Get Field From:**
    - Table
    - Setup Table
    - E-Mail Contact
    - Sales Person
    - Employee
    - UserID
    - Company Name
    - Codeunit
  - **Get From Table:** The Table No. that should be used.
  - **Get From Field:** The field No. on the merge field.
  - **Web address:**
  - **Show text:**
  - **Codeunit ID:** If Type is Codeunit you can specify the Codeunit no. to find the value for the merge field. (See Codeunit 6175282 “Merge Field Value Finder”)
  - **Codeunit Parameter:** Specify a parameter that will be passed to the Codeunit. (See Codeunit 6175282 “Merge Field Value Finder”).
- Current Values:**
- PackTrack – Package Tracking No.
  - ShippingAgent – Shipping Agent
  - SalespersonName – Salesperson Name
  - SalespersonJobTitle – Salesperson Job Title

SalespersonPhoneNo – Salesperson Phone No.

SalespersonEMail – Salesperson E-Mail

Contact1FirstName – The first contacts First Name

Contact2FirstName – The second contacts First Name

Contact1Surname – The first contacts Surname

Contact2Surname – The second contacts Surname

Contact1FormalSalutation – The first contacts Formal Salutation

Contact2FormalSalutation – The second contacts Formal Salutation

Contact1InformalSalutation – The first contacts Informal Salutation

Contact2InformalSalutation – The second contacts Informal Salutation

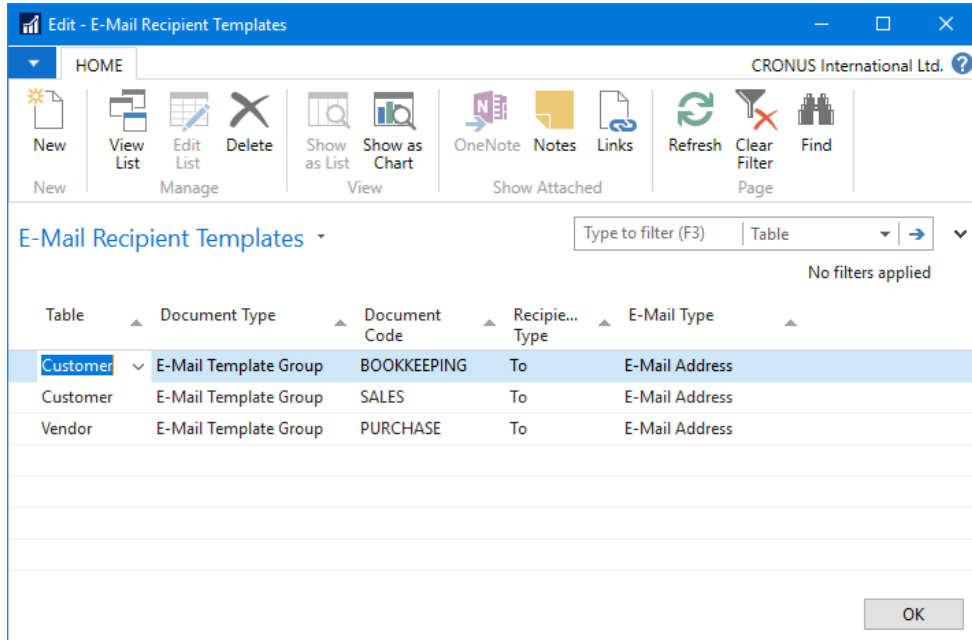
BalanceDue – Customers Balance Due

BalanceDueLCY – Customer Balance Due LCY

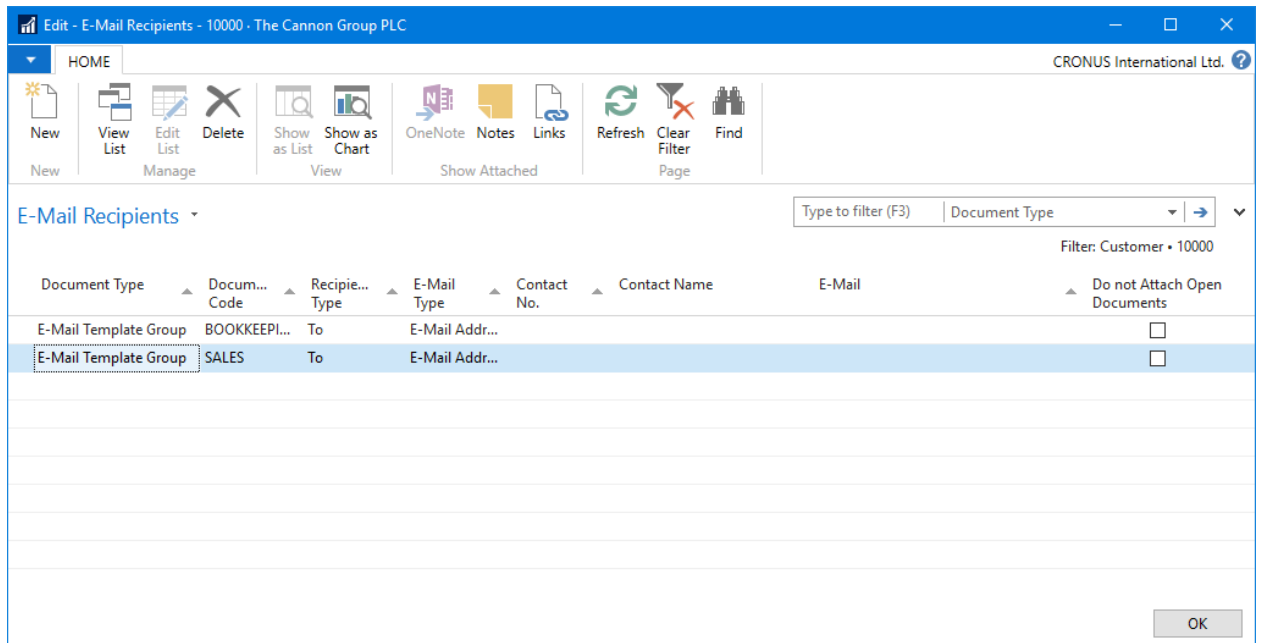
### E-Mail Recipients Template

The E-Mail Recipient Template is used to makes it easy to enter e-mails on your Customers and Vendors.

The setup in E-Mail Recipient Template is then used when you open “E-Mail Recipients” on Customer, Vendor, Contact or Bank Account.



When you open “E-Mail Recipients” on Customer card with the above setup NAV will create 2 lines, and you are now ready to enter 2 e-mail addresses.



### Automatic Customer Statements Setup

These codes are used to create automatic statements.

You can setup Job Queue to create Automatic Statements. The Job Queue Entry should run Codeunit: 6175297 "Send Customer Statement Mgt.".

#### Period Statements:

"Period statement" is a statement send with a fixed period to customers if the condition in the "Send statement if" field is meet.

#### Balance Due Statements

"Balance Due Statements" are send if a customer has an overdue (negative date formula) Balance Due for the period in "Send statement if Balance Due Date Formula".

Code	Send statement if	Period Date Formula	Send statement if Balance Due Date Formula	Do not send if negative balance	Change to manual on Finance Charge Memo	Change to manual on Reminder	E-Mail Template Code	Output
BAL-14D	Balance	14D	-5D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STATEMENT	Journal
BAL-1M	Balance	1M	-5D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STATEMENT	Journal
BALDUE-14D	Balance Due	14D	-5D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STATEMENT	Journal
BALDUE-1M	Balance Due	1M	-5D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STATEMENT	Journal
ENTBAL-14D	Entries in per...	14D	-5D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STATEMENT	Journal
ENTBAL-1M	Entries in per...	1M	-5D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STATEMENT	Journal
ENTDUE-14D	Entries in per...	14D	-5D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STATEMENT	Journal
ENTDUE-1M	Entries in per...	1M	-5D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STATEMENT	Journal
ENTRY-14D	Entries in per...	14D	-5D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STATEMENT	Journal
ENTRY-1M	Entries in per...	1M	-5D	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STATEMENT	Journal

#### Fields:

- **Code:** The unique code for this Send Customer Statement line.
- **Send statement if:** Description of the merge field.
- **Period Date Formula:** How often the customer should receive a period statement.
- **Send statement if Balance Due Date Formula:** When the customer should receive a "Balance Due Statement". This field should normally be negative to give the customer some days before sending the "Balance Due Statement". If Positive the customer will receive the "Balance Due Statement" before the amount is due. If blank no "Balance Due Statement" is sent.



- **Do not send if negative balance:** If checked, Customers will not receive statements if their Balance is negative.
- **Change to manual on Finance Charge Memo:** Change “Automatic Statement” on the Customer to Manual if the customer receives a Finance Charge Memo. See Automatic Customer Statements
- **Change to manual on Reminder:** Change “Automatic Statement” on the Customer to Manual if the customer receives a Reminder.
- **E-Mail Template Code:** Enter the Template code used for sending statements.
- **Output:** Choose Journal if you want to see the statement in the Customer Statement Journal (Automatic Generated Statements) before mailing. Choose E-Mail if you want Doc. Output to send directly.

## Document Output Setup

### Fields:

- **Default Engine (NAV 2013 and forward):** Specify which attachment to be generated.
  - NAV-PDF (Only RTC)
  - NAV-Excel (Only NAV 2013 and forward)
  - NAV Word (Only NAV 2015 and forward)
- **Default Engine (Classic Clients):** Specify the PDF driver, and choose the Printer!.
  - Printer Driver (Cannot be used unless you get custom development)
  - Bullzip-PDF (Uses the PDF driver from [www.bullzip.com](http://www.bullzip.com))
  - bioPDF (Uses the PDF driver from [www.biopdf.com](http://www.biopdf.com))
  - Document Output Setup (Uses the PDF driver from “Document Output Setup”)
  - Continia PDF (Uses the “Continia PDF Writer”, delivered with this product)
- **Document Folder:** You can setup a network folder where document output stores the PDF files. The Code from the template will be added to the folder.
- **Statement Report ID:** The report number used to send statements to customers. If you use Version 2013 R2, you need a NAV developer to change Table 6175279 “Statement Request Page Setup”. Report ID on the variable StatementReport need to be changed in the function RunStatementReport
- **Package Tracking Template:** Choose the Template Code used to send Package Tracking.
- **Sales Quote E-Mail Action:** Choose how the E-Mail button on Sales Quote should send e-mails.
- **Sales Order E-Mail Action:** Choose how the E-Mail button on Sales Order should send e-mails.
- **Purchase Order E-Mail Action:** Choose how the E-Mail button on Purchase Order should send e-mails.

## SMTP Mail Setup

The screenshot shows the 'Edit - Document Output SMTP Setup' dialog box. The ribbon includes 'HOME', 'ACTIONS', and 'NAVIGATE'. Under 'ACTIONS', there are icons for 'View', 'Edit', 'Advanced', 'Gmail Setup', 'Office 365 Setup', 'Notes', 'Links', 'Refresh', and 'Clear Filter'. The main content area is titled 'Document Output SMTP Setup' and contains a 'General' tab with the following fields:

- SMTP Server Address: localhost
- Authentication: Anonymous
- User ID: (empty)
- Password: (empty)
- Use SSL:
- Port: (empty)
- Connection Timeout (sec): (empty)
- E-Mail Address: invoice@cronuscorp.net

An 'OK' button is located at the bottom right of the dialog.

Enter your SMTP information. If you do not have this information, you can contact your internet/e-mail provider.

### Fields:

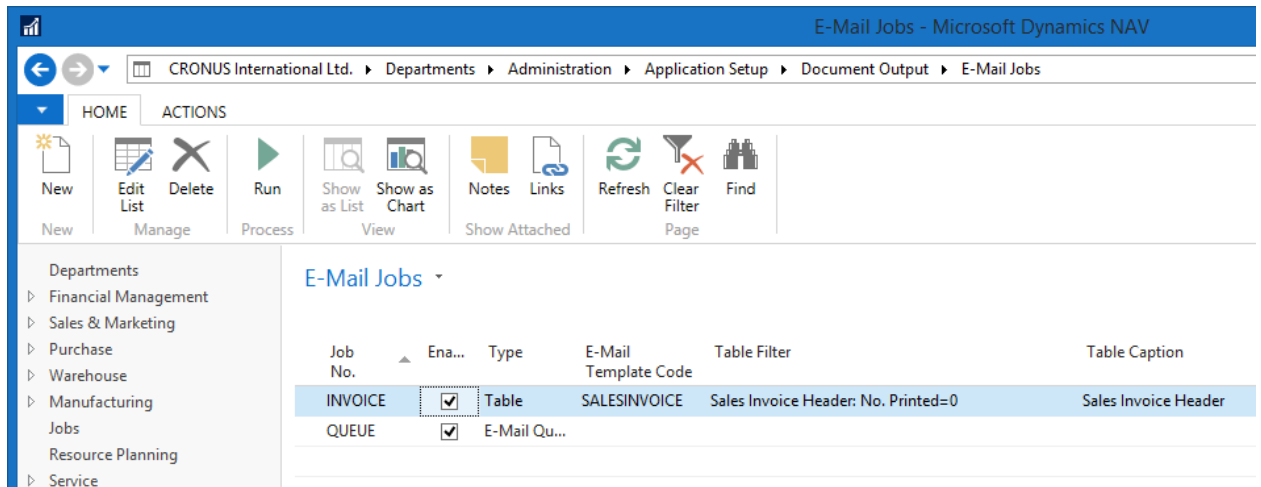
- **SMTP Server Address:** The SMTP servername or ip. address.
- **Authentication:** Choose the Authentication for the SMTP server.
  - Anonymous
  - NTLM
  - Basic
- **User ID:** The SMTP User Account.
- **Password:** Password for the User Account.
- **Use SSL:** Select if the connection requires SSL.
- **Port:** Type the Port number if it's different from the default SMTP port (25).
- **Connection Timeout (Sec):** Connection timeout in seconds.
- **E-Mail Address:** The E-Mail address used in the mail's From field.

### Buttons:

- **Advanced:** Opens a list view of SMTP servers if you want to use more than one SMTP Server or "E-Mail Address"s.
- **Gmail setup:** Sets the defaults for Gmail (SMTP Server Address, SSL and Port).
- **Office 365 Setup:** Sets the defaults for Office 365 (SMTP Server Address, SSL and Port).

## E-Mail jobs (can be run from NAS)

With E-Mail Job's, you can setup jobs you want to run with "Job Queue" in Dynamics NAV.



### Fields:

- **Job No.:** Set the Job No. or code for this job.
- **Enabled:** Sets the job to enabled or disabled.
- **Type:** Can be either Table or E-Mail Queue.
  - Table (Searches this table with the specified filters for e-mails to send)
  - E-Mail Queue (Sends mails from the Document Output Queue)
- **Table:** Choose the table this job will run with.
  - Sales Header
  - Sales Shipment Header
  - Sales Invoice Header
  - Sales Credit Memo Header
  - Issued Reminder Header
  - Issued Finance Charge Header Memo Header
- **Table Filter:** Click the Assist Edit Button , then you can setup which field should be filtered for the job.
- **E-Mail Template Code:** Select the "E-Mail Template" the job must use.

### Buttons:

- **Run:** You can Run the job manually with this button.

### NAS (Navision Application Server)

To setup Job Queue to run the "E-Mail Jobs". The Job Queue Entry should run Codeunit: 6175283 "NAV App. Server E-Mail Job Mgt".