

# Continia Document Output 365

User Guide

August 2021 - CDO 5.0

Web: www.Continia.dk

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## 1. Introduction

Document Output is an add-on for Microsoft Business Central 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 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 the Sales Quote. The Sales Quote has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second show the e-mail log for this document.

$\leftarrow$	SALES QUOTE   W	/ORK	DATE: 28-0	-2021				$\oslash$	+ 🗊				✓ SAVED 🗖				
	1001 · -	Th	e Ca	annon Gr	oup PL	.C											
	Process     Quote     Request Approval     Print/Send     Release     Navigate     More options       General													(			
								Show more ① Details ① Attachments (0)									
								··· Reque	ested Deliver								
	External Docume	n ·	Due Date 28-02-2021									Quot	Quote Recipient mr.andy.teal@contoso.				
												E-N	1ail Log∨				
	Lines Mar	nage	More of	otions							63	11	D Data Tara	τ.			
	Туре		No.	Description		Location Code	Quantity	Qty. to Assemble to Order	Unit of Measure Code	Unit Price Excl. VAT	Tax Group Code	WO	Date lime	0 10:40 mr.andy.teal@contoso.com			
	$\rightarrow$ Item	÷	1000	Bicycle			1	0	PCS	4.000,00	*						
												Sell	-to Customer Sales I	History			

From the Doc. Output Fact Box, you can click:

- Open E-Mail This will open the e-mail with the PDF.
- Send E-Mail This will create the mail with attached PDF and send it.
- Queue E-Mail This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active).
- Save PDF Creates the PDF and downloads it.



When you can click the "Open E-Mail" button.

This will create the PDF file and open the e-mail with the template.

Doc. Output E-Ma	ail		
Send More options			
Recipients		Show more Attach	ments $\vee$
То	mr.andy.teal@contoso.com	File Nam	ie
		Quote	1001.pdf
Subject	Quote 1001		
Message			
13 v Arial v A	B I U ≡ ≐ ≡ x² x₂ ⊱ % % ⊠		
13     ✓     Arial     ✓     A       Dear Mr. Andy Teal	B I U   ■ = =   x <sup>2</sup> x <sub>2</sub> S   % %   ⊡	*	Ş
13     ✓     Arial     ✓     A       Dear Mr. Andy Teal       Please find your quote attached to this e-mail.	B I U E ≐ Ξ x² x₂ S 96 % D		2
13     Arial     A       Dear Mr. Andy Teal       Please find your quote attached to this e-mail.       I hope that this quote meets your expectations a       unish your guote day.	I B I U ■ ± ≡   x <sup>2</sup> x <sub>2</sub> S   % S   ⊡ and I look forward hearing from you.	<u></u>	ß
13       Arial       A         Dear Mr. Andy Teal       Please find your quote attached to this e-mail.         I hope that this quote meets your expectations at I wish you a very nice day.         Best Regards	and I look forward hearing from you.	*	2
13       ✓       Arial       ✓       A         Dear Mr. Andy Teal       Please find your quote attached to this e-mail.         I hope that this quote meets your expectations a         I wish you a very nice day.         Best Regards         CRONUS International Ltd.         5 The Ring. W2 8HG London         Phone No.: 0666-666-6666	B I U E Ξ Ξ   x <sup>2</sup> x <sub>2</sub> S   % S   Ω and I look forward hearing from you.	A	ß
13       ✓       Arial       ✓       A         Dear Mr. Andy Teal         Please find your quote attached to this e-mail.         I hope that this quote meets your expectations a         I wish you a very nice day.         Best Regards         CRONUS International Ltd.         5 The Ring. W2 8HG London         Phone No.: 0666-666-6666         Mail:	B I U ■ Ξ Ξ   x <sup>2</sup> x <sub>2</sub> S % % ⊡ and I look forward hearing from you.		₿.
13        Arial        A         Dear Mr. Andy Teal             Please find your quote attached to this e-mail.	And I look forward hearing from you.		ß
13        Arial        A         Dear Mr. Andy Teal       Please find your quote attached to this e-mail.       I hope that this quote meets your expectations at wish you a very nice day.         Best Regards	And I look forward hearing from you.		<b>₽</b>

You can now edit the mail before sending it.

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

### E-Mail Sales Order

Open the Sales Order. The Sales Order has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second show the e-mail log for this document.

101005 · John Haddock Insurance Co.

Process Release	Posting Pre	pare Order Request Approva	al Print/Send	Navigate	More options				0
General							Sh	ow more	① Details 🔋 Attachments (0)
Customer Name	Haddock Insur	rance Co. V Order Date	14-01-20	21 [	External D	Ocumen			Doc. Output ~
Contact	Miss Patricia Do	oyle ···· Due Date ····	31-01-20	21 [					Order Recipient miss.patricia.doyle@contoso.com
Posting Date	29-01-2021	Requested Deli	ver	ſ					Shipment Recipient miss.patricia.doyle@contoso.com Invoice Recipient miss.patricia.doyle@contoso.com
Lines Manage	More options	s						E2	E-Mail Log ∨
Туре	No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Reserved Quantity	Unit of Measure Code	Unit F	UserID Date Time To
$\rightarrow$ Item :	1920-S	ANTWERP Conference Table	RED	4		-	PCS		WORK\AD : 21-01-2020 16:22 miss.patricia.doyle@contosc
									Sell-to Customer Sales History

From the Doc. Output Fact Box, you can click:

- Open E-Mail This will open the e-mail with the PDF.
- Send E-Mail This will create the mail with attached PDF and send it.
- Queue E-Mail This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Save PDF Creates the PDF and downloads it.
- Post and send/print Posts the order and sends the shipment/invoice or prints it.

04	4,20		Doc. Output $\sim$						
	<u>01</u>	Open E-N	Nail Order Confirmation						
	<u>01</u>	Send E-N	1ail Order Confirmation						
0	<u>01</u>	Queue E-	-Mail Order Confirmation						
2		Save PDF							
	勸	Post and	send/print						

From the Sales Order, you can click the "Email Confirmation" button.

This will create the PDF file and open the e-mail with the template.

Send More options			(
Recipients	Show more	Attachments $\vee$	
o miss.patricia.doyle@contoso.com		File Name	
		Order Confirmation 101005.pdf	÷
Utject Order Confirmation 101005		lş.	
Message			
13 ∨ Arial ∨ A∎ B I U E ± Ξ   x <sup>1</sup> x <sub>2</sub> S   % % Ω			
Dear Miss Patricia Doyle,	-		
Please find your order confirmation attached to this e-mail. The expected shipment date is 14-01-21.			
It is always a pleasure to do business with you and we wish you a very nice day.			
CRONUS International Ltd. 5 The Ring, W2 BHC London Phone No.: 0666-66666			
Mail:			
cronus			
Continia Document Output Editor			

You can now edit the mail before sending it.

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

### Warehouse from Sales Order

Open the Sales Order. If a Warehouse Employee exists, the Fact Box "Whse. Doc. Output" will show.

The Fact Box will show the locations for this order and the e-mail addresses to these locations.

	rocess Release Posting Prepare Order Request Approval Print/Send Navigate More options										
General Show more							Sho	ow more	Details     Attachments (0)		
Sustomer Name	Beef House	✓ Order Date -	14-10-202	1 [	🗂 External [	Documen			Doc. Output $\!$		
Contact · · · · · ·	Frau Karin Fl	eischer ··· Due Date ···	14-11-202	1 (					Order Recipient frau.karin.fleischer@contoso.com		
Posting Date ····	14-10-2021	Requested De	liver	f	1				Shipment Recipient frau.karin.fleischer@contoso.com		
					-				Invoice Recipient frau.karin.fleischer@contoso.com		
Lines Mar	nage More opti	ons						62	E-Mail Log $\sim$		
					On the Association		Unit of	11-2-7			
Туре	No.	Description	Location Code	Quantity	to Order	Reserved Quantity	Measure Code	Unit F	UserID Date Time To		
Type → Item	No.	Description LONDON Swivel Chair, blue	Location Code	Quantity 12	to Order	Reserved Quantity	Measure Code PCS	Unit F	UserID Date Time To (There is nothing to show in this view)		
Type → Item Item	No. 1908-S 1906-S	Description LONDON Swivel Chair, blue ATHENS Mobile Pedestal	GREEN GREEN	Quantity 12 22	to Order	Reserved Quantity	Measure Code PCS PCS	Unit F	UserID Date Time To (There is nothing to show in this view)		
Type → Item Item Item	No. 1908-S 1906-S 80100	Description LONDON Swivel Chair, blue ATHENS Mobile Pedestal Printing Paper	Cocation Code GREEN GREEN GREEN	Quantity 12 22 20	to Order	Reserved Quantity	Measure Code PCS PCS PACK	Unit F	UserID Date Time To (There is nothing to show in this view)		
Type → Item Item Item	No. 1908-S 1906-S 80100	Description LONDON Swivel Chair, blue ATHENS Mobile Pedestal Printing Paper	Continue Code GREEN GREEN GREEN	Quantity 12 22 20	to Order	Reserved Quantity	PCS PCS PACK		UserID Date Time To (There is nothing to show in this view) Whse Doc, Output		
Type → Item Item Item	No. 1908-S 1906-S 80100	Description LONDON Swivel Chair, blue ATHENS Mobile Pedestal Printing Paper	Location Code GREEN GREEN GREEN	Quantity 12 22 20	to Order	Reserved Quantity	PCS PCS PACK		UserID Date Time To (There is nothing to show in this view) Whse Doc. Output Location Code Recipient Haru.		

From the Warehouse Doc. Output Fact Box, you can click:

- Create Inventory Pick: Opens the batch to create Inventory Picks.
- Create and send Inventory Pick: Creates the pick and sends the e-mail.
- Inventory Pick: Shows the Inventory Pick.
- Create Warehouse Shipment: Creates the Warehouse Shipment.
- **Create and Send Warehouse Shipment:** Creates the Warehouse Shipment and sends the e-mail with the shipment attached.
- Warehouse Shipment: Shows the Warehouse Shipment.

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#### 



### Warehouse from Purchase Order

Open the Purchase Order. If a Warehouse Employee exists, the Fact Box "Whse. Doc. Output" will show.

The Fact Box will show the locations for this order and the e-mail addresses to these locations.

Process Release Posting Order Request Approval Print/Send Navigate More options													
Gei	neral								Show more	Details     Attachments (0)			
Ven Con	dor Name	Busterby S	tole og Borde 🗸 Document D riske ···· Vendor Invo		Doc. Output ~ Order Recipient fr.karen.friske@contoso								
										E-Mail Log $\vee$			
.ine	Type	age More op	tions Description	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Exc	UserID Date Time To			
$\rightarrow$	ltem	: 1964-S	TOKYO Gæstestol, blå	GREEN		100	-	PCS	8:	(There is nothing to show in this view)			
	ltem	1996-S	ATLANTA Whiteboard, basis	GREEN		110	-	PCS	6.05				
	ltem	80100	Printerpapir	GREEN		140	-	PALLET	82	Whse Doc. Output ~			
										Location Code Recipient			

From the Warehouse Doc. Output Fact Box, you can click:

- **Create Inventory Put-away:** Opens the batch to create Inventory Put-away.
- Create Inventory Put-away and send/print: Creates the put-away and sends the e-mail.
- **Inventory Put-away:** Shows the Inventory Put-away.
- Create Warehouse Receipt: Creates the Warehouse Receipt.
- **Create Warehouse Receipt and send/print:** Creates the Warehouse Receipt and sends the e-mail with the Receipt attached.
- Warehouse Receipt: Shows the Warehouse Receipt.

<sup>82</sup> Whse. - Doc. Output  $\sim$ 



### E-Mail Pro Forma Invoice

Open the Sales Invoice. The Sales Invoice has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second show the e-mail log for this document.

- SALES	INVOICE   WOR	K DATE: 28-01-20	021				$\oslash$	+ 🗊		√SAVED ⊑ ⇒ <sup>⊭</sup>	
103	103004 · Guildford Water Department										
Process											0
Gene	General									Show more	O Details     Attachments (0)
Custor	Customer Name · · · Guildford Water Departi V Posting Date · · · · · 26-01-2021										Doc. Output
Contac		With Jim Stewar		Due Date	05-02-20	21					Invoice Recipient mr.jim.stewart@contoso.com
Lines	Manage	More option	s							E2	E-Mail Log∨
Тур	pe	No.	Description		Location Code	Quantity	Unit of Measure Code	Unit Price Excl. VAT	Tax Area Code	Tax Group Code	UserID Date Time To
$\rightarrow$											WORK\AD : 22-01-2020 10:57 mr.jim.stewart@contoso.cor
											·
											Customer Statistics

#### Actions:

- **Open E-Mail:** Opens the E-Mail with the Pro forma Invoice.
- **Send E-Mail:** Sends (using SMTP) e-mail to recipient shown on the factbox.
- **Queue E-Mail:** Sends the document to the queue where it will be e-mailed or printed.
- **Post and Send/print:** Posts the Invoice and e-mails or prints the invoice.





### E-Mail Blanket Sales Order

Open the Blanket Sales Order. The Blanket Sales Order has an E-Mail Log Fact Box it shows the e-mail log for this document.

$\leftarrow$	BLANKET SALES ORDER   WORK DATE: 28-01-2021		+ ii	√ SAVED □	۲ <sub>م</sub> ۲
	1001 · The Cannon Gr	oup PLC			
	Process Request Approval Print/Send Release	Order More options			0
	월 Open E-Mail 🖶 Print				-12
	Customer Name · · · · The Cannon Group PLC V	Due Date · · · · · · 28-02-2021 🛗	Campaign No. · · · · · · · · · · · · · · · · · · ·	E-Mail Log∨	
	Contact · · · · · · Mr. Andy Teal · · · ·	Order Date · · · · · · · ·	Responsibility Ce · · BIRMINGHAM · ·	UserID Date Time To	
	No. of Archived V 0	External Documen	Assigned User ID · · · · ·	(There is nothing to show in this view)	
	Document Date · · · · 28-01-2021	Salesperson Code · · · PS · · ·	Status ····· Open		
				Customer Statistics	

From the Sales Order, you can click "Print/Send" and then "Open E-Mail" button.

This will create the PDF file and open the e-mail with the template.

### E-Mail Posted Sales Shipment

Open the Posted Sales Shipment. The Posted Sales Shipment has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second show the e-mail log for this document.

$\leftarrow$	POSTED SALES SHIPM	ENT   WORK DA	FE: 28-01-2021				- +	Î						√ SAVE	ED 🚅	ہ <sup>لا</sup>
	102038 · The Cannon Group PLC															
	Process Print/Send	rocess Print/Send Shipment More options												0		
	General									Show m	ore	() Details	Attachments	(0)		
	No	102038		Posting Date	28-01-2021		Quote No	)				Doc. Outp	ut∨			
	Customer	The Cannon G	oup PLC	Requested Deliv	ver		Order No		101016			Recipient		mr.andy.teal@conte	oso.com	
	Contact · · · · · · · · · · · ·	Mr. Andy Teal		Promised Delive	ery							E-Mail Log	1~			
	Lines Manage	e More opti	ons							6	2	UserID	Date Time	То		
	Туре	No.	Description	I	Location Code	Quantity	Unit of Measure Code	Quantity Invoiced	Planned Delivery Date	Planned Shipment Date	c I		(There is nothing t	o show in this view)		
	→ Item	1920-S	ANTWERP Confe	erence Table	RED	1	PCS		28-01-2021	28-01-2021						-

From the menu bar you can open the e-mail, and you can also Open The Package Traking e-mail.

Process	Print/Se	nd Shipment	More optio	ns			
🕒 Ope	n E-Mail	🐏 Open Packag	ge Tracking E-Mail	🖶 Print			

From the Doc. Output FactBox, you can click:

- Open E-Mail This will open the e-mail with the PDF.
- Send E-Mail This will create the mail with attached PDF and send it.
- Queue E-Mail This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Save PDF Creates the PDF and downloads it.



From the Posted Sales Shipment you can click the "Open E-Mail" button.

This will create the PDF file and open the e-mail with the template.



You can now edit the mail before sending it.

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 the Posted Sales Invoice. The Posted Sales Invoice has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second show the e-mail log for this document.



Invoice Correct	Print/Send Navigate	More options							
General						Show more	i) Details	Attachments (0)	
No	103027	Posting Date	28-01-2021	Order No.	101008		Doc. Output	$\checkmark$	
Customer	Gagn & Gaman	Due Date · · · · · ·	03-02-2021	Closed · · · · · ·	•••••		Recipient	ragnheidur.k.gudmu	ndsdottir@contoso.com
Contact · · · · · · · · ·	Ragnheidur K. Gudmunds	Quote No.					E-Mail Log ~		
					6				
Lines Manag	ge More options					63	UserID	Date Time	То
Туре	No. Description	q	Unit of Quantity Measure Code	Unit Price Excl. Tax Group VAT Code	Line Discount %	Line Amou Excl. V/	WORK\AD	22-01-2020 13:10	ragnheidur.k.gudmundsdott
→ Item :	1992-W ALBERTVILL	E Whiteboard, green	1 PCS	97.960,004	10	88.164,			

From the Doc. Output FactBox, you can click:

- Open E-Mail This will open the e-mail with the PDF.
- Send E-Mail This will create the mail with attached PDF and send it.
- Queue E-Mail This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Save PDF Creates the PDF and downloads it.



From the Posted Sales Invoice you can click the "Open E-Mail" button.

This will create the PDF file and open the e-mail with the template.



You can now edit the mail before sending it.

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 the Posted Return Receipt. The Posted Return Receipt has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second show the e-mail log for this document.



Process Print/Send	Receipt	More options								0
General									① Details	Attachments (0)
No	107004		SELL-TO		Post	ting Date · · · · · 2	2-01-2021		Doc. Output	~
Sell-to Customer	49633663		Name ·····	Autohaus Mielberg KG	Doc	ument Date · · · · 2	2-01-2021		Recipient	autohaus.mielberg.kg@contoso.com
Sell-to Contact No.	CT000084		Address · · · · · · · ·	Porschestraße 911	Retu	urn Order No.			E-Mail Log	· · · · · · · · · · · · · · · · · · ·
			Address 2		Exte	ernal Documen · ·			E-IMail Eog (	
			Post Code	DE-22417	Sale	sperson Code · · · J	R		UserID	Date Time To
			City · · · · · · · · · · · · · · · · · · ·	Hamburg 36	Res	ponsibility Ce				(There is nothing to show in this view)
			Country/Region	DE	No.	Printed		0		
			Contact · · · · · · · ·							
Lines Manag	ge More opti	ons						Ež		
Туре	No.	Description	Return R Code	eason Location Code	Quantity	Unit of Measure Code	Quantity Invoiced	Return Qty. Rcc Not Invc		
$\rightarrow$ Item :	1896-S	ATHENS Desk		RED	1	PCS	1			

From the Doc. Output FactBox, you can click:

- Open E-Mail This will open the e-mail with the PDF.
- Send E-Mail This will create the mail with attached PDF and send it.
- Queue E-Mail This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Save PDF Creates the PDF and downloads it.



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

This will create the PDF file and open the e-mail with the template.



You can now edit the mail before sending it.

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 the Posted Sales Credit Memo. The Posted Sales Credit Memo has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second show the e-mail log for this document.

104005 · Autohaus Mielberg KG

Credit Memo Navi	igate Print/S	end Mo	ore options									
General								Show more		① Details	Attachments (0)	
No	104005		Contact · · · · · ·		D	ocument Date · ·	22-01-2021			Doc. Output	$\checkmark$	
Customer · · · · · ·	Autohaus Mie	lberg KG	Posting Date	22-01-2021	Ex	ternal Documen.				Recipient	autohaus.m	ielberg.kg@contoso.com
									ß	E-Mail Log √	/	
Lines Mana	ge More opt	ions						62				
Туре	No.	Cross- Reference No.	Description	Return Reason Code	Quantity	Unit of Measure Code	Unit Cost (LCY)	Unit Price Excl. VAT		UserID WORK\AD	Date Time 22-01-2020 13:19	To autohaus.mielberg.kg@con
$\rightarrow$ Item	1896-S		ATHENS Desk		1	PCS	506,60	1.005,574				

From the Doc. Output FactBox, you can click:

- Open E-Mail This will open the e-mail with the PDF.
- Send E-Mail This will create the mail with attached PDF and send it.
- Queue E-Mail This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active) - Save PDF – Creates the PDF and downloads it.
  - Doc. Output

From the Posted Sales Credit Memo, you can click the "E-Mail" button.

This will create the PDF file and open the e-mail with the template.

### Doc. Output E-Mail

Send More options			0
Recipients	Show more	Attachments $\vee$	
To autohaus.mielberg.kg@contoso.com		File Name	
		Credit Memo 104005.pdf	- E -
Subject ····· Credit Memo 104005			
Message			
$\boxed{13  \checkmark}  \boxed{\text{Artal}}  \checkmark  \boxed{\mathbf{A} \blacksquare    \ \mathbf{B}  I  \underline{\mathbf{U}}  \boxed{\mathbf{\mathbf{U}}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}  \boxed{\mathbf{U}}}  \boxed{\mathbf{U}}  $			
Dear , Please find your credit memo 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	1		
CRONUS International Ltd. 5 The Ring, W2 8HG London Phone No: 0666-666-6666			
Mail: Vieb:			
cronus			
Continia Document Output Editor			

You can now edit the mail before sending it.

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 the Issued Reminder. The Issued Reminder has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second show the e-mail log for this document.

×	ISSUED REMINDER   W	ORK DATE: 28-01-202	21				2 + 🗈				đ	»۲
	105001 ·	Selango	orian l	_td.								
	Process Print/Send	Reminder Na	vigate	More options								0
	General									Details      Attachments (0)		
	No	105001		Post Code · · · · ·	CV6 1GY		Pre-Assigned No.	1001		Doc. Output ∨		1
	Customer No.	20000		City · · · · · · · ·	Coventry		Reminder Level · ·		1	Recipient mr.mark.	mcarthur@contoso.com	L
	Name · · · · · · · · ·	Selangorian Ltd.		Contact · · · · · ·	Mr. Mark N	lcArthur	No. Printed		1	E-Mail Log ∨		1
	Address	153 Thomas Drive		Posting Date	28-01-2021		Canceled · · · · · ·					L
	Address 2			Document Date	28-01-2021					UserID Date Time	То	
										WORK\AD : 22-01-2020 13:21	mr.mark.mcarthur@contosc	1
	Lines Manag	e							53			1
	Туре	No.	Document Type	Document No.	Due Date	Description		Remaining Amount	Amount	Customer Ledger Entry Details		
	$\rightarrow$ Customer Le	÷	Invoice	00-8	14-01-2021	Opening Entries,	Customers	48.845,77		Document Due Date	Invoice 00-8 14-01-2021	) I
	C/I A	0120				A 1.000			5.00	Pmt. Discount Date	31-12-2020	)
	G/L Account	9120				Additional Fee			5,00	Reminder/Fin. Charge Entri	1	
						Please remit your	r payment of 4			Applied Entries Detailed Ledger Entries	2	1

From the Doc. Output FactBox, you can click:

- Open E-Mail This will open the e-mail with the PDF.
- Send E-Mail This will create the mail with attached PDF and send it.
- Queue E-Mail This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Save PDF Creates the PDF and downloads it.



### E-Mail Issued Finance Charge Memo

Open the Issued Finance Charge Memo. The Issued Finance Charge Memo has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second show the e-mail log for this document.

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



This will create the PDF file and open the e-mail with the template.

From the Doc. Output FactBox, you can click:

- Open E-Mail This will open the e-mail with the PDF.
- Send E-Mail This will create the mail with attached PDF and send it.
- Queue E-Mail This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Save PDF Creates the PDF and downloads it.



### E-Mail Statement for one customer

Open Document Output, Customer, E-Mail/Print Statement.

MAIL/PRINT STATEMENT	WORK DATE: 28-01-2021						√ SAVED [	
🔎 Search 📑 Edit List	😫 Print/E-Mail all 🛛 😫 Send all to Qu	ueue 🔮 Open E-Mail 🔮 E-Mail (SMTP)	🖶 Print 🛛 📧 Customer Ca	ard 🛛 🖳 Ledger Entrie	s 🂫 Statistics 🚺	Open in Excel	Actions	Y
General								
Date Filter	01-01-2131-01-21	E-Mail filter		•	Balance (LCY) filter · · ·			
Print Statements		Entries in period · · · · · · ·			Balance Due (LCY) Filte	ir · · · · · ·		
No. ↑	Name	E-Mail Recipients	Automatic Statement	Print Statem	Balance (LCY)	Net Change (LCY)	Balance Due (LCY)	ls i Qu
01445544	Progressive Home Furnishings	mr.scott.mitchell@contoso.com	Manual	×.	1.499,03	1.499,03	0,00	)
10000	The Cannon Group PLC	mr.andy.teal@contoso.com	Manual	×.	168.364,41	-123.611,99	147.811,14	l.
20000	Selangorian Ltd.	mr.mark.mcarthur@contoso.com	Manual	×	96.408,46	-115.168,63	87.932,88	3
30000	John Haddock Insurance Co.	miss.patricia.doyle@contoso.com	Manual	Ø	349.615,40	6.860,53	349.615,40	)
32656565	Antarcticopy	michael.zeman@contoso.com	Manual		2.582,80	2.582,80	2.582,80	)
35451236	Gagn & Gaman	ragnheidur.k.gudmundsdottir@contoso	Manual	Ø	877,32	877,32	0,00	)
35963852	Heimilisprydi	gunnar.orn.thorsteinsson@contoso.com	Manual	<b>Ø</b>	2.024,21	2.024,21	2.024,21	
42147258	BYT-KOMPLET s.r.o.	milos.silhan@contoso.com	Manual	Ø	1.602,90	1.602,90	0,00	)
43687129	Designstudio Gmunden	fr.birgitte.vestphael@contoso.com	Manual	Ø	13.732,60	13.732,60	0,00	)
46897889	Englunds Kontorsmöbler AB		Manual	Ø	673,71	673,71	673,71	1
47563218	Klubben	thomas.andersen@contoso.com	Manual	Ø	11.772,20	11.772,20	0,00	)
49525252	Beef House	frau.karin.fleischer@contoso.com	Manual	Ø	11.941.36	11.941,36	0,00	)
49633663	Autohaus Mielberg KG		Manual		7.924,80	7.924,80	4.050,00	)
A0858585 :	Hotal Dfordoson	herrn ionathan haas@contoso.com	Manual		14 205 75	14 205 75	0.00	1

#### Set the "Date Filter".

Find the Customer you want to send a statement, Click "Open E-Mail".

This will create the PDF file and open the e-mail with the template.

Doc. Output E-Mail		
Send More options		C
Recipients	Show more Attachments ~	
To Imrandyteal@contoso.com	File Name	
	Statement.pdf Open documents.zip	:
Subject Statement		
Message		
13         ∨         A         B         I         U         E         ±         Ξ         x <sup>2</sup> x <sub>2</sub> %         %         %         ½		
Dear Mr. Andy Teal,		
Please find you statement attached to this e-mail. Your current balance due is 147.811,14 To your convenience we have attached all the open documents to this e-mail.		
We will appreciate your prompt payment of this amount. Best Regards		
CRONUS International Ltd. 5 The Ring, W2 8HG London Phone No.: 0066-666-666		
Mail: Web:		
cronus		
Continia Document Output Editor		

You can now edit the mail before sending it.

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

### E-Mail Statement for multiple customers

Open Document Output, Customer, E-Mail/Print Statement.

	$\mathbf{N}$	
Print/E-Mail all 🐘 Send all to Queue	E-Mail 🚷 E-Mail (SMTP) 🖶 Print 🔚 Customer Card 📑 Ledger Entries 🕑 Statistics 🕼 Open in Excel 🛛 Actions … 🖓	=
General		
Date Filter	E-Mail filter · · · · · Balance (LCV) filter · · · · · · ·	
Print Statements 01-01-2131-01-21	Entries in period Entries in period	

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 the Purchase Quote. The Purchase Quote has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second show the e-mail log for this document.

From the Purchase Quote you can click the "Open E-Mail" button.

$\leftarrow$	PUR	CHASE QUOT	ElWo	RK DATE: 28-	01-2021					+ 🗊			√SAVED ⊑ , , <sup>∠</sup>
	10	)01 · L	_0	ndon	Postma	aster							
	Proc	ess Reque	est Ap	proval Pri	nt/Send Quote	Release Nav	igate Mo	ore options					0
	Gen	neral										Show more	① Details 🔋 Attachments (0)
	Vend	lor Name		London Post	master $\checkmark$	Document Date	28-01-2	021	🛅 Reque	ested Receip			Doc. Output∨
	Cont	act · · · · · ·		Mrs. Carol Pł	ilips	Order Date	28-01-2	021	Vendo	or Shipment			Quote Recipient mrs.carol.philips@contoso.com
													E-Mail Log 🗸
	Lines	s Mar	nage	More optio	ons							Ež	Uter/D Date Time To
		Туре		No.	Description		Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. VAT	Tax Group Code	Line Disco	WORK\AD : 22-01-2020 13:41 mrs.carol.philips@contoso.c
	$\rightarrow$ I	ltem	÷	1000	Bicycle			1	PCS	*	*		

This will create the PDF file and open the e-mail with the template.

Doc. Output E-Mail			
Send More options			(i)
Recipients	Show more	Attachments $\vee$	
То	mrs.carol.philips@contoso.com	File Name Purchase Quote 1001.pdf	
Subject	Purchase Quote 1001		
Message	د غ ه ا × × د ۹ ا ۹ ۵ ا		
Dear Mrs. Carol Phillips, Please find our purchase quote attached to this e-mail. It is always a pleasure to do business with you and we wish you a very n Best Regards	ce day.		
CRONUS Invernational Ltd. 5 This Bing, W2 8HG London Phone No.: 0666-6666-66666 Mail: Web:			
cronus			
Continia Document Output Editor			

You can now edit the mail before sending it.

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

### E-Mail Purchase Order

Open the Purchase Order. The Purchase Order has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second show the e-mail log for this document.

From the Purchase Order, you can click the "Open E-Mail" button.

$\leftarrow$	PUR	CHASE ORDE	R   WO	ORK DATE: 28-0	1-2021				+ 🗊			√SAVED ⊑ <sub>≫</sub> ⊄
	104001 · CoolWood Technologies											
	Process Release Posting Order Request Approval Print/Send Navigate More options											
	Ger	neral									Show more	① Details 🔋 Attachments (0)
	Vend	dor Name		CoolWood Tec	hnologie: V Document Da	te · · · · 25-01-2	021	🟥 Vendo	r Shipment			Doc. Output 🗸
	Cont	tact · · · · · ·		Mr. Richard Br	eady ··· Vendor Invoid	e No. · · D-303						Order Recipient mr.richard.bready@contoso.com
	Lines	s Man	age	More option	s						Eľ	E-Mail Log ∨
		Туре	-	No.	Description	Location Code	Bin Code	Quantity	Reserved Quantity	Unit of Measure Code	Direct Unit Exc	UserID Date Time To WORK\AD
	$\rightarrow$	ltem	÷	LS-MAN-10	Manual for Loudspeakers	WHITE		100	_	PCS	*	
		ltem		LS-75	Loudspeaker, Cherry, 75W	WHITE		10	-	PALLET		

This will create the PDF file and open the e-mail with the template.

Doc. Output E-Mail			
Send More options			()
Recipients	Show more	Attachments $\vee$	
To	mr.richard.bready@contoso.com	File Name	
		Purchase Order 104001.pdf	÷
Subject	Purchase Order 104001		
Message			
13     ∨       Arial     ∨       A     B       I     U	± =  x <sup>2</sup> x <sub>2</sub> ⊗  % ⊠		
Dear Mr. Richard Bready,	i i		
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 nic Best Regards	e cay.		
CRONUS International Ltd. 5 The Ring, W2 8HG London Phone No.: 0666-666-6666			
Mail:			
web:			
cronus			
Continia Document Output Editor			

You can now edit the mail before sending it.

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

### E-Mail Blanket Purchase Order

Open the Blanket Purchase Order. The Blanket Purchase Order has a Fact Box "E-Mail Log" that shows the e-mail log for this document.

From the Blanket Purchase Order, you can click "Print/Send" and then "Open E-Mail" button.

	BLA	NKET PURCHA	SE OI	RDER   WORK D	ATE: 28-01-2021					+ 🗊						√ SAVED	ت م
	1(	)01 · L	Oľ	ndon	Postma	aster											
	Pro	cess Reques	st App	proval Print/	/Send Release	Order	More option	s									0
ſ	ę;	Open E-Mail	•	Print	)												-(=
	Vendor Name ····· London Postmaster V Order Date ······ E							] Campai	gn No. • • • • •		~		E-Mail Log∨	/			
	Con	tact · · · · · ·	••• [1	Mrs. Carol Philip	ps	Vendor Shipmen	t ·		Respon	sibility Ce	LONDON	$\sim$		UserID	Date Time	То	
	No. of Archived V · 0			Order Address C	o ·	~	/ Assigne	Assigned User ID · · · ·					(There is nothing to	show in this view)			
	Doc	ument Date \cdots	[	28-01-2021	Ē	Vendor Order No	Status Open								(		
	Due	Date		31-01-2021	Ē	Purchaser Code	RL	~	,				L .	Vendor Deta	ils~		
	Line	is Mana	iae	More options	5									Vendor No.		London De	10000
		Turne	-	No	Description		Location Cod	la Quantity	Unit of	Direct Unit Cost	Tay Area Code	Tax Group		Phone No.		London Po	sunaster
	$\rightarrow$	Item		1000	Bicycle		Location Coo	1	PCS	EXCL VAI	In Area cour	Code		Fax No.			
														Contact		Mrs. Car	ol Philips

This will create the PDF file and open the e-mail with the template.

### E-Mail Job Quote

Open the Job. The Job Card has two Document Output Fact Boxes, the first shows the e-mail address(es) found, and the second shows the e-mail log for this document.

JOB CARD   WORK DATE: 28-01-2021		+ i	✓ SAVED □ ¬ <sup>K</sup>
DEERFIELD, 8 WP $\cdot$ S	etting up Eight Work	Areas	
Process Report Prices WIP Navigate	Job Print/Send More options		0
General		Show more	Details     Attachments (0)
No. · · · · · · DEERFIELD, 8 WP · · ·	Bill-to Name	Last Date Modified · · · 28-01-2021	Doc. Output ~
Description · · · · · · Setting up Eight Work Areas	County	Project Manager · · · ·	Recipient mr.kevin.wright@contoso.com
Bill-to Customer · 40000 · · · · Bill-to Contact No · · · CT000014 · · · ·	Person Responsible · · MARY · ·	]	E-Mail Log ∨
			UserID Date Time To
Tasks Manage More options		El El	(There is nothing to show in this view)
Job Task No. Description	Job Task Bu Type Start Date End Date	udget (Total Billable (Total Billable Cost) Actual (Total Cost) Price)	Joh Dataile. No. of Driese

From the Doc. Output FactBox, you can click:

- **Open E-Mail:** This will open the e-mail with the PDF.
- Send E-Mail: This will create the mail with attached PDF and send it.
- **Queue E-Mail:** This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Save PDF: Creates the PDF and downloads it.

### Doc. Output $\sim$



### E-Mail Warehouse Receipt

Open Warehouse Receipt. The Warehouse Receipt has a Fact Boxes, that shows the e-mail address for this document.

WAREHOUSE RECEIP	T   WORK DATE	: 28-01-2021			Ø	+ 🗊				✓ SAVED
RE00000	)2									
Process Print/Sen	d Posting	Receipt N	avigate More options							
Coneral								Details      Attachments (0)		
No	RE000002		Document Status · · · ·		As	signment Date · · ·			Whse Doc. Output ~ Recipient	green@contoso.com
Location Code	GREEN		Posting Date · · · · · 01	-01-2020	E As	signment Time · · ·				-
Zone Code		~	Vendor Shipment		Sc	orting Method · · · ·		٣	Item Details - Warehouse	
Bin Code · · · · · · ·		~	Assigned User ID · · · ·		$\sim$				Item No.	1964-9
									Identifier Code	-
Lines Manage	More opti	ons						Ež	Base Unit of Measure Put-away Unit of Measure Code	PCS
Source Document	Source No.	Item No.	Description	Bin Code	Quantity	Qty. to Receive	Qty. to Cross- Dock	Qty. Receive	Purch. Unit of Measure Item Tracking Code	PCS
→ Purchase Or	6002	1964-S	TOKYO Gæstestol, blå		100	100	0		Special Equipment Code	
Purchase Or	6002	1996-S	ATLANTA Whiteboard, basis		110	110	0		Last Phys. Invt. Date	31-12-2020
Purchase Or	6002	80100	Printerpapir		140	140	0		Net Weight	0,00
Purchase Or	6003	1964-S	TOKYO Guest Chair, blue		110	110	0		Warehouse Class Code	
Purchase Or	6003	1968-S	MEXICO Swivel Chair, black		110	110	0			
Purchase Or	6003	80100	Printing Paper		300	300	0			
Purchase Or	6003	80100	Printing Paper		60	60	0			

From the Doc. Output FactBox, you can click:

- **Open E-Mail:** This will open the e-mail, with the PDF attached.
- Send E-Mail: This will create the mail with attached PDF and send it.
- **Queue E-Mail:** This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Save PDF: Creates the PDF and downloads it.



### E-Mail Warehouse Shipment

Open Warehouse Shipment. The Warehouse Receipt has a Fact Boxes, that shows the e-mail address for this document.

$\leftarrow$	WAREHOUSE SHIPMENT   WORK DATE: 28-01-2021	(2) + III	$\checkmark$ SAVED $\square = \pi^{k'}$
	SH000001		
	Process Print/Send Release Posting Shipment More options		0
	General		Details     Attachments (0)
	No	Assignment Date · · · · · · · · · · · · · · · · · · ·	Whse Doc. Output ~           Recipient         green@contoso.com           Shipment Recipient         fraukarin.fleischer@contoso.com           Invoice Recipient         fraukarin.fleischer@contoso.com
	Zone Code         Yesting Date         01-01_2020           Bin Code         Xesting Date         Xesting Date	Sorting Method · · · · · · · · ·	Item Details - Warehouse
	Lines Manage More options	ß	Item No. 1908-S Identifier Code _ Base Unit of Measure PCS

From the Doc. Output Fact Box, you can click:

- **Open E-Mail:** This will open the e-mail, with the PDF attached.
- Send E-Mail: This will create the mail with attached PDF and send it.
- **Queue E-Mail:** This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Save PDF: Creates the PDF and downloads it.

### Doc. Output $\sim$



### E-Mail Inventory Put-away

Open Inventory Put-away. The Inventory Put-away has a Fact Boxes, that shows the e-mail address for this document.

From the Doc. Output Fact Box, you can click:

- **Open E-Mail:** This will open the e-mail in, with the PDF attached.
- Send E-Mail: This will create the mail with attached PDF and send it.
- **Queue E-Mail:** This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Save PDF: Creates the PDF and downloads it.

### Doc. Output $\smallsetminus$



### **E-Mail Inventory Pick**

Open Inventory Pick. The Inventory Pick has a Fact Boxes, that shows the e-mail address for this document.

From the Doc. Output Fact Box, you can click:

- **Open E-Mail:** This will open the e-mail, with the PDF attached.
- Send E-Mail: This will create the mail with attached PDF and send it.
- **Queue E-Mail:** This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- **Save PDF:** Creates the PDF and downloads it.

### Doc. Output $\smallsetminus$



### **Open E-Mail in Business Central**

You can create a PDF mail that opens in Business Central.

#### 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 Order.

Doc.	Output	E-Mail
------	--------	--------

Send More options			0
Recipients	Show more	Attachments $\sim$	
То	miss.patricia.doyle@contoso.com	File Name	
		Order Confirmation 101005.pdf	
Subject	Order Confirmation 101005	~~ ~	
Message			
13 $\checkmark$ Arial $\checkmark$ A $\blacksquare$ B I $\blacksquare$	± ≡  x² x₂ S  % % ⊠		
Dear Miss Patricia Doyle,	·		
Please find your order confirmation attached to this e-mail.			
The expected shipment date is 14-01-21.			
It is always a pleasure to do business with you and we wish you a very nic	ady.		
Best Regards			
CRONUS International Ltd. 5 The Ring, W2 8HG London Phone No: 0666-666-6666			
Mail:			
Web:			
cronus	l		
Continia Document Output Editor			

### Unhandled Documents (Sales, Service and Finance)

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

#### Service:

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

#### Finance:

- Issued Reminders
- Issued Finance Charge Memo

On the Sales Order Processore Role Center (Profile) you can find tiles for all the unhandled documents.

CRONUS International Ltd Sales Orders Items Custom	I. Sales∨ P ers Item Journals	urchasing V Inver	ntory – Posted D Cash Receipt Journal	ocuments v Do s Transfer Orders	s	Setup & Extension	s∨   ≡			2
Want to los	irn mor		ıt		+ Sales Quo	te + Sales Orde	r + Sale	s Credit Memo	> Sales	> History
			IL I		+ Sales Invo	ice + Sales Retui	n Order > Task	S	> Reports	
Want to learn more about Business Central?> ctivities ctivities > sales orders - open 20										
Activities										
Activities∨ sales quotes - open	SALES ORDERS - 0	PEN								
1	20									
>See more	>See more									
SALES ORDERS RELEASED NOT SHIF	PED		RETURNS		MY USER TASKS					
READY TO SHIP     PARTIALLY       6     0       >     >	delayed 14	average days delayed 7,5	SALES RETUR OPEN - >	sales credit_ open - 1 >						
Document Output UNHANDLED POSTED SALES			UNHANDLED POST	ED SERVICE		UNHANDLED FINA	1CE		E-MAIL QUE	UE
SALES SHIPMENTS 41 3	SALES CREDIT MEMOS	POSTED RETU RECEIPTS 3 →					ISSUED FINAN MEMOS			EUE

On all unhandled pages, you have the following buttons:

🐏 Print/E-Mail all 🛛 🐏 Send all to Queue 🛛 🐏 Open E-Mail

- **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.
- **Open E-Mail**: This button opens the e-mail 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.

### **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.

Click Document Output, Customer, "E-Mail/Print Statement" to open the page.



### The "E-Mail/Print Statement" page:

Search	🐯 Edit List	Print/E-Mail all 🐘 Send all to Qu	eue 🐁 Open E-Mail 🐁 E-Mail (SMTP	) 🖶 Print 📧 Customer Card	📴 Ledger Entrie	s 🕗 Statistics 🚺 🤇	Open in Excel	Actions	Y	
General										
Date Filter		01-01-2131-01-21	E-Mail filter	E-Mail filter · · · · · · Balance (LCY) filter · · · · · · · ·						
Print Staten	nents		Entries in period · · · · · ·			Balance Due (LCY) Filter				
No.†		Name	F-Mail Recipients	Automatic Statement	Print	Balance (ICV)	Net Chappe (I CV)	Balance Due (I CY)	ls in Que	
No. T Name 01445544 Progressive Home Furnishings		Progressive Home Euroishings	mr scott mitchell@contoso.com	Manual	2	1 /09 03	1 /09 03	0.00	que	
10000		The Cannon Group PLC	mr.andv.teal@contoso.com	Manual	Image: Second	168.364.41	-123.611.99	147.811.14		
20000		Selangorian Ltd.	mr.mark.mcarthur@contoso.com	Manual	×.	96.408,46	-115.168,63	87.932,88	5	
30000		John Haddock Insurance Co.	miss.patricia.doyle@contoso.com	Manual	¥	349.615,40	6.860,53	349.615,40		
3265656	65	Antarcticopy	michael.zeman@contoso.com	Manual	1	2.582,80	2.582,80	2.582,80	,	
3545123	36	Gagn & Gaman	ragnheidur.k.gudmundsdottir@contoso.	Manual	1	877,32	877,32	0,00		
3596385	52	Heimilisprydi	gunnar.orn.thorsteinsson@contoso.com	Manual	×.	2.024,21	2.024,21	2.024,21		
4214725	58	BYT-KOMPLET s.r.o.	milos.silhan@contoso.com	Manual	×.	1.602,90	1.602,90	0,00	1	
4368712	29	Designstudio Gmunden	fr.birgitte.vestphael@contoso.com	Manual	×.	13.732,60	13.732,60	0,00	1	
4689788	89	Englunds Kontorsmöbler AB		Manual	×.	673,71	673,71	673,71		
4756321	18	Klubben	thomas.andersen@contoso.com	Manual	×.	11.772.20	11.772.20	0,00	1	
						11 041 26	11 941 26	0.00		
4952525	52	Beef House	frau.karin.fleischer@contoso.com	Manual	<u>(</u>	11.541,50	11.341,30	0,00		
4952525	52	Beef House Autohaus Mielberg KG	frau.karin.fleischer@contoso.com	Manual	v V	7.924,80	7.924,80	4.050.00	,	

#### 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.
- **Open E-Mail:** This button opens the e-mail 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)

Click Document Output, Customer,

CRONUS International Lt	d. Sales∨	Purchasing $\lor$	Inventory $\smallsetminus$	Posted Documents $\smallsetminus$
Customer∨ Vendor∨ Se	tup∨			
E-Mail/Print Statement				
Customer Statement Journal				
Unhandled >	arn mo	ore ab	out	

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.

$\leftarrow$	CUSTOM	ER STATEMENT.	JOURNAL   WOR	K DATE: 28-01	1-2021							√ SAVED	[] 🖬 🔎
	,⊂ Se	arch + New	🐯 Edit List	📋 Delete	🕒 Open E-Mail	🕮 E-Mail all	🗟 Show PDF	🕒 E-Mail (SMTP)	🗷 Customer Card	Den in Excel Acti	ons Navigate	Fewer options	7 ≣
		Customer No.			Customer Name			Туре		Start Date	End Date	E-Mail Template Code	
	$\rightarrow$	10000			The Cannon Group	D PLC		Period		01-01-2021	22-01-2021	STATEMENT	

**Buttons:** 

- **Open E-Mail:** Opens the e-mail with current statement PDF attached.
- **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.

Close

### **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 <u>E-Mail jobs</u>

Search Manage  EDIT - DOCUMENT OUTPU	Start Dispatcher	➤ Delete all	Show record	Open in Excel	More options						≡ 88	7 <sup>4</sup>
Entry No. †	E-Mail Template Code	Language Code	UserID	Date Time	Record ID (There is no	Error othing to show	Error message in this view)	Error Date Time	Table No.	Filter		
		G	2									

**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 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**

Open Customer Card.

On the Customer Card, you can setup:

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

### E-Mail Recipients

E-IVIAII	Recipien	TS								
$\leftarrow$	CUSTOMER CARD   WORK DATE: 28-01-2021									
	100	00 · T	he C	lann	on (	Group	) PLC	-		
	New Doc	ument Rec	quest Appro	val Nav	gate <u>C</u>	ustomer	More opti	ions		
	Sa E-M	1ail Recipients	♪ Dime	ensions	🛂 Ledger	Entries 🛛 🗋	Statistics	₽ Cross References	쿠 Cor	nments
	No. · · ·		10000			Balance Due	e (LCY)	-2	92,84	Total
	Name		The Canno	n Group PL	C	Credit Limit	(LCY) · · · · [		0,00	Costs
	Balance (	LCY)		168.3	364,41	Blocked · · ·	[		•	
	Addres	s & Contac	t							
	ADDRESS	5				CONTACT				
	Address		192 Marke	t Square		Contact Nar	ne · · · · ·	Mr. Andy Teal		
	Addrase ?					Phone No	[			
From	the Custo	omer Card	you can c	pen E-M	ail Recip	ents.				
,	+ New 🕼 Edit List	🖹 Delete 🛛 🚺 Open in E	xcel							
EDIT - E-MAIL	RECIPIENTS - 10000 · TH	HE CANNON GROUP PLC							100 68	, , , , , , , , , , , , , , , , , , ,
Document	Type †	Document Code ↑	Recipient Type ↑	E-Mail Type↑	Contact No. †	Contact Name		E-Mail 1		Open Documents
→ E-Mail Ter E-Mail Ter	mplate Group	BOOKKEEPING	To	E-Mail Address E-Mail Address		-		sales@contoso.com accounting@contoso.com		

Here you can enter the e-mail addresses used to send your PDF's. See also <u>Document Output Customer</u> <u>Setup List</u>

#### E-Mail or Print

CUSTOMER CARD   WORK DATE: 28-01-2021		(4	⁄) + ₪			√SAVED □ 🕺
10000 · The Cannon	Group PLC					
New Document Request Approval Navigate	Customer More options					0
General				Show more	Details     Attachments (0)	
No	Balance Due (LCY)	-292,84	Total Sales	17.100,96	Doc. Output $\vee$	
Name The Cannon Group PLC	Credit Limit (LCY)	0,00	Costs (LCY)	11.762,70	MAIL	
Balance (LCY) 168.364.41	Blocked	v			Log On E-Mail (SMTP) Template Setup	2 2 E-Mail 0
Address & Contact				Show more	STATEMENT	
ADDRESS	CONTACT				Automatic statement Send Statement Code	Automatic ···· ENTBAL-1M ····
Address · · · · · · · 192 Market Square	Contact Name · · · · · Mr. Andy leal		N			

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:**

Manage							
EDIT - DOCUMENT OUTP	UT CUSTOMER SETUP LIST	- 10000 · THE CANNON	GROUP PLC		$\nearrow$ $\times$		
General							
Automatic statement · ·	Automatic	T	Template Setup		0		
Send Statement Code	ENTBAL-1M	$\sim$	On E-Mail (SMTP)	E-Mail	Ţ		
First statement start date	01-01-2021	Ē		E-Mail E-Mail and F	Print		
Period Statement				Skip			
Last period statement (S.		Ē	Last period statement	(E · ·	Ē		
Balance Due Stater	nent						
Last balance due statem.			Last balance due state	m · ·			
Cemplate Setu	<b>p:</b> UTPUT CUSTOMER	TEMPLATE SE	TUP   WORK DA	TE: 28-01-202	1		~
,₽ s	earch + New	🐯 Edit List	📋 Delete	💶 Open in I	Excel		
	E-Mail Templat	e Code 1			On E-Mail (SMTP)		
$\rightarrow$	SHIPMENT			:	E-Mail and Print	•	]

#### Automatic Customer Statements CUSTOMER CARD | WORK DATE: 28-01-2021 (₽) + 🗊 ✓ SAVED 📑 🦯 10000 · The Cannon Group PLC New Document Request Approval Navigate Customer More options Details Attachments (0) General Show more Doc. Output $\smallsetminus$ Balance Due (LCY) -292,84 Total Sales 17.100,96 The Cannon Group PLC Credit Limit (LCY) 0,00 Costs (LCY) 11.762,70 MAIL Name · · · · · · · · · E-Mail Recipients Balance (LCY) 168.364,41 Blocked ٠ Log On E-Mail (SMTP) Template Setup E-Mail ... 0. Address & Contact Show more STATEMENT CONTACT ADDRESS Automatic statement Send Statement Code Auto ENTBAL-1M Contact Name · · · · · Mr. Andy Teal 192 Market Square Address · · · · · · .

#### From the Customer Card you can open "Doc. Output Customer Setup".

Manage	
EDIT - DOCUMENT OUTPUT CUSTOMER SETUP LIST - 10000 · THE CANN	on group plc $ otag and a base of the second secon$
General	
Automatic statement · · · · · Automatic 🔻	Template Setup 0
Send Statement Code · · · · · ENTBAL-1M · ·	On E-Mail (SMTP) · · · · · · E-Mail
First statement start date · · · 01-01-2021	
Period Statement	
Last period statement (S 👘	Last period statement (E
Balance Due Statement	
Last balance due statem	Last balance due statem

Fields:

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

#### Document Output Customer Setup List

#### Click Document Output, Setup, Customer Setup List.

CRONUS International	Ltd. Sales - Purchasing	$\sim$ Inventory $\sim$	Posted Documents $\!$	Document Output $\smallsetminus$
Customer $\lor$ Vendor $\lor$	Setup 🗸			
	E-Mail Templates			
Customer Vendor Setup HEADLINE GOOD afte E-Mail Templates E-Mail Template Groups E-Mail Recipient Templates Send Customer Statements Customer Setup List			ACTIONS	
Good afte	E-Mail Recipient Templates			+ Sales Qu + Sales Inv
	Send Customer Statements			
	Customer Setup List			
• 0	E-Mail Jobs			
Activities	Setup Wizard			

Here you have a List view of the Customer Setup for Document Output.

CRONUS Internation	nal Ltd.   Sales $\lor$ Purchasing $\lor$ Inventory $\lor$	Posted Documents ~ Docume	ent Output – Setup & E	xtensions $\vee$ =	
Customer $\lor$ Vendor $\lor$	✓ Setup ✓				冷
Customer Setup List: All	✓ Ø Search + New Manage ✓	mers 📲 Open in Excel 🛛 Mo	pre options		∀ ≡ [] 2
Customer No. †	Customer Name	Automatic statement	Send Statement Code	First statement start date	Template Setup On E-Mail (SMTP)
10000	The Cannon Group PLC	Automatic	ENTBAL-1M	01-01-2021	1 E-Mail
	N				

#### **Buttons:**

- **Update Customers:** Opens batch job to set Automatic Statement, Send Statement Code and First Statement start date on customers.

CD0 UPDATE CUSTOMER SETUP		$\swarrow$		
Options				
Automatic statement		•		
Sand Chatamant Cards				
Send Statement Code				
First statement start date				
Change Existing setup				
Filter: Customer				
× Customer Posting Group		$\sim$		
+ Filter				
Filter totals by:				
+ Filter				
	ОК	Cancel		

### 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.

$\leftarrow$	CUSTOMER CARD   WOF	RK DATE: 28-01-2021						Ø			
	10000 · The Cannon Group PLC										
	New Document Req	Document Request Approval Navigate <u>Customer</u> More options									
	E-Mail Recipients	د Dimensions	🖳 Ledg	jer Entries	2 Statistics	<b>₽</b> Cross References	₽ Co	mments			
	No	10000		Balanc	e Due (LCY)	-2	92,84	Total			
	Name · · · · ·	The Cannon Group P	LC	Credit	Limit (LCY)		0,00	Costs			
	B-1 (10)0	400	264.44	DI= -1	L		-				
Custor	mer sample: + New  □ Edit List  □ Delete  □ Open in Ex	xcel									
EDIT - E-MAIL	RECIPIENTS - 10000 · THE CANNON GROUP PLC	Recipient Type † E-Mail Type †	Contact No. 1	f Contac	t Name	E-Mail †	100 68	یر کے Do not Attach Open Documents			

#### E-mail recipient's fields:

E-Mail Template Group

E-Mail Template Grou

Document Type:

SALES

- E-Mail Template Group: Use this if you want to specify e-mail per group.
- E-Mail Template: Use this if you want to specify e-mail for each template.
- All: Use this if you want to use this e-mail for all Templates.

E-Mail Addres

- Document Code:

If the Document type is "E-Mail Template Group", you specify the group code here. If the Document Type is "E-Mail Template", you specify the Template Code here. If the Document Type is All this field should be left blank.

- Recipient Type:
  - To: The e-mail address will be placed in the To recipient on the mail.
  - Cc: The e-mail address will be placed in the Cc (Carbon Copy) recipient on the mail.
  - Bcc: The e-mail address will be placed in the Bcc (Blind Carbon Copy) recipient on the mail.
- E-Mail Type:
  - Contact: Use Contact if you what to specify a Contact.
  - E-Mail Address: Use "E-Mail Address" if you want to specify a E-Mail address.
- Contact No.: If E-Mail Type is Contact, you specify the Contact Number here.
- **E-Mail:** If E-Mail Type is "E-Mail Address" you specify the e-mail address here.
- **Do not Attach Open Documents:** If this is checked, open documents on Statements, Reminder and Finance Charge memo's will not be attached to the mail. Can be used if the Customer cant receive zip files or have other issues.

### E-Mail log

### In the E-Mail Log you can see all mails sent with SMTP

$\leftarrow$	E-MAIL LOG   WOR	K DATE: 28-01-2021								ß		□ ◻ ,⊀
	🔎 Search 🖃	Open Mail 🛛 🚺 Open in Excel	More of	otions								⊽ ≡
	Entry No,↑	E-Mail Language Template Code Code	UserID	Date Time	Linked to Table	Linked to Code	Table No.	Filter	Report-ID	Sent with	To Cc	
	1 :	SALESORDER	WORK\AD	21-01-2020 16:22	Customer	30000	36	Document Type: Order, No.: 10	1305	SMTP	miss.patricia.doyle@contoso.c	
	2	SALESQUOTE	WORK\AD	22-01-2020 10:40	Customer	10000	36	Document Type: Quote, No.: 1	1304	SMTP	mr.andy.teal@contoso.com	
	3	DRAFT-INVOI	WORK\AD	22-01-2020 10:57	Customer	50000	36	Document Type: Invoice, No.: 1	1303	SMTP	mr.jim.stewart@contoso.com	
	4	SALESINVOICE	WORK\AD	22-01-2020 13:10	Customer	35451236	112	No.: 103027	1306	SMTP	ragnheidur.k.gudmundsdottir	
	5	SALESCRME	WORK\AD	22-01-2020 13:19	Customer	49633663	114	No.: 104005	1307	SMTP	autohaus.mielberg.kg@contos	
	6	REMINDER	WORK\AD	22-01-2020 13:21	Customer	20000	297	No.: 105001	117	SMTP	mr.mark.mcarthur@contoso.com	
	7	FINCHRGME	WORK\AD	22-01-2020 13:28	Customer	20000	304	No.: 106001	118	SMTP	mr.mark.mcarthur@contoso.com	
	8	STATEMENT	WORK\AD	22-01-2020 13:36	Customer	10000	18	Marked: Yes, No.: 10000, Date	1316	SMTP	mr.andy.teal@contoso.com	
	9	PURCHQUOTE	WORK\AD	22-01-2020 13:41	Vendor	10000	38	Document Type: Quote, No.: 1	404	SMTP	mrs.carol.philips@contoso.com	
	10	PURCHORDER	WORK\AD	22-01-2020 13:43	Vendor	30000	38	Document Type: Order, No.: 10	1322	SMTP	mr.richard.bready@contoso.com	

### **Buttons:**

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

### 3. Setup

### E-Mail Template Setup

Click Document Output, Setup, E-Mail Templates.

CRONUS International	Ltd. Sales $\lor$	Purchasing $\smallsetminus$	Inventory $\smallsetminus$	Posted Documents $\smallsetminus$	Document Output $\smallsetminus$
Customer $\lor$ Vendor $\lor$	Setup 🗸				
HEADLINE Good afte	E-Mail Templates E-Mail Template Group E-Mail Recipient Temp	os lates			ACTIONS + Sales Quot + Sales Invoic

You can setup one template for each report. 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.

CRONUS International Ltd.	ales $\lor$ Purchasing $\lor$ Inventory $\lor$ Posted Docume	ents V Docu	ment Output Setup & Extensions	
Customer $\lor$ Vendor $\lor$ Setup $\lor$				
E-Mail Templates: All $\checkmark$ $\bigcirc$ Search	Manage 🗸 Template 🗸 🖪 Open in Excel 🛛 Actions 🛇	/ Navigate	Fewer options	
Code ↑	Document Group	Report-ID	Report Name	Report Selection
BLAN		210	Blanket Sales Order	S.Blanket
DRAFT-INVOICE	BOOKKEEPING	1303	Standard Sales - Draft Invoice	S.Invoice Draft
FINCHRGMEMO	BOOKKEEPING	118	Finance Charge Memo	Fin.Charge
JOB-QUOTE	SALES	1016	Job Quote	
PACKAGETRACK	SALES			
PURCHORDER	PURCHASE	1322	Standard Purchase - Order	P.Order
PURCHQUOTE	PURCHASE	404	Purchase - Quote	P.Quote
REMINDER	SALES	117	Reminder	Reminder
REMITTANCE-ENT		400	Remittance Advice - Entries	P.V.Remit.
REMITTANCE-JNL		399	Remittance Advice - Journal	V.Remittance
RETURNORDER	SALES	6631	Return Order Confirmation	S.Return
RETURNRECEIPT	SALES	6646	Sales - Return Receipt	S.Ret.Rcpt.
SALESCRMEMO	BOOKKEEPING	1307	Standard Sales - Credit Memo	S.Cr.Memo
SALESINVOICE	BOOKKEEPING	1306	Standard Sales - Invoice	S.Invoice
SALESORDER	SALES	1305	Standard Sales - Order Conf.	S.Order
SALESQUOTE	SALES	1304	Standard Sales - Quote	S.Quote
SERVCONTRACT	SALES	5970	Service Contract	SM.Contract
SERVCRMEMO	BOOKKEEPING	5912	Service - Credit Memo	SM.Credit Memo
SERVINVOICE	BOOKKEEPING	5911	Service - Invoice	SM.Invoice
SERVITEM	SALES	5936	Service Item Worksheet	
SERVORDER	SALES	5900	Service Order	SM.Order
SERVQUOTE	SALES	5902	Service Quote	SM.Quote
SERVSHIPMENT	SALES	5913	Service - Shipment	SM.Shipment
SHIPMENT	SALES	208	Sales - Shipment	S.Shipment
STATEMENT	BOOKKEEPING	1316	Standard Statement	C.Statement
WHSE-PICK	WHSE	5752	Picking List	
WHSE-PUT-AWAY	WHSE	5751	Put-away List	
WHSE-RECEIPT	WHSE	7316	Whse Receipt	
WHSE-SHIPMENT	WHSE	7317	Whse Shipment	

#### **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.

<b>R</b> 1305 ~	RECIPIENTS		SIGN					Sho
<b>₽</b> 1305 ∨	RECIPIENTS		SIGN	205				
1305 🗸	Document Group			PDF				
	2 - coment or oup	SALES	∨ Certifi	cate imported				
lles - Order Conf.	E-Mail Recipients Field	2	··· PDF S	ign File Name				
36 🗸	E-Mail Recipients Field Caption	Sell-to Customer No.	PDF S	ign Password				
er	E-Mail Address Field	Sell-to Contact No> Contact - Email	··· PDF S	ign Reason				
	E-Mail is mandatory		PDF S	ign Location				
	Fixed Cc Recipient(s)		ADVA	NCED				
~	Fixed Bcc Recipient(s)		Docur	nent Folder				
33	Test Recipient		Do No	of Save to Document F				
	FROM E-MAIL		Comb	ine Documents to one				
	From E-Mail	Fixed	<ul> <li>Comb</li> </ul>	ine Documents to one				
	From E-Mail Address		Log E-	Mails · · · · · · · · · · · · · · · · · · ·				
	From E-Mail Name		Keep	E-Mail log for				
	LINKED TO		On E-	Mail (SMTP)	E-Mail			
	Linked to	Customer	Engine	9	Document O	)utput Se	≥tup	
	Linked to Field No.	2	SMTP	Server				
	Linked to Field Caption	Sell-to Customer No.						
le	er	er E-Mail Address Field  E-Mail smandatory  E-Mail is mandatory  Fixed Cc Recipient(s)  S3 Fixed Bcc Recipient(s)  S3 From E-Mail From E-Mail From E-Mail Address From E-Mail Address From E-Mail Address From E-Mail Name LINKED T0 Linked to Field No. Linked to Field Caption	30 V     E-Mail Address Field     Sell-to Contact No> Contact - Email       er     E-Mail is mandatory     Image: Sell-to Contact No> Contact - Email       Image: Sell-to Contact No> Contact - Email     Image: Sell-to Contact No> Contact - Email       Image: Sell-to Contact No> Contact - Email     Image: Sell-to Contact No> Contact - Email       Image: Sell-to Contact No> Contact - Email     Image: Sell-to Contact No> Contact - Email       Image: Sell-to Contact No> Contact - Email     Image: Sell-to Contact No> Contact - Email       Image: Sell-to Contact No> Contact - Email     Image: Sell-to Contact No> Contact - Email       Image: Sell-to Contact No> Contact - Email     Image: Sell-to Contact No> Contact - Email       Image: Sell-to Customer No.     Image: Sell-to Customer No.	30 C         E-Mail Address Field         Sell-to Contact No> Contact - Email ····         PDF Si           er         E-Mail is mandatory         Image: Sell-to Contact No> Contact - Email ····         PDF Si            E-Mail is mandatory         Image: Sell-to Contact No> Contact - Email ····         PDF Si            Fixed Cc Recipient(s)         Image: Sell-to Contact No> Contact - Email ····         Docur            Fixed Bcc Recipient(s)         Image: Sell-to Contact No> Contact - Email ····         Do Ne            Test Recipient         Image: Sell-to Contact No> Contact No> Contact - Email ····         Do Ne            Fixed Bcc Recipient(s)         Image: Sell-to Contact No> Contact No> Contact No> Contact No> Contact - Email ····         Comb            From E-Mail Address         Image: Sell-to Customer         Contact No> Customer No.	36     E-Mail Address Field     Sell-to Contact No> Contact - Email     PDF Sign Reason       er     E-Mail is mandatory     Image: Contact No> Contact - Email     PDF Sign Reason       image: Contact No> Contact - Email     PDF Sign Reason     PDF Sign Reason       image: Contact No> Contact - Email     PDF Sign Reason     PDF Sign Reason       image: Contact No> Contact - Email     PDF Sign Reason     PDF Sign Reason       image: Contact No> Contact - Email     PDF Sign Reason     PDF Sign Reason       image: Contact No> Contact - Email     PDF Sign Reason     PDF Sign Reason       image: Contact No> Contact - Email     PDF Sign Reason     DD NO Save to Document Folder       image: Contact No> Contact - Email     Do Not Save to Document F     Contact No> Contact - Email       image: Contact No> Contact - Email     PDF Sign Reason     Contact No> Contact - Email       image: Contact No> Contact - Email     PDF Sign Reason     Contact No> Contact - Email       image: Contact No> Contact - Email     PDF Sign Reason     Contact No> Contact - Email       image: Contact No> Contact - Email     PDF Sign Reason     Contact No> Contact - Email       image: Contact No> Contact - Email     PDF Sign Reason> Contact - Email     Contact No> Contact - Email       image: Contact No> Contact - Email     From E-Mail Address     Contact No> Contact - Email	30 C     E-Mail Address Field     Sell-to Contact No> Contact - Email     PDF Sign Reason       er     E-Mail is mandatory     Image: Contact No> Contact - Email     PDF Sign Reason       image: Contact C Recipient(s)     Image: Contact No> Contact - Email     PDF Sign Reason       image: Contact C Recipient(s)     Image: Contact No> Contact - Email     PDF Sign Reason       image: Contact C Recipient(s)     Image: Contact No> C	36 V       E-Mail Address Field       Sell-to Contact No> Contact - Email       PDF Sign Reason         er       E-Mail is mandatory       Image: Contact No> Contact - Email       PDF Sign Reason          E-Mail is mandatory       Image: Contact No> Contact - Email       PDF Sign Reason          Fixed Cc Recipient(s)       Image: Contact No> Contact - Email       PDF Sign Reason          Fixed Cc Recipient(s)       Image: Contact No> Contact - Email       Image: Contact No> Contact - Email          Fixed Bcc Recipient(s)       Image: Contact No> Contact - Email       Do Cournent Folder       Image: Contact No> C	36 V       E-Mail Address Field       Sell-to Contact No> Contact - Email ····       PDF Sign Reason         er       E-Mail is mandatory       Image: Contact No> Contact - Email ····       PDF Sign Reason          E-Mail is mandatory       Image: Contact No> Contact - Email ····       PDF Sign Reason          Fixed Cc Recipient(s)       Image: Contact No> Contact - Email ····       PDF Sign Reason          Fixed Cc Recipient(s)       Image: Contact No> Contact - Email ····       Document Folder          Fixed Bcc Recipient(s)       Image: Contact No> Contact No

#### 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 Business Central dealer has added to your solution.

The mail address specified in this field is only used if Document Output does not find an e-mail address in the "E-mail recipient table" (See E-Mail Recipients Field above).

- **E-Mail is mandatory:** Should be checked if you do not want the user to be able to open the mail 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 email 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.
- 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.".

#### Sign PDF:

- **Certificate imported:** Shows if a certificate has been imported.
- **PDF Sign file Name.:** The file name of the imported certificate
- **PDF Sign password: P**assword to the imported certificate.
- **PDF Sign reason:** Informational text.
- **PDF Sign location:** Informational text.

#### 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\
- Log E-Mails: When checked e-mail are saved in the E-Mail Log table.
- Keep E-Mail for: Here you can set a period for how long time you want to same the e-mail log.
   1 month: -1M
  - 1 year: -1Y
- On-E-Mail (SMTP):
  - Email:
  - E-Mail and Print:
  - Print:
- Engine: Specifies how to generate the attachment to the e-mail.
  - NAV-PDF
  - NAV-Excel
  - NAV Word
  - 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.
- **Import certificate for digital signing PDF:** Import a certificate file. Must be PKCS#12 certificate (.PFX, .P12).
- Delete certificate for digital signing PDF: Deletes the imported certificate file.

#### 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.
- 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 email.
- Attach Open Doc. File Name: The filename used for the zip or pdf file. If zip is used as file name extension, a zip file will be created with all the documents. If pdf is used as file name extension, all the open documents will be merged into one PDF.
- Attach Open Documents Filter: Here you can choose which documents must be included.
  - Open documents in period: Open documents in the statement period is attached.
  - All open documents: All open documents is attached.
  - Overdue documents: Only document past due date is attached.
- Print uses:
  - **Report** Runs the report as normally.

- **PDF (From Client)** – Creates a PDF (including background and merge PDF) and prints the PDF from the client PC.

- **PDF (From Service Tier)** – Creates a PDF (including background and merge PDF) and prints the PDF from the Service Tier. When printing from service tier, make sure to install the printers needed with the User used for the Service Tier Service (Log On As).

#### Available fields:

- Mail Importance: Choose the importance of the mail (Low, Normal or High).

#### Line Buttons:

#### **E-Mail Template**

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

#### **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**

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

#### Edit HTML E-Mail Template

When the button "Edit Html E-Mail Template" is pressed the template opens.

Save E-Mail Template Actions Fewer opt	tions					
eneral				Attachments $\lor$		
nabled · · · · · · · · · ·	Language Code · · · · ·	Template Variant		File Name		
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You can now edit your template.

All the merge fields that are setup are shown in the Fact Box.

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

#### Merge Fields (Page)

On the "Merge Fields" page you setup all the fields you need for merging information into the created email.

-Mail Te	ork date: 28-01-2021 Montate Me	orae F	ield					√ SAV	red 🖬 🦯
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- Search   New		e Ma Open	III EXCEI						
Number †	Description	Туре	Get Field From	Get From Table	Get From Field	Web Address	Show text	Codeunit ID	Codeunit Paramete
→ <b>1</b> :	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)				
30	User Name (Salesperson)	Text	Sales Perso	13 (Salesperson/Purchaser)	2 (Name)				
31	User Phone No. (Salespers	Text	Sales Perso	13 (Salesperson/Purchaser)	5053 (Phone No.)		Direct Phone No.: %1		
32	User E-Mail (Salesperson)	Text	Sales Perso	13 (Salesperson/Purchaser)	5052 (E-Mail)				
33	User Job Title (Salesperson)	Text	Sales Perso	13 (Salesperson/Purchaser)	5062 (Job Title)				
35	Salesperson Name	Text	Codeunit		_			6175282	SalespersonNam
36	Salesperson Job Title	Text	Codeunit		_			6175282	SalespersonJobT
37	Salesperson Phone No.	Text	Codeunit		_			6175282	SalespersonPhon
38	Salesperson E-Mail	Text	Codeunit		_			6175282	SalespersonEMai
40	Company Name	Text	Setup Table	79 (Company Information)	2 (Name)				
41	Company Name 2	Text	Setup Table	79 (Company Information)	3 (Name 2)				
42	Company Address	Text	Setup Table	79 (Company Information)	4 (Address)				
43	Company Address 2	Text	Setup Table	79 (Company Information)	5 (Address 2)				
44	Company Post Code	Text	Setup Table	79 (Company Information)	30 (Post Code)				
45	Company City	Text	Setup Table	79 (Company Information)	6 (City)				
46	Company Phone No.	Text	Setup Table	79 (Company Information)	7 (Phone No.)		Phone No.: %1		
47	Company Phone No. 2	Text	Setup Table	79 (Company Information)	8 (Phone No. 2)		Phone No.2 %1		
48	Company E-Mail	Link to E-M	Setup Table	79 (Company Information)	34 (E-Mail)	961	%1		
49	Company Home Page	Hyperlink	Setup Table	79 (Company Information)	35 (Home Page)	961	%1		
50	Company VAT Registration	Text	Setup Table	79 (Company Information)	19 (VAT Registration No.)				
60	1st Contact First Name	Text	Codeunit		_			6175282	Contact1FirstNar
61	1st Contact Surname	Text	Codeunit		_			6175282	Contact1Surnam
62	1st Contact Formal Salutat	Text	Codeunit		_			6175282	Contact1FormalS
63	1st Contact Informal Salut	Text	Codeunit		_			6175282	Contact1Informa
64	2nd Contact First Name	Text	Codeunit		_			6175282	Contact2FirstNar
65	2nd Contact Surname	Text	Codeunit		_			6175282	Contact2Surnam
66	2nd Contact Formal Saluta	Text	Codeunit		_			6175282	Contact2FormalS
67	2nd Contact Informal Salu	Text	Codeunit		_			6175282	Contact2Informa

#### 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.

E-MAI	IL RECIPIENT TEMP	√ SAVED	0 0	2					
		🐯 Ed	dit List	🗎 Delete 🛛 🚺 C	)pen in Excel			Y	=
	Table 1		I	Document Type ↑	Document Code 1	Recipient Type↑	E-Mail	Type 1	
$\rightarrow$	Customer	•	; E	-Mail Template Group	BOOKKEEPING	То	E-Mail	Address	
	Customer		E	-Mail Template Gro	SALES	То	E-Mail	Address	
	Customer		E	-Mail Template	STATEMENT	То	E-Mail	Address	

When you open "E-Mail Recipients" on Customer card with the above setup Business Central will create 3 lines, and you are now ready to enter 3 e-mail addresses.

Q	Search + New 👿 E	dit List	📋 Delete 🛛 🚺 Open in Exc	el										
EDIT	EDIT - E-MAIL RECIPIENTS - 01121212 - SPOTSMEYER'S FURNISHINGS													
	Document Type T		Document Code T	Recipient Type T	E-Mail Type T	Contact No. 1	Contact Name	E-Mail T						
$\rightarrow$	E-Mail Template Group. 🔻	÷	BOOKKEEPING	То	E-Mail Address		_							
	E-Mail Template Group		SALES	То	E-Mail Address		_							
	E-Mail Template Group E-Mail Template		SALES STATEMENT	To To	E-Mail Address E-Mail Address									

### 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**".

hasing $\sim$ Inventory $\sim$ Post	ed Documents > Document	Output - Setu	up & Extensions	/   ≡							
						5	\$				
Send Customer Statements: All ->   P Search + New Manage -> 🖾 Open in Excel											
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					
14D	-5D		<b>V</b>		STATEMENT	Journal					
1M	-5D		¥		STATEMENT	Journal					
14D	-5D		×	×.	STATEMENT	Journal					
1M	-5D		¥	×.	STATEMENT	Journal					
Balance 14D	-5D		¥	×.	STATEMENT	Journal					
Balance 1M	-5D			V	STATEMENT	Journal					
Balance D 14D	-5D		<b>V</b>	×.	STATEMENT	Journal					
Balance D 1M	-5D		¥	s.	STATEMENT	Journal					
14D	-5D		¥	s.	STATEMENT	Journal					
1M	-5D		¥.	×.	STATEMENT	Journal					
	ew Manage Period Date Formula Period Date Formula Manage Manage Manage Period Date Formula Manage Mana Manage Manage Mana	Aasing Ventory Ventory Posted Documents Documents Documents Ventory Posted Documents Ventory V	Assing        Inventory        Posted Documents        Document Output        Setu         ew       Manage        IB Open in Excel       Image        Do not send if negative balance       Do not send if negative balance         14D       -5D       Image        Image        Do not send if negative balance         14D       -5D       Image        Image	assing     Inventory     Posted Documents     Document Output     Setup & Extensions       ew     Manage     If Open in Excel     Image of If Open in Excel     Image of If Open in Excel       ew     Manage     If Open in Excel     Image of If Open in Excel     Image of If Open in Excel       14D     -5D     Image of If Open in Excel     Image of Imag	Assing     Inventory     Posted Documents     Document Output     Setup & Extension     Image: Comparison of the	assing       Inventory       Posted Documents       Document Output       Setup & Extensions       Image: Comparison of the comparison	Inventory         Posted Documents         Document Quept         Setup & Extensions         Image Control         Image Contro         Image Contro         Image				

#### 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.
- **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**

	Ø	+ 🗊		
Document (	Dutput Setup	)		
Start Performance Monitor	Stop Performance Monitor	瞬 Reset No. Printed	Actions	Fewer options
General				
Default Engine · · · · · · NA	/-PDF	Package Tracking Tem		
Document Folder				

#### Fields:

- **Default Engine:** Specify which attachment to be generated.
  - NAV-PDF
  - NAV-Excel
  - NAV Word
  - Default Engine (Classic Clients): Specify the PDF driver, and choose the Printer!.
    - Printer Driver (Cannot be used unless you get custom development)
    - 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.
- Package Tracking Template: Choose the Template Code used to send Package Tracking.

#### **Buttons:**

- **Start Performance Monitor:** Starts the Performance monitor. The performance Monitor, show a message after you send an e-mail showing the elapsed timer for each step required to create the e-mail.
- **Stop Performance Monitor:** Stops the Performance monitor.

### Document Output SMTP Setup

	Ø	+ 1	
Documen	t Output SM1	FP Setup	
👍 Advanced 🛛 🗟 Send	test E-Mail 🛛 🙀 Gmail Setup	∯* Office 365 Setup More options	
General			Show more
SMTP Server Address	localhost	Password	
From E-Mail Address	svend@contoso.com	Use SSL	
From E-Mail Name		Port · · · · · · · · · · · · · · · · · · ·	
Authentication	Anonymous	Connection Timeout (	
User ID · · · · · · · · · · · · · · · · · ·			

#### Fields:

- Server: Specify which attachment to be generated.
- From e-mail: Specify.

### **Buttons:**

- Advanced: Opens a list view of SMTP servers if you want to use more than one SMTP Server or "E-Mail Address"s.
- Send test E-Mail: Opens an e-mail you can send to test the SMTP setup.
- 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. They will use "Job Queue" to send mails.

CRONUS Int	RONUS International Ltd. Sales Purchasing Inventory Posted Documents Document Output Setup & Extensions 🗧																		
Customer $\lor$	Customer v Vendor v Setup v												5è						
E-Mail Jobs: A	ul V	<u>م</u>	Search + New	Manage $\lor$	🕨 Run 🛛 🚺 Open	in Excel More op	tions										\ ≣		2
Job No.†		Enabled	Туре	E-Mail Template Code	Table Filter	Table Caption	Disable Check for sent erlier	Starting Time	Ending Time	Run on Mond	Run on Tuesd	Run on Wedn	Run on Thursd	Run on Fridays	Run on Saturd	Run on Sundays	Last run time		
DELETE-LOG	- 1	<b>V</b>	Delete old log		-					<b>e</b>		<b>V</b>	<b>V</b>			<b>e</b>			
QUEUE		¢.	E-Mail Queue	ş	-					¥	2	¥	¥	¥	¥	¢.			

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.
- Disable Check for sent earlier: Makes it possible to send the same e-mail again!
- **Stating Time:** The starting time this job can run.
- Ending Time: The ending time for this job.
- **Run on Mondays:** Specifies if you want this job to run on Mondays. (If none is specified the job wil run all days!)
- **Run on Tuesdays:** Specifies if you want this job to run on Tuesdays. (If none is specified the job wil run all days!)
- **Run on Wednesdays:** Specifies if you want this job to run on Wednesdays. (If none is specified the job wil run all days!)
- **Run on Thursdays:** Specifies if you want this job to run on Thursdays. (If none is specified the job wil run all days!)
- **Run on Fridays:** Specifies if you want this job to run on Fridays. (If none is specified the job wil run all days!)
- **Run on Saturdays:** Specifies if you want this job to run on Saturdays. (If none is specified the job wil run all days!)
- **Run on Sundays** Specifies if you want this job to run on Sundays. (If none is specified the job wil run all days!):
- Last run time: The last Date/Time the job was executed.

**Buttons:** 

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

### NAS (Application Server)

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

When you use a NAS for printing (E-Mail Queue). Make sure to install the printers needed with the User used for the Service Tier Service (Log On As).