

Continia Document Output

Install guide

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Introduction

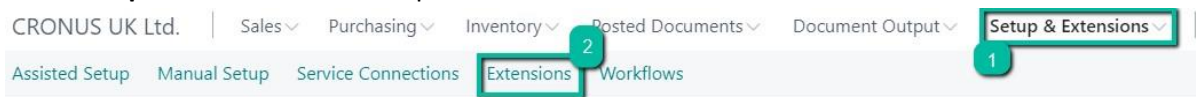
The purpose of this document is to show installation of the Continia Document Output solution. The focus for this document is on the cloud version for Document Output.

Continia Document Output will subsequently be referred to in this document as DO.

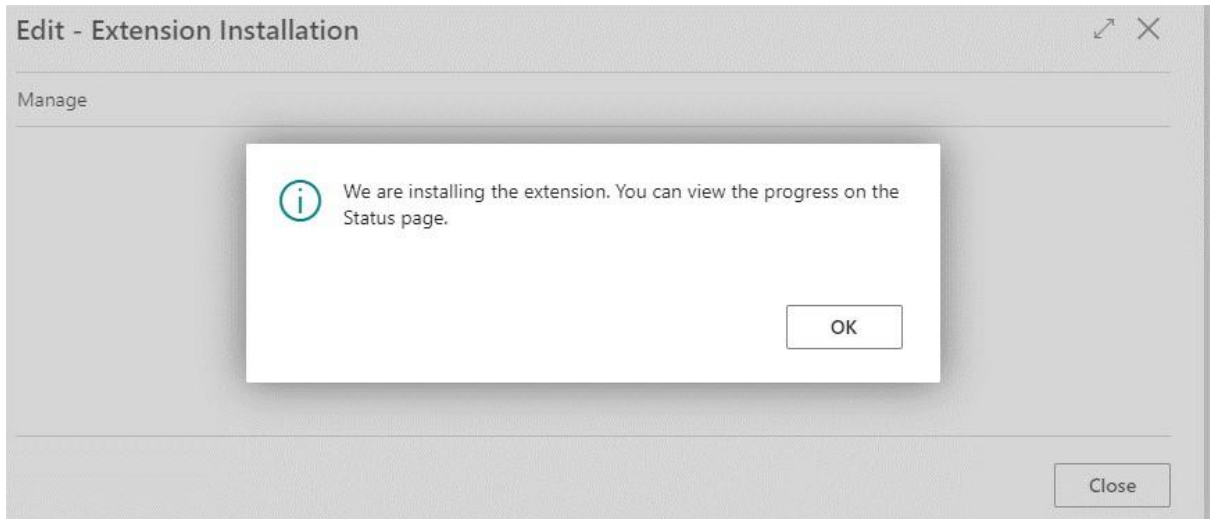
Install Continia Document Output

Before you can start using DO, you must install the app. The following steps show you how to install DO.

1. Sign into Business Central.
2. Select **Setup & Extensions** in the top bar.



3. Select **Manage** and **Extension Marketplace**
4. Search for “Continia Document Output”
5. Select “Free Trial”
6. Type in the Profile information
7. Set check mark in give permission to use or share my.....
8. Select **Continue**
9. Choose **language**
10. Select **Install**
11. The installation will now start – select **OK**



12. Go back to Manage and Select the **Deployment status** to see the installation status
13. When the installation status is Complete, go back to the Role Center

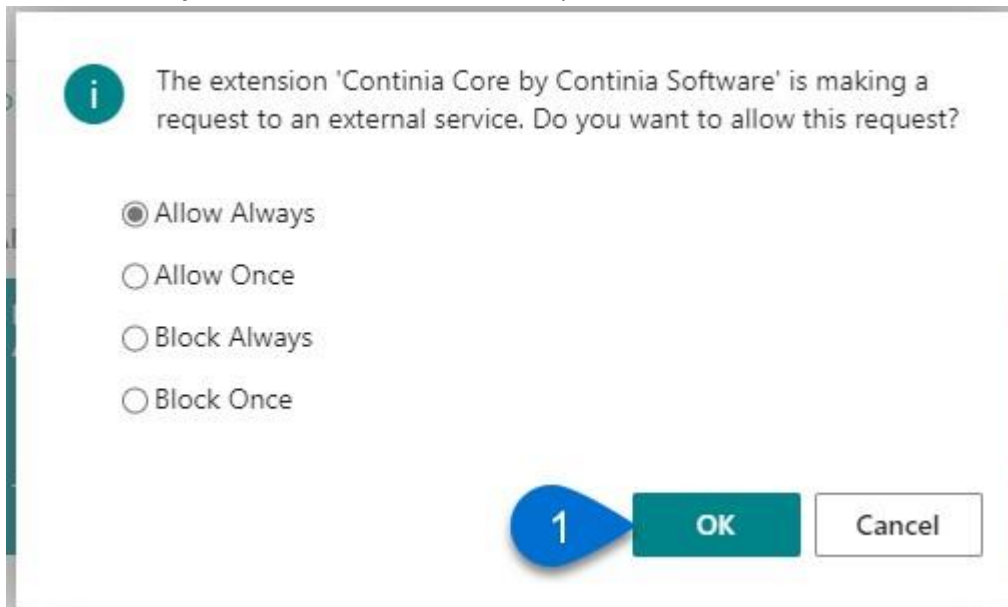
Activate Continia Document Output

Before you can start using DO, you must activate the app. The following steps show you how to activate the DO.

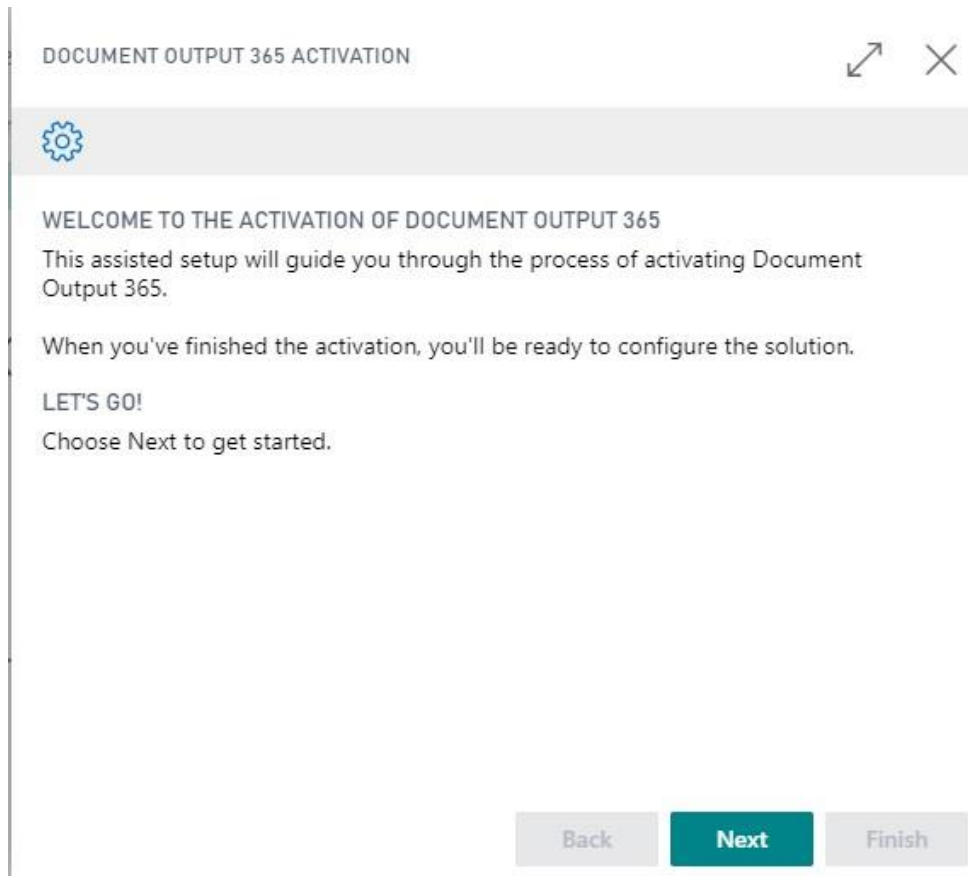
15. Sign into Business Central.
16. Select **Activate now** in the notification bar.



17. Set **Allow Always** for the extension to make requests to an external service and click **OK**.




18. Select **Next** on the welcome page.



19. Enter your **PartnerZone User ID** and **PartnerZone Password** and select **Next**.

DOCUMENT OUTPUT 365 ACTIVATION ↗ ✕



PARTNER INFORMATION

When activating Document Output 365, you must be assisted by an approved Continia partner. Continia identifies approved partners based on their Continia PartnerZone user information.

Please enter the PartnerZone details of the partner who's assisting you with the setup of Document Output 365.

PartnerZone User ID *

PartnerZone Password *

[Forgot password?](#)

[Not a partner, click here for more information.](#)

20. Set **Activation mode** to **Start Subscription** and select **Next**.

DOCUMENT OUTPUT 365 ACTIVATION



ACTIVATION AND MODULE SETUP

Select if you want to start a subscription now, or if you would rather start using the solution on a trial basis.

Activation mode

Start Trial




Back

Next

Finish

21. Enter a **Customer Contact Email** and select **Next**.

DOCUMENT OUTPUT 365 ACTIVATION ↶ ✕

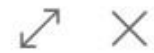


COMPANY INFORMATION
Please provide information about the company using Document Output 365.

Company Name	<input type="text" value="CRONUS International Ltd."/>
Address	<input type="text" value="5 The Ring"/>
Address 2	<input type="text" value="Westminster"/>
Post Code	<input type="text" value="W2 8HG"/>
City	<input type="text" value="London"/>
County	<input type="text"/>
Country/Region Code	<input type="text" value="GB"/> ▼
Phone No.	<input type="text" value="0666-666-6666"/>
VAT Registration No.	<input type="text" value="77777777"/>
Customer Contact	<input type="text" value="Adam Matteson"/>
Customer Contact Email	<input type="text"/> *

22. Accept the agreement and select **Next**.

DOCUMENT OUTPUT 365 ACTIVATION



CONTINIA SOFTWARE END-USER LICENSE AGREEMENT

To activate and use Document Output 365, you must accept the Continia Software Terms of Use. If you do not accept these agreements, you will not be able to use Document Output 365.

If you're using Continia's solutions on behalf of a corporate entity or organization, you agree to these terms on behalf of that corporate entity or organization and confirm that you have the authority to do so.

AGREEMENT

[End User License Agreement_v203.pdf](#)

I ACCEPT



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Next

Finish

23. Select **Finish** to close the activation wizard.

DOCUMENT OUTPUT 365 ACTIVATION



THAT'S IT!

We're happy that you've chosen Document Output 365 for your company and hope that you'll enjoy using it.

Select Finish to complete the activation of Document Output 365.

Thank you,
Continia Software

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Next

Finish

Document Output is now sending data to Continia Software A/S about the activation.

Setup Continia Document Output

Before you can start using DO, you must set up the app. In these key usage scenarios, we will setup DO. The following steps show you how to set up DO.

The Document Output Setup Wizard will automatically start after activation.

General setup

1. Download templates from Continia Online is pre-set. 2. Select **Next**

DOCUMENT OUTPUT SETUP WIZARD ↗ ✕

Import Templates (XML-file) for the language to be used.

Download templates from Conti...

Template filename

Templates defines the text for mails, merge fields etc. used for the mail.

It is always possible to import new Templates. This is done under 'Departments, Administration, Application Setup, Document Output, Templates, Function, Import Template'

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Next

Finish

3. Create Jobs: here it is possible to create some different jobs used with DO. It is recommended to activate them all. Select **Finish**

DOCUMENT OUTPUT SETUP WIZARD



Create Jobs:

Create Job Queue Entry Create E-Mail Job for E-Mail Qu... Create Send Statement Codes

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Next

Finish

4. Set **Allow Always** for the extension to make requests to an external service and click **OK**



The extension 'Continia Document Output 365 by Continia Software' is making a request to an external service. Do you want to allow this request?

 Allow Always Allow Once Block Always Block Once

OK

Cancel

5. A list of E-Mail templates is now visible, in the column "Action" it is an option to Choose **Create**, **Replace** or **Skip** in order to get the templates needed. Choose Create on all lines and Select **OK**.

E-MAIL TEMPLATE IMPORT WORKSHEET



E-Mail Template Code ↑	Language Code ↑	New Language Code	Template Variant Value Code ↑	Report-ID	Report Exists	Action	Template Header Exists	Tem... Exists	New Tem... Exists
→ PURCHQUOTE	:			404	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
REMINDER				117	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
REMITTANCE-E...				400	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
REMITTANCE-J...				399	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RETURNORDER				6631	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
RETURNRECEIPT				6646	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SALESCRMEMO				1307	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SALESINVOICE				1306	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SALESORDER				1305	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SALESQUOTE				1304	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SERVCONTRACT				5970	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SERVCRMEMO				5912	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SERVINVOICE				5911	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SERVITEM				5936	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SERVORDER				5900	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SERVQUOTE				5902	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SERVSHIPMENT				5913	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SHIPMENT				208	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
STATEMENT				1316	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WHSE-PICK				5752	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WHSE-PUT-AW...				5751	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WHSE-RECEIPT				7316	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
WHSE-SHIPME...				7317	<input checked="" type="checkbox"/>	Skip	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

OK

Cancel

6. Do has now created 28 E-Mail templates ready to use. 7. Select **OK**



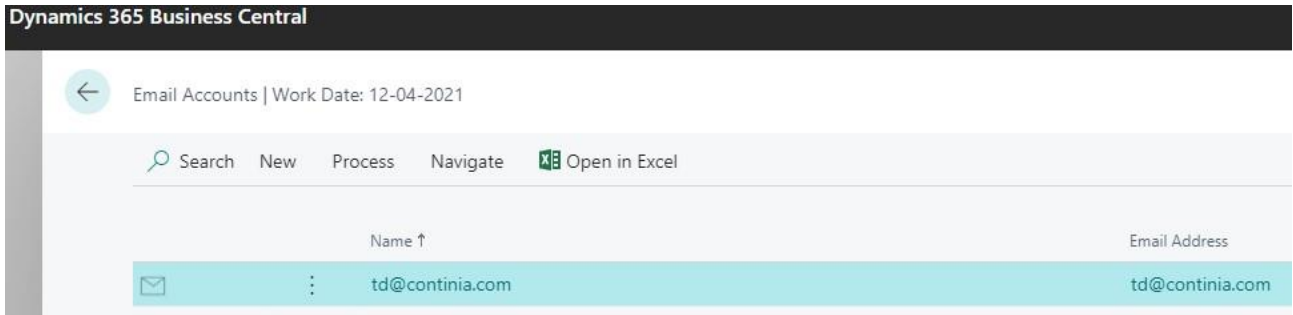
28 Created
0 Replaced
0 Skipped

OK

Email Accounts

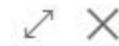
In standard Business Central there is now Email Accounts. Document Output now uses this to send out Emails instead of standard SMTP in the Cloud.

1. Setting up Email Accounts (uses the standard Email Account setup).






Choose the type of Email accounts to add.

Set Up Email



Specify the type of email account to add

	Account Type ↑	Details
→	 Microsoft 3...	Use Microsoft 365 shared mailboxes.
	 Current User	Users send emails from their sign-in account.
	 SMTP	Use SMTP to send emails.

Cancel

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Prerequisites

After activating and setting up Continia Document Output you must set permission sets:

There are different Permission Sets to set on the User:

PERMISSION SET LOOKUP

Role ID ↑	Name	Extension Name	Scope ↑
CDO-ALL	CDO - All users.	Continia Document Output 365	Tenant
CDO-LOG	CDO - Read the log.	Continia Document Output 365	Tenant
CDO-SUPER	CDO - Super user.	Continia Document Output 365	Tenant
CSC APP SETUP	Continia App Setup	Continia Core	Tenant
CSC BASIC	Continia App Basic access	Continia Core	Tenant

CDO-All: Allows the user to see all, but they can't see the log, edit templates and other setup. Gives permission to edit E-Mail recipients.

CDO-LOG: Allows the user to see the log in Document Output.

CDO-SUPER: Gives permission to all Document Output functionality.

CSC APP SETUP: This permission set is used when installing Continia Core and Continias solutions. It is also used when there are made changes to the license agreement. This is only for administrators.

CSC BASIC: Gives permission to all the functionality in Continia Core. **NOTICE:** All Users that uses Continia products **must have** this permission set.