



Continia

# Document Output

## Continia Document Output 365

Setup Quick Guide – Extension (Business Central on Premise)

August 2021 - CDO 5.0

**Table of contents:**

- 1. Introduction..... 3**
  - About the installation guide for Continia Document Output ..... 3
  - Installation Requirements ..... 3
- 2. Installation – Business Central on Premise ..... 4**
  - Installing Applications: ..... 4
  - Copy dll:..... 4
  - Import license: ..... 4
  - Install applications: ..... 4
- 3. Business Central Setup:..... 5**
  - Run the Activation Wizard..... 5
  - Document Output Setup Wizard ..... 8
  - Edit templates..... 11
  - Job Queue..... 12

## 1. Introduction

About the installation guide for Continia Document Output

The purpose of this installation guide is to give the resellers and consultants a full understanding of the architecture and installation procedures for the Document Output 365 application.

Installation Requirements

To use Continia Document Output 365, you must be running Microsoft Dynamics Business Central on Premise. Continia Document Output 365 will work with the following application versions:

**Business Central:**

- 2019 Wave 2 (15.0)
- 2020 Wave 1 (16.0)
- 2020 Wave 2 (17.0)
- 2021 Wave 1 (18.0)

## 2. Installation – Business Central on Premise

### Installing Applications:

To make Document Output 365 extension available requires five basic tasks:

- Install license file.
  - Install dll files.
  - Publish the extension packages to the Dynamics 365 Business Central server instance.
  - Synchronize the extensions with the tenant database.
  - Install Continia Core and Document Output 365 on the tenant.
- To help you install License file and our Extensions, we have created a set of PowerShell scripts. They are included in the zip file under Applications\PowerShell Setup CDO.

### Copy dll:

You need to copy the folder “Continia Doc. Output” from “CDO library (dll)\Add-ins\” to the Add-ins folder on the server(s).

The Business central Server are typically installed in the folder: C:\Program Files\Microsoft Dynamics 365 Business Central\150\Service\Add-ins

Make sure they are not blocked, by right clicking, and choose Properties for each dll, and make sure its not blocked.

### Import license:

#### **Import license.ps1**

The script contains a sample of the commands used to import a License.

#### **Show License.ps1**

The script contains a sample of the commands to show the current license installed.

### Install applications:

#### **Example - install.ps1**

This script contains a sample of the commands used to install the apps.

You can change the parameters to suit your needs and then right-click at the script and press “Run with PowerShell.

#### **Example - uninstall.ps1**

The script contains a sample of the commands used to uninstall the apps.

#### **ContiniaAppHelper.ps1**

This script contains modules for helping to install the apps to BC.

To start, you need to import ContiniaHelper module:

```
Import-Module <PathToExtractedProductFolder>\ContiniaAppHelper.ps1
```

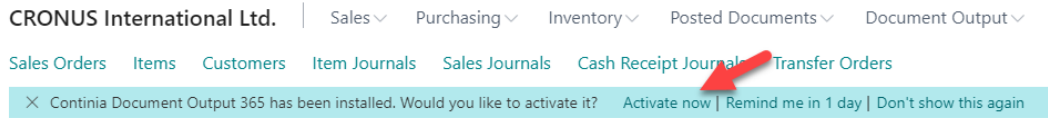
This module contains a function named Install-ContiniaAppSuite, which automatically handles the three steps required to install an app (Publish, Synchronize, Install), and have the flowing parameters:

- ServerInstance: The instance of Business Central server
- Tenant: If you have a single-tenant deployment, you can omit the -Tenant parameter and value.
- CoreAppPath: Path to the Continia Core extension. This parameter is mandatory.
- DOAppPath: Path to the Continia Document Output extension. This parameter is mandatory.

### 3. Business Central Setup:

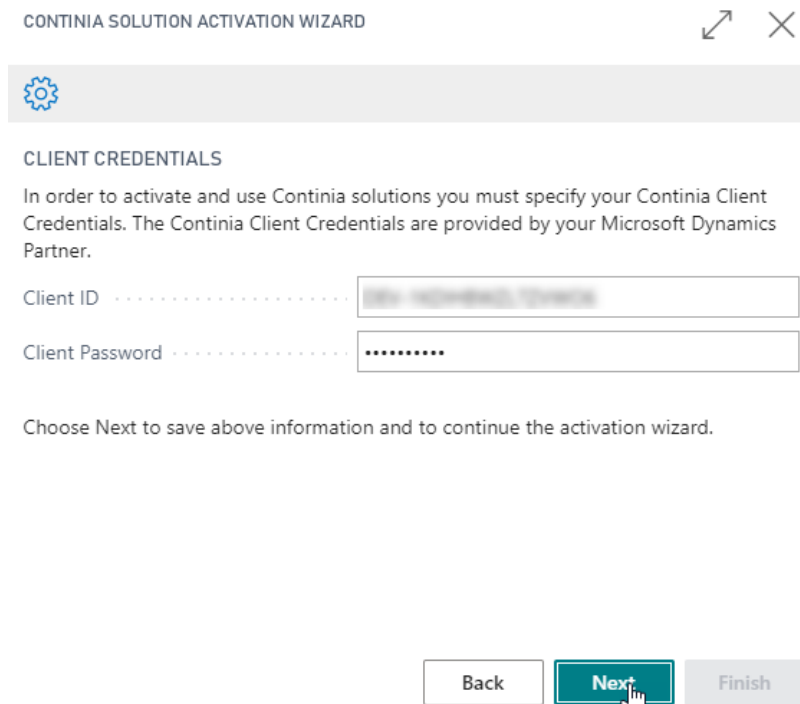
Run the Activation Wizard

After installing the application, open the Business Central Web App. You can now see a notification about Activating Continia Document Output. Click Activate Now.




C

Click Next,




Enter your Client ID and Client Password provided by Continia when you ordered the license for your customer.

If you do not have the client credentials you can send a mail to [Accounting@continia.com](mailto:Accounting@continia.com) you must include your Voice account no.

CONTINIA SOLUTION ACTIVATION WIZARD 

---




Please select whether this is a production or a test company


Production Company .....

Test Company .....

Choose production or test company.

CONTINIA SOLUTION ACTIVATION WIZARD 

---

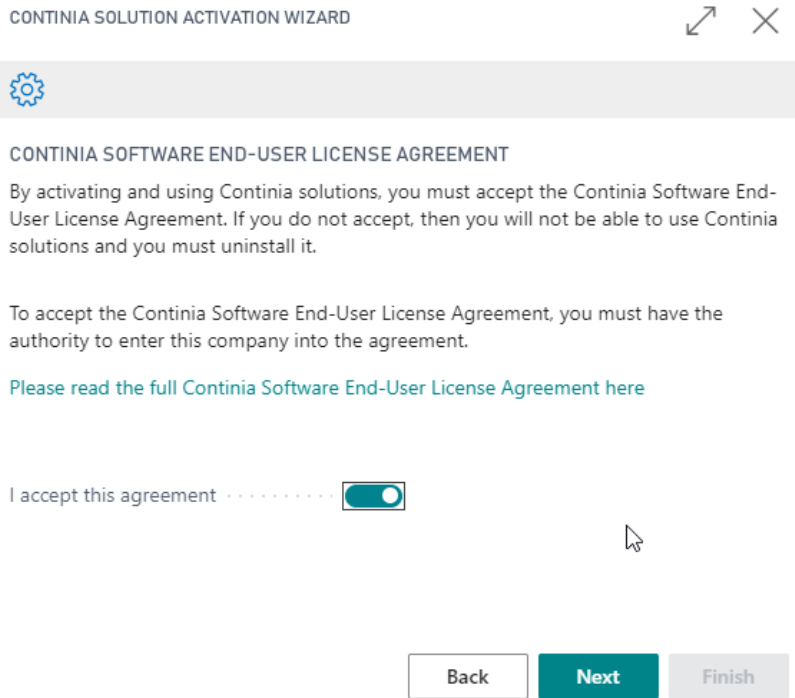


The following solutions are installed in your system. Please select which solution you want to activate in this company, and then choose Next.

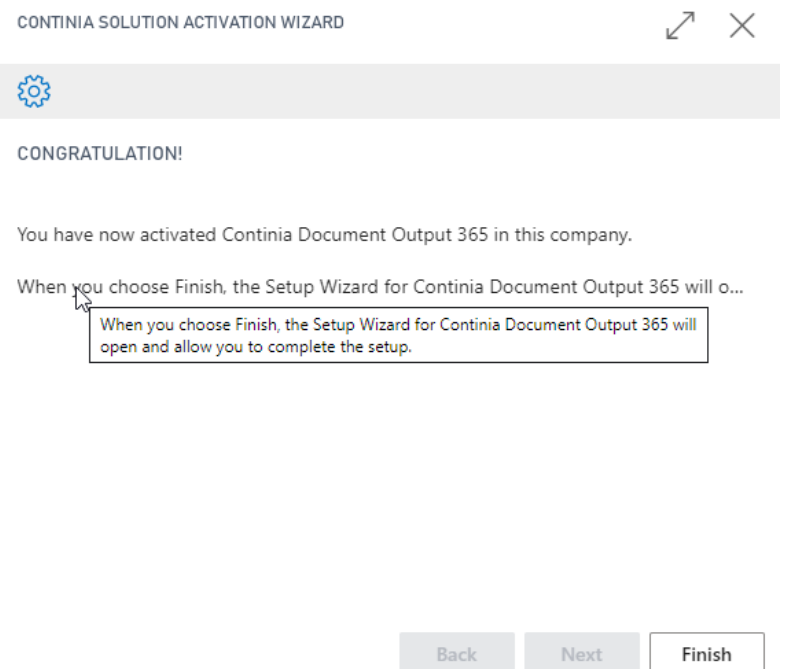
Activate

Name	Active
→ Continia Document Output 365	<input checked="" type="checkbox"/>

Set a Check mark in Active and click next.



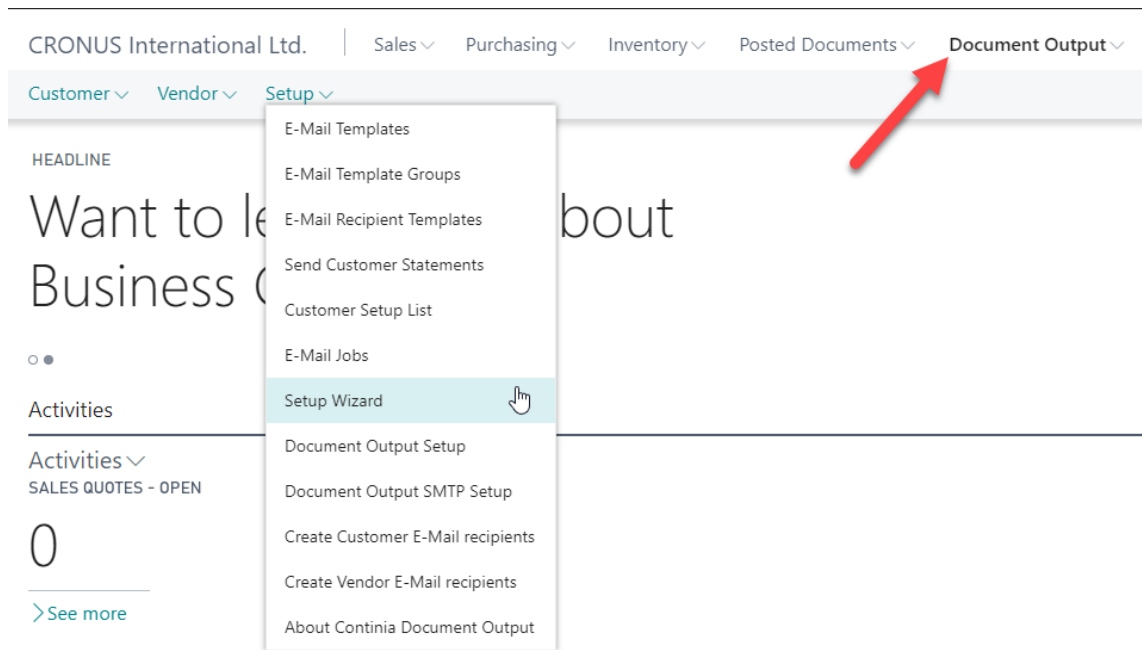
Accept the agreement and click next.



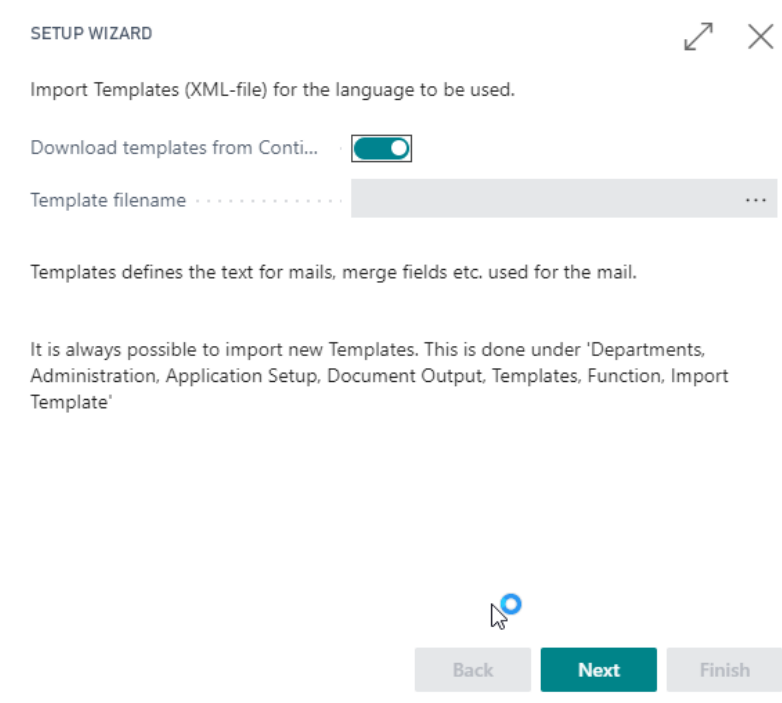
Click Finish, to end the activation, and start the Document Output Setup Wizard.

### Document Output Setup Wizard

Click Setup Wizard.



Choose a template file or leave the checkmark in “Download templates from Continia” to download/import, and then click next.



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



DOCUMENT OUTPUT SETUP WIZARD ↗ ✕

SMTP Setup:

SMTP Server Address ..... localhost

From E-Mail Address ..... svend@contoso.com

Authentication ..... Anonymous ▾

User ID .....

Password .....

Use SSL .....

Port .....

Back Next Finish

On the “User Setup” you can link the users with the corresponding Salespeople.

DOCUMENT OUTPUT SETUP WIZARD ↗ ✕

User Setup

User ID ↑	Salespers./Purch. Code
→ WORK\ADMINISTRATOR	<input type="text"/>

Code ↑	Name
→ AH	Annette Hill
BD	Bart Duncan
DC	Debra L. Core
JR	John Roberts
LM	Linda Martin
MD	Mark A. Davenport
+ New	

Back Next Finish

Finally, you can create Job Queue Entry, E-Mail Jobs, and Send Customer Statement Codes.

DOCUMENT OUTPUT SETUP WIZARD



Create Jobs:

Create Job Queue Entry .....

Create E-Mail Job for E-Mail Qu... ..

Create Send Statement Codes .....



Back Next Finish

**Create Job Que Entry:** Creates a Job Que Entry for the Codeunit 6175283 "CDO NAV App.ServerE-MailJobMgt"

**Create E-Mail Jobs:**

- **E-Mail Queue:** Creates E-Mail job to empty the E-Mail queue.
- **Delete E-Mail Log:** Deletes old e-mail log entries as specified on Template.

When you click Finish, all your changes are saved.

### Edit templates

You can now edit the templates provided with Document Output. Go to Document Output, Setup, and choose E-Mail Templates, open one of the templates.

For each template Choose “Edit Html Template” this will open the template. After you have changed the template make sure you click “Save E-Mail Template”.

### E-Mail template editor:

### Job Queue

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

To setup Job Queue to create Automatic Statements. The Job Queue Entry should run Codeunit: 6175297 "CDO Send Cust. Statement Mgt.".