Document Output cloud for Microsoft Dynamics BC

Feature Setup

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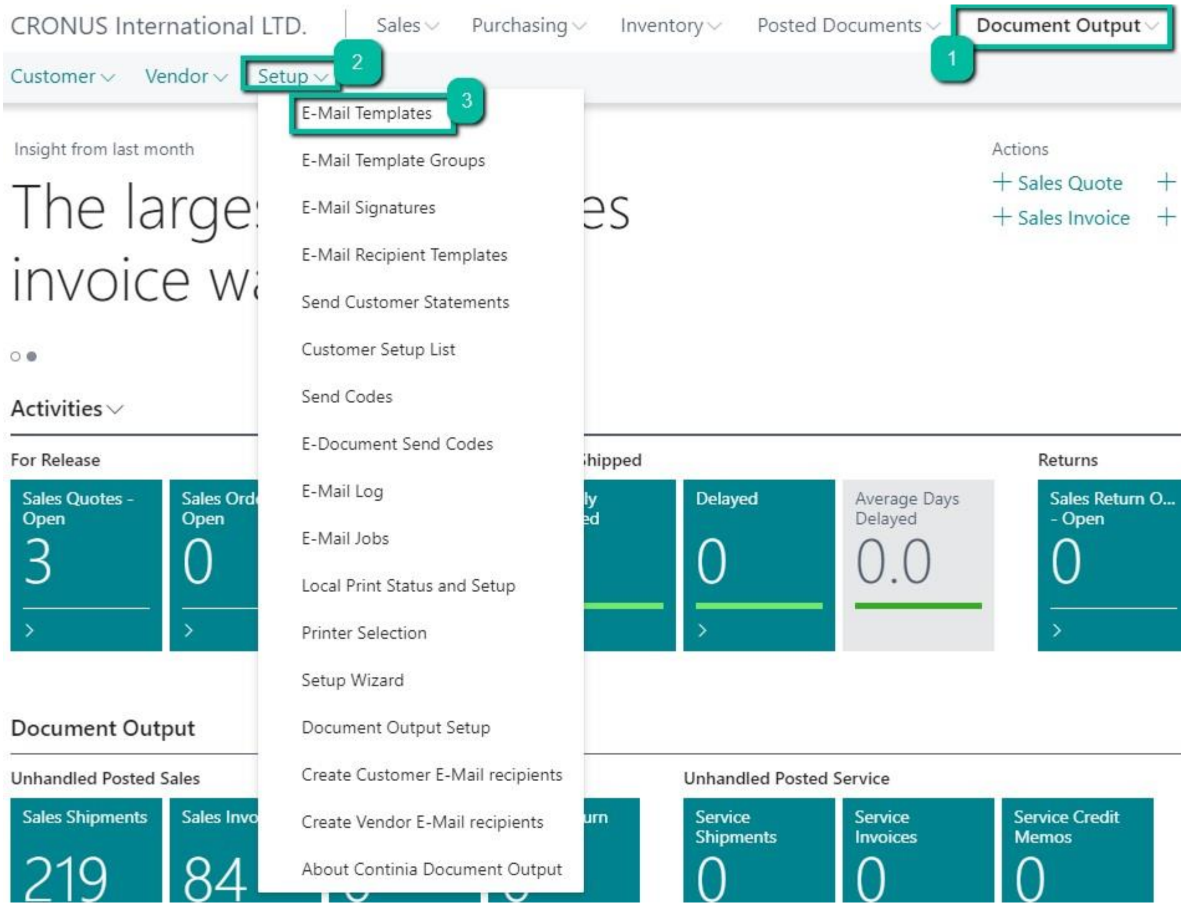
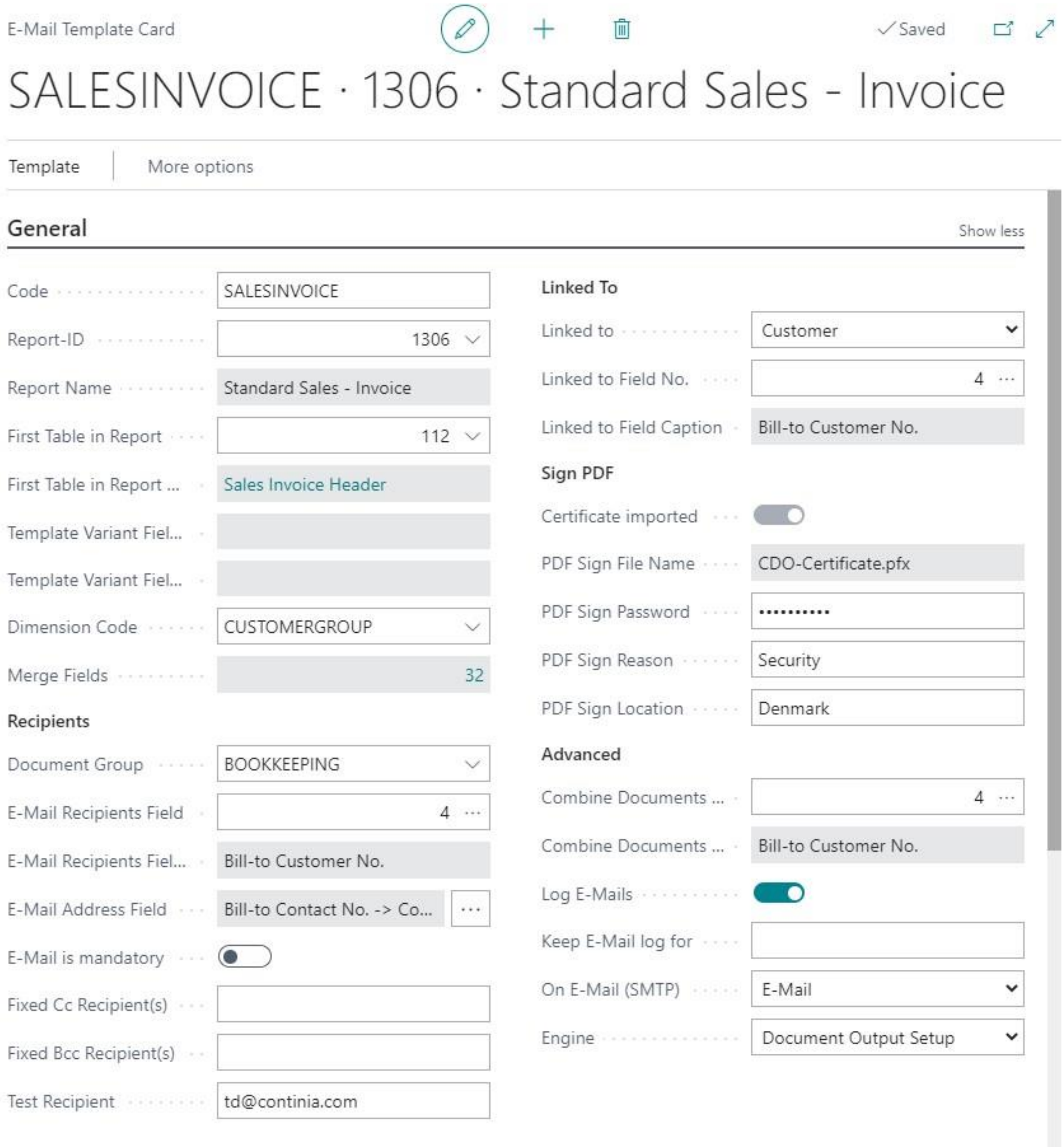
EDIT E-MAIL TEMPLATES GENERAL

The following section describes how to edit the General E-mail templates in Document Output

1) Choose E-Mail Templates from the Document Output Menu or search for E-Mail Templates



3) Choose Template for Sales invoice and click on edit



4) In the field Dimension Code, it is an option to set a Dimension (to be used on the E-Mail Template Lines.)
5) The E-Mail Recipient Field looks if there is any Recipients on the customer card in the E-Mail recipient table. If Document Output doesn't find an E-Mail Recipient it will look in the next field E-Mail Address Field to see if it can find an E-Mail (in this case Bill-to Contact and contact EMail, this can be changed by selecting the assisted setup on the field).
6) If no E-Mails are found it will Print the Document.
7) It is also an option to set a Fixed CC or BCC Recipient (mostly used for internal use).

8) Linked to only means that this template is linked to the Customer Card, so Document Output knows where to put the logged files and find the Recipients.
9) Sign PDF gives the user the option to Sign the PDF, so that the receiver knows that the document hasn't been changed on its journey. (see the Documentation Sign PDF).
10) Combine Documents to One PDF, means that if we have more than one E-Mail with one document in each E-Mail, we can combine them into one E-Mail with all the Documents in one PDF. Remember to set a value in Combine Docs. File name on the template lines.
11) Log E-Mails means that we in this case logs all send E-Mailed or printed Sales invoices.
12) Keep E-Mail Log for makes it possible to clean up the log, so there is only stored logged EMails for a certain time of period, this functionality works together with the E-Mail job Delete Log. The value that must be set is eg -3Y (only stored log I Blob fields for 3 years at the time)
13) On E-Mail SMTP gives the user the option to either E-Mail or E-Mail/Print or just Print certain types of Documents.
14) Engine uses the setup from the Document Output Setup, which is default set as NAV-PDF.

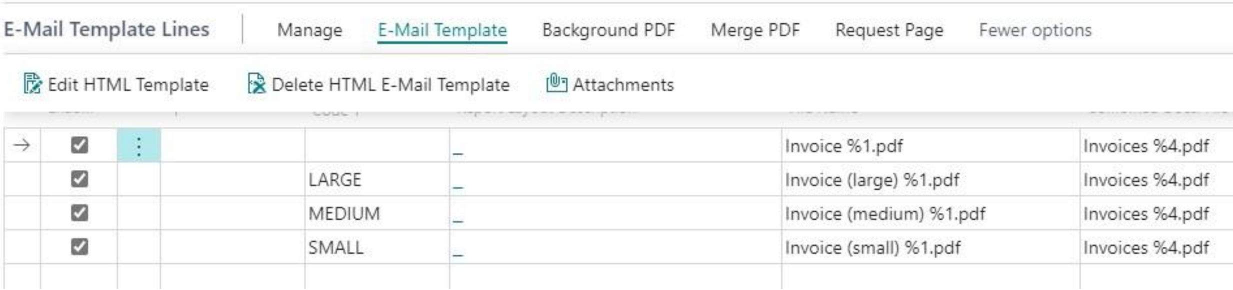
EDIT E-MAIL TEMPLATE LINES

The following section describes how to edit the E-mail template lines in Document Output.

On the template, go to the template lines.

Setup Background PDF and Merge PDF:

1) Go to the first E-Mail Template Line

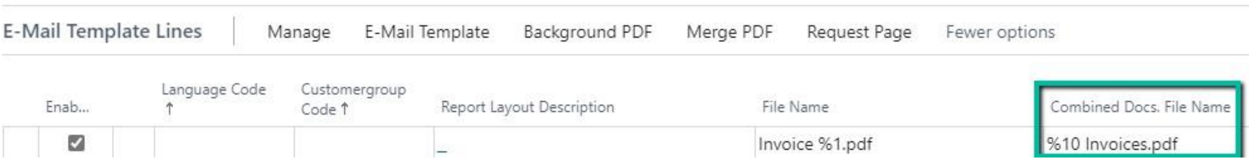


2) Select Background PDF (Background PDF is used to set as a Background on the Document)
3) Click on Set Background PDF and choose the background PDF from a folder
4) Select Merge PDF (Merge PDF is used to set as a merged PDF to the Document)
5) Click on Set Merge PDF file and choose the merge PDF from a folder 6) There are now check marks on the template line

Combine Documents to one PDF:

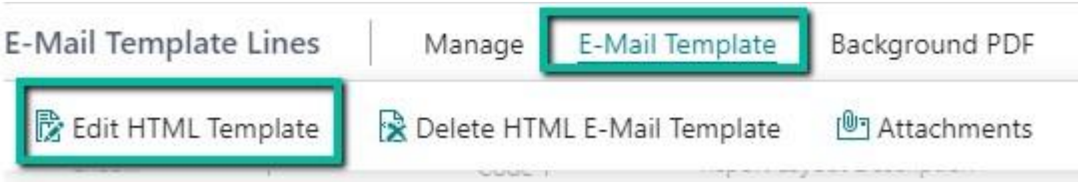
1) On the template lines choose the column Combine Docs File name, set in the text: %10 invoices.pdf, (%10 counts the number of documents in the PDF). Also see the Documentation for Combine Documents to one PDF.

On the general template setup, you also must set the combine value, which we did in the General setup.



This will make it possible to combine more than one e.g. Sales invoices in one PDF attached to the EMail.

2) We also need to change the Subject on the E-mail template.
   Click on the line where we wish to combine Docs. and click on E-Mail Template 3)
Click on Edit HTML template



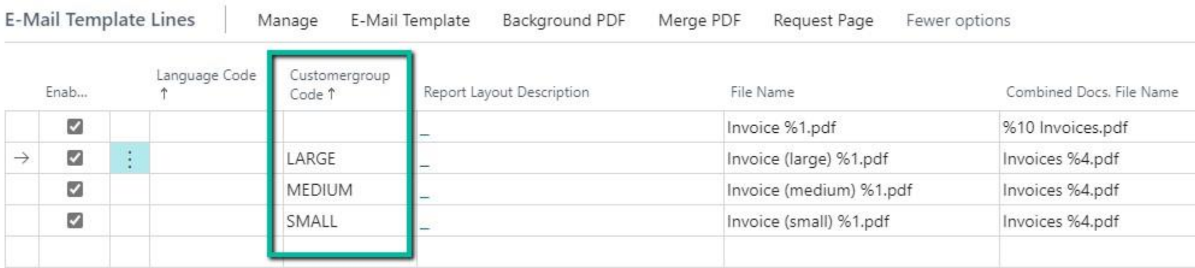
4) An E-Mail template now opens, Change the Subject text to e.g. %10 Invoices

5) Select Save E-Mail Template

Set up E-Mail Template Lines with Dimensions:

The first E-Mail Template Line should always be blank in Language Code and Dimension Code.

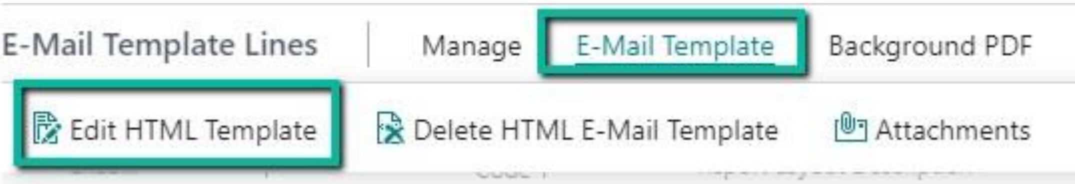
1) Choose E-Mail Template Lines
2) Based on the value there is set on the General template, the name of the column will now change (in this case to Customergroup Code)
3) Now make template lines based on that dimension.



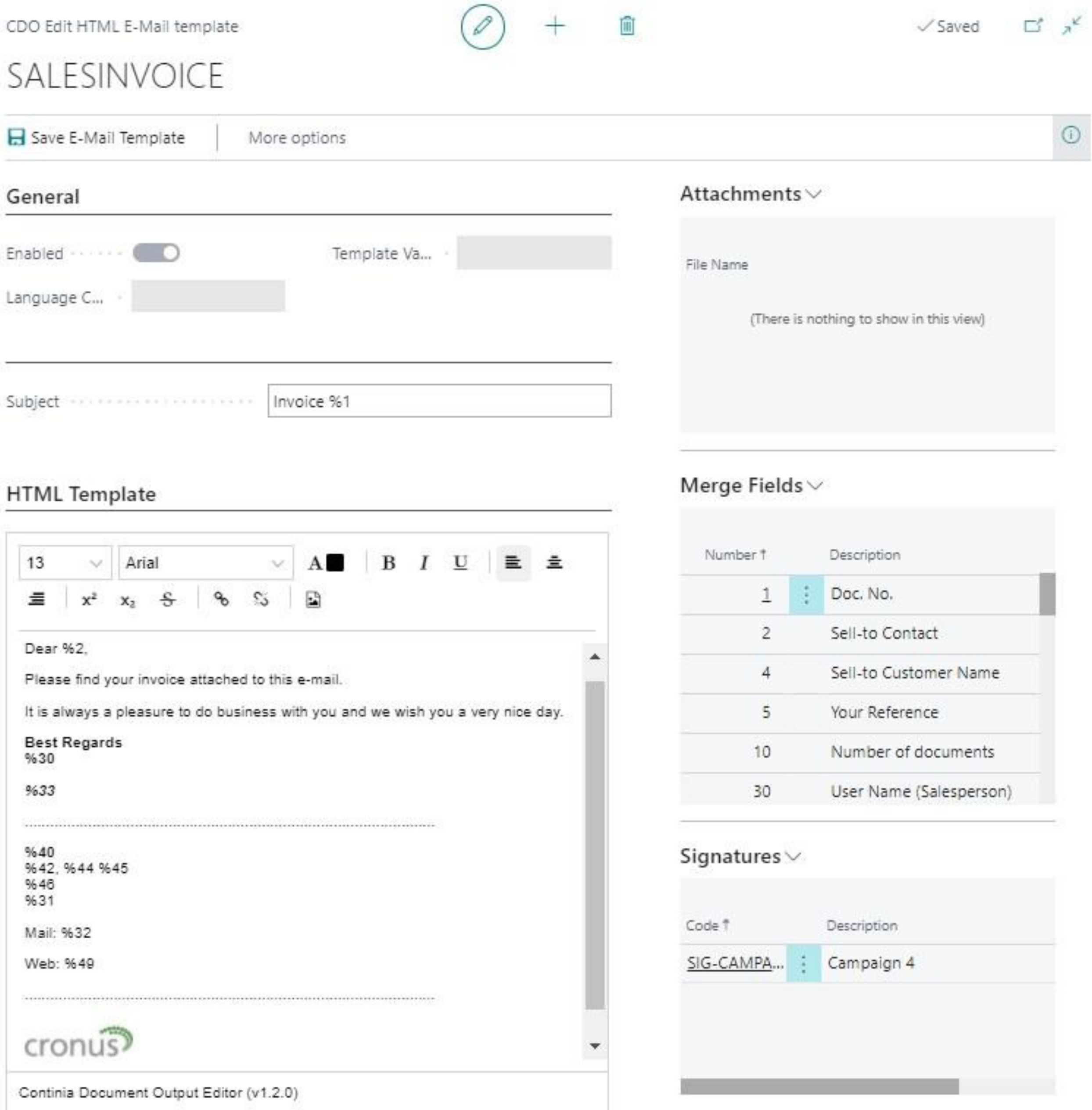
Enab...	Language Code ↑	Customergroup Code ↑	Report Layout Description	File Name	Combined Docs. File Name
☑			_	Invoice %1.pdf	%10 Invoices.pdf
☑		LARGE	_	Invoice (large) %1.pdf	Invoices %4.pdf
☑		MEDIUM	_	Invoice (medium) %1.pdf	Invoices %4.pdf
☑		SMALL	_	Invoice (small) %1.pdf	Invoices %4.pdf

SET UP E-MAIL TEMPLATES:

Select Edit E-Mail HTML Template



1) The HTML Template for this line can now be modified to the customer's needs.



2) It is an option to change logo, merge fields, text etc.

SET OPTIONS FOR STATEMENT TEMPLATE:

1) Go to the statement template
2) Go to the E-Mail Template Lines
3) The check mark for attaching open documents is set as default on the Statement and Reminders.
   This means that Document Output will send a statement and a file with the e.g. open document ´s in period. The value in the file name, can be changed from .zip to .pdf

Show Request Page	Saved Request Page	Backgr... PDF	Merge PDF file	Attach Open Docum...	Attach Open Doc. File Name	Attach Open Documents Filter
☐	☑	☐	☐	☑	Open documents.zip	Open documents in period

4) In the column attach open documents filter, click on the Drop-down button

Attach Open Documents Filter
Open documents in period

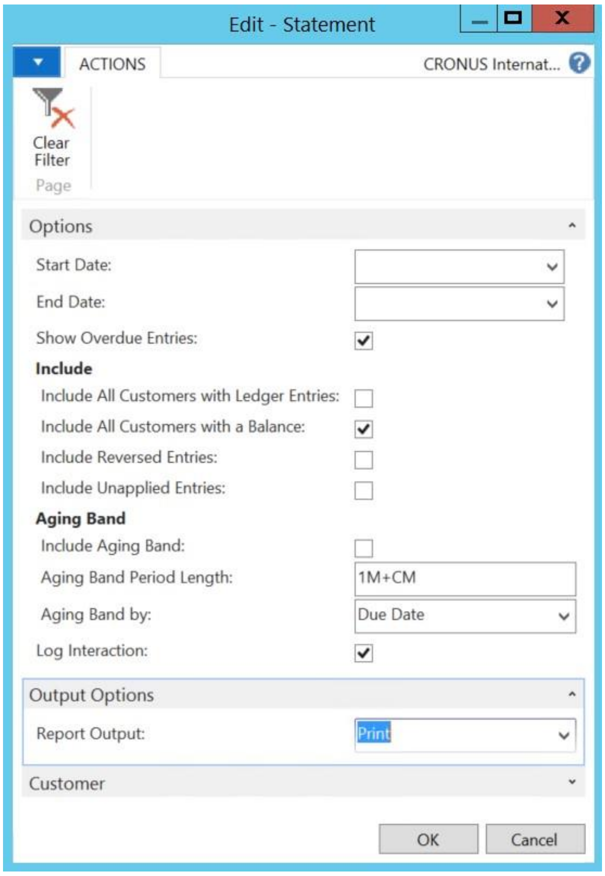
5) More options will now appear, choose the value for which documents that needs to be attach as a .zip file of a PDF file.

Open documents in period
All open documents
Overdue documents

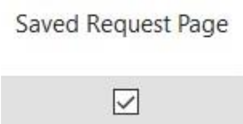
If e.g. All open documents are chosen, Document output will now attach all open documents to the statement and not just for the chosen period.

Set Request page for statements

1) Click on Request page in the ribbon on the E-Mail Template line
2) Click on Set Request page
3) The available options for a Customer Statement request page will now appear



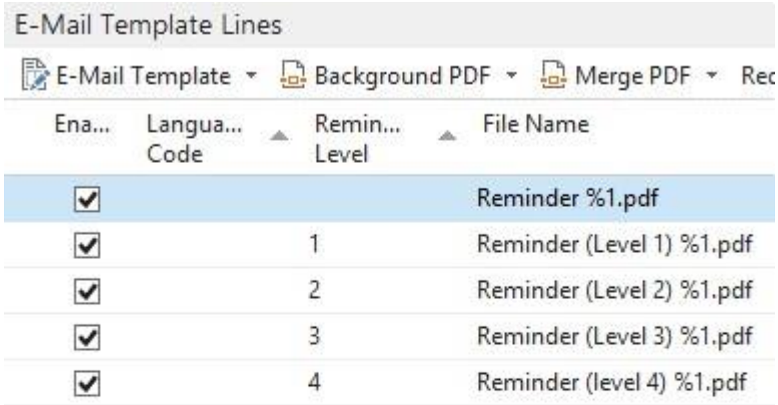
4) Set the wished values
5) Click on OK, and you will notice a check mark in the column Saved Request page on the template line



CREATE TEMPLATE LINE COMBINATIONS ON A REMINDER TEMPLATE:

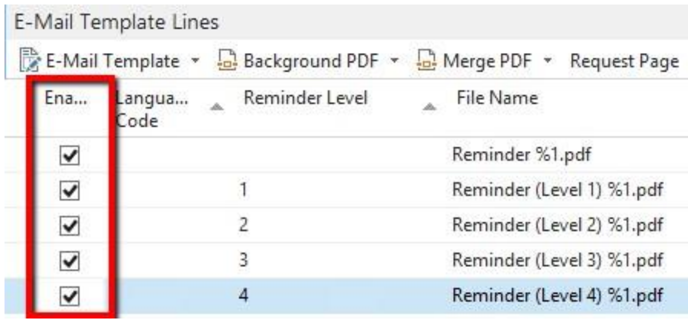
1) Go to the Reminder template
2) In the Template Variant Field No. choose 28 (Reminder Level)
   The Variant field looks in the report table and see what options there is to base the template lines on. (for a reminder the value 28 Reminder level makes sense)

3) Click on the next empty E-Mail template line and type in 1 (the value of the reminder level, could be different in the customer database) in the Reminder Level Column



4) Now type in File name, Edit E-mail template and setup the email templates for all reminder levels
5) Set a check mark in Attach open documents and type in an Open Docs. File Name on all the template lines.

6) Remember to enable the template lines and click on OK.



SETUP CUSTOMER CARD

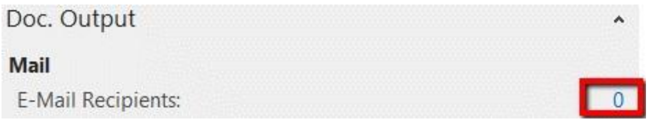
When using Continia Document Output you will get access to a lot of Factboxes and Actions. The Customer Card includes a Factbox, where it is possible to set up a lot of useful information related to the customer.

Edit Factbox for a Customer:

1) Search for Customers in the Search field and choose Customers
2) Go to a Customer

Now there is a Document Output factbox on the Customer Card

3) Click on the zero next to E-Mail recipient



4) Setup E-Mail Recipients 5) Fill in E-Mails e.g.

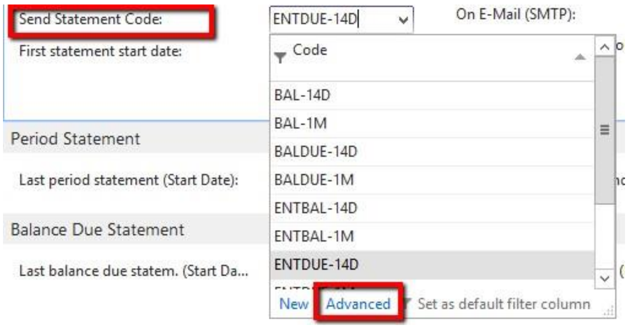
Bookkeeping: bookkeeping@contoso.com
Sales: Sales@contoso.com
Shipment: shipment@contoso.com
Statement: Statement@contoso.com 6)
Click on OK

7) Click on Manual, next to Automatic Statement:
Here we can change the setup on the customer to send Automatic Statements

8) Change the setup on the customer

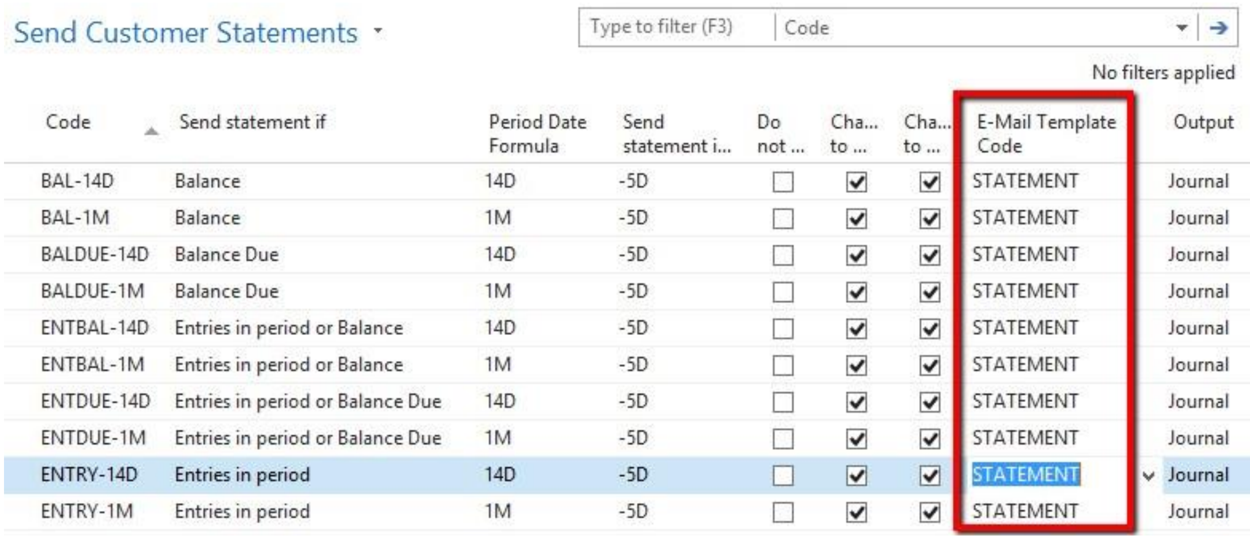
This means that the statement will be sent automatically starting from January 1st, 2019 and it will send if there is a balance due or if there are entries in period.
(Document Output delivers ready statement codes)

9) Click on the drop-down button next to Send Statement Code and click on advanced



10) Click on Edit List on the Send Customer Statements list

11) Set the value STATEMENT in the column E-Mail Template Code


Send Customer Statements

Type to filter (F3) | Code

No filters applied

Code	Send statement if	Period Date Formula	Send statement i...	Do not ...	Cha... to ...	Cha... to ...	E-Mail Template Code	Output
BAL-14D	Balance	14D	-5D	☐	☑	☑	STATEMENT	Journal
BAL-1M	Balance	1M	-5D	☐	☑	☑	STATEMENT	Journal
BALDUE-14D	Balance Due	14D	-5D	☐	☑	☑	STATEMENT	Journal
BALDUE-1M	Balance Due	1M	-5D	☐	☑	☑	STATEMENT	Journal
ENTBAL-14D	Entries in period or Balance	14D	-5D	☐	☑	☑	STATEMENT	Journal
ENTBAL-1M	Entries in period or Balance	1M	-5D	☐	☑	☑	STATEMENT	Journal
ENTDUE-14D	Entries in period or Balance Due	14D	-5D	☐	☑	☑	STATEMENT	Journal
ENTDUE-1M	Entries in period or Balance Due	1M	-5D	☐	☑	☑	STATEMENT	Journal
ENTRY-14D	Entries in period	14D	-5D	☐	☑	☑	STATEMENT	Journal
ENTRY-1M	Entries in period	1M	-5D	☐	☑	☑	STATEMENT	Journal

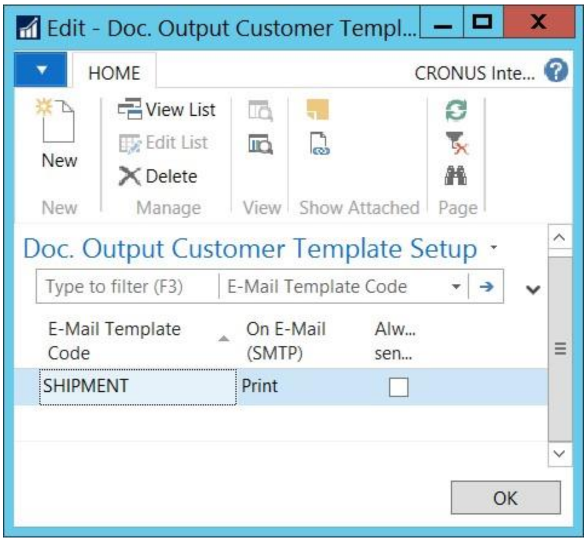
12) Click on OK and on OK to close the setup list

The column Output is set to Journal, which means that the statements will be listed in the customer statement Journal. This value can be changed to E-mail, meaning that the statements will be sent automatically using the E-Mail jobs (makes sure that the Job queue entries for sending statements are running)

13) It is possible to setup On E-Mail (SMTP) for specific Templates, click on the zero next to Template setup.

14) Click on Edit List

15) Type in E-Mail Template Code: Shipment and On E-Mail (SMTP): Print



This will print the shipment document for this customer

16) Click on OK

AUTOMATIC STATEMENTS

This section describes how to send automatic statements with Document Output. In Document Output you can send both Manual Statements and Automatic Statements in fixed intervals.

Automatic Statements setup:

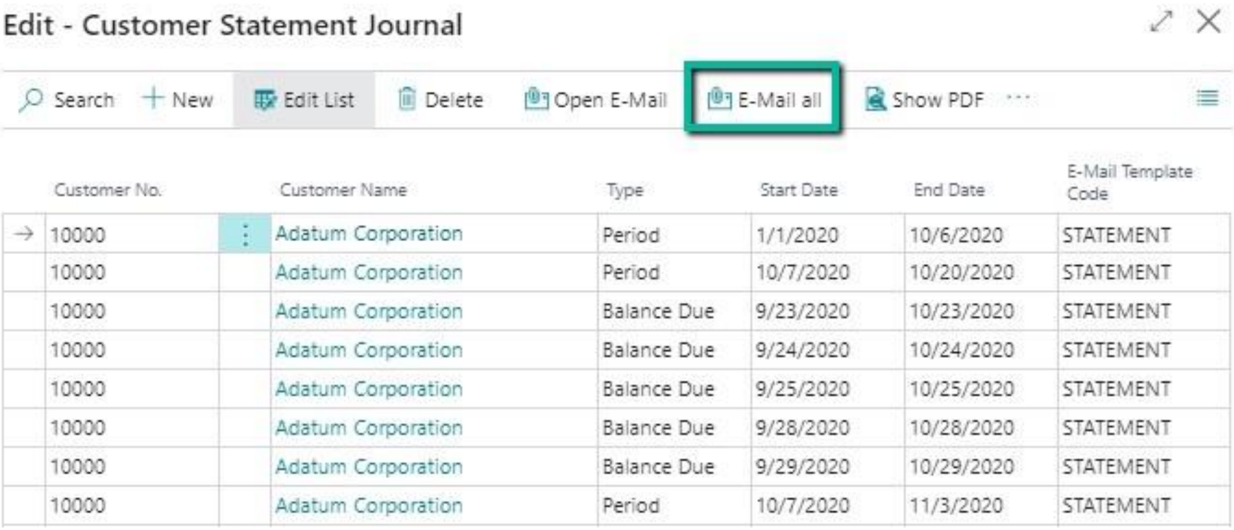
On the customer Card we set up Automatic Statements for Customers

Go to the Role Center and find the tile Customer Statement Journal

1) Under Actions – Check for New statements (the Job queue entry will normally do this actin for you every time it runs)

To set up Job Queue to create Automatic Statements. The Job Queue Entry should run Codeunit: 6175297 "Send Customer Statement Mgt.".

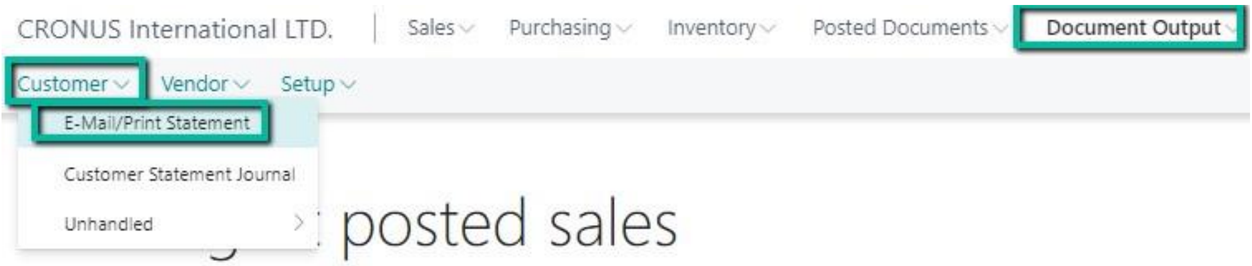
2) Click on E-Mail All to send all the statements. (it is also possible to create a job to send them completely automatically)



Customer No.	Customer Name	Type	Start Date	End Date	E-Mail Template Code
10000	Adatum Corporation	Period	1/1/2020	10/6/2020	STATEMENT
10000	Adatum Corporation	Period	10/7/2020	10/20/2020	STATEMENT
10000	Adatum Corporation	Balance Due	9/23/2020	10/23/2020	STATEMENT
10000	Adatum Corporation	Balance Due	9/24/2020	10/24/2020	STATEMENT
10000	Adatum Corporation	Balance Due	9/25/2020	10/25/2020	STATEMENT
10000	Adatum Corporation	Balance Due	9/28/2020	10/28/2020	STATEMENT
10000	Adatum Corporation	Balance Due	9/29/2020	10/29/2020	STATEMENT
10000	Adatum Corporation	Period	10/7/2020	11/3/2020	STATEMENT

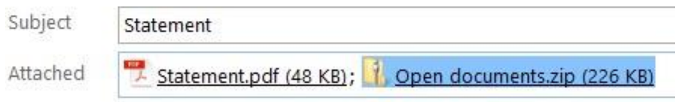
MANUEL STATEMENT:

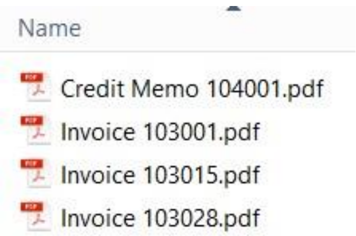
1) Go to the Role Center and select E-Mail/Print Statement (or search for E-Mail/Print Statement)



2) Filter to a Date value
3) Set a check mark in Entries in period –
   (Document Output will now filter to Customers with Entries in the chosen period.)
4) Send the Statements or Open E-Mail

If Open E-Mail I chosen the E-Mail will now open and you will see an attached PDF statement and a Zipped Folder with open Documents.



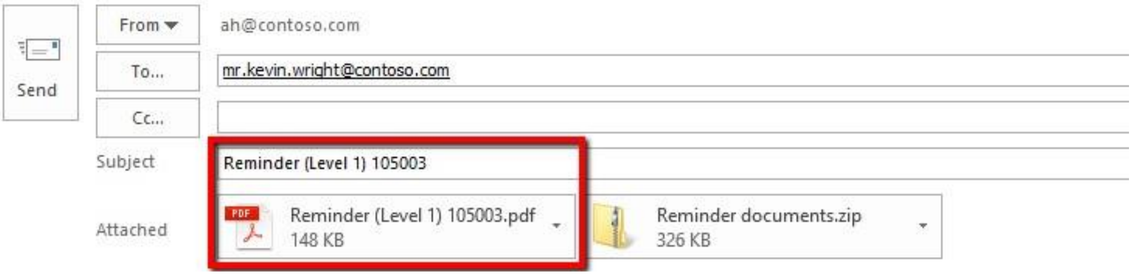


5) Send the E-Mail

SEND REMINDER:

1) Go to the Role Center and choose the unhandled Issued Reminders

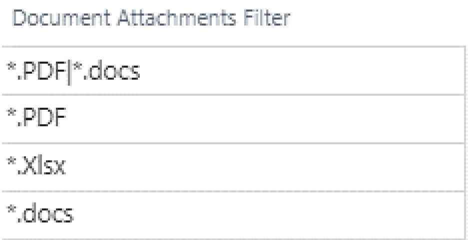
The same way as statement you can see an attached reminder and a zip file with the open Documents. (This can be changed to .PDF the same way as the statements.)



MAIL ATTACHMENTS:

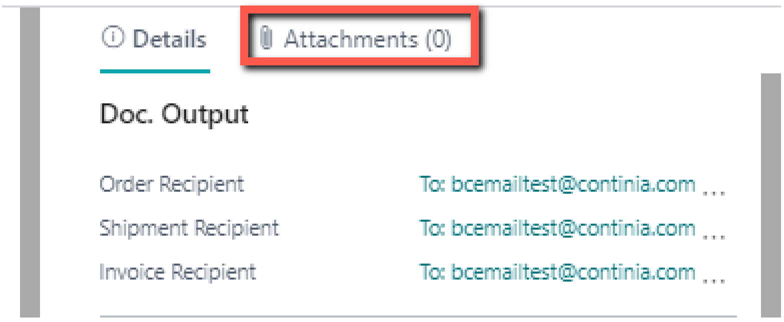
1) On each template, it is an option to allow Mail attachments, on either the Document or lines.

2) On the template lines it is possible to define which file types that needs to be attached



If the fields are blank it takes all document types, but we can set values for one or more file types. Start with a * and dot filetype. Use | to add more than one file type.

3) "Attachments" can be found on the document in the factbox on e.g. the Sales Order



4) "Line Attachments" can be found on the Document lines. Here the user can attach Attachments to each e.g. order line and these will then be attached.