Contínia
Document Output

Continia Document Output

User Guide

August 2021 - CDO 5.0

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Web: www.Continia.dk

Table of contents

1. Introduction

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

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

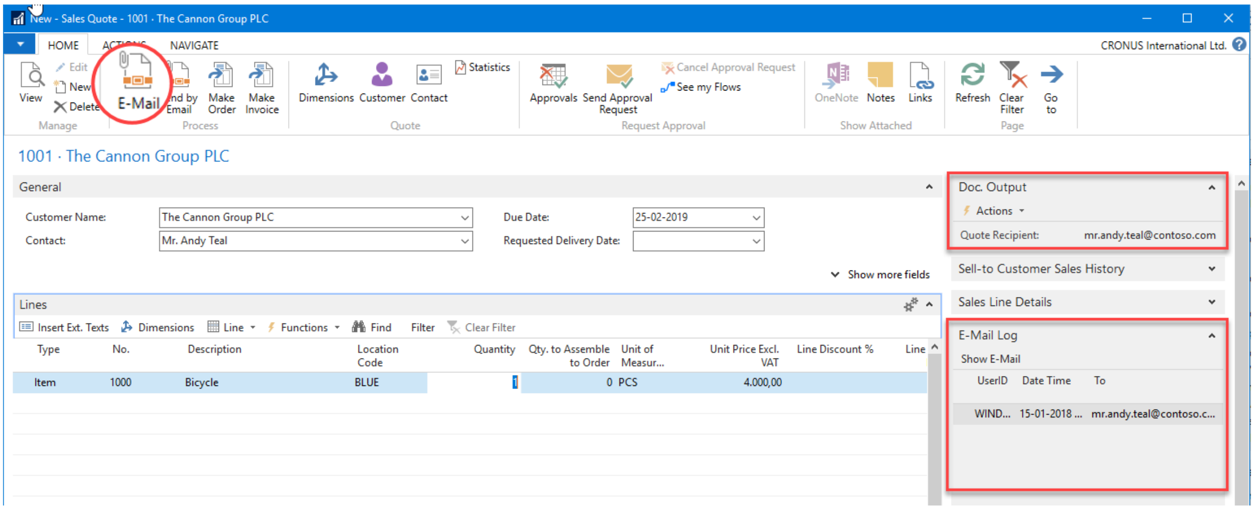
This manual introduces the basic configuration for Document Output to send Sales Quotes and Sales Invoice etc.

2. Daily use

E-Mail Sales Quote

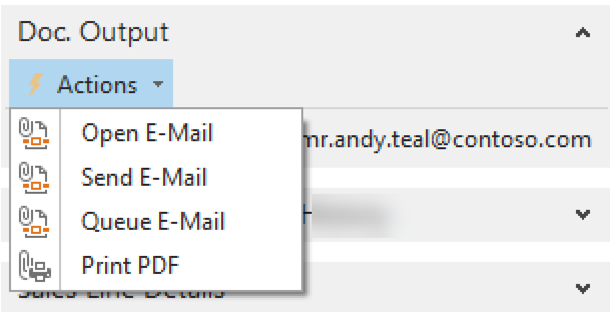
Open /Departments/Sales & Marketing/Order Processing/Sales Quotes

Open the Sales Quote.



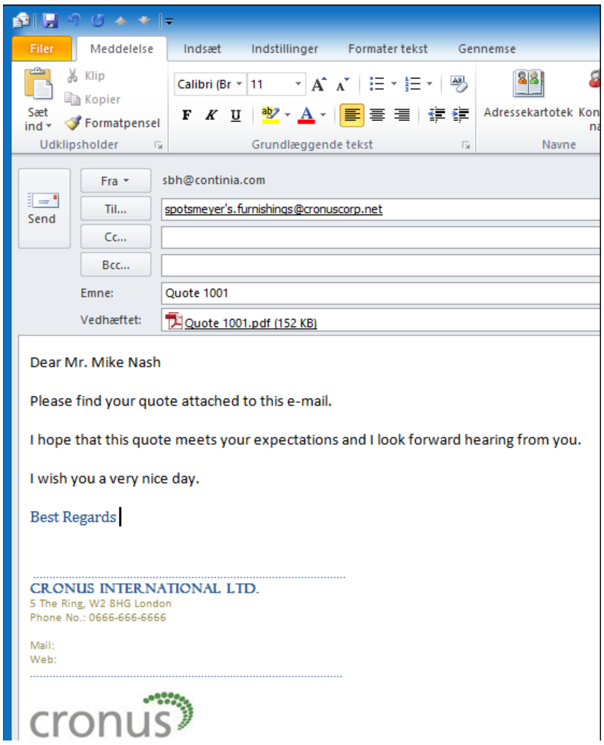
From the Doc. Output Fact Box, you can click:

- Open E-Mail – This will open an Outlook 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)
- Print PDF – This will create the PDF and print the PDF (including background and merger PDF).



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

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

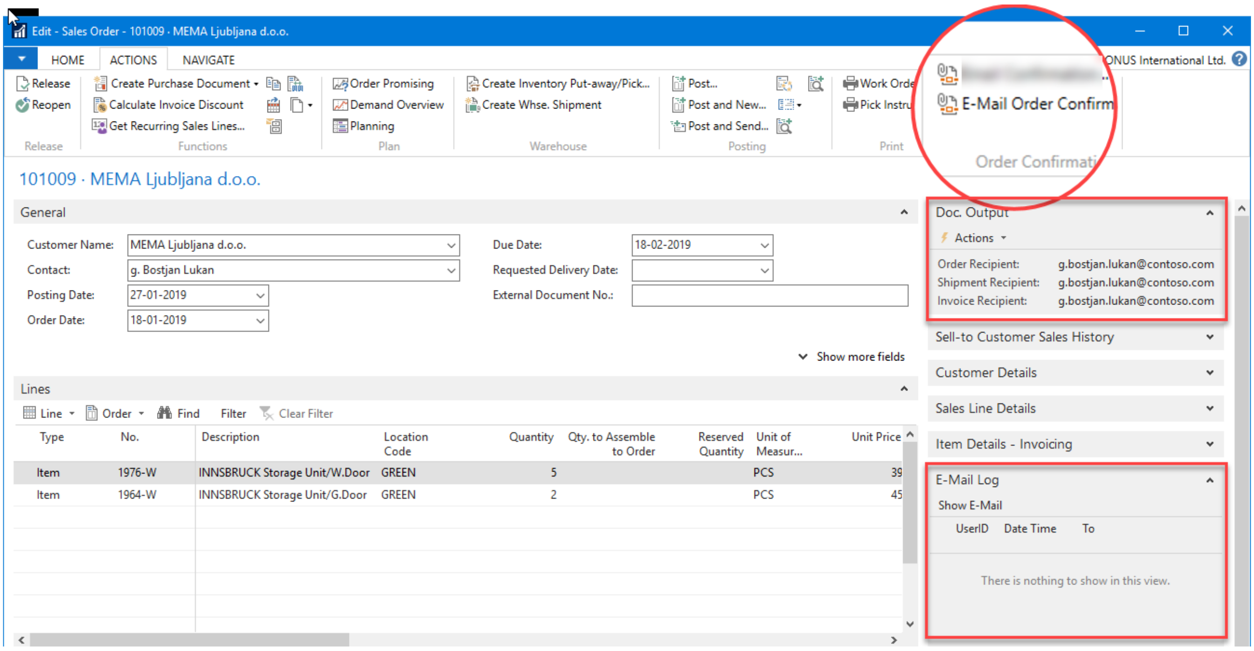


When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

E-Mail Sales Order

Open /Departments/Sales & Marketing/Order Processing/Sales Orders

Open the Sales Order.



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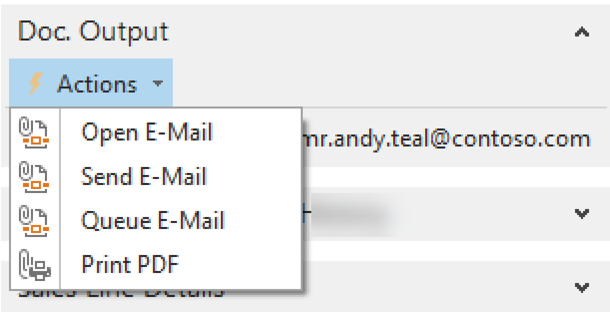
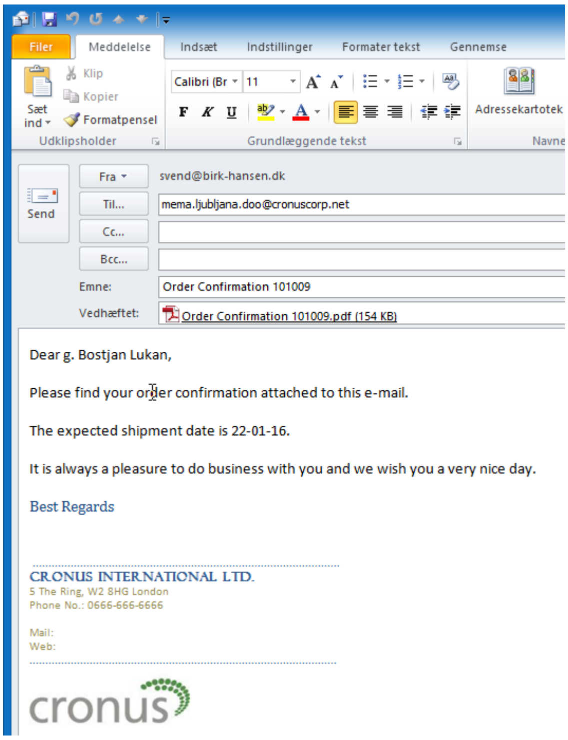


From the Sales Order, you can click the “Email Confirmation CDO” button.

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

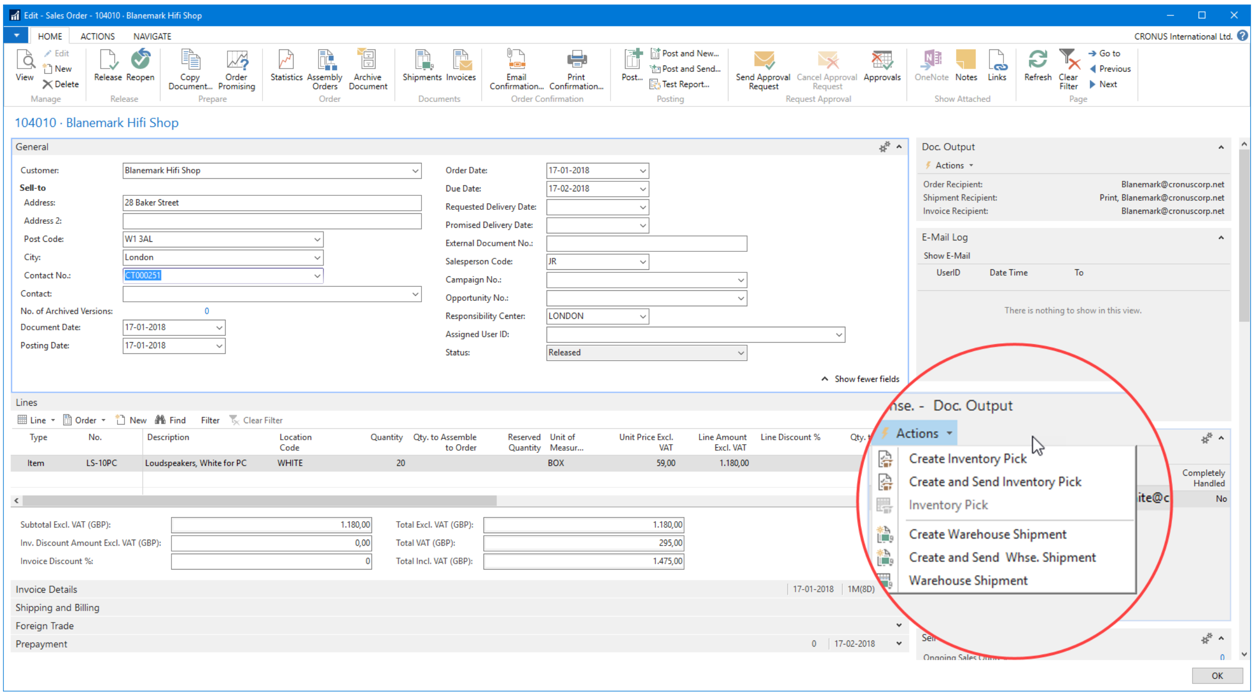


When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

Warehouse from Sales Order

Open /Departments/Sales & Marketing/Order Processing/Sales Orders

Open the Sales Order.



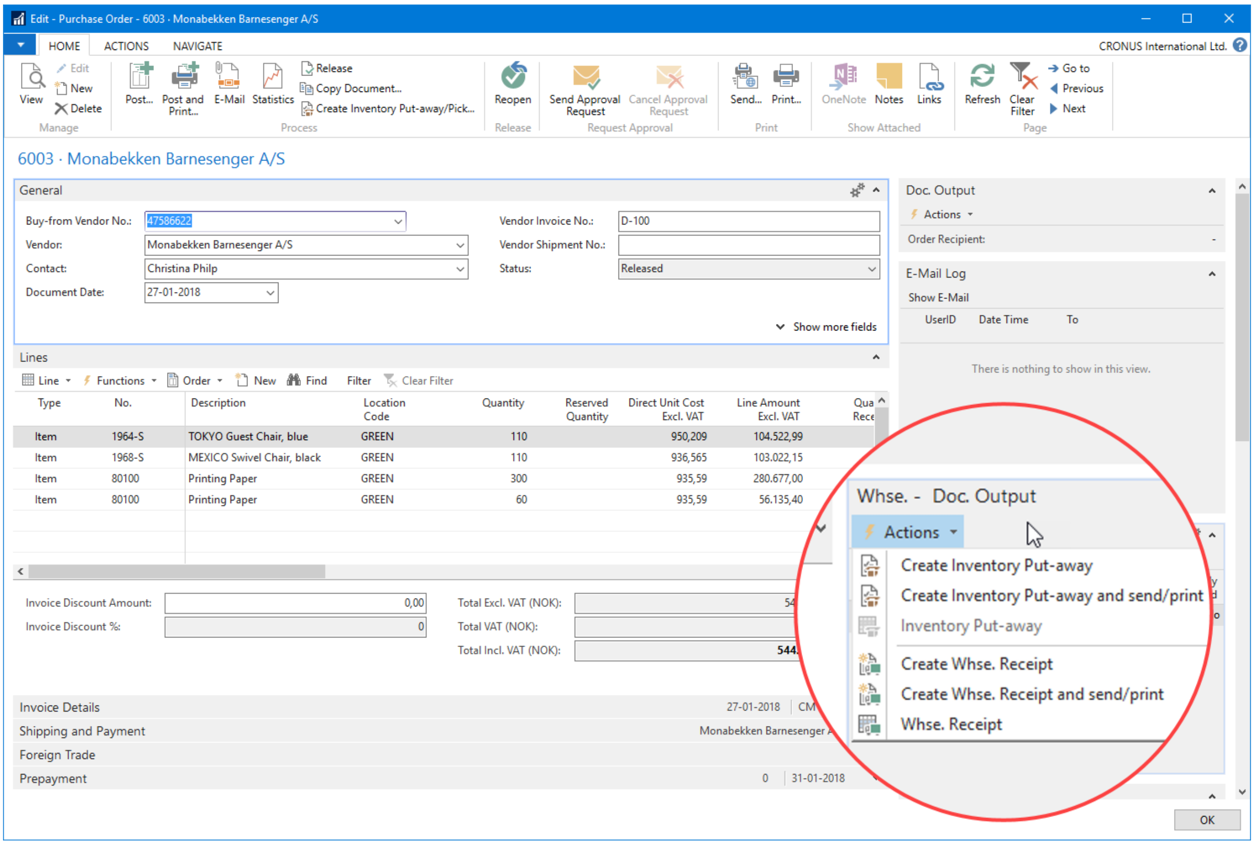
From the Warehouse Doc. Output Fact Box, you can click:

- **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.

Warehouse from Purchase Order

Open /Departments/Purchase/Order Processing/Purchase Orders

Open the Purchase Order



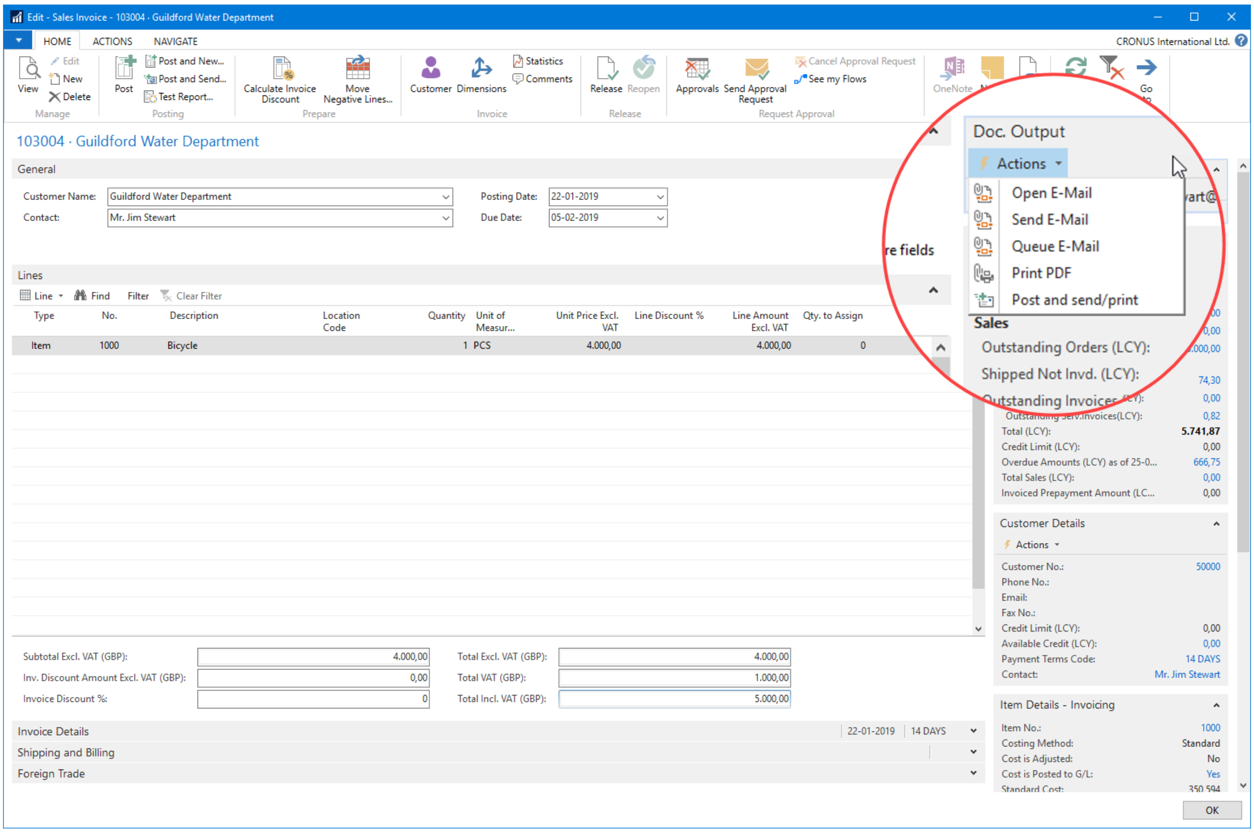
From the Warehouse Doc. Output Fact Box, you can click:

- **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.
-

E-Mail Pro Forma Invoice

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

Open the Sales Invoice



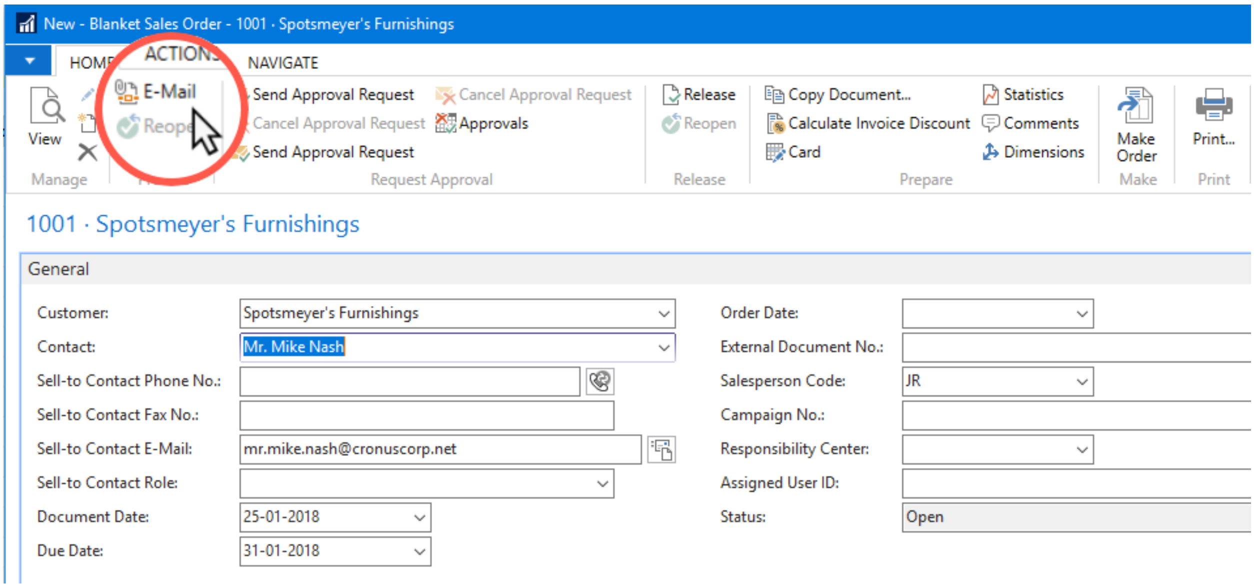
Actions:

- **Open E-Mail:** Opens the E-Mail in Outlook or NAV.
- **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.
- **Print PDF:** Creates the PDF (including background and merge PDF) and prints it.
- **Post and Send/print:** Posts the Invoice and e-mails or prints the invoice.

E-Mail Blanket Sales Order

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

Open the Blanket Sales Order.



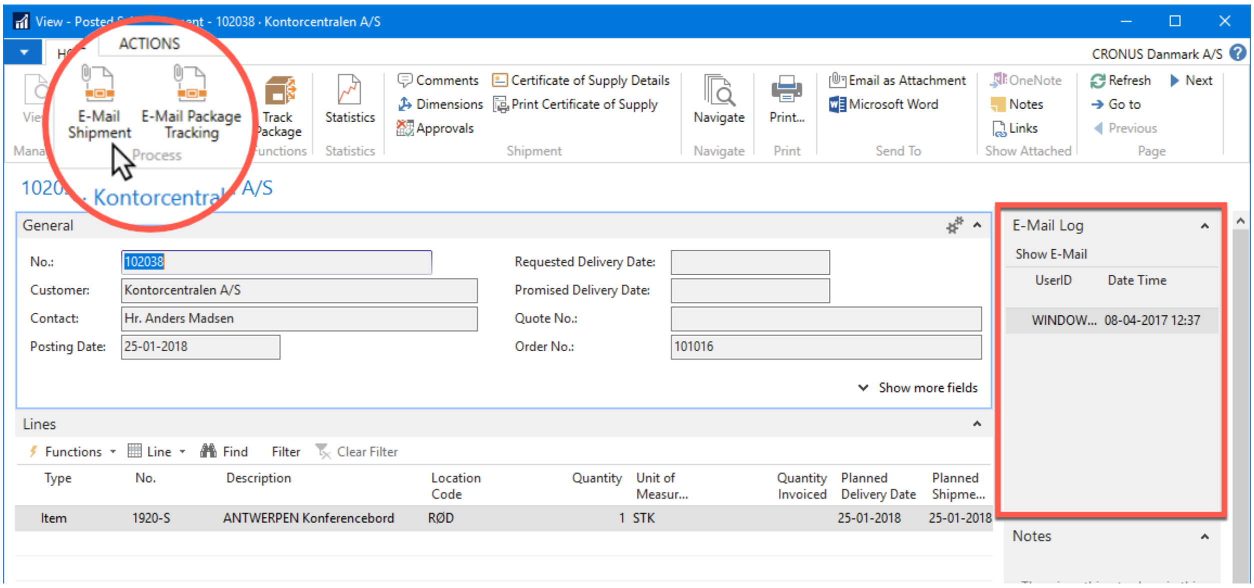
From the Sales Order, you can click the “E-Mail” button.

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

E-Mail Posted Sales Shipment

Open Posted Documents, Posted Sales Shipments.

Open the Posted Sales Shipment.



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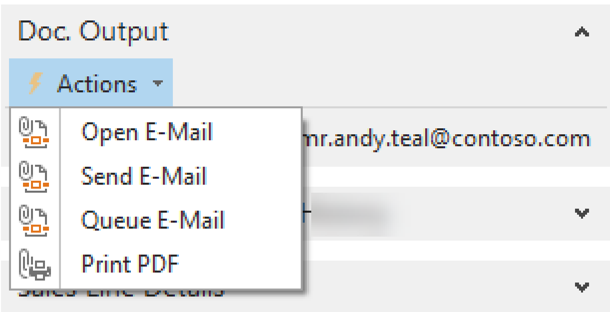
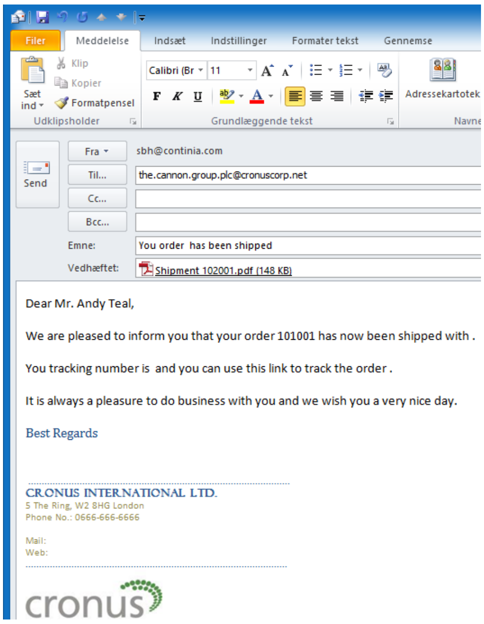


From the Posted Sales Shipment you can click the “E-Mail Shipment” button.

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

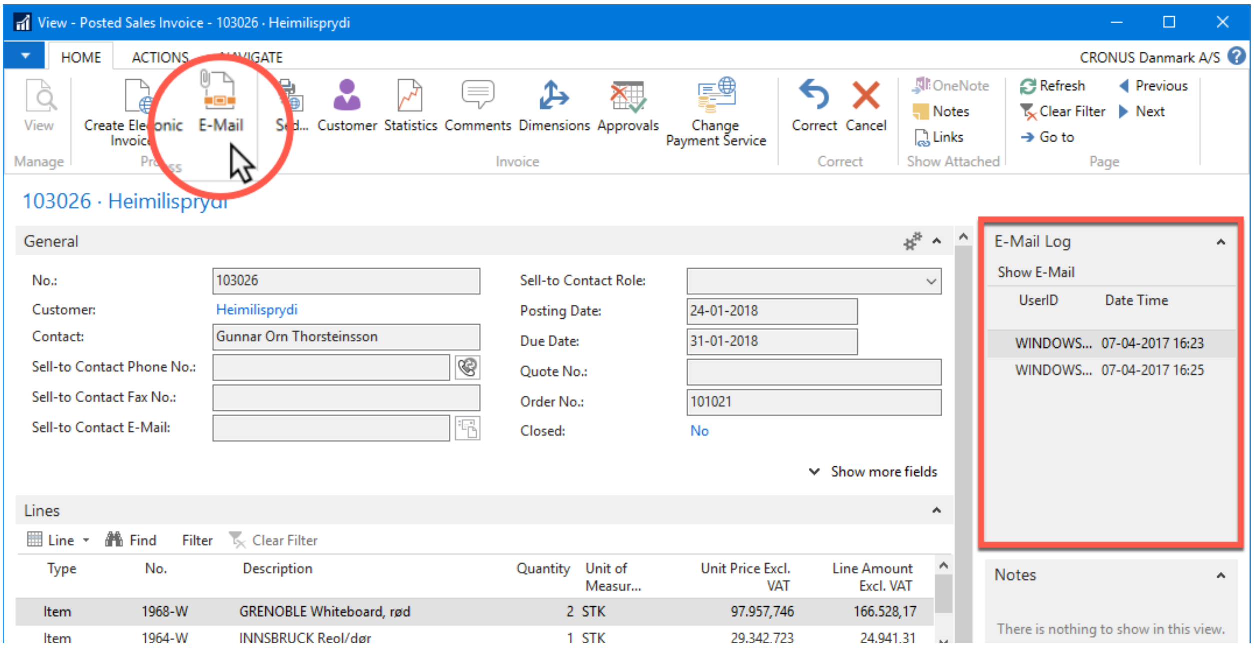


When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

E-Mail Posted Sales Invoice

Open Posted Documents, Posted Sales Invoices.

Open the Posted Sales Invoice.



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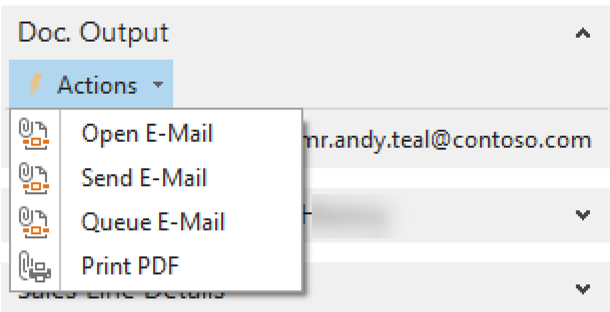
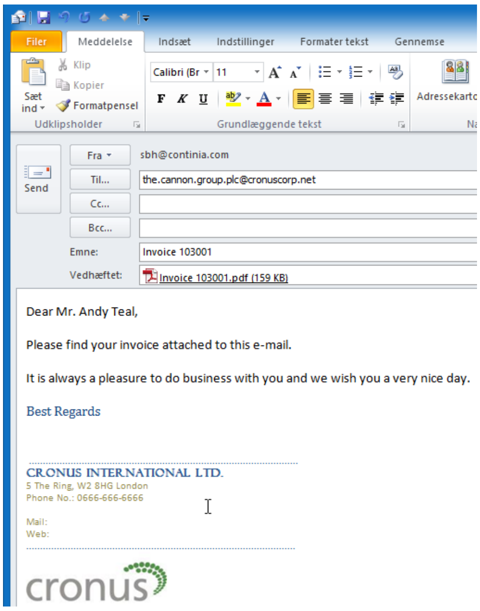


From the Posted Sales Invoice you can click the “E-Mail” button.

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

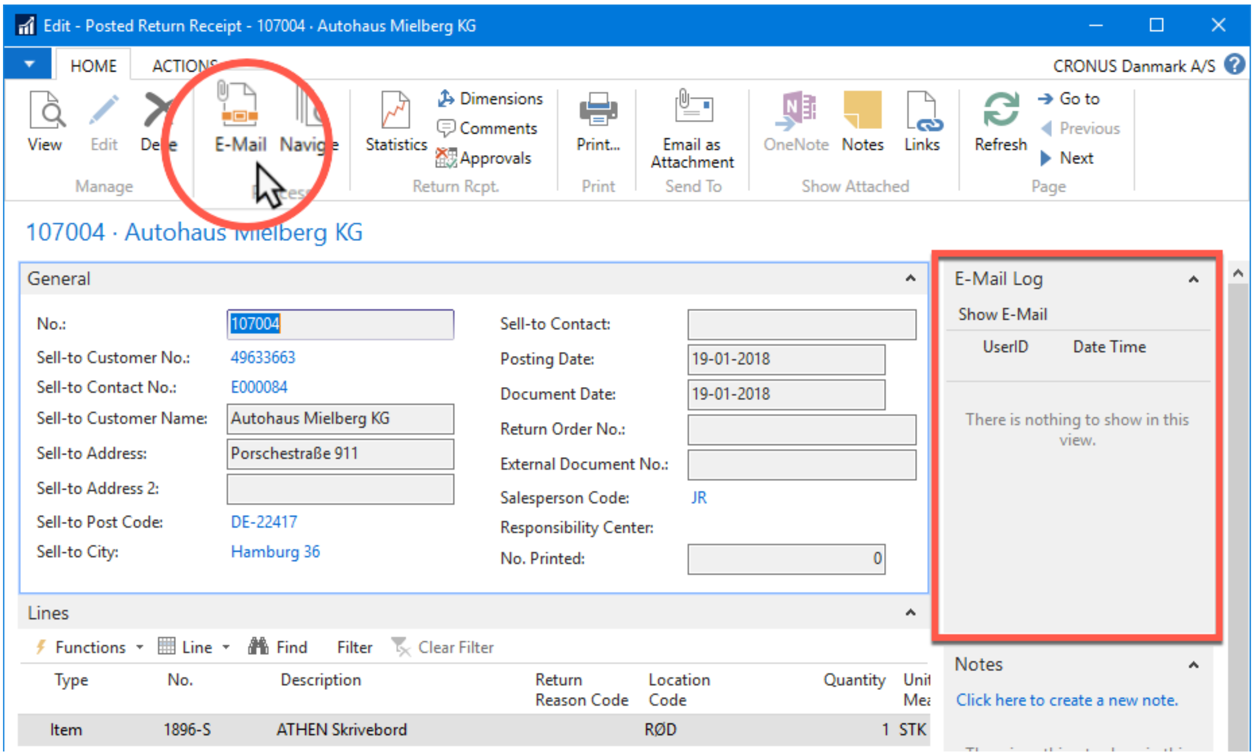


When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

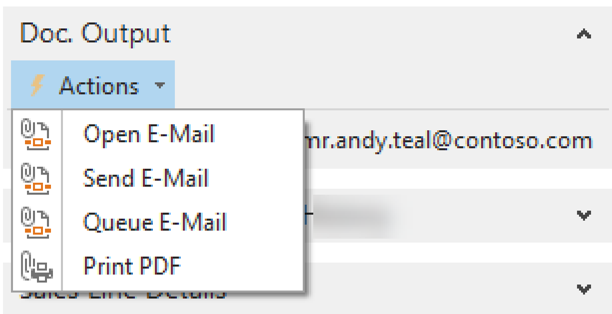
E-Mail Posted Return Receipts

Open Posted Documents, Posted Return Receipts.

Open the Posted Return Receipt.

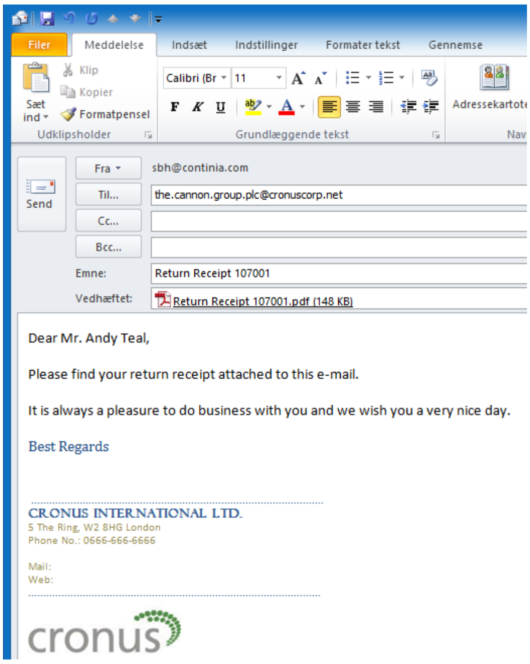


From the Doc. Output Fact Box, you can click:
- Open E-Mail – This will open an Outlook e-mail with the PDF.
- Send E-Mail – This will create the mail with attached PDF and send it.
- Queue E-Mail – This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Print PDF – This will create the PDF and print the PDF (including background and merger PDF).



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

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

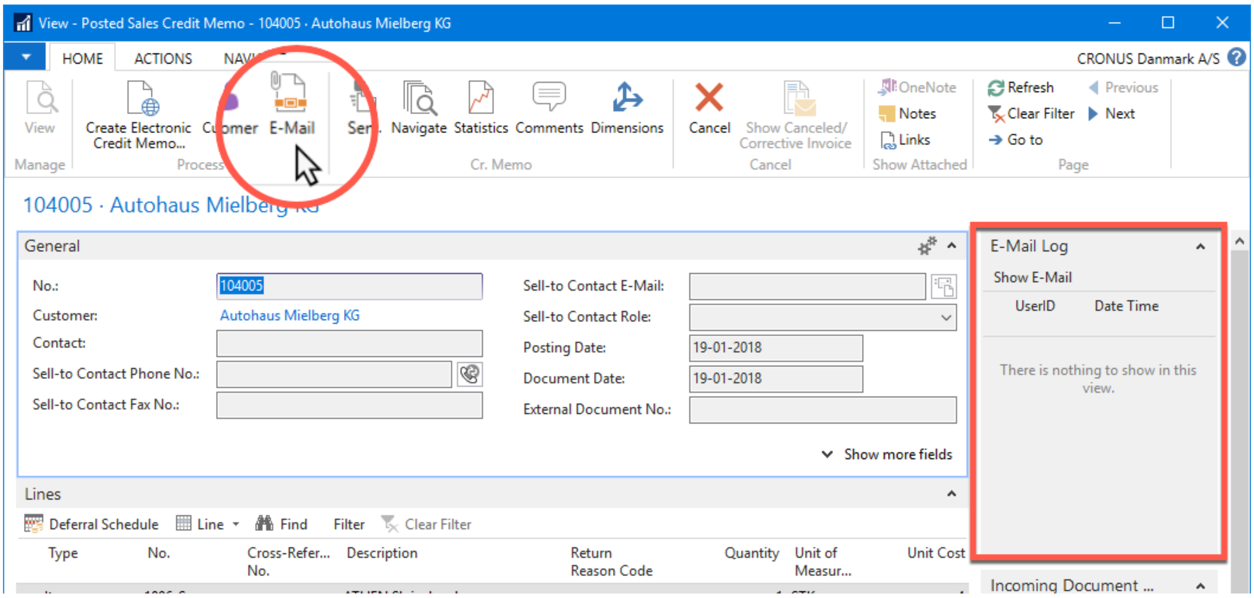


When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

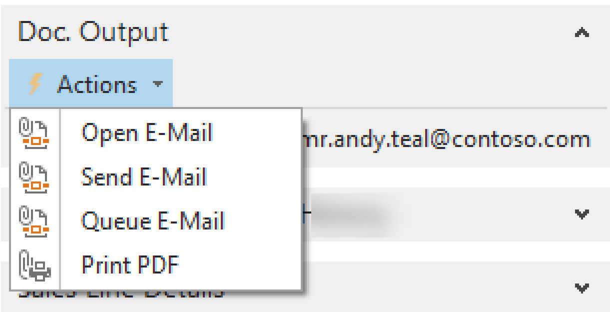
E-Mail Posted Sales Credit Memo

Open Posted Documents, Posted Sales Credit Memos.

Open the Posted Sales Credit Memo.

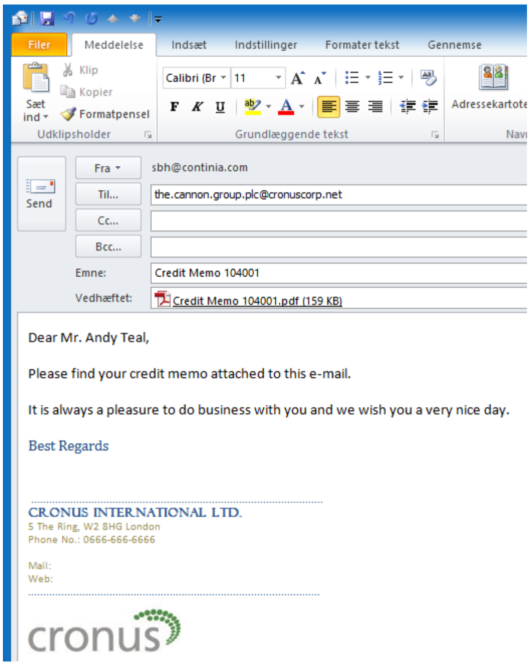


From the Doc. Output Fact Box, you can click:
- Open E-Mail – This will open an Outlook e-mail with the PDF.
- Send E-Mail – This will create the mail with attached PDF and send it.
- Queue E-Mail – This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- Print PDF – This will create the PDF and print the PDF (including background and merger PDF).



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

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



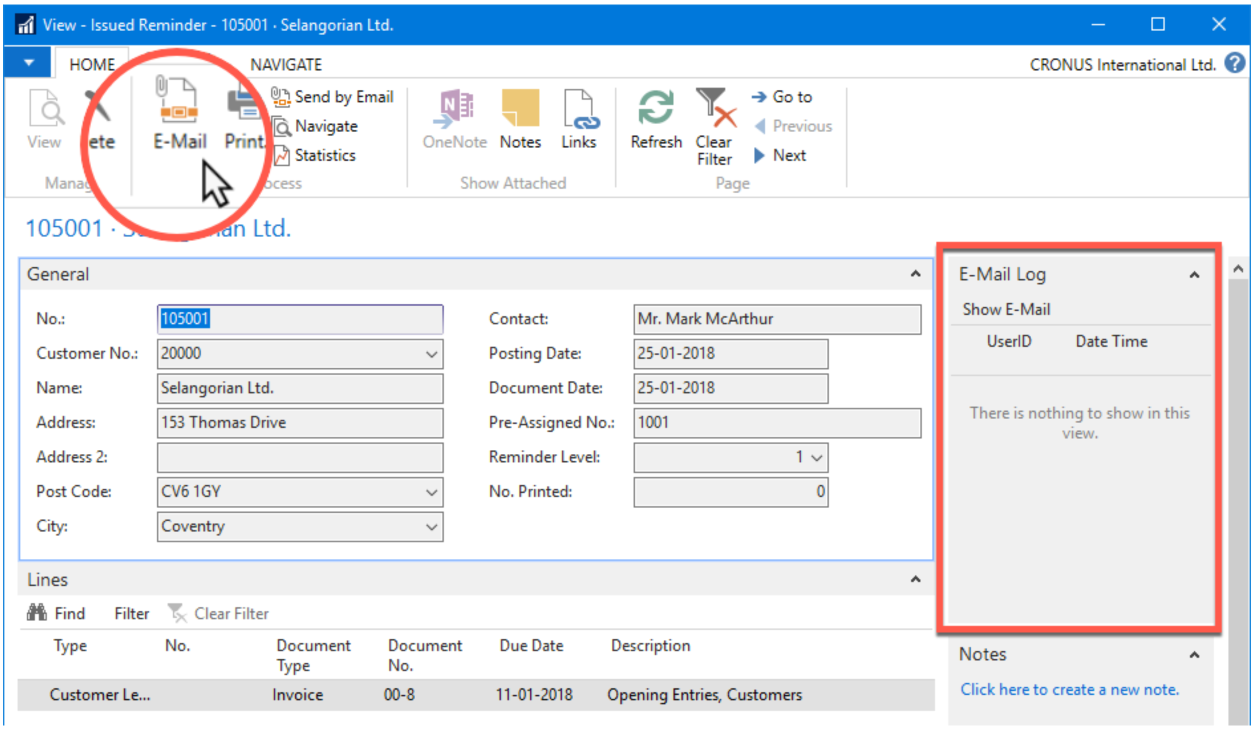
When you click "Send" the mail will be sent, and the mail will be added to CDO E-Mail Log.

E-Mail Issued Reminder

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

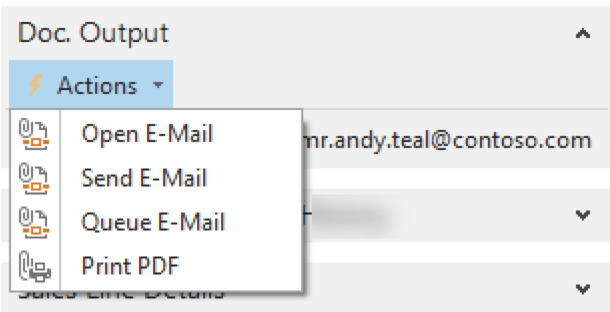
Open the Issued Reminder.

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



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

From the Doc. Output Fact Box, you can click:
- Open E-Mail – This will open an Outlook 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)
- Print PDF – This will create the PDF and print the PDF (including background and merger PDF).

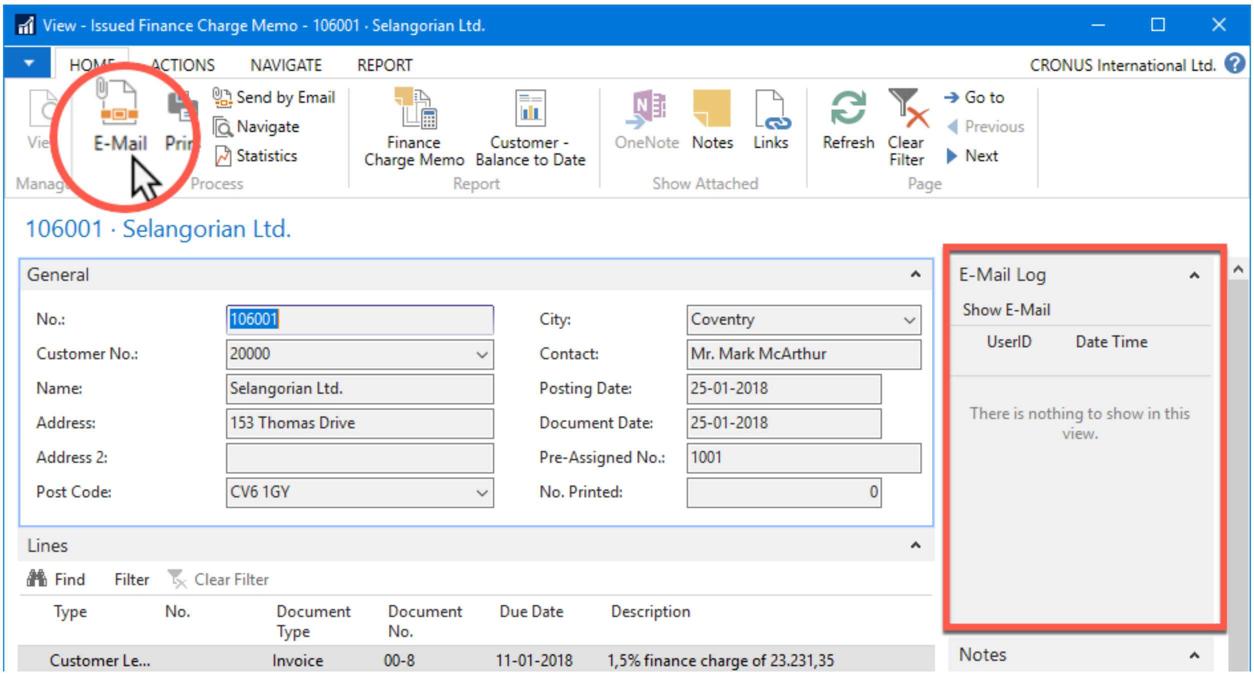


E-Mail Issued Finance Charge Memo

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

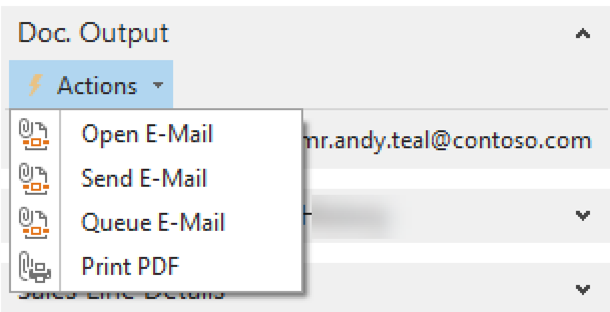
Open the Issued Finance Charge Memo.

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



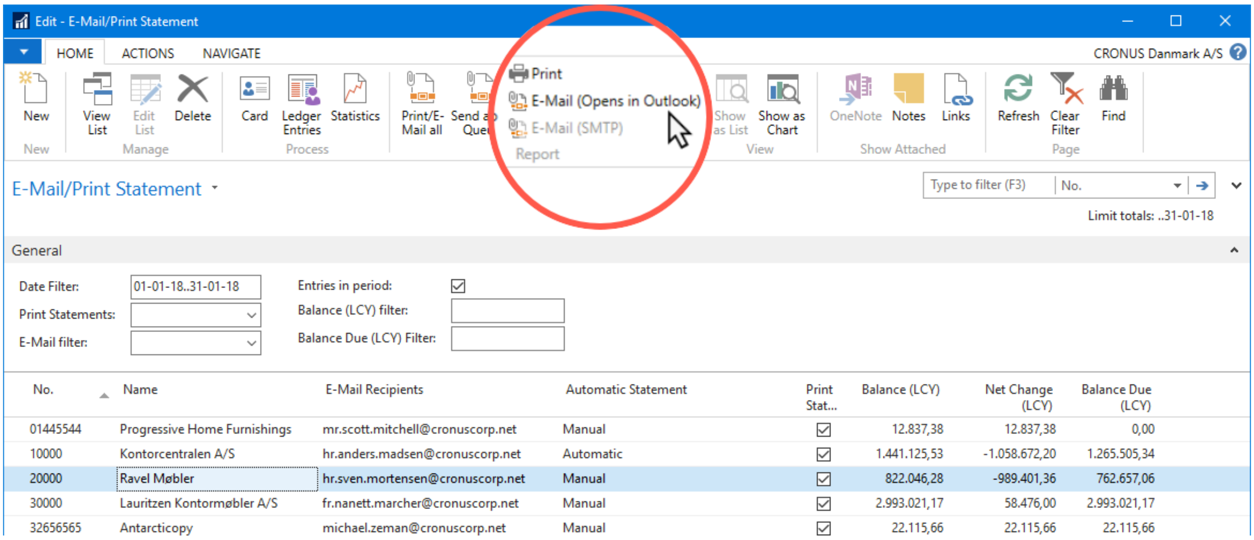
This will create the PDF file and open Outlook with the template.

From the Doc. Output Fact Box, you can click:
- Open E-Mail – This will open an Outlook 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)
- Print PDF – This will create the PDF and print the PDF (including background and merger PDF).



E-Mail Statement for one customer

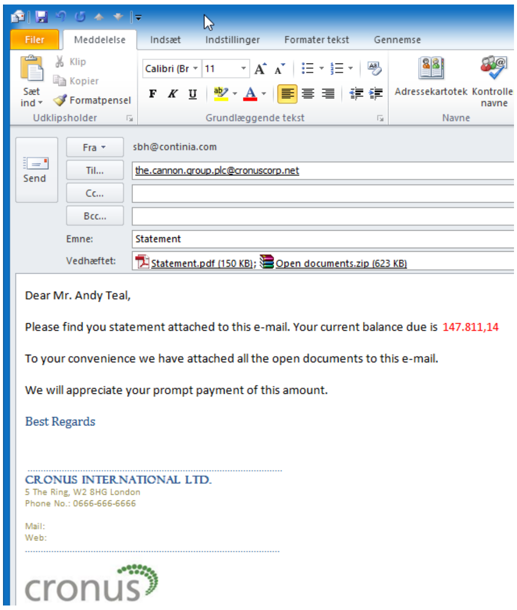
Open Departments, Financial Management, Periodic Activities, Receivables, E-Mail/Print Statement.



Set the “Date Filter”.

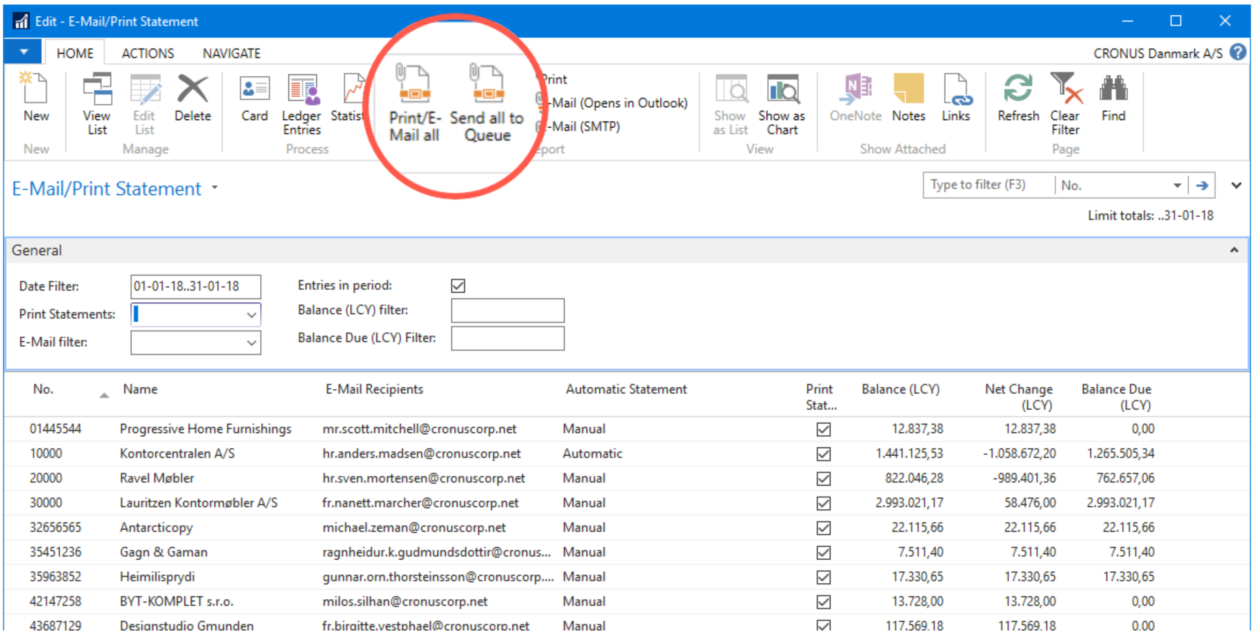
Find the Customer you want to send a statement, Click “E-Mail (Opens in Outlook)”.

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



E-Mail Statement for multiple customers

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



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

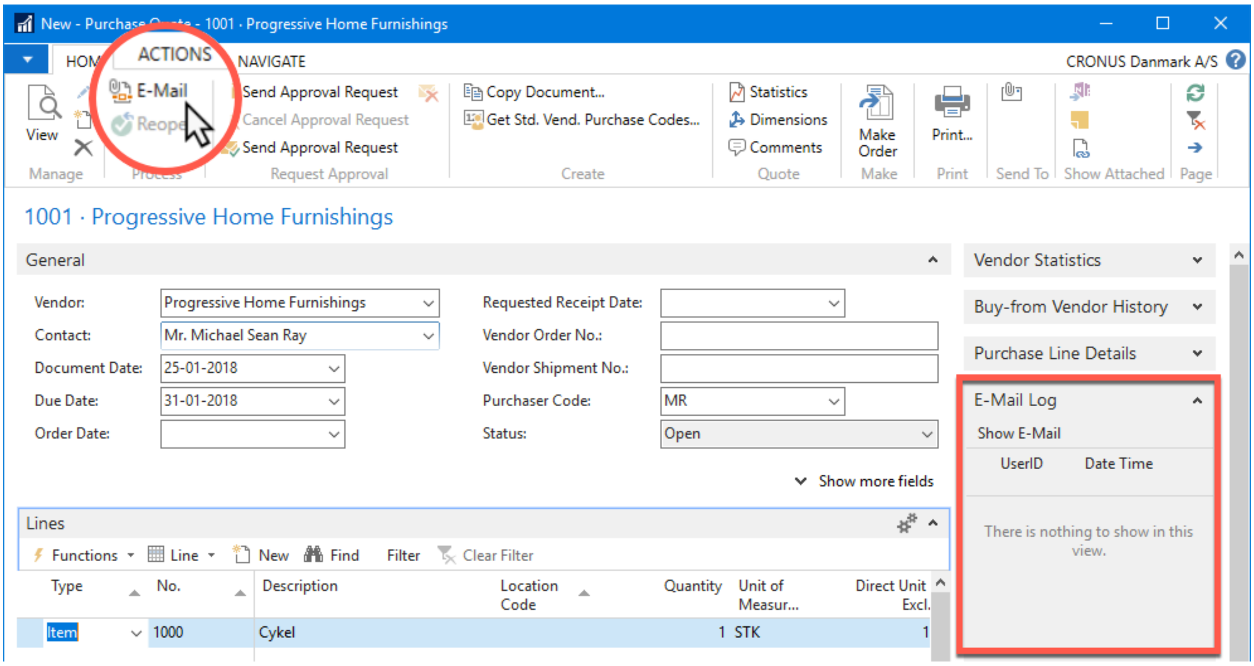
Click “Print/E-Mail all” or “Send all to Queue, this will send all statements to the customers with an e-mail address. Customers without an e-mail address will be printed.

E-Mail Purchase Quote

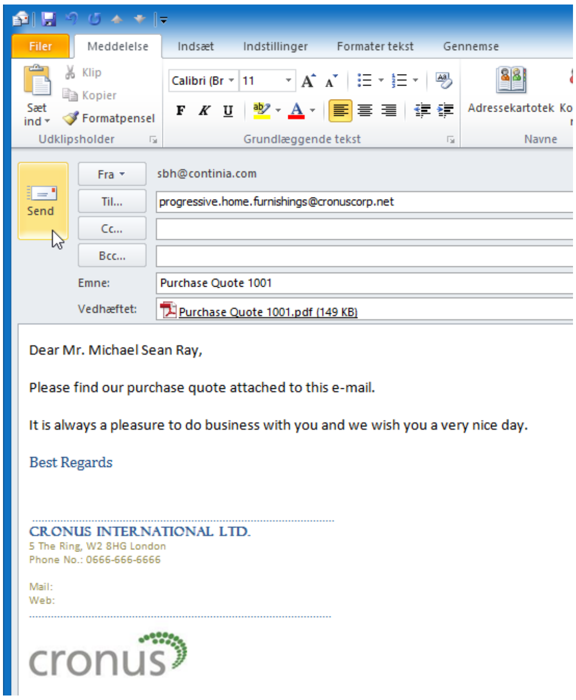
Open Departments, Purchase, Order Processing, Purchase Quotes.

Open the Purchase Quote.

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



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



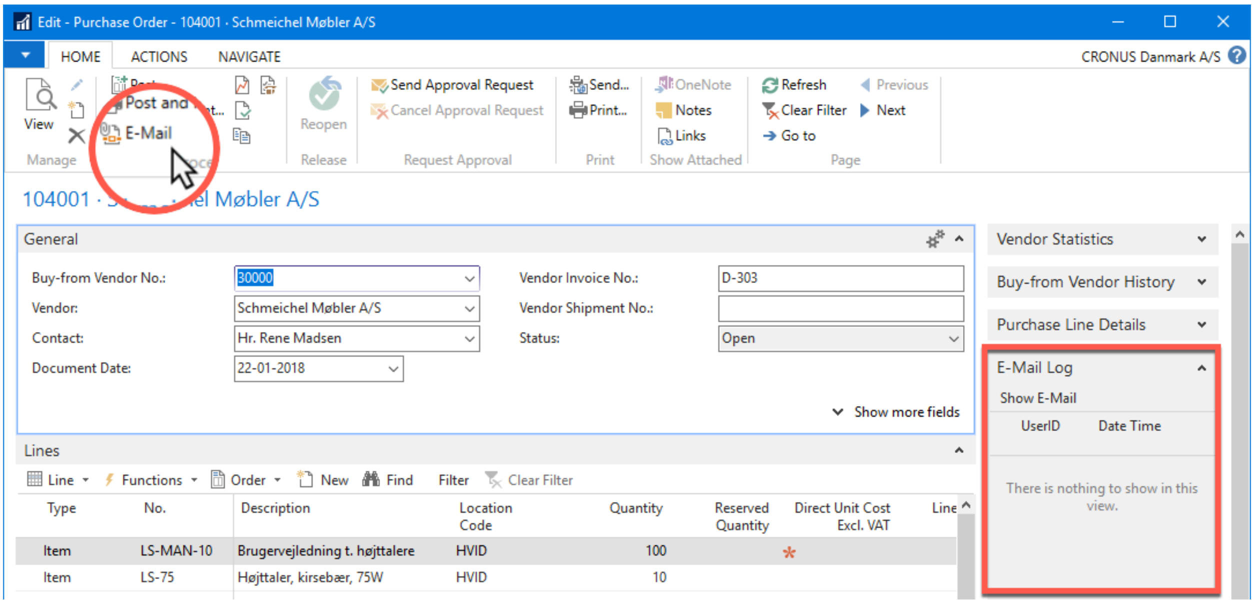
When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

E-Mail Purchase Order

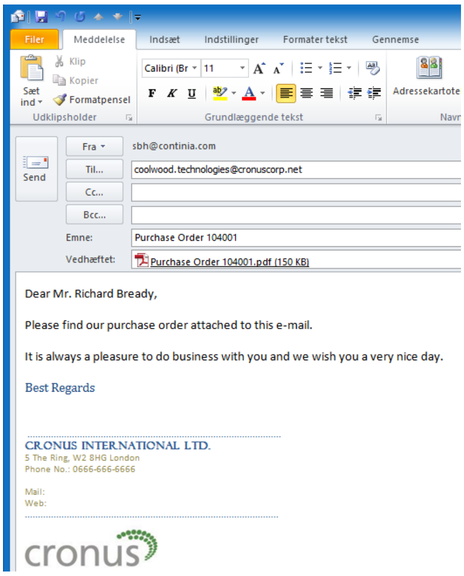
Open Departments, Purchase, Order Processing, Purchase Orders.

Open the Purchase Order.

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



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



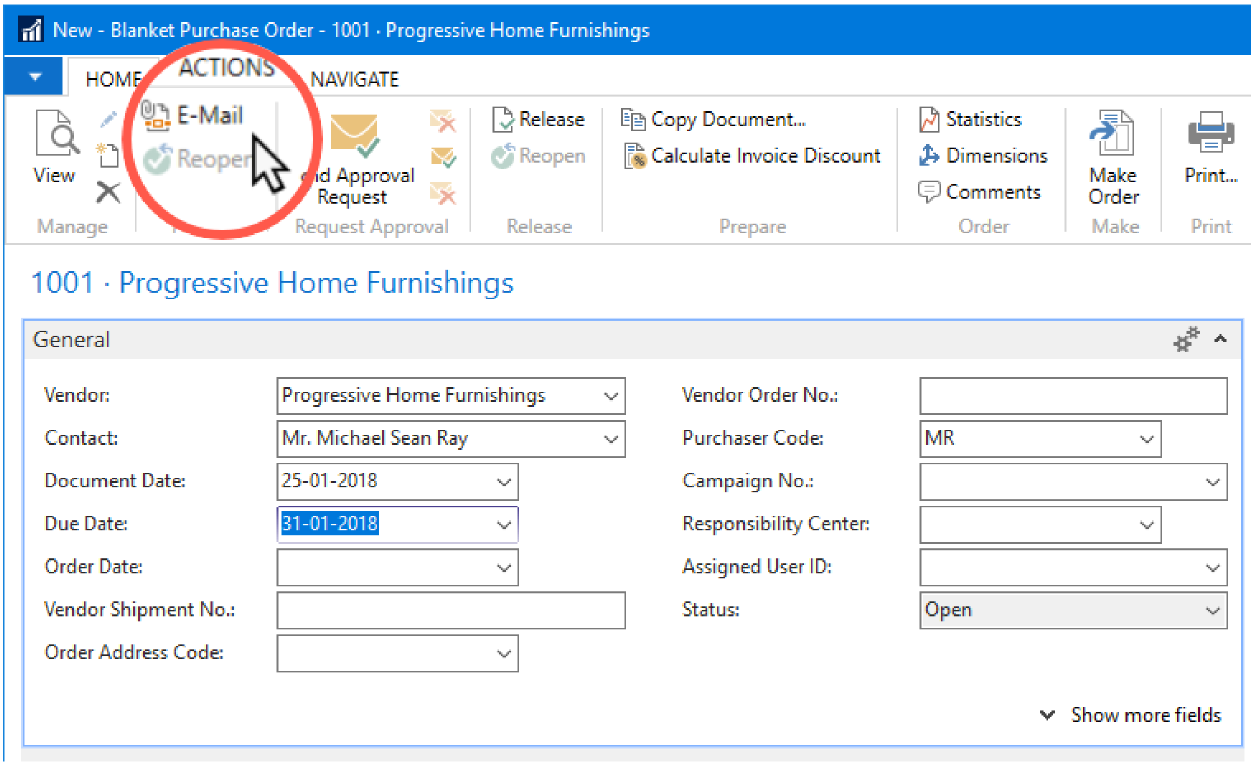
When you click “Send” the mail will be sent, and the mail will be added to CDO E-Mail Log.

E-Mail Blanket Purchase Order

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

Open the Blanket Purchase Order.

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

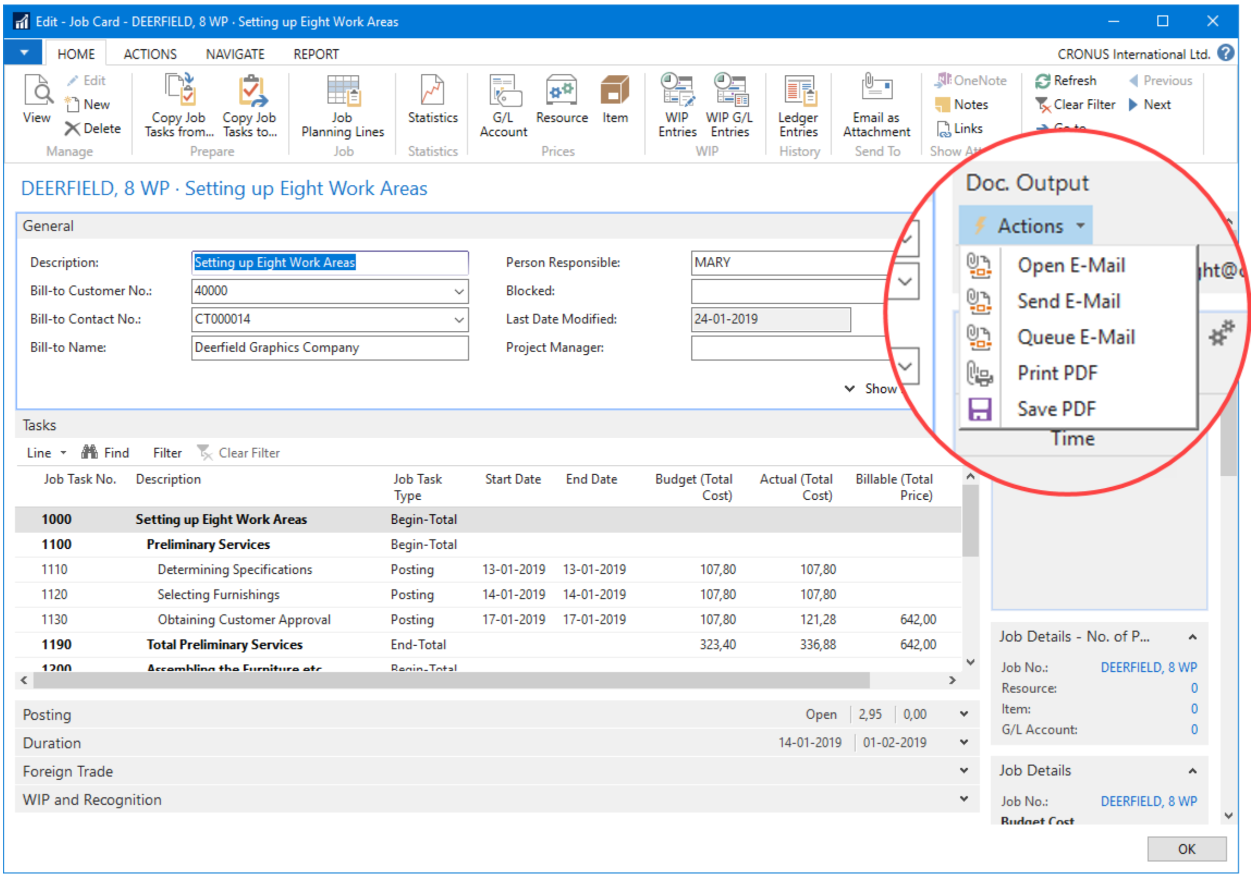


This will create the PDF file and open Outlook with the template.

E-Mail Job Quote

Open /Departments/Purchasing/Planning/Jobs

Open Job



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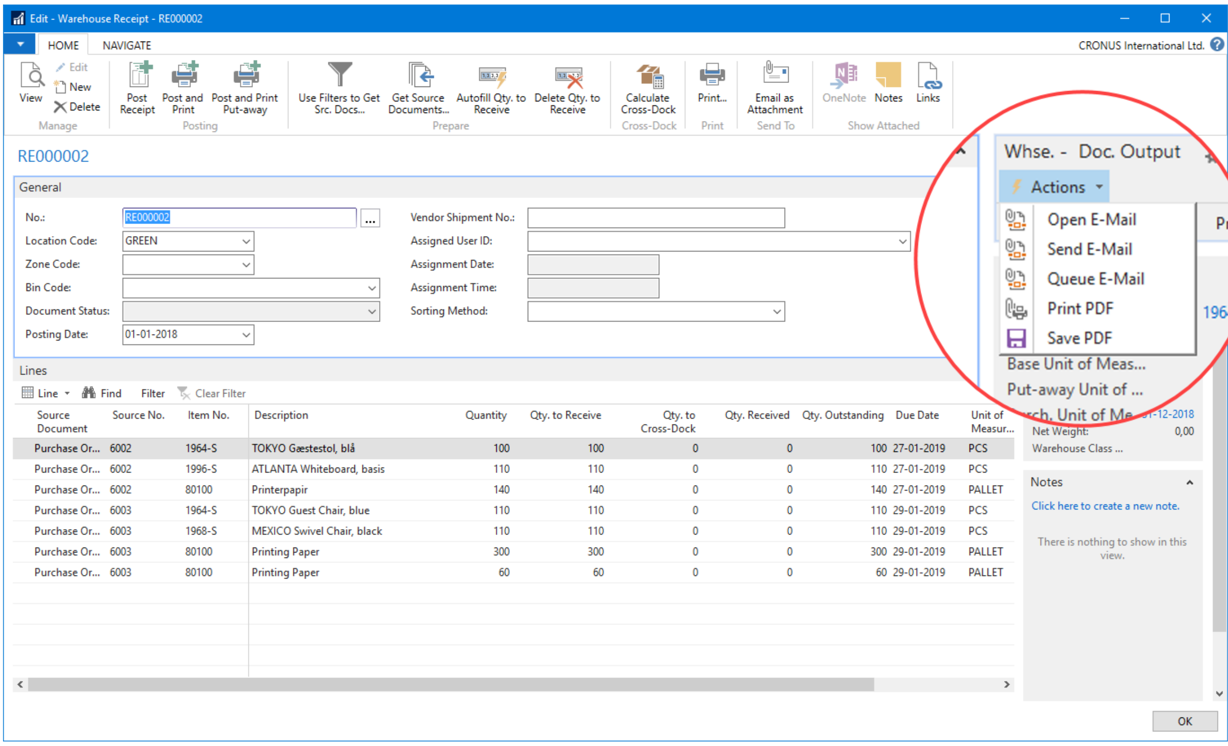
- **Print PDF**: This will create the PDF and print the PDF (including background and merge PDF).
- **Save PDF:** This will create the PDF and ask where to save the PDF.

E-Mail Warehouse Receipt

Open /Departments/Warehouse/Planning & Execution/Warehouse Receipts

Open Warehouse Receipt



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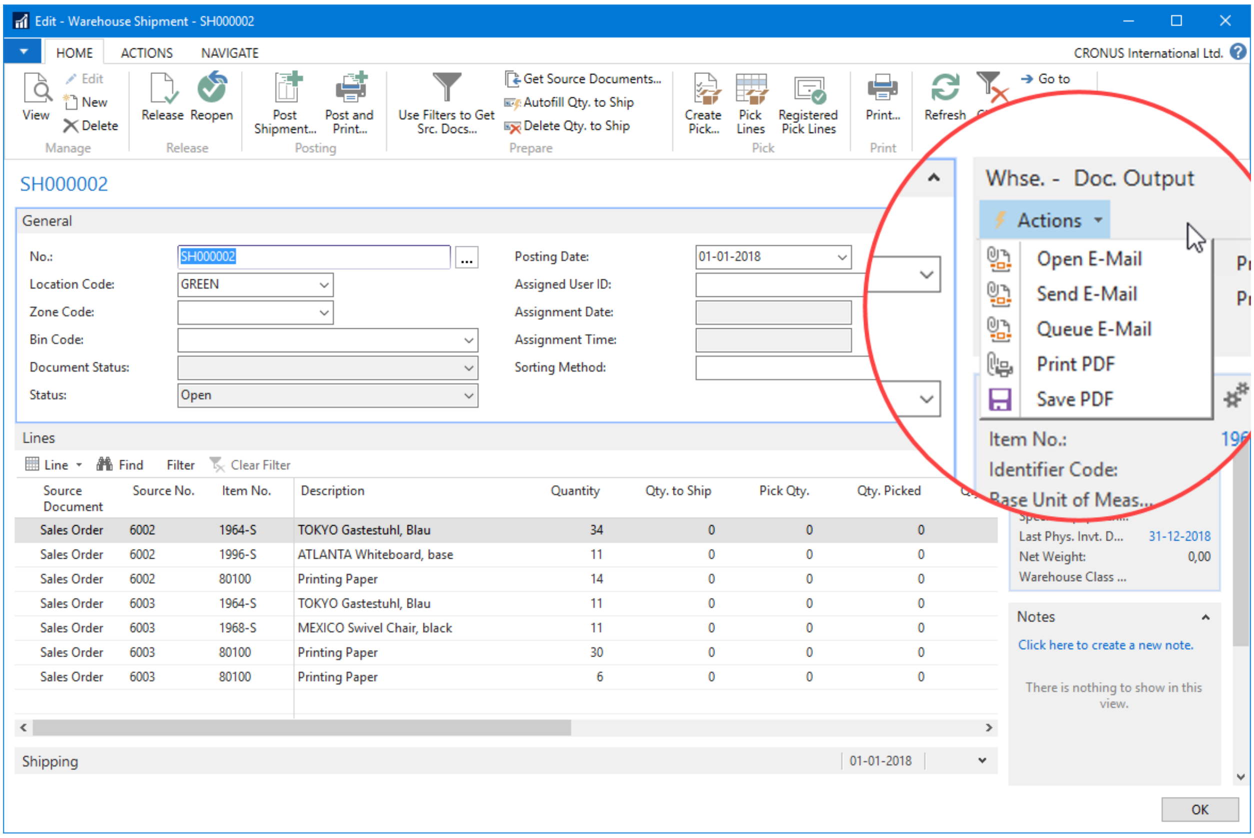
- **Print PDF**: This will create the PDF and print the PDF (including background and merge PDF).
- **Save PDF:** This will create the PDF and ask where to save the PDF.

E-Mail Warehouse Shipment

Open /Departments/Warehouse/Planning & Execution/Warehouse Shipments

Open Warehouse Shipment



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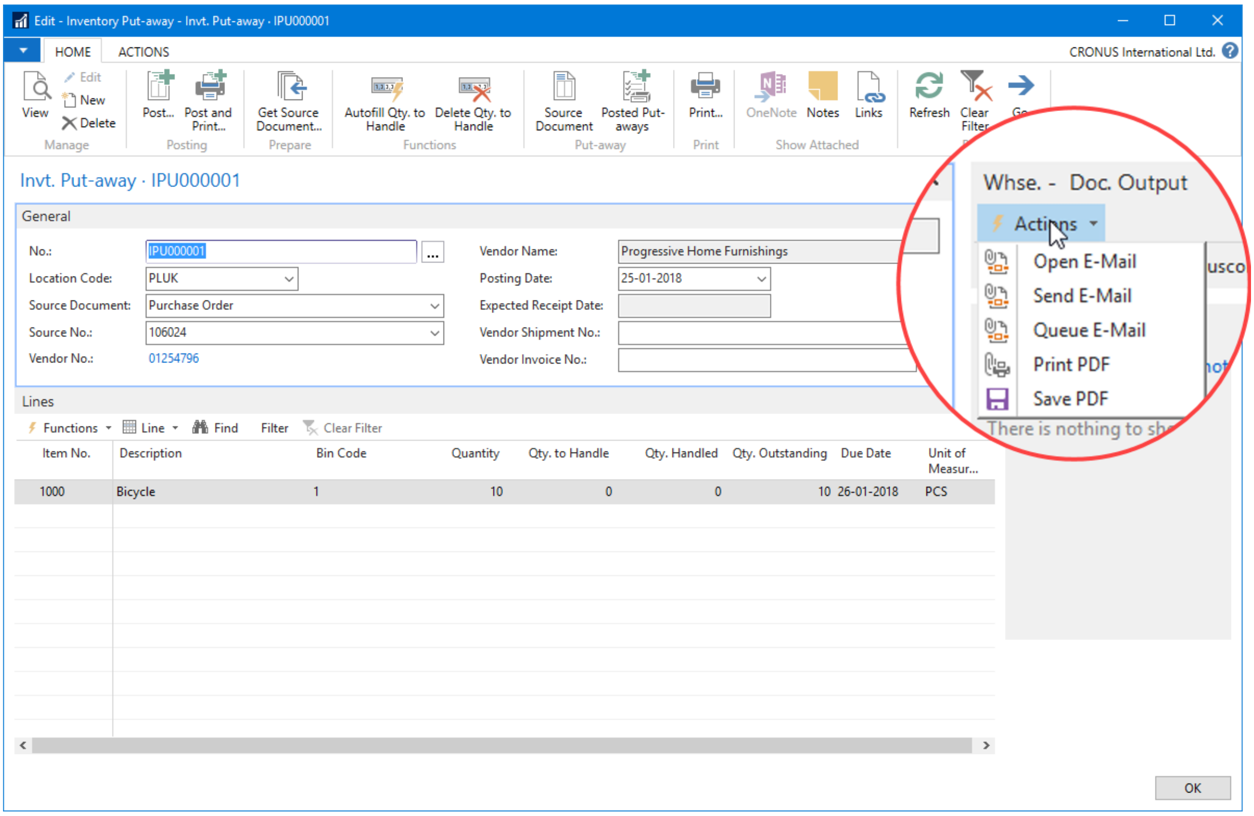
- **Send E-Mail:** This will create the mail with attached PDF and send it.
- **Queue E-Mail:** This will put the mail in the Doc. Output Queue. (Only visible if the Queue is active)
- **Print PDF**: This will create the PDF and print the PDF (including background and merge PDF).
- **Save PDF:** This will create the PDF and ask where to save the PDF.

E-Mail Inventory Put-away

Open /Departments/Warehouse/Goods Handling Order by Order/Inventory Put-aways

Open Inventory Put-away



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- **Send E-Mail:** This will create the mail with attached PDF and send it.
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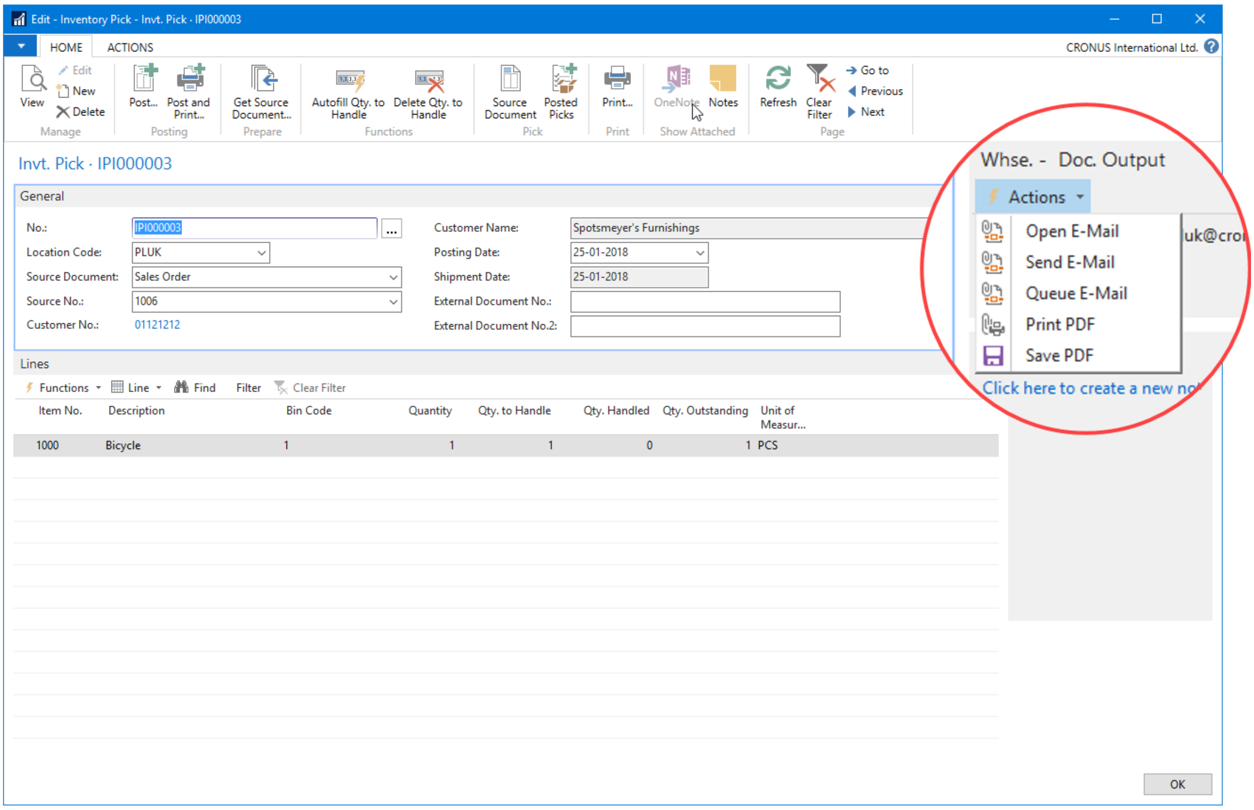
- **Print PDF**: This will create the PDF and print the PDF (including background and merge PDF).
- **Save PDF:** This will create the PDF and ask where to save the PDF.

E-Mail Inventory Pick

Open /Departments/Warehouse/Goods Handling Order by Order/Inventory Picks

Open Inventory Pick



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

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- **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)
- **Print PDF**: This will create the PDF and print the PDF (including background and merge PDF).
- **Save PDF:** This will create the PDF and ask where to save the PDF.

Open E-Mails in Outlook

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

Sales:

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

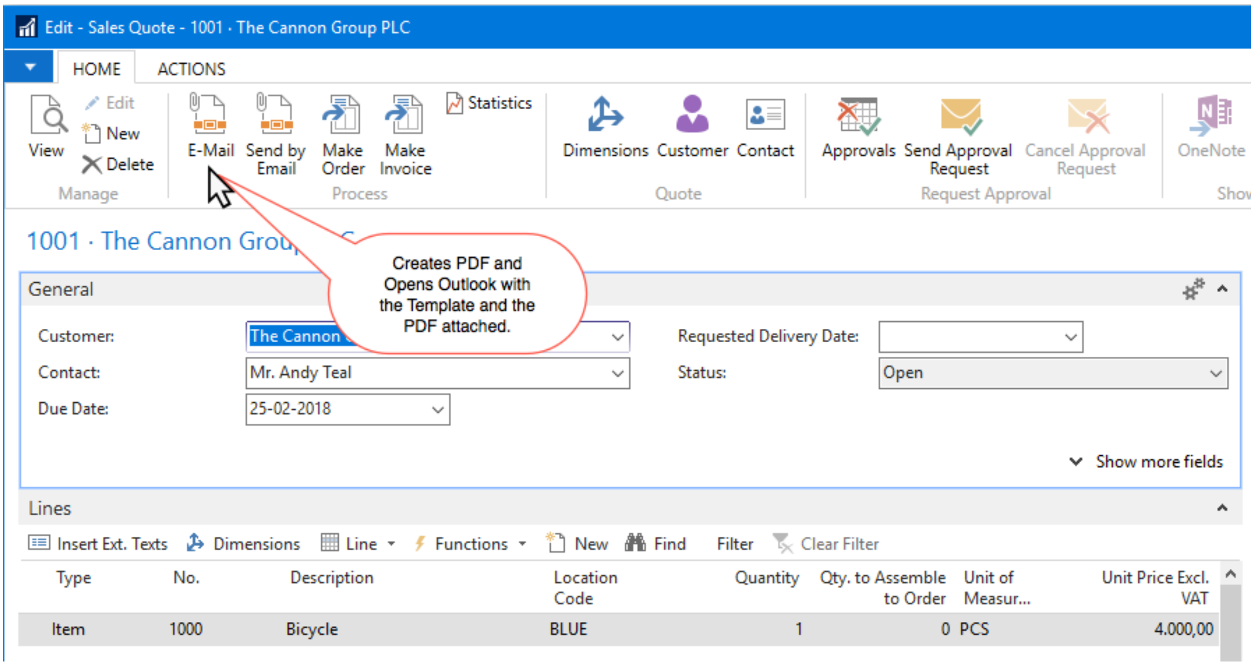
Purchase:

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

Service:

- Service Contract
- Service Quote
- Service Order

Here is a sample from Sales Quote.



Open E-Mail in NAV

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

Sales:

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

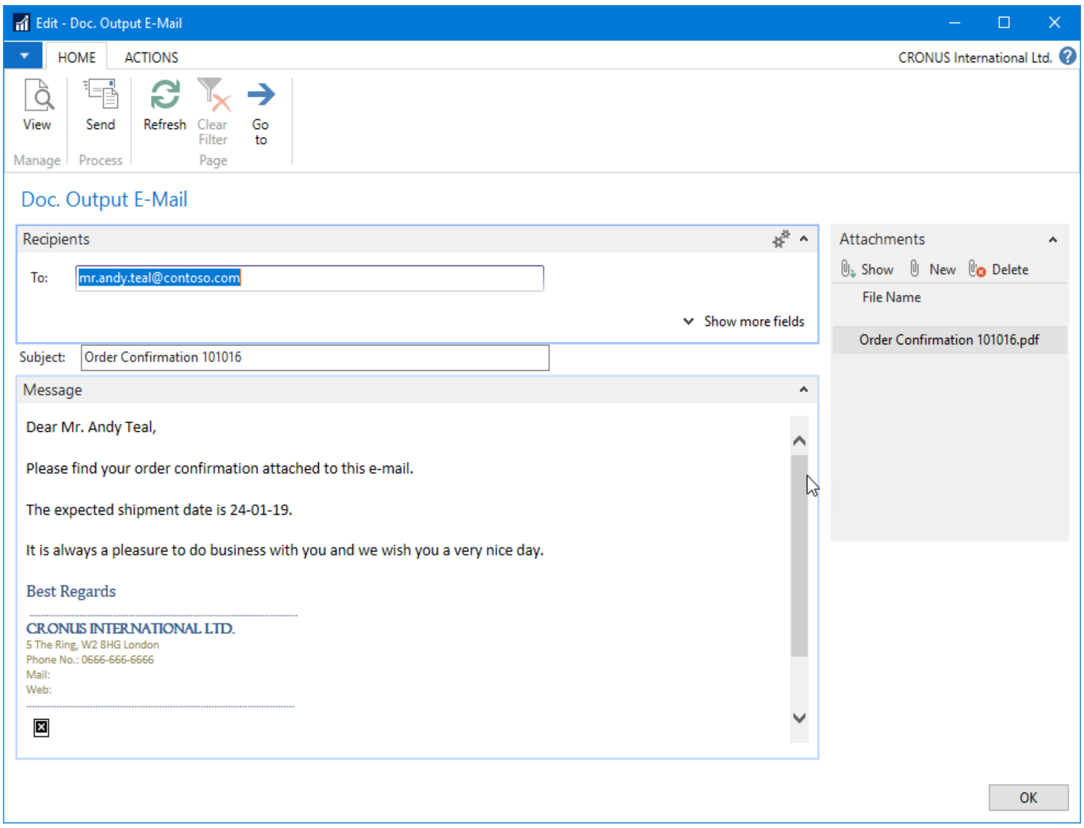
Purchase:

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

Service:

- Service Contract
- Service Quote
- Service Order

Here is a sample from Sales Order.



Unhandled Documents (Sales and Service)

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

Sales:

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

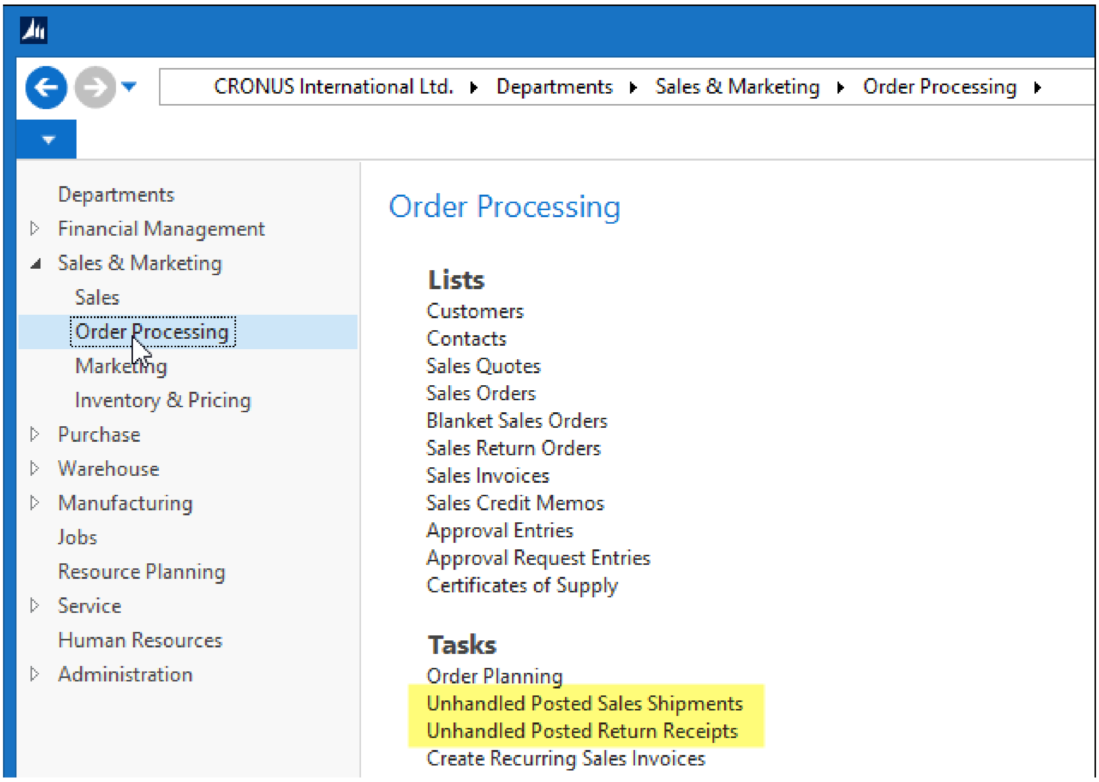
Service:

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

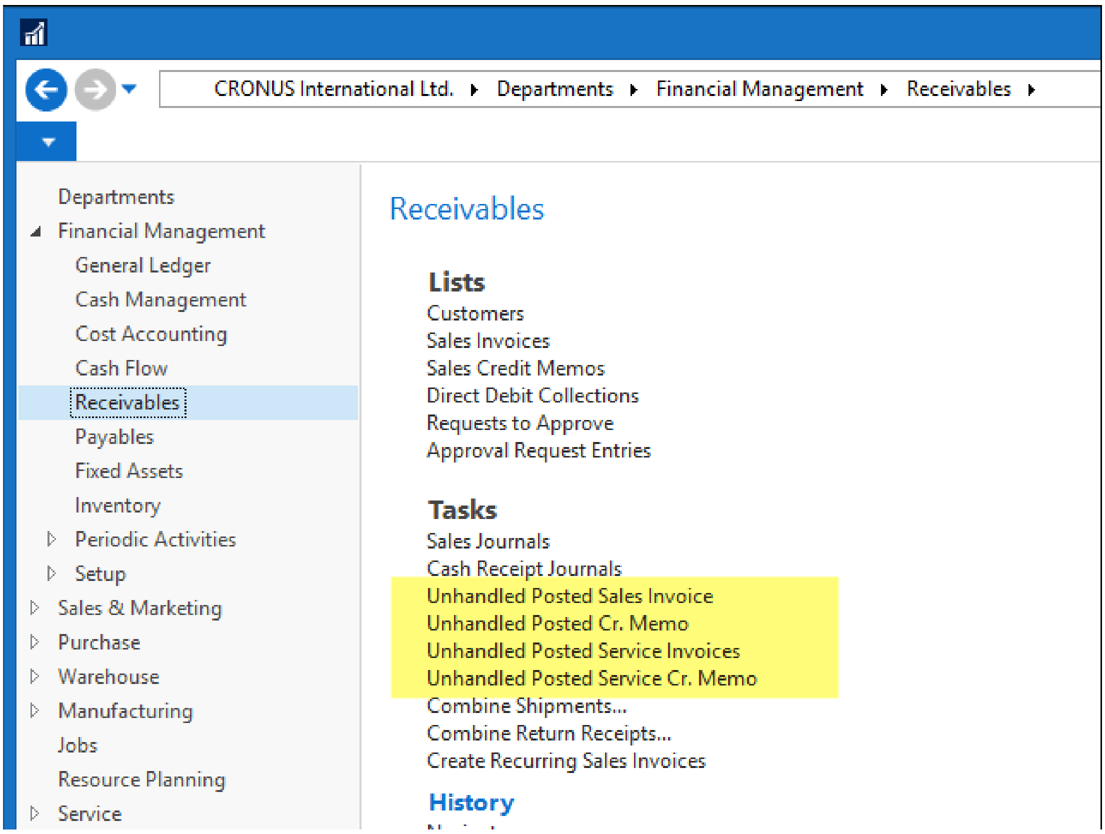
On all unhandled pages, you have the following buttons:

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

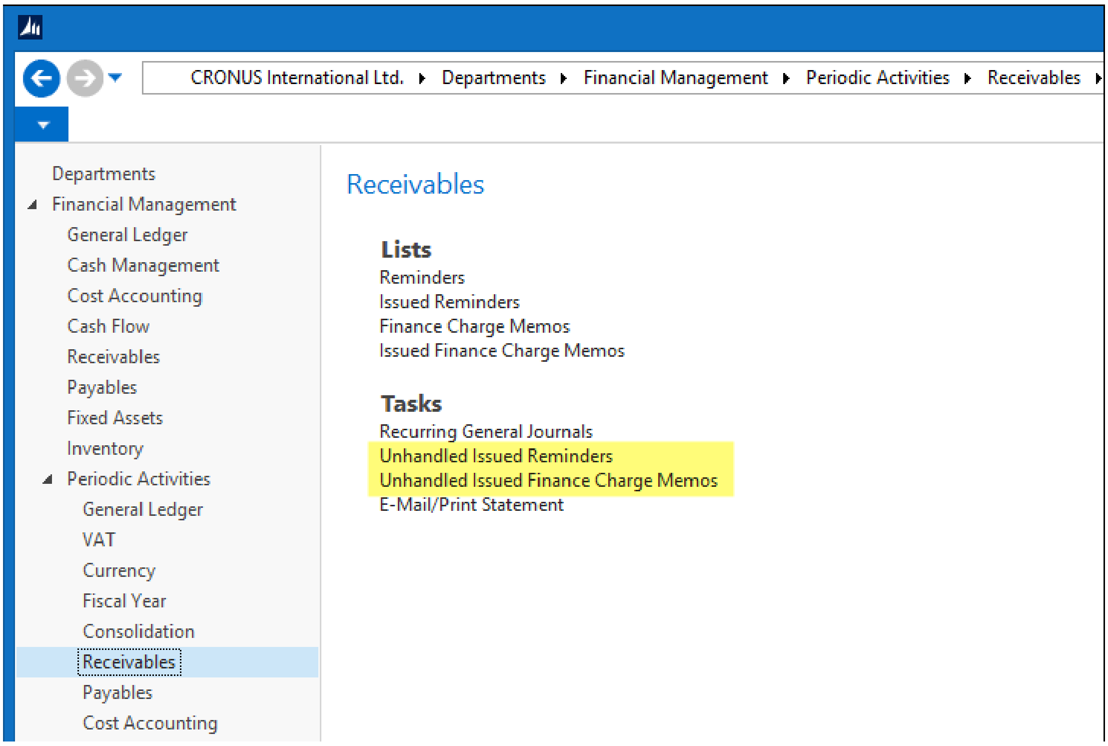
Choosing Departments, Sales & Marketing, Order Processing. You find Unhandled Posted Shipments, and Unhandled Posted Receipts:



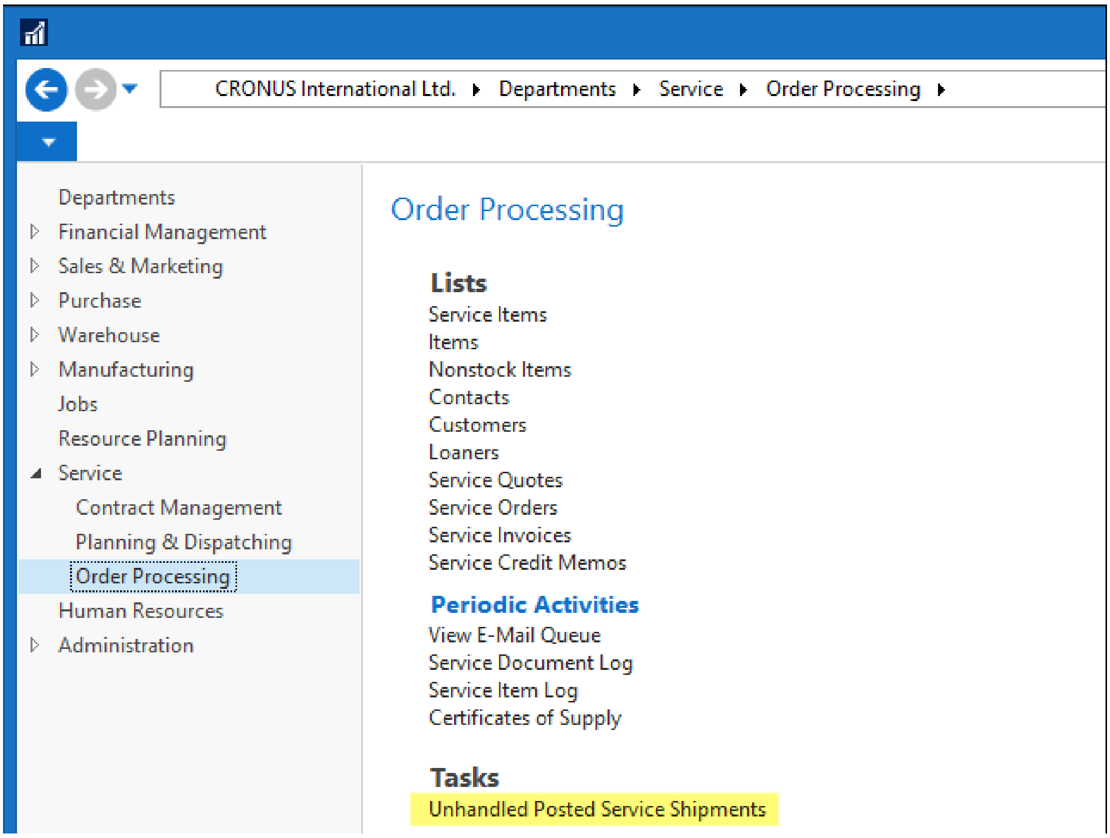
Choosing Departments, Financial Management, Receivables. You find Unhandled Posted Sales Invoice, Unhandled Posted Cr. Memo, Unhandled Posted Service Invoice and Unhandled Posted Service Cr. Memo:



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



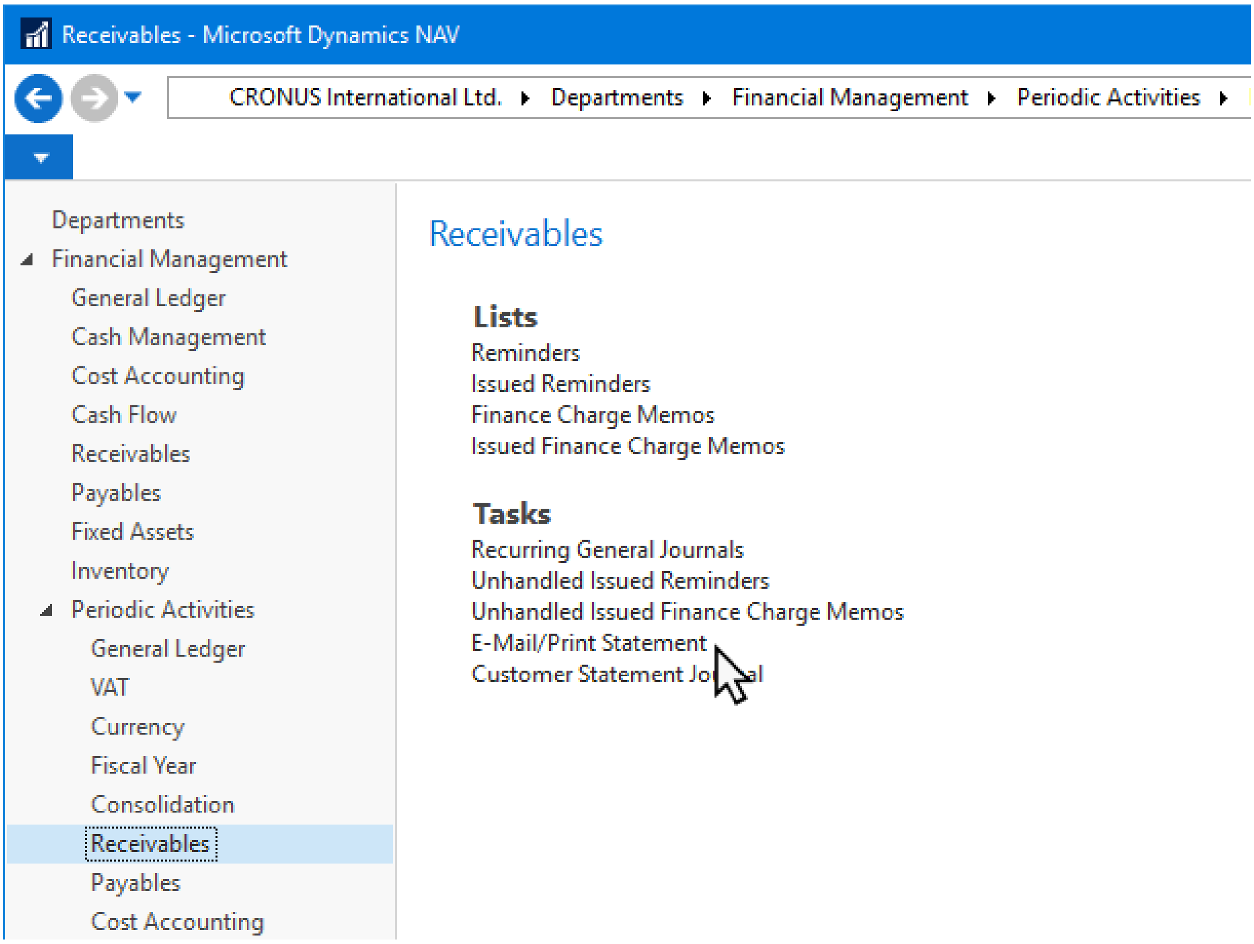
Choosing Departments, Service, Order Processing. You find Unhandled Posted Service Shipments:



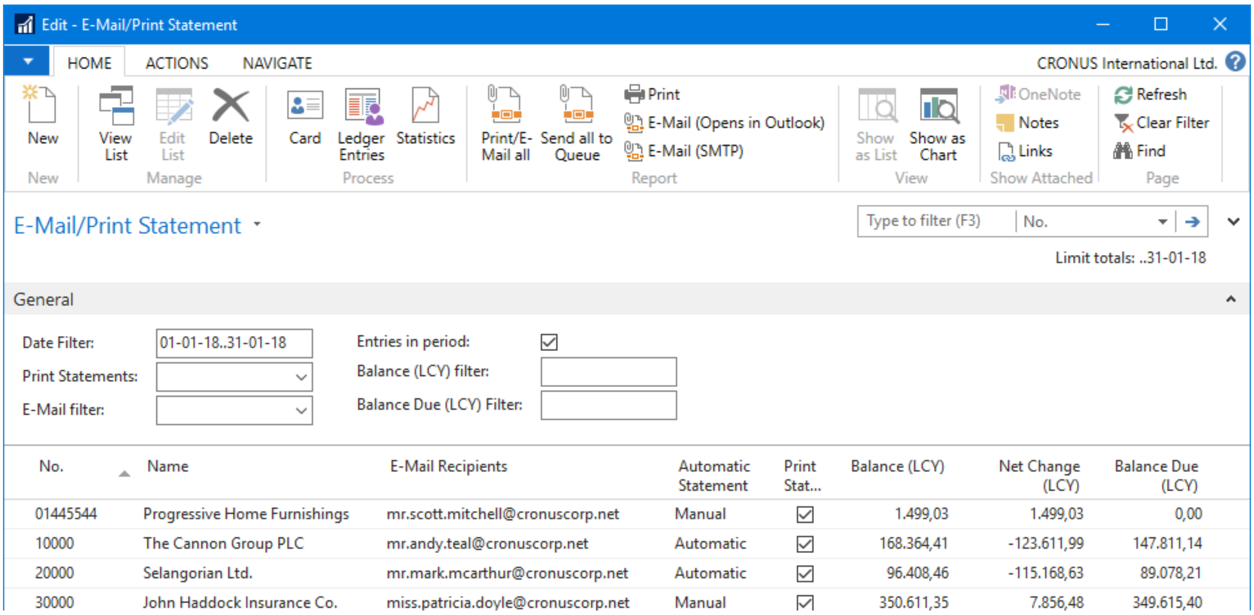
Customer Statements

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

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



You get this page:



Filters:

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

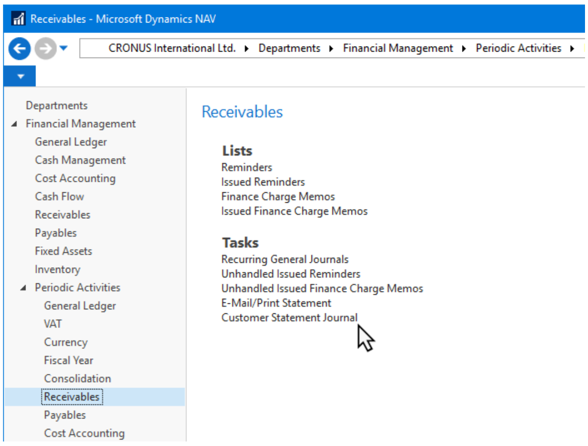
Buttons:

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

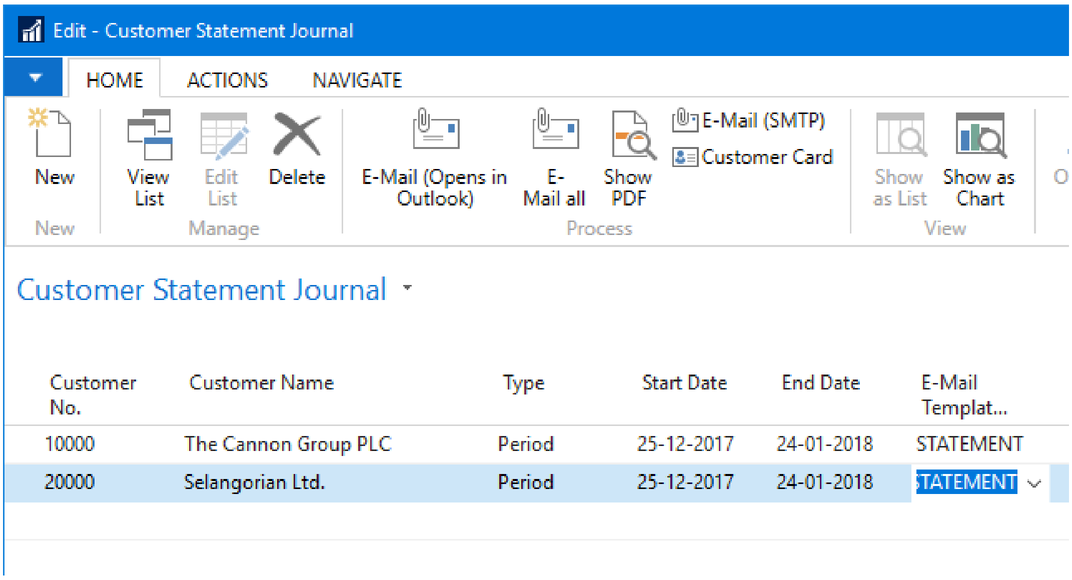
If the batch process sending/printing is interrupted you can restart the batch from Document Output Queue.

Customer Statement Journal (Automatic Generated Statements)

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



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

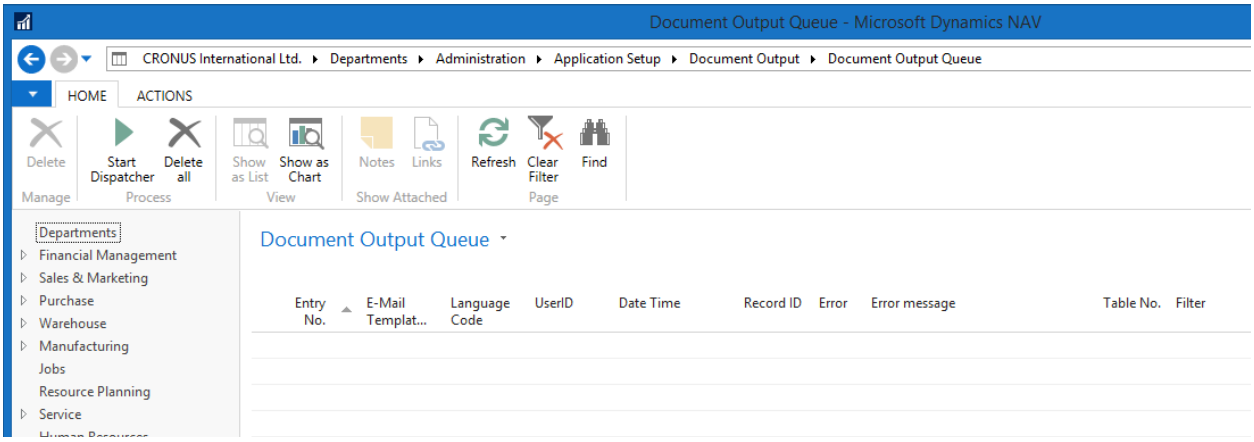


Buttons:

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

Document Output Queue

From all the Unhandled pages and from E-Mail/print Statements, you can send print/e-mail requests to the “Document Output Queue”, the queue will normally be processed automatically. See E-Mail jobs



Buttons:

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

Fields:

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

Customer Setup

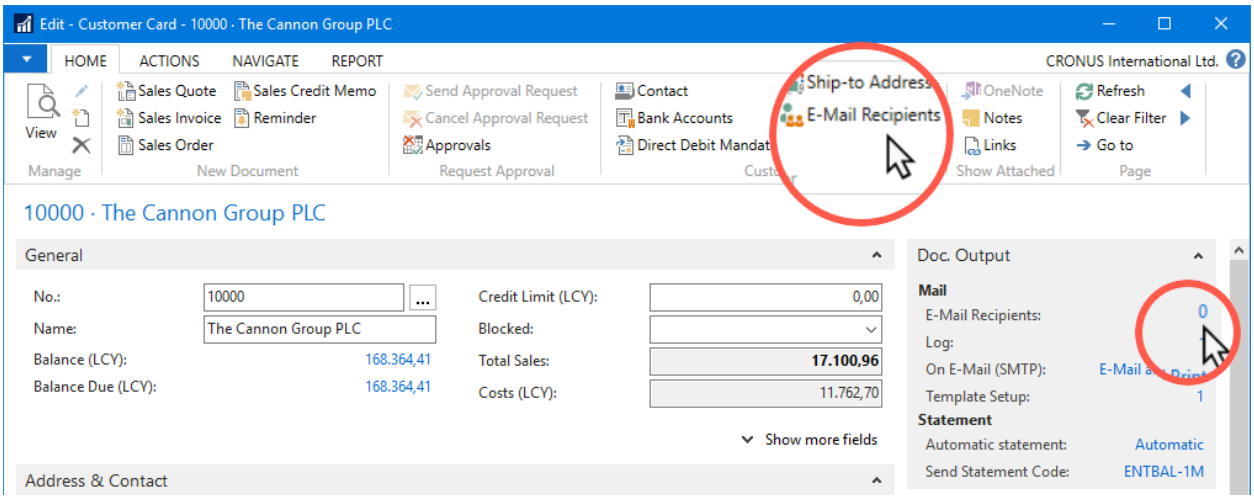
Customer setup can be found in Departments/Sales & Marketing/Sales/Customers

Open Customer Card

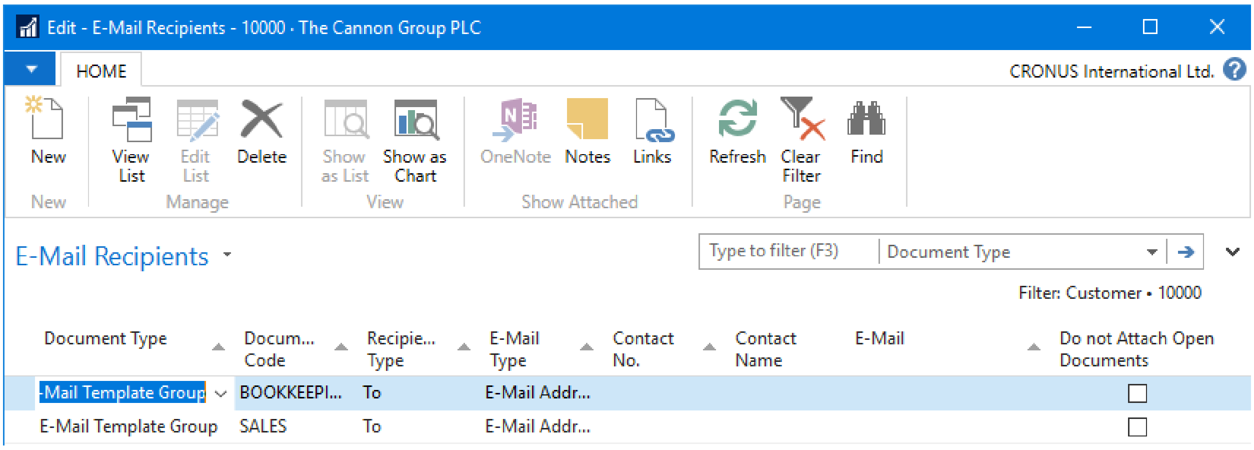
On the Customer Card, you can setup:

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

E-Mail Recipients



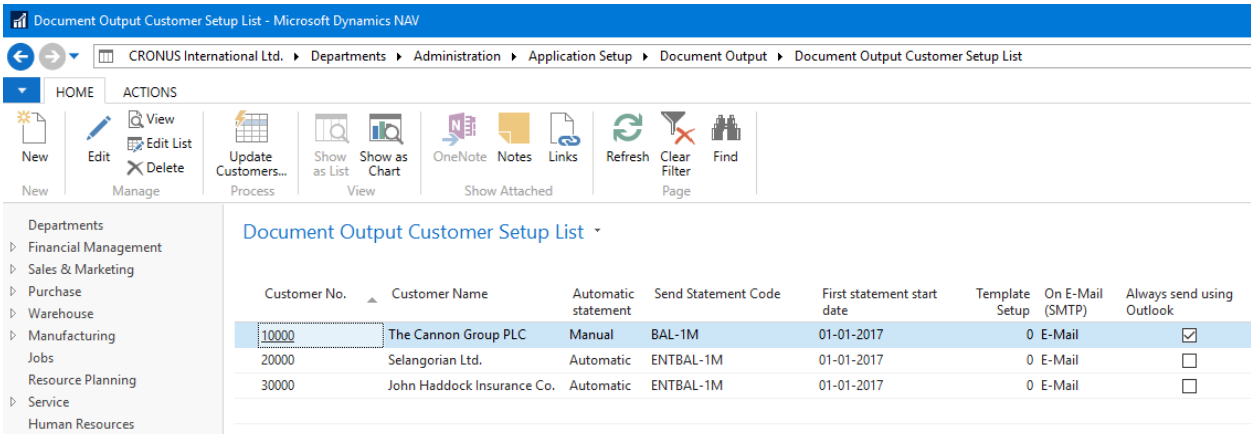
From the Customer Card you can open E-Mail Recipients.



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

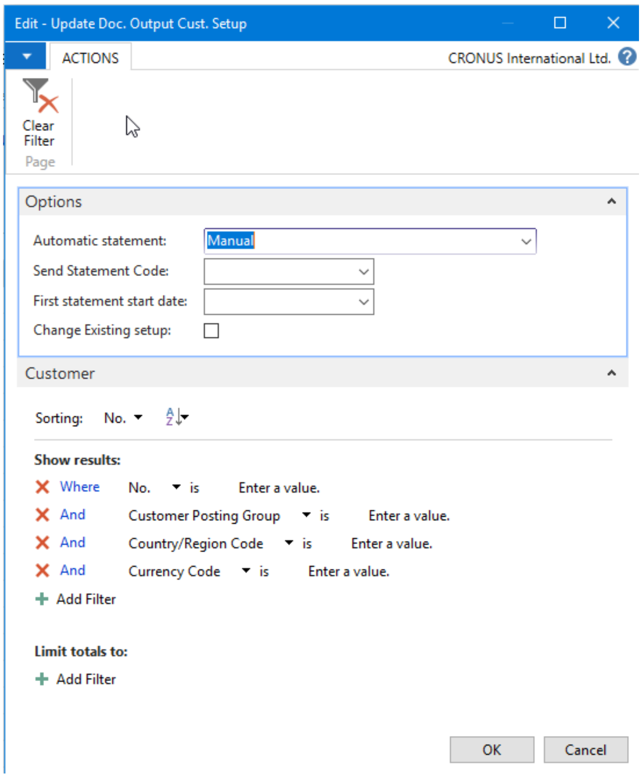
Document Output Customer Setup List can be found under: /Departments/Administration/Application Setup/Document Output/

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



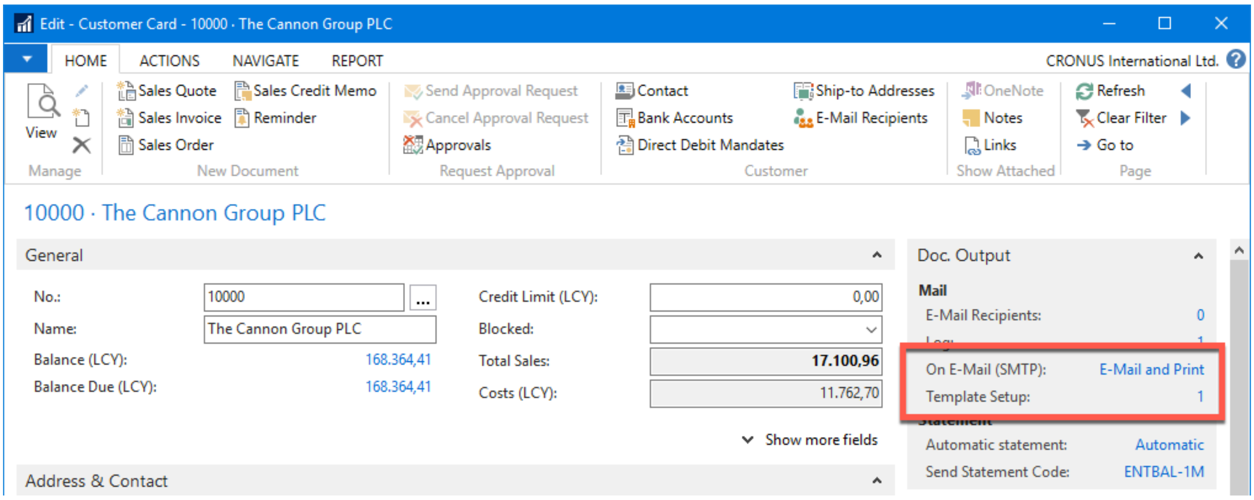
Buttons:

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



E-mail recipients

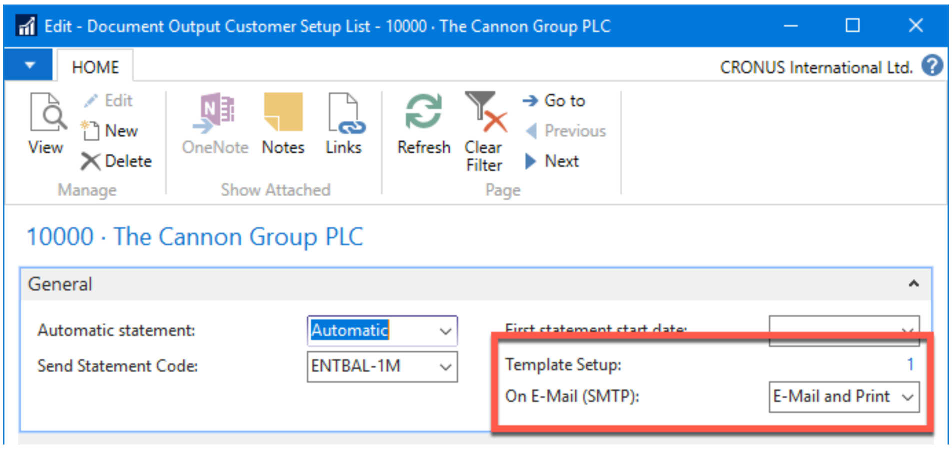
E-Mail or Print and Always send using Outlook



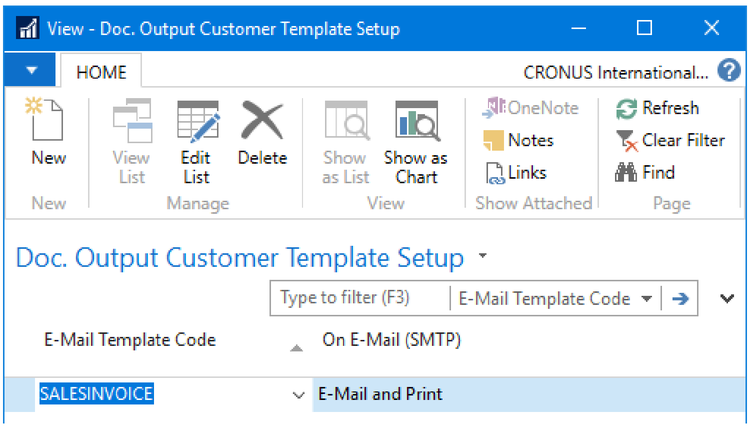
Normally Doc. Output will send e-mails to customers with an e-mail address, this behavior can be changed by clicking on “On E-Mail (SMTP)” or “Template Setup”.

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

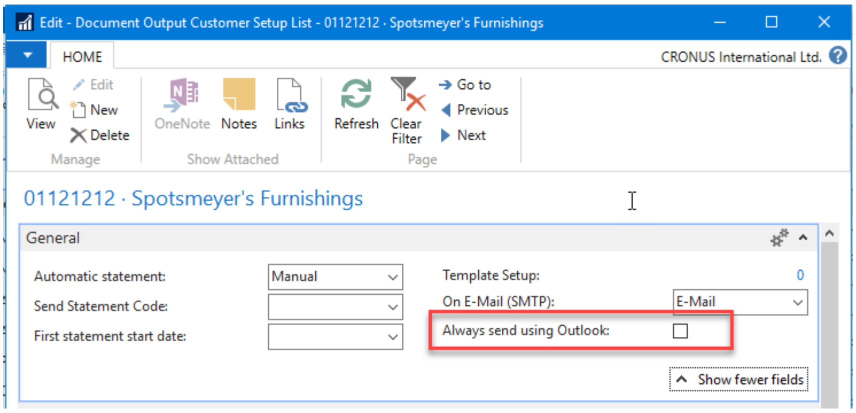
On E-Mail Setup:



Template Setup:

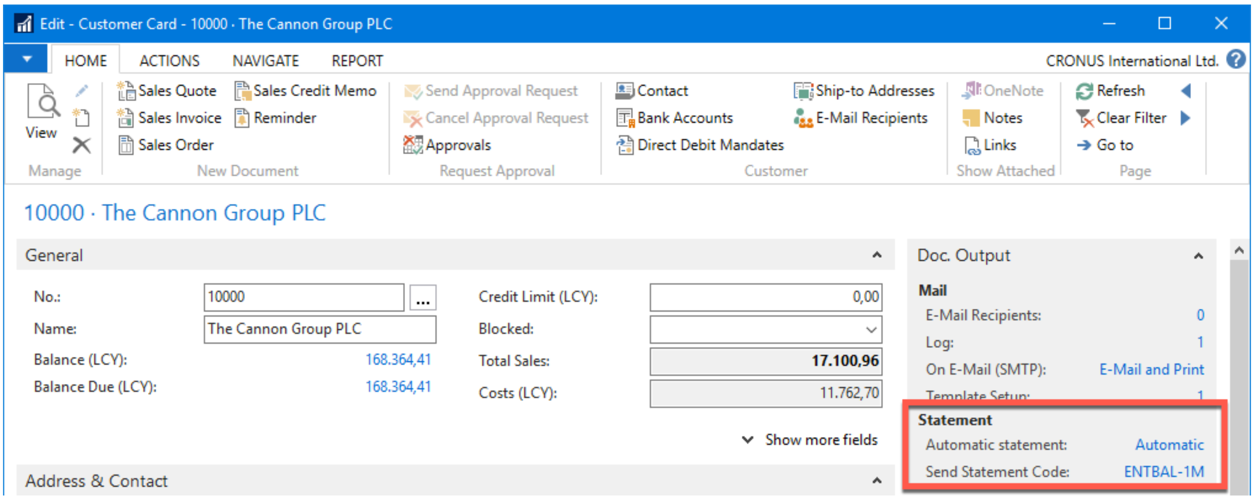


Always Send using Outlook:

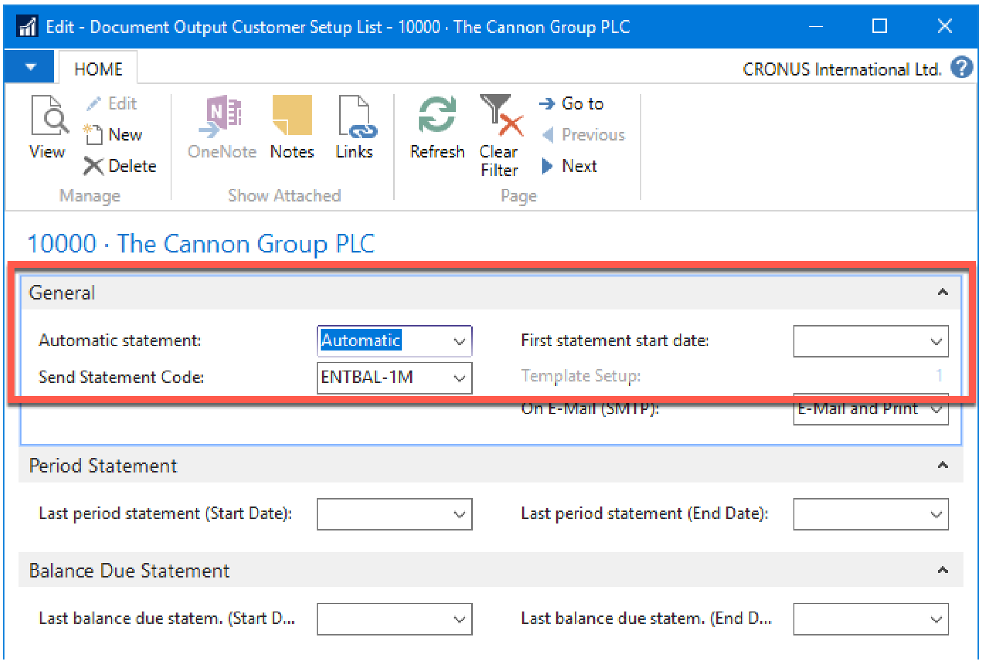


If this is specified Outlook will be used to send the mail, even when SMTP is normally used. This can be used if you experience combability issues. This requires that you have Outlook installed on your NAV Service Tier. Outlook must be setup to send a-mails, with the User setup to run the Service for NAV Service Tier. It is not necessary to setup receiving mails in Outlook, if you don't want this for security reasons on you NAV Service Tier.

Automatic Customer Statements



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



Fields:

- **Automatic Statement:** Choose between Manual or Automatic.

Send Statement Code: Choose how often you customer should receive a statement. See Log Mails with Doc. Output Monitor

The advantage when using the Doc. Output Monitor to log e-mails is that NAV is not locked when opening mails in Outlook.

Requirements for using Doc. Output Monitor:

- (SOAP) Web Service is setup
- A Web Service in NAV is created with the name DocOutputMailLog and using Codeunit 6175308 “Web Service E-Mail Log” (is handled by Setup Wizard).

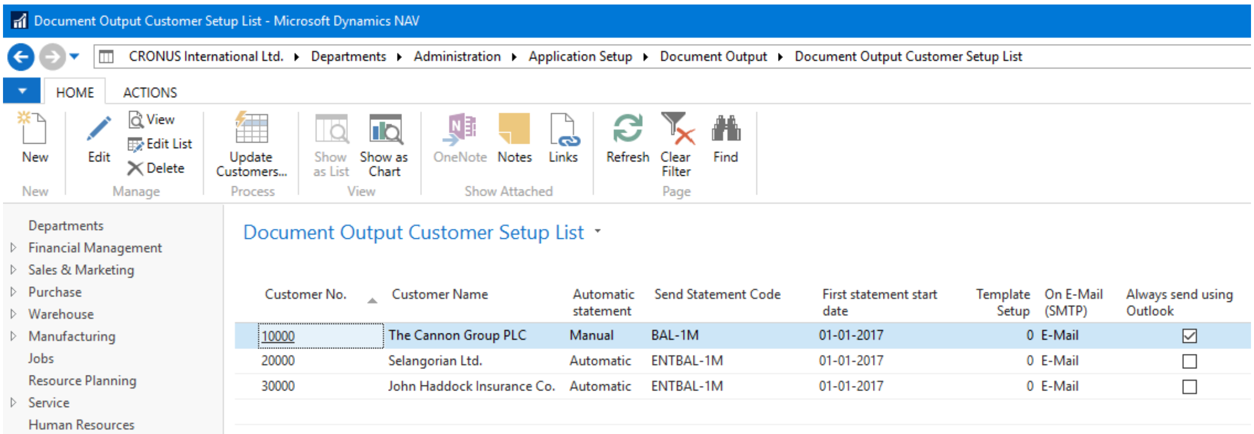
- In NAV 2013 and 2013 R2 you also need to setup Server Name, Instance and Port in Doc. Output Setup.
- Doc. Output Monitor is installed on all clients.

- Automatic Customer Statements Setup
- **First statement start date:** Enter a start date for the first statement to this customer.

Document Output Customer Setup List

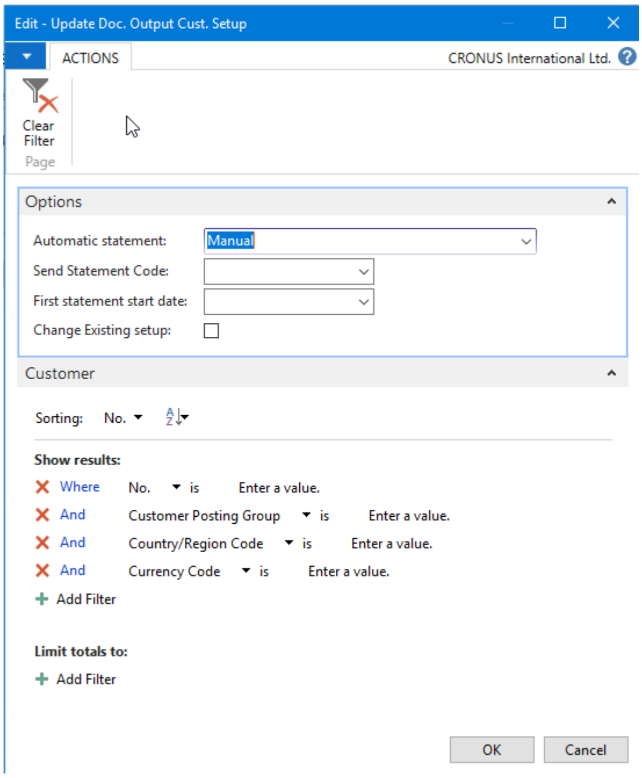
Document Output Customer Setup List can be found under: /Departments/Administration/Application Setup/Document Output/

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



Buttons:

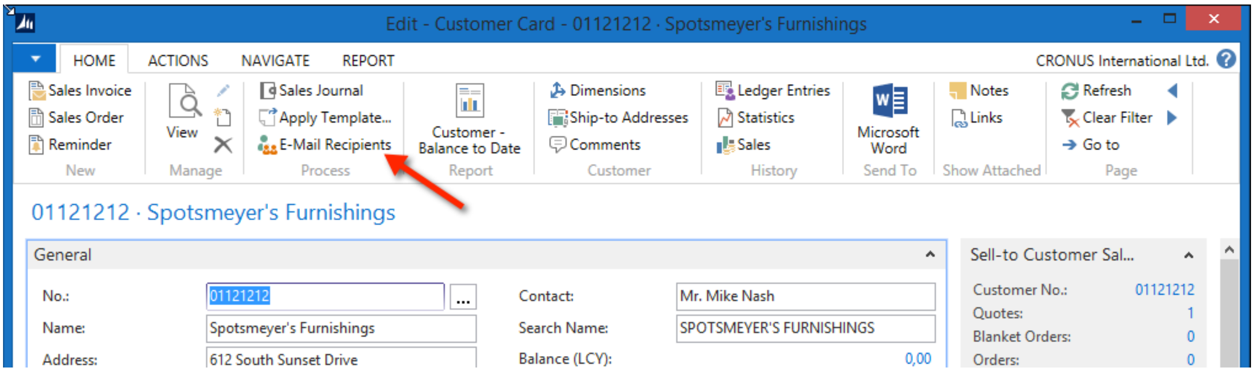
- **Update Customers:** Opens batch job to set Automatic Statement, Send Statement Code and First Statement start date on customers.



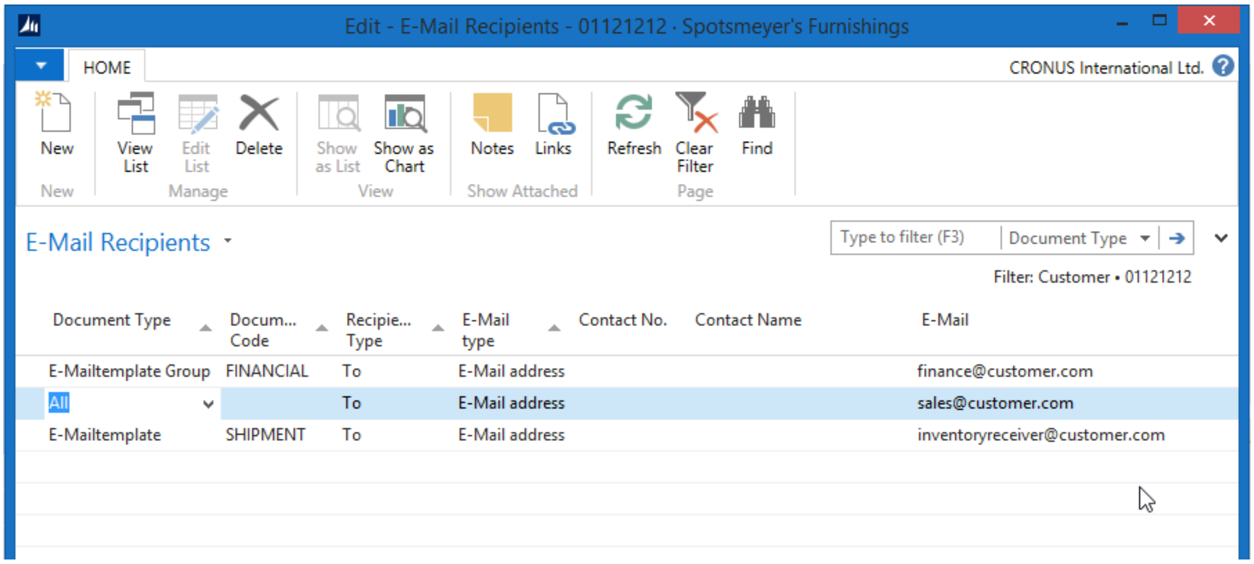
E-mail recipients

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

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



Customer sample:



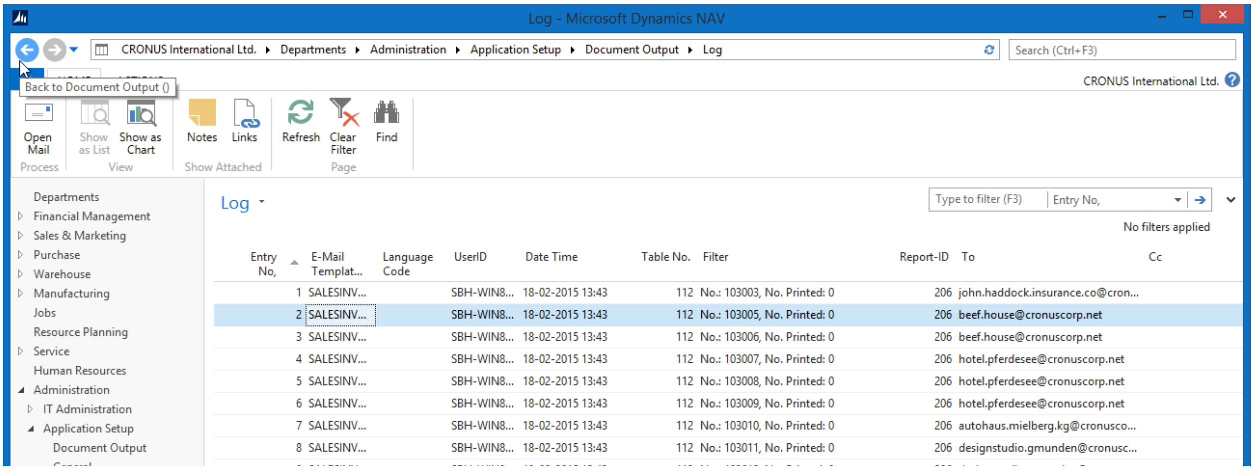
E-mail recipient's fields:

- **Document Type:**
  - 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.
- **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 mail sent with SMTP or with Outlook (Outlook only if dll's are installed on clients)



Buttons:

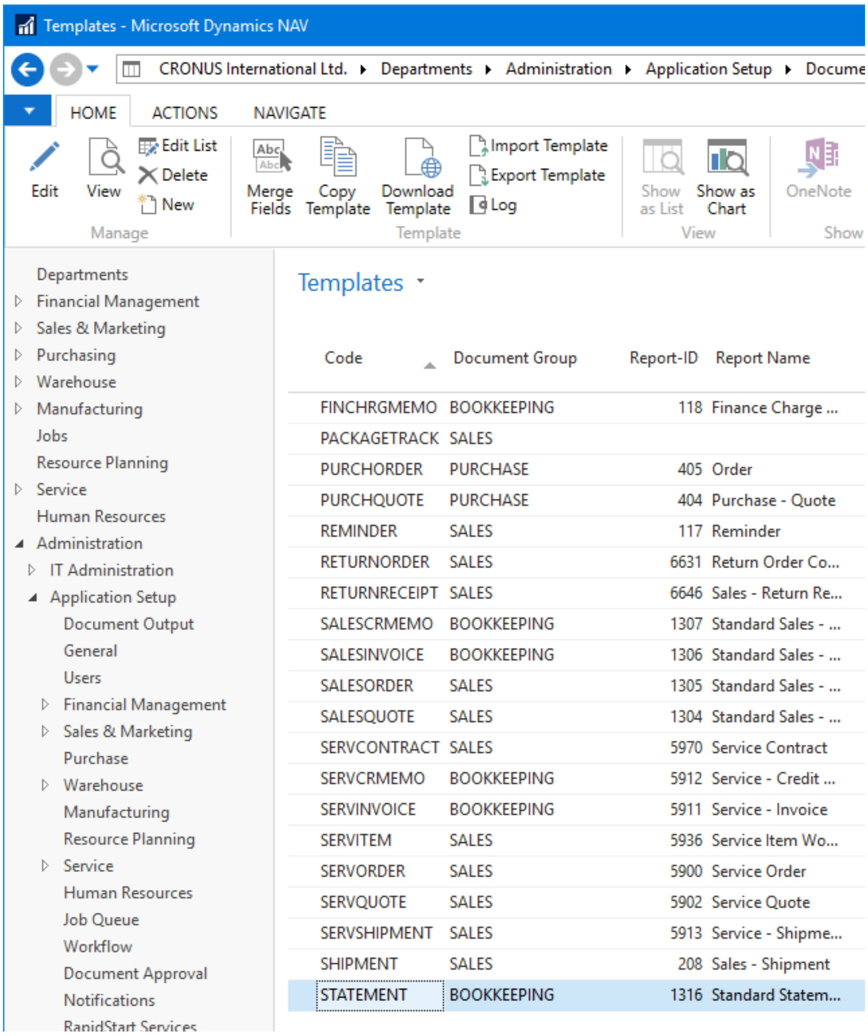
- **Open Mail:** Opens the e-mail including the PDF.

3. Setup

E-Mail Template Setup

E-Mail Templates

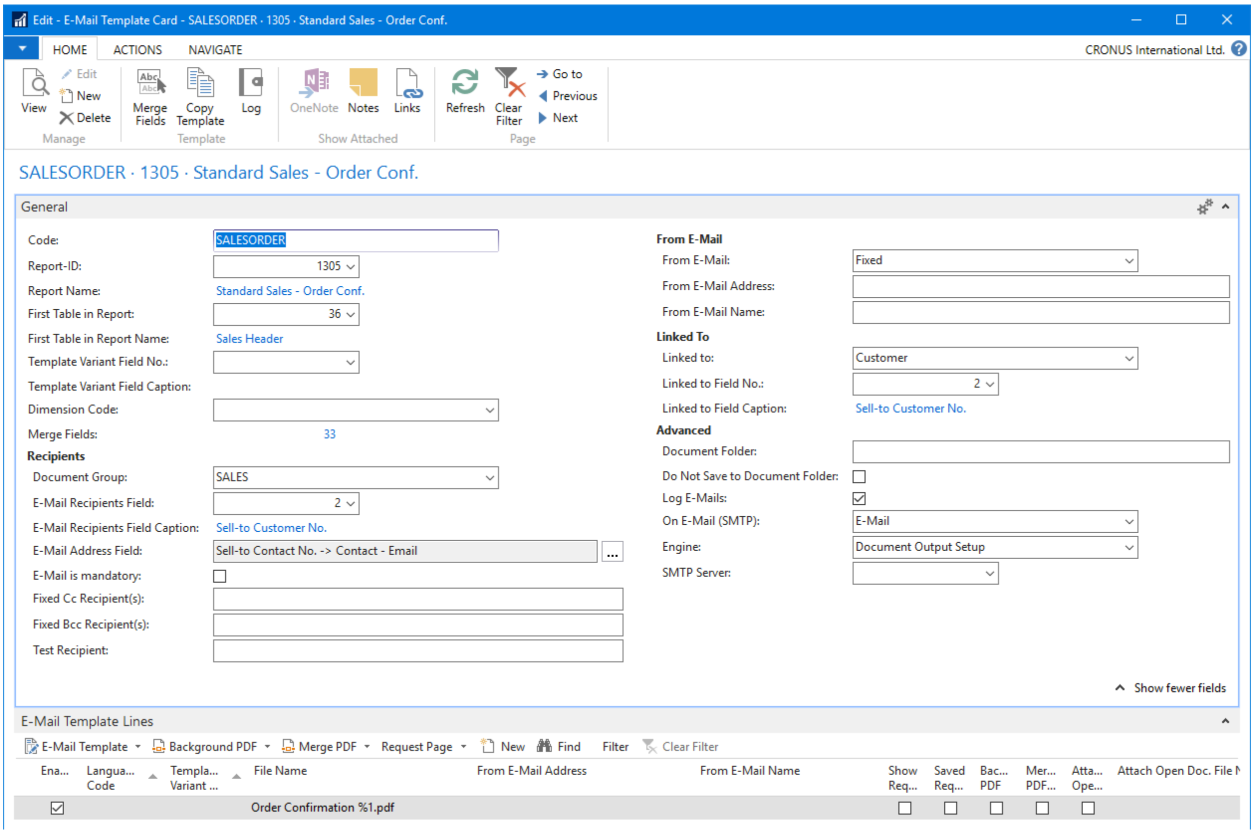
You can setup one template for each report in NAV. You can also setup templates without link to a report. “E-Mail templates” is used for setting up the text for Subject and body of the E-Mail.



Buttons:

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

E-Mail Template Card (Page)



Header fields:

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

Recipients:

- **Document Group:** You can group templates in document groups.
- **E-Mail Recipients Field:** If you want to use recipients from the "E-Mail recipient Table" you need to setup a Field No. for Customer, Vendor or Contact here.
- **E-Mail Address Field:** Here you setup how to find an e-mail address from the Customer Card, Vendor Card, Contact Card or similar. It can also be an e-mail field your NAV dealer has added to your NAV solution.
  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 a PDF in Outlook with no e-mail address.
- **Fixed Cc Recipient(s):** An e-mail address that always receives the mail as cc.
- **Fixed Bcc Recipient(s):** An e-mail address that always receives the mail as cc.
- **Test Recipient:** You can specify a test recipient here. When used all mails will be sent to this e-mail address instead of the normal e-mail address.

From E-Mail

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

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

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

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\
- **Use Document Output in Std. NAV actions:** Set this to yes if you want to use the standard buttons/actions in NAV for Document Output.
- **Log E-Mails:** When checked e-mail are saved in the E-Mail Log table.
- **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
- **Open E-Mail with:**
  - Outlook: The e-mail will open in Outlook and sent with Outlook.
- - NAV: The E-Mail will open in NAV and be sent with SMTP.
- **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 (Only NAV 2013 and forward)
  - NAV Word (Only NAV 2015 and forward)
  - Document Output Setup (Uses the “Default engine” from “Document Output Setup”)
- **SMTP Server:** If you have more the one SMTP server you can choose which should be used for this template.

Header Buttons:

- **Merge Fields:** Shows Merge Fields (Page)
- **Copy Template:** Use this function to copy a template. Templates can also be copied from another Company.
- **Log:** Opens the Log for this template.
- **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. This will work with both Outlook (If setup in Outlook) and SMTP.
- **From E-Mail Name:** Name of the person in “From E-Mail Address”.
- **Show Request Page:** When checked the request page on the report is opened every time the PDF is created.
- **Saved Request Page:** Shows a checkmark if a Request Page is attached.
- **Background PDF:** Shows a checkmark if a Background PDF is attached.
- **Merge PDF File:** Shows a checkmark if a Merge PDF is attached.
- **Attach Open Documents:** When checked open documents in a zip file will be attached to the e-mail.
- **Attach Open Doc. File Name:** The filename used for the zip 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 format:** Choose the mail format (HTML, Plain Text or RTF).
- **Mail Importance:** Choose the importance of the mail (Low, Normal or High).

Line Buttons:

E-Mail Template

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

Background PDF

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

Merge PDF

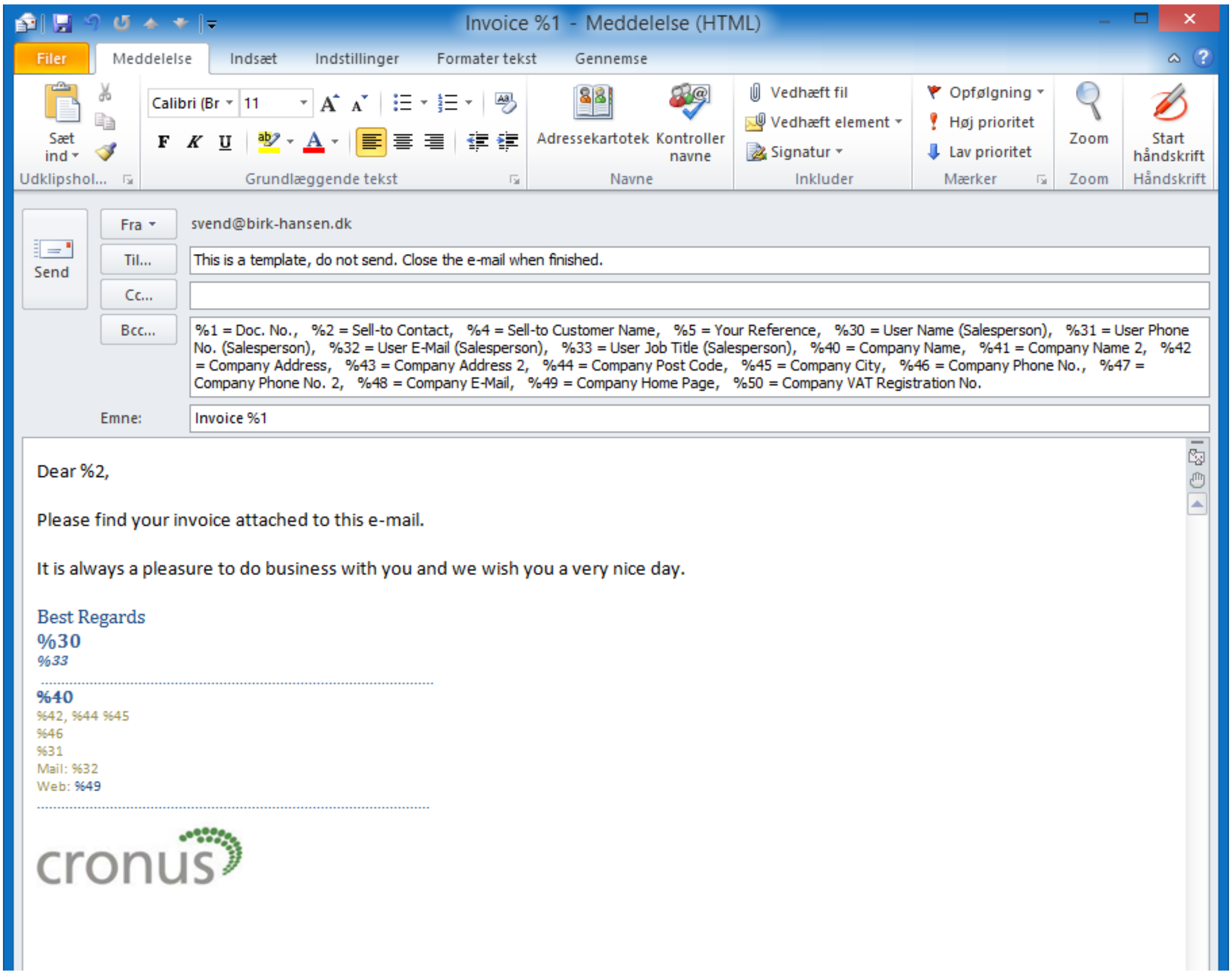
- **Set Merge PDF File:** Set the Merge file PDF, this can be sales and delivery terms or similar.
- **Show Merge PDF File**: Shows the Merge PDF saved on the line.
- **Delete Merge PDF File:** Deletes the Merge PDF saved on the line.

Request Page (NAV 2015 and forward)

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

Edit E-Mail Template (In Outlook)

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



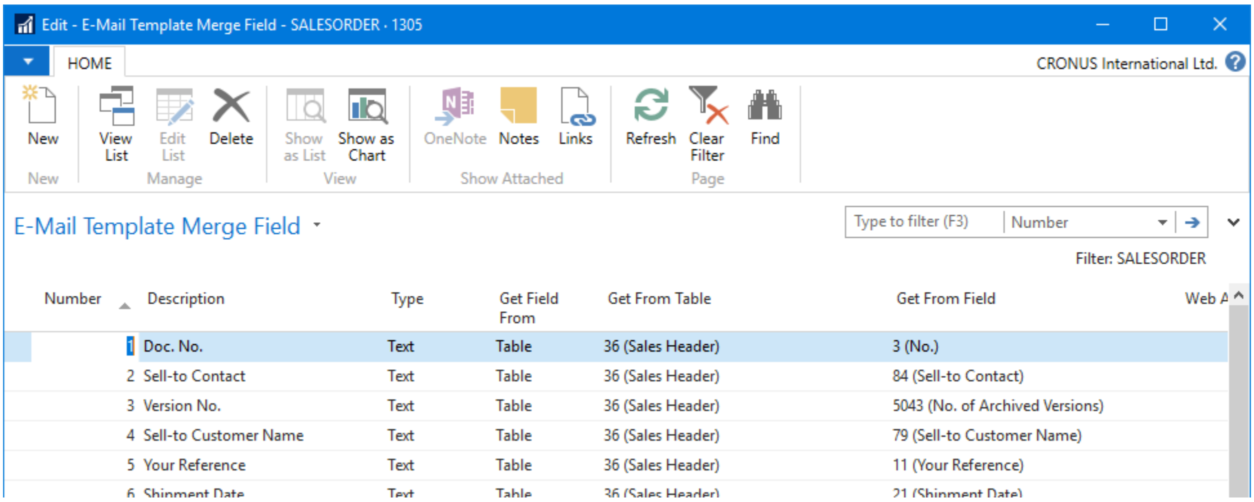
In Outlook you can now edit your template.

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

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

Merge Fields (Page)

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



Fields:

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

  Current Values:

  PackTrack – Package Tracking No.

  ShippingAgent – Shipping Agent

  SalespersonName – Salesperson Name

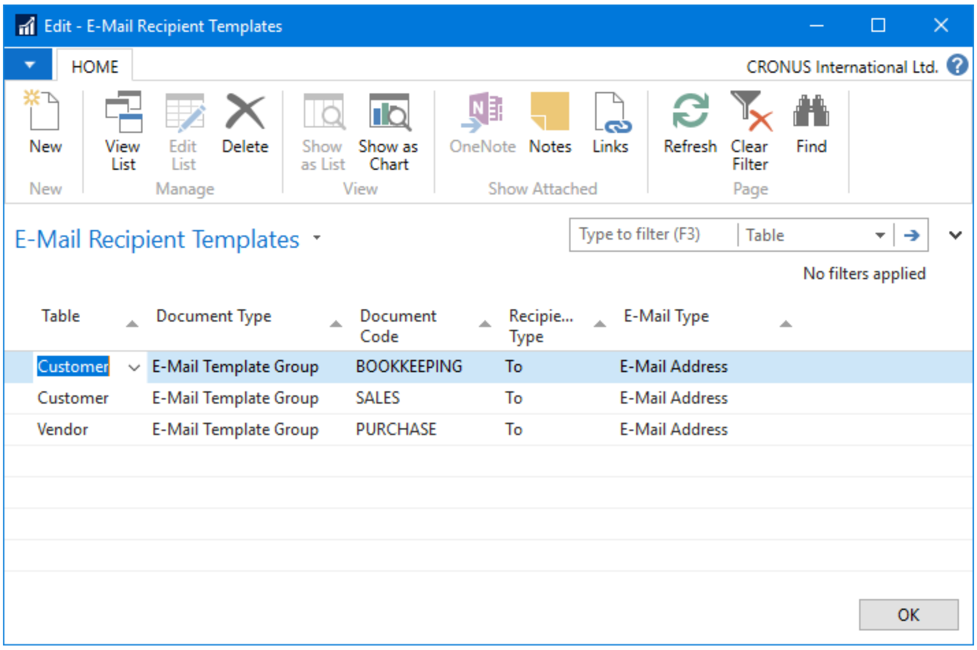
  SalespersonJobTitle – Salesperson Job Title

SalespersonPhoneNo – Salesperson Phone No.
SalespersonEMail – Salesperson E-Mail
Contact1FirstName – The first contacts First Name
Contact2FirstName – The second contacts First Name
Contact1Surname – The first contacts Surname
Contact2Surname – The second contacts Surname
Contact1FormalSalutation – The first contacts Formal Salutation
Contact2FormalSalutation – The second contacts Formal Salutation
Contact1InformalSalutation – The first contacts Informal Salutation
Contact2InformalSalutation – The second contacts Informal Salutation
BalanceDue – Customers Balance Due
BalanceDueLCY – Customer Balance Due LCY

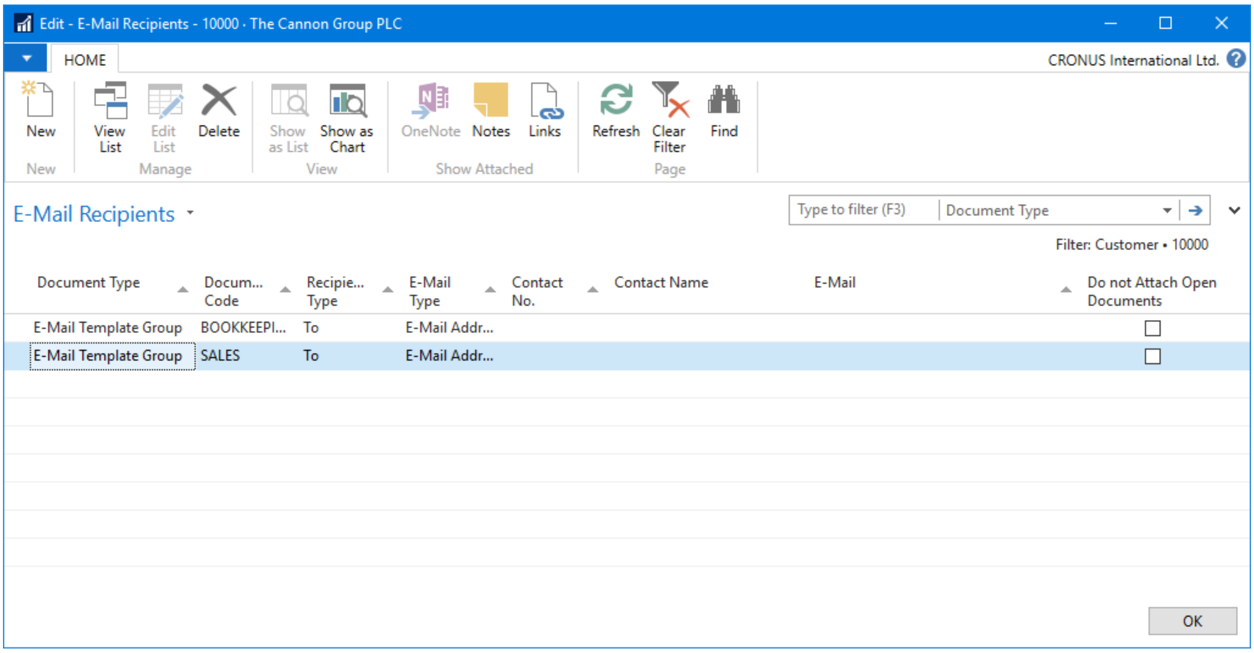
E-Mail Recipients Template

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

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



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



Log Mails with Doc. Output Monitor

The advantage when using the Doc. Output Monitor to log e-mails is that NAV is not locked when opening mails in Outlook.

Requirements for using Doc. Output Monitor:

- (SOAP) Web Service is setup
- A Web Service in NAV is created with the name DocOutputMailLog and using Codeunit 6175308 “Web Service E-Mail Log” (is handled by Setup Wizard).
- In NAV 2013 and 2013 R2 you also need to setup Server Name, Instance and Port in Doc. Output Setup.
- Doc. Output Monitor is installed on all clients.

Automatic Customer Statements Setup

These codes are used to create automatic statements.

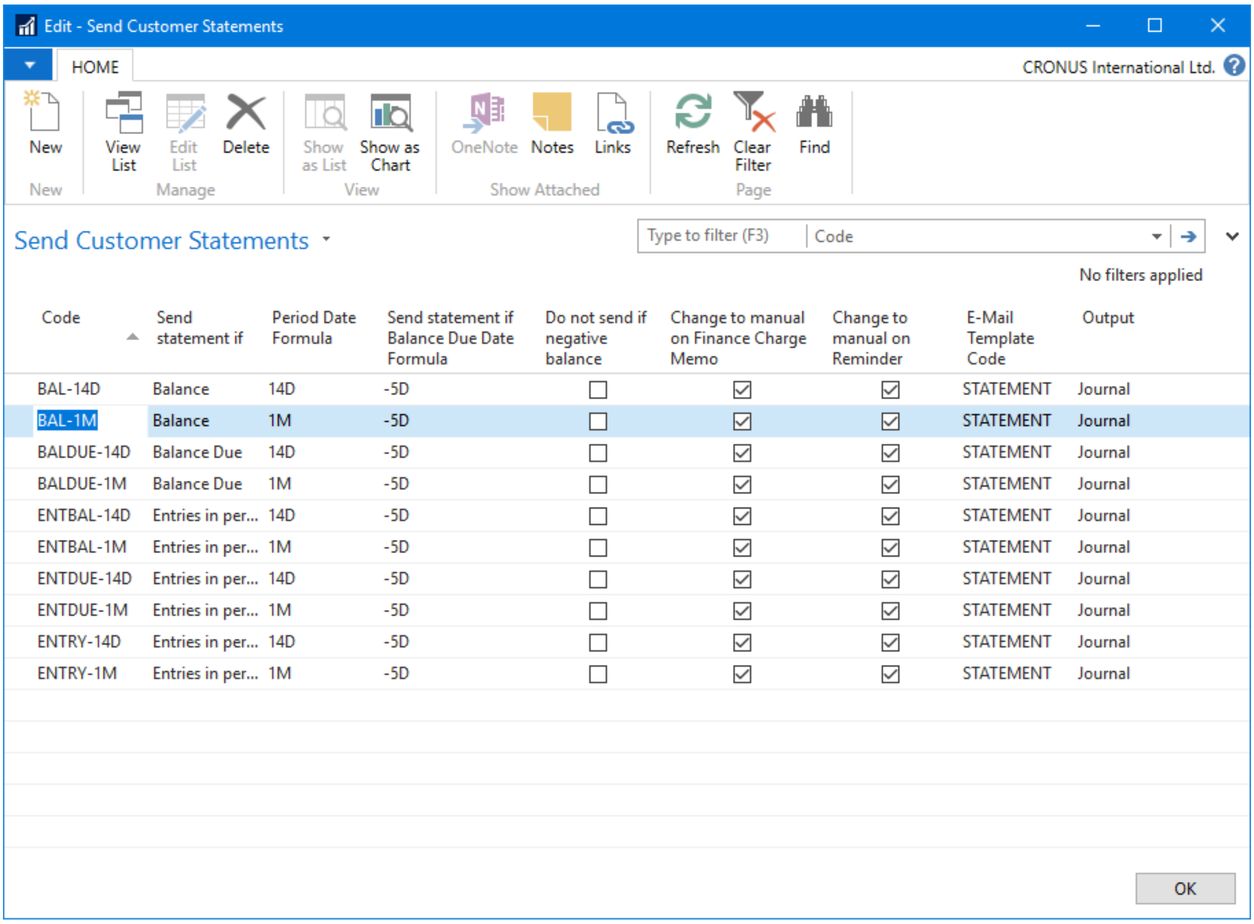
You can setup Job Queue to create Automatic Statements. The Job Queue Entry should run Codeunit: 6175297 “Send Customer Statement Mgt.”.

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**”.

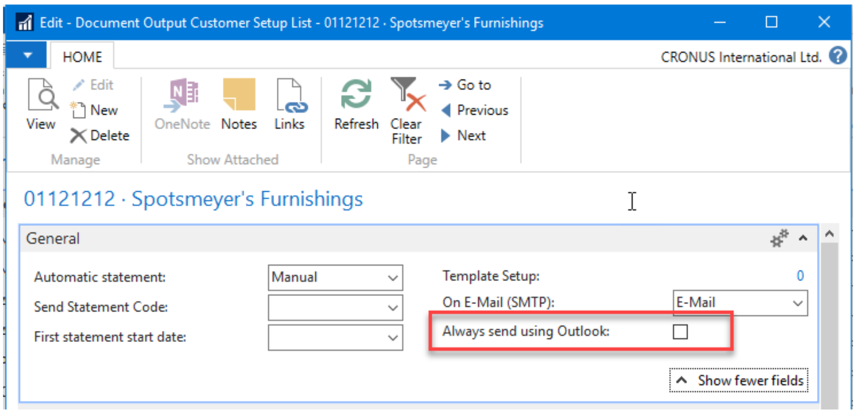


Fields:

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

- **Do not send if negative balance:** If checked, Customers will not receive statements if their Balance is negative.

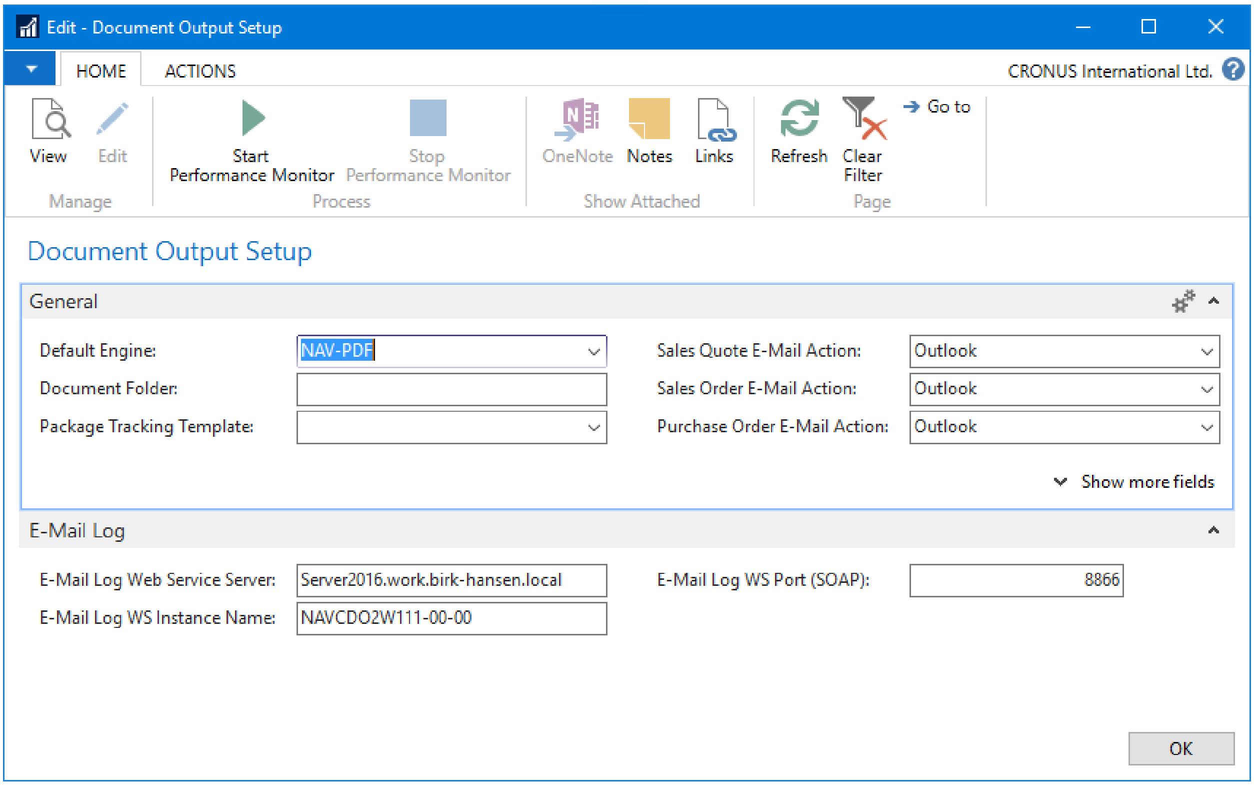
Change to manual on Finance Charge Memo: Change “Automatic Statement” on the Customer to Manual if the customer receives a Finance Charge Memo. See **Always Send using Outlook:**



If this is specified Outlook will be used to send the mail, even when SMTP is normally used. This can be used if you experience combability issues. This requires that you have Outlook installed on your NAV Service Tier. Outlook must be setup to send a-mails, with the User setup to run the Service for NAV Service Tier. It is not necessary to setup receiving mails in Outlook, if you don’t want this for security reasons on you NAV Service Tier.

- Automatic Customer Statements
- **Change to manual on Reminder:** Change “Automatic Statement” on the Customer to Manual if the customer receives a Reminder.
- **E-Mail Template Code:** Enter the Template code used for sending statements.
- **Output:** Choose Journal if you want to see the statement in the Customer Statement Journal (Automatic Generated Statements) before mailing. Choose E-Mail if you want Doc. Output to send directly.

Document Output Setup



Fields:

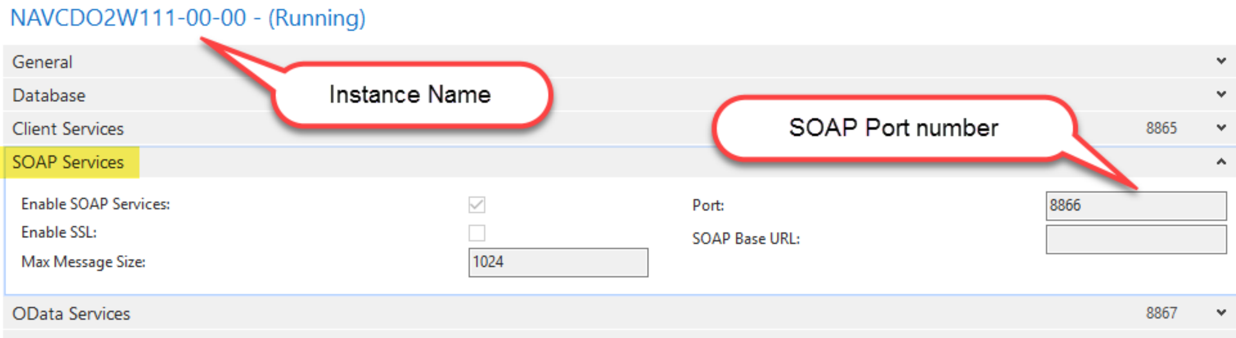
General

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

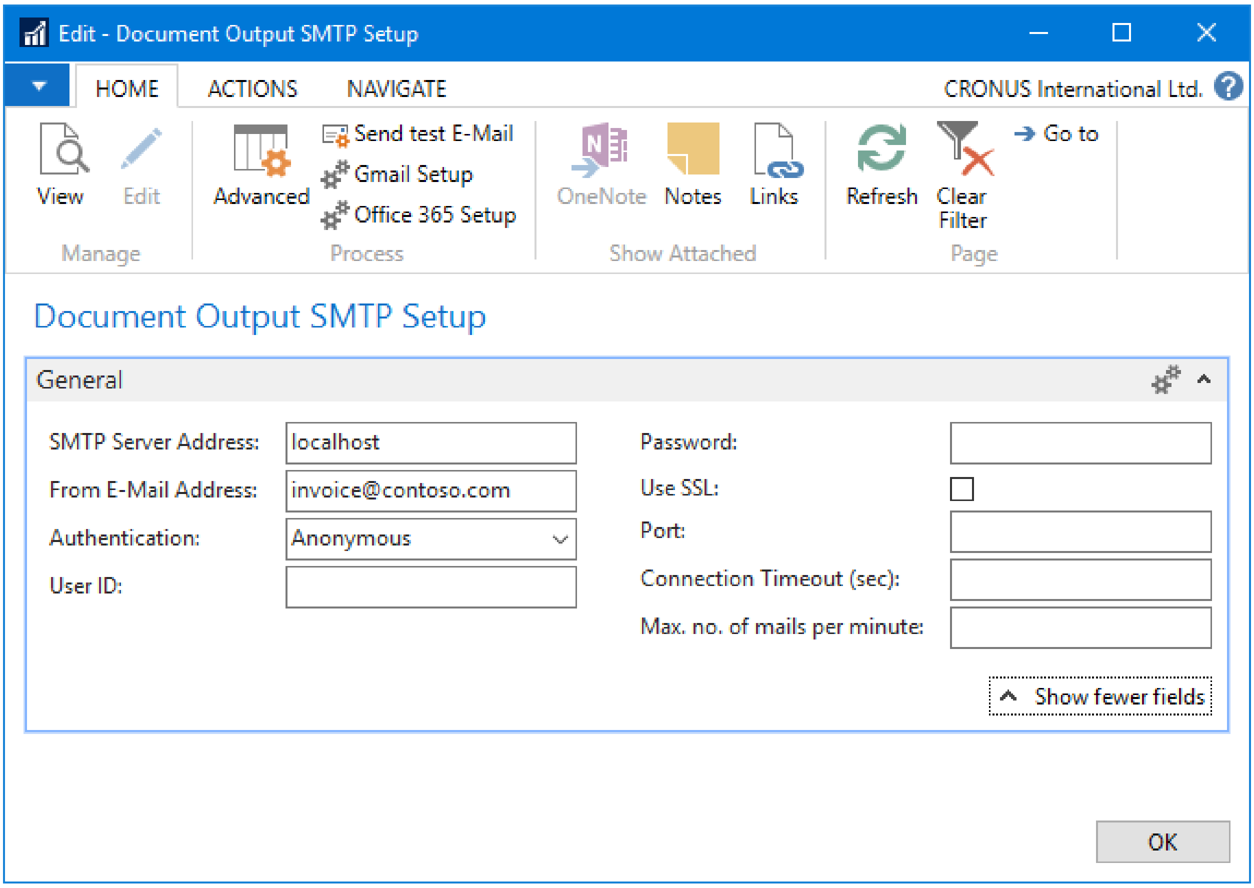
E-Mail Log

- **E-Mail Log Web Service Server:** The server name running the NAV Web Service (SOAP) typically the same as the NAV Service Tier server. In NAV 2013 and 2013 R2 This field is required.
- **E-Mail Log WS Instance Name:** The Instance Name of the Web Service running SOAP. In NAV 2013 and 2013 R2 This field is required.
- **E-Mail Log WS port (SOAP):** The port number used for SOAP web service. In NAV 2013 and 2013 R2 This field is required.

Screenshot from NAV Administration (Mgt. Console)



SMTP Mail Setup



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

Fields:

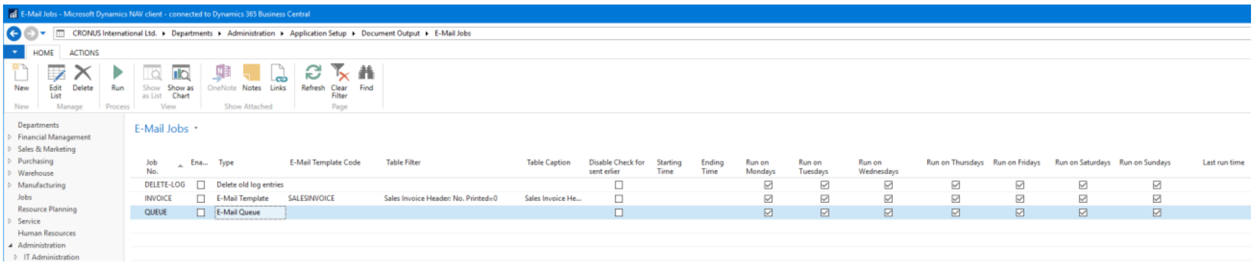
- **SMTP Server Address:** The SMTP servername or ip. address.
- **Authentication:** Choose the Authentication for the SMTP server.
  - Anonymous
  - NTLM
  - Basic
- **User ID:** The SMTP User Account.
- **Password:** Password for the User Account.
- **Use SSL:** Select if the connection requires SSL.
- **Port:** Type the Port number if it's different from the default SMTP port (25).
- **Connection Timeout (Sec):** Connection timeout in seconds.
- **E-Mail Address:** The E-Mail address used in the mail's From field.
- **Max no. of mails per minute:** Some SMTP providers only allow a certain number of mails per minute, this will limit the SMTP server to only send the specified amount of e-mail per minute.

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 with "Job Queue" in Dynamics NAV.



Fields:

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

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

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).