

# Continia Document Output

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 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.

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- 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.

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### E-Mail Sales Order

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

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- 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 Order, you can click the "Email Confirmation CDO" button.

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

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### Warehouse from Sales Order

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

#### Open the Sales Order.

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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

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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

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#### 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.

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Sell-to Contact E-Mail: mr.mike.nash@cronuscorp.net Responsibility Center:	~
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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

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Open the Posted Sales Shipment.

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- 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 Shipment you can click the "E-Mail Shipment" button.

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

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### E-Mail Posted Sales Invoice

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Open the Posted Sales Invoice.

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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 merger PDF).



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

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

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### E-Mail Posted Return Receipts

Open Posted Documents, Posted Return Receipts.

Open the Posted Return Receipt.

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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 merger PDF).

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

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

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### E-Mail Posted Sales Credit Memo

Open Posted Documents, Posted Sales Credit Memos.

Open the Posted Sales Credit Memo.

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- 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.



#### **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.

View - Issued R	eminder - 10500	01 · Selangorian l	.td.			-		×
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This will create the PDF file and open Outlook with the template.

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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 merger PDF).

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### 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.

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### E-Mail Statement for one customer

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

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01445544 Progressive Home Furnishings mr.scott.mitchell@cronuscorp.net	Manual 🗹 12.837,38 12.837,38 0,00	
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32656565 Antarcticopy michael.zeman@cronuscorp.net	Manual 22.115,66 22.115,66 22.115,66	

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.

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01445544	Progressive Home Furnishings	mr.scott.mitchell@cronuscorp.net	Manual		12.837,38	12.837,38	0,00	
10000	Kontorcentralen A/S	hr.anders.madsen@cronuscorp.net	Automatic		1.441.125,53	-1.058.672,20	1.265.505,34	
20000	Ravel Møbler	hr.sven.mortensen@cronuscorp.net	Manual	$\checkmark$	822.046,28	-989.401,36	762.657,06	
30000	Lauritzen Kontormøbler A/S	fr.nanett.marcher@cronuscorp.net	Manual		2.993.021,17	58.476,00	2.993.021,17	
32656565	Antarcticopy	michael.zeman@cronuscorp.net	Manual		22.115,66	22.115,66	22.115,66	
35451236	Gagn & Gaman	ragnheidur.k.gudmundsdottir@cronus	Manual		7.511,40	7.511,40	7.511,40	
35963852	Heimilisprydi	gunnar.orn.thorsteinsson@cronuscorp	Manual		17.330,65	17.330,65	17.330,65	
42147258	BYT-KOMPLET s.r.o.	milos.silhan@cronuscorp.net	Manual		13.728,00	13.728,00	0,00	
43687129	Desianstudio Gmunden	fr.birgitte.vestphael@cronuscorp.net	Manual		117.569.18	117.569.18	0.00	

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.

New - Purchase	e - 1001 · Progressive Home Furnishings						- 0	×
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#### 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.

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### 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.

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1001 · Progressive	Home Furnishing	gs							
General					** ^				
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Contact:	Mr. Michael Sean Ray		<ul> <li>Purchaser Code:</li> </ul>	MR	~				
Document Date:	25-01-2018	$\sim$	Campaign No.:		~				
Due Date:	31-01-2018	$\sim$	Responsibility Center:		~				
Order Date:		$\sim$	Assigned User ID:		~				
Vendor Shipment No.:			Status:	Open	~				
Order Address Code:		~							
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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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- 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 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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- 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 Warehouse Shipment

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

#### **Open Warehouse Shipment**

🚮 Edit - Warehouse Shipment - SH000002						-	□ ×
HOME ACTIONS NAVIGATE						CRONUS In	ternational Ltd. 🕜
View View Delete Manage	st Post and ent Print Posting	Get Source Documer Autofill Qty. to Ship Delete Qty. to Ship Prepare	nts Create Pi Pick Lir	ck Registered hes Pick Lines Pick	Print Refresh	→ Go to	
SH000002					^	Whse Doc. O	utput
General						🗲 Actions 👻	
No.:     SH000002       Location Code:     GREEN       Zone Code:	· · · · · · · · · · · · · · · · · · ·	Posting Date: Assigned User ID: Assignment Date: Assignment Time: Sorting Method:	01-01-20	18		Image: Send E-Mail       Image: S	I <sup>L</sup> √ P p nil P
Lines						Item No :	106
Line - 🎢 Find Filter 🐷 Clear Filter						Identifier Code	/
Source Source No. Item No. Document	Description	Quantity	Qty. to Ship	Pick Qty.	Qty. Picked	Rase Unit of Meas	
Sales Order 6002 1964-S	TOKYO Gastestuhl, Blau	34	0	0	0	Last Phys. Invt. D.,	31-12-2018
Sales Order 6002 1996-S	ATLANTA Whiteboard, base	11	0	0	0	Net Weight:	0,00
Sales Order 6002 80100	Printing Paper	14	0	0	0	Warehouse Class	
Sales Order 6003 1964-S	TOKYO Gastestuhl, Blau	11	0	0	0	Notes	•
Sales Order 6003 1968-S	MEXICO Swivel Chair, black	11	0	0	0	Click berg to grapte a	now pote
Sales Order 6003 80100	Printing Paper	30	0	0	0	Click here to create a	new note.
Sales Order 6003 80100	Printing Paper	6	0	0	0	There is nothing to s	how in this
<						>	
Shipping					01-01-2018	*	Ų
							ОК

- **Open E-Mail:** This will open the e-mail in Outlook or NAV, 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)
- **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

🖬 Edit - Inventory	Put-away - Invt. Put-away	· IPU000001					- 0	×
- HOME	ACTIONS						CRONUS Internationa	l Ltd. 🕜
View Cedit View Delete Manage	Post Post and Print Do Posting	et Source ocument Prepare Function	elete Qty, to Handle Is Put-av	osted Put- aways vay Print	Note Notes Links	Refresh Clear Filter		
Invt. Put-aw	ay · IPU000001				/	Whs 5 4	se Doc. Output Actions -	
No.: Location Code: Source Documer Source No.: Vendor No.:	PLUK           PLUK           106024           01254796	· · · · · · · · · · · · · · · · · · ·	Vendor Name: Posting Date: Expected Receipt Date: Vendor Shipment No.: Vendor Invoice No.:	Progressive Home Furnishi	ings		Open E-Mail Send E-Mail Queue E-Mail Print PDF	usco
Lines Functions Item No. 1000	⊞ Line → 🏦 Find Fi Description Bicycle	ilter 📡 Clear Filter Bin Code 1	Quantity Qty. to Handle	Qty. Handled Qty. C	Uutstanding Due Date 10 26-01-2018	Unit of Measur PCS	Save PDF re is nothing to sh	
٢						>		ОК

- **Open E-Mail:** This will open the e-mail in Outlook or NAV, 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)
- **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**

🚮 Edit - Inventory Pick - Invt. Pick - IP/000003	– 🗆 X
HOME ACTIONS	CRONUS International Ltd. 💡
Image     Image	
Invt. Pick · IPI000003	Whse Doc. Output
General	🕴 Actions 👻
No.:     IND00003     Customer Name:     Spotsmeyer's Furnishings       Location Code:     PLUK     Posting Date:     25-01-2018       Source Document:     Sales Order     Shipment Date:     25-01-2018       Source No.:     1006     External Document No.:	이 Open E-Mail uk@cr 아이 Send E-Mail 이 이 이 이 이 이 이 이 이 이 이 이 이 이 이 이 이 이 이
Lines	Save PDF
Functions      Ime	Click here to create a new nor
item No. Description bin Code Quantity Qty. to Handle Qty. Handled Qty. Outstanding Unit of Measur	
1000 Bicycle 1 1 1 0 1 PCS	
	ОК

- **Open E-Mail:** This will open the e-mail in Outlook or NAV, 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)
- **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.

🚮 Edit - Sales Qu	uote - 1001 ·	The Cannon Group PLC							
HOME	ACTIONS								
View Cedit	e E-Mai	Send by Make Mak	Statistics	2 Dimensions	Customer Cor	ntact Approv	als Send Approval	Cancel Approval	OneNote
Manage	3	Process			Quote		Request App	proval	Sho
1001 · The General Customer:	Cannon	Grou Cre Ope the T The Cannon P	eates PDF and ns Outlook with emplate and the DF attached.		Requested [	Delivery Date:		~	∦* ^
Contact:		Mr. Andy Teal		~	Status:		Open		~
Due Date:		25-02-2018	~					✓ Show m	ore fields
Lines									^
💷 Insert Ext. Te	exts 🔑 Di	mensions 🖩 Line 🔻	🗲 Functions 👻	🗋 New 🧰	Find Filter	🖳 Clear Filte	r		
Туре	No.	Description		Location Code	Qua	antity Qty. to	Assemble Unit of to Order Measu	f Unit Pri r	ce Excl. ^ VAT
ltem	1000	Bicycle		BLUE		1	0 PCS		4.000,00

### 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.

🖬 Edit - Doc. Output E-Mail		– 🗆 X
HOME ACTIONS		CRONUS International Ltd. 💡
View Send Refresh Clear Go Filter to Page		
Doc. Output E-Mail		
Recipients	A **	Attachments 🔹
To: mr.andy.teal@contoso.com		🕽 Show 🛛 New 🕼 Delete
	✓ Show more fields	File Name
Subject: Order Confirmation 101016		Order Confirmation 101016.pdf
Message	•	
Dear Mr. Andy Teal, Please find your order confirmation attached to this e-mail.		
The expected shipment date is 24-01-19.		
it is always a pleasure to do business with you and we wish you a very nice day		
Best Regards		
CRONUS INTERNATIONAL LTD. 5 The Ring, W2 8HG London Phone No.: 0666-666-6666 Mail: Web:		
	Ŷ	
		ОК

### 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:

€ ● - [	CRONUS Interna	ational Ltd. 🕨 Departments 🕨 Sales & Marketing 🕨 Order Processing 🕨	
Departments         ▷ Financial Management         ▲ Sales & Marketing         Sales         Order Processing         Marketing         Inventory & Pricing         ▷ Purchase         ▷ Warehouse         ▷ Manufacturing         Jobs         Resource Planning         ▷ Service		Order Processing Lists Customers Contacts Sales Quotes Sales Orders Blanket Sales Orders Sales Return Orders Sales Invoices Sales Invoices Sales Credit Memos Approval Entries Approval Request Entries Certificates of Supply	
Human Reso ▷ Administratio	on	Tasks         Order Planning         Unhandled Posted Sales Shipments         Unhandled Posted Return Receipts         Create Recurring Sales Invoices	

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:

CRONUS Interna	tional Ltd.      Departments      Financial Management      Receivables		
Departments  Financial Management General Ledger Cash Management Cost Accounting Cash Flow Receivables Payables Fixed Assets	Receivables Lists Customers Sales Invoices Sales Credit Memos Direct Debit Collections Requests to Approve Approval Request Entries		
Inventory  Periodic Activities  Setup  Sales & Marketing  Purchase  Warehouse  Manufacturing Jobs Resource Planning  Service	Tasks         Sales Journals         Cash Receipt Journals         Unhandled Posted Sales Invoice         Unhandled Posted Cr. Memo         Unhandled Posted Service Invoices         Unhandled Posted Service Cr. Memo         Combine Shipments         Combine Return Receipts         Create Recurring Sales Invoices         History		
Choosing Departments, Financial Management, Periodic Activities, Receivables. You find Unhandled Issued Reminder and Unhandled Issued Finance Charge Memo:

<b>2</b> 11	
CRONUS Interna	ational Ltd.
-	
Departments	Receivables

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"

Receivables - Microsoft Dynamics NAV									
€ ● - [	CRONUS Interna	tional Ltd. > Departments > Financial Management > Periodic Activities >							
<b>•</b>									
Department Financial M General Lo Cash Man Cost Acco Cash Flow Receivable Payables Fixed Asse Inventory Periodic A General VAT Currence Fiscal Ve Consoli Receivable Payables Cost Acco	ts anagement edger agement ounting v es ets Activities Ledger y ear dation bles s counting	Receivables							

#### You get this page:

Edit - E-Mail/Print Statement				-	- 🗆 ×	<
HOME ACTIONS NAVI	GATE			CRONUS	International Ltd.	0
New View Edit Delete List List Manage	Card Ledger Statistics Process	Print E-Mail (Opens in Outlook) E-Mail (SMTP) :port	Show Show as as List Chart View	Show Attached	Clear Filter	
E-Mail/Print Statement •			Type to filter (F3)	No.	• ->	~
				Limit t	otals:31-01-18	
General						^
Date Filter:         01-01-1831-01-1           Print Statements:	8     Entries in period:       V     Balance (LCY) filter:       V     Balance Due (LCY) Filter:					
No. 🔒 Name	E-Mail Recipients	Automatic Print Statement Stat	Balance (LCY)	Net Change (LCY)	Balance Due (LCY)	
01445544 Progressive Home F	urnishings mr.scott.mitchell@cronuscorp.net	Manual 🗸	1.499,03	1.499,03	0,00	
10000 The Cannon Group	PLC mr.andy.teal@cronuscorp.net	Automatic 🔽	168.364,41	-123.611,99	147.811,14	
20000 Selangorian Ltd.	mr.mark.mcarthur@cronuscorp.net	Automatic 🗹	96.408,46	-115.168,63	89.078,21	
30000 John Haddock Insur	ance Co. miss.patricia.doyle@cronuscorp.net	Manual 🗸	350.611,35	7.856,48	349.615,40	

#### 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.

📶 Ed	lit - Custor	mer Statement Journa	al				
-	HOME	ACTIONS NAV	VIGATE				
X New	View	Edit List Delete	E-Mail (Opens in Outlook)	E- Mail all	Show PDF	I (SMTP) mer Card	Show Show as of Chart
New		Manage		Pro	cess		View
Cust	omer S	Statement Jour	rnal -				
Cu No	stomer	Customer Name		Туре	Start Date	End Date	E-Mail Templat
100	00	The Cannon Grou	p PLC F	Period	25-12-2017	24-01-201	8 STATEMENT
200	00	Selangorian Ltd.	F	Period	25-12-2017	24-01-2018	B TATEMENT ~

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

4		Document Output Q	ueue - Microsoft Dynamics NAV	
CRONUS International L	Ltd.      Departments     Administration	n      Application Setup      Document Output	Document Output Queue	
HOME ACTIONS				
		🏹 🇰		
Delete Start Delete Show S Dispatcher all as List	Show as Notes Links Refresh	Clear Find Filter		
Manage Process Vie	iew Show Attached	Page		
Departments Do	ocument Output Queue •			
<ul> <li>▷ Sales &amp; Marketing</li> <li>▷ Purchase</li> <li>▷ Warehouse</li> </ul>	Entry E-Mail Language No. Templat Code	UserID Date Time Record ID	Error Error message	Table No. Filter
Manufacturing				
Jobs				
Resource Planning				
Service     Human Persurger				

#### **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** 

dit - Customer Card - 10	000 · The Cannon Group PLC	:			- 0	×
HOME ACTIONS HOME ACTIONS Sales Quot Sales Invoi Sales Orde Manage N 10000 · The Canno	NAVIGATE REPORT Constraints and the second	Send Approval Request Cancel Approval Request Approvals Request Approval	Contact Ship-to Ad Bank Accounts E-Mail Reci Direct Debit Mandat Custi	CRd dress pients Chi OneNote Chi OneNote Chi OneNote Chi OneNote Chi OneNote Chi OneNote Chi OneNote Chi OneNote	DNUS Internation Refresh Clear Filter Go to Page	al Ltd. 🕜
General No.: Name: Balance (LCY): Balance Due (LCY):	10000 The Cannon Group PLC 168 168	Credit Limit (LCY): Blocked: 364,41 Total Sales: 364,41 Costs (LCY):	<ul> <li>▲</li> <li>0,00</li> <li>✓</li> <li>17.100,96</li> <li>11.762,70</li> <li>✓ Show more fields</li> </ul>	Doc. Output Mail E-Mail Recipients: Log: On E-Mail (SMTP): Template Setup: Statement Automatic statement: Send Extensest Code	E-Mail a n	atic
Address & Contact			^	Send Statement Code	ENTBAL	- 11VI

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

🚮 Edit	- E-Mail Re	cipients	- 10000 · Tł	ne Can	non Group	PLC	2									—		×
<b>▼</b> +	HOME													C	RON	IUS Interr	national l	.td. 🕜
X New	View List	Edit List	X Delete	Show as Lis	Show as Chart	5	OneNote	Note	es Links	í Re	<b>C</b> efresh	Clear Filter	Find					
New		Manage			view		200/	v Atta	cnea	_		Page	1					_
E-Mai	l Recipi	ents .	-							Т	/pe to fi	lter (F3)	Do	cument Type				×
															Filte	r: Custom	ner • 1000	0
Docu	iment Type	e 🔺	Docum Code		Recipie Type		E-Mail Type		Contact No.	*	Conta Name	ict	E-Mail		*	Do not A Docume	Attach Op ents	ben
-Mail	Template (	Group ~	BOOKKEE	PI	То		E-Mail Ad	ddr										
E-Ma	il Template	Group	SALES		То		E-Mail Ad	ddr										

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.

🖬 Document Output Customer Setup List - Microsoft Dynamics NAV								
CRONUS Intern	ational Ltd. 🔸 Departments 🕨	Administration      Applie	cation Setup	Document Output      E	ocument Output Custome	r Setup List		
<ul> <li>HOME ACTIONS</li> </ul>								
New Edit List New Manage	Update Customers Process View	s OneNote Notes Lir Show Attached	ks Refres	h Clear Find Filter Page				
Departments Financial Management Sales & Marketing	Document Output	Customer Setup L	ist •					
<ul> <li>Purchase</li> <li>Warehouse</li> </ul>	Customer No. 🔔 Co	ustomer Name	Automatic statement	Send Statement Code	First statement start date	Template On E-Mail Setup (SMTP)	Always send using Outlook	
Manufacturing	<u>10000</u> Th	e Cannon Group PLC	Manual	BAL-1M	01-01-2017	0 E-Mail		
Jobs	20000 Se	langorian Ltd.	Automatic	ENTBAL-1M	01-01-2017	0 E-Mail		
Resource Planning <ul> <li>Service</li> <li>Human Resources</li> </ul>	30000 Jo	hn Haddock Insurance Co.	Automatic	ENTBAL-1M	01-01-2017	0 E-Mail		

#### **Buttons:**

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

Edit - Update Doc. Output Cust. Setup	– 🗆 X
▼ ACTIONS	CRONUS International Ltd. 🕜
Clear Filter Page	
Options	^
Automatic statement:     Manual       Send Statement Code:     ~       First statement start date:     ~       Change Existing setup:	~
Customer Sorting: No. ▼ 2↓▼ Show results:	
× Where No. ▼ is Enter a value.	
🗙 And 🛛 Customer Posting Group 🔻 is 🔹 Enter a valu	e.
X And Country/Region Code ▼ is Enter a value.	
X And Currency Code ▼ is Enter a value. + Add Filter	
Limit totals to:	
+ Add Filter	
	OK Cancel

E-mail recipients

	ways seria asing	SOUTIOOK						
🚮 Edit - Customer Card - 10000 · T	The Cannon Group PLC					- 0		×
- HOME ACTIONS N	IAVIGATE REPORT				CRO	ONUS Internatio	nal Lto	I. 🕜
View X Manage New Do	Sales Credit Memo	Send Approval Request Cancel Approval Request Approvals Request Approval	E Contact Bank Accounts Direct Debit Mandates Custon	Ship-to Addre:	sses I ConeNote nts I Notes Links Show Attached	<ul> <li>♂ Refresh</li> <li>▼ Clear Filter</li> <li>→ Go to</li> <li>Page</li> </ul>	•	
10000 · The Cannon Gr General	roup PLC			^	Doc. Output		^	^
No.: 10000 Name: The C	Cannon Group PLC	Credit Limit (LCY): Blocked: Total Saler:		0,00	Mail E-Mail Recipients:		0	
Balance Due (LCY):	168.364,	41 Costs (LCY):	✓ Sha	11.762,70	On E-Mail (SMTP): Template Setup:	E-Mail and	Print 1	J
Address & Contact				^	Send Statement Code	ENTBA	-1M	

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:**

dit - Document Output Customer Setup List - 10000 · The Cannon Group PL	c – 🗆 X
HOME	CRONUS International Ltd. 😯
View Kiew Koese Show Attached Kefresh Clear Filter Next	5
10000 · The Cannon Group PLC	
General	^
Automatic statement:     Automatic     First statement       Send Statement Code:     ENTBAL-1M     Template Setu       On E-Mail (SN)	up: 1 ATP): E-Mail and Print v

#### **Template Setup:**

View - Doc. O	utput Customer T	emplate Setup		
▼ HOME			CRONUS	nternational 🕜
New View List	Edit List Manage	Show Show as as List Chart View	Show Attached	Clear Filter
Doc. Output	t Customer	Template Setup	E-Mail Template C	ode 🔻 🔿 🗸
E-Mail Templa	te Code	On E-Mail (SMTP)		
SALESINVOICE		<ul> <li>E-Mail and Print</li> </ul>		

#### Always Send using Outlook:

HOME								CRONUS Inte	rnational	Ltd. 🌘
✓ Edit ✓ Edit Mew ✓ Delete	OneNote Not	es Links	Refresh	Clear Filter Page	<ul> <li>→ Go to</li> <li>◆ Previous</li> <li>◆ Next</li> </ul>					
) )1121212 · S	potsmever	s Furnisł	ninas				т			
		5 T diffioi	lings				T			_
General		5 T diffici	iirigo				T		*	^ ^
General Automatic statem	ent:	Manual		~	Template Setup		T		*	• •
General Automatic statem Send Statement Co	ent: ode:	Manual		~	Template Setup On E-Mail (SM1	: [P):	Ţ	E-Mail	** · (	
General Automatic statem Send Statement Co First statement sta	ent: ode: irt date:	Manual		> > >	Template Setup On E-Mail (SM' Always send us	: [P): ing Outlook:	Ţ	E-Mail	** · (	

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

🖬 Edit - Customer Card - 10000 · The	e Cannon Group PLC					- 0		×
HOME ACTIONS NAVI	/IGATE REPORT				CRO	ONUS Internation	nal Ltd	I. 🕜
View X Manage The Cappoor Grou	Quote       Sales Credit Memo       Send Approval Request       Contact       Ship-to A         Invoice       Reminder       Cancel Approval Request       Real       E-Mail Re         Order       Approvals       Direct Debit Mandates       Direct Debit Mandates         New Document       Request Approval       Customer					<ul> <li>♂ Refresh</li> <li>▼ Clear Filter</li> <li>→ Go to</li> <li>Page</li> </ul>	•	
General	up rtc			^	Doc. Output		^	^
No.: 10000 Name: The Can	nnon Group PLC	Credit Limit (LCY): Blocked:		0,00 ~	Mail E-Mail Recipients:		0	
Balance (LCY): Balance Due (LCY):	168.364,41 168.364,41	Total Sales: Costs (LCY):		<b>17.100,96</b> 11.762,70	On E-Mail (SMTP): Template Setup:	E-Mail and	· Print 1	
Address & Contact			✓ Sho	ow more fields	Statement Automatic statement: Send Statement Code	Auton	natic 1M	

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

🖬 Edit - Document Output Customer	Setup List - 10000 · The	e Cannon Group PLC	– 🗆 🗙
▼ HOME		CRO	NUS International Ltd. 🕜
View Celit View Delete Manage Show Attact	Links Refresh	→ Go to Previous Clear Filter Page	
General			^
Automatic statement: Send Statement Code:	Automatic ~ ENTBAL-1M ~	First statement start date: Template Setup:	<b>~</b> 1
		On E-Mail (SMTP):	E-Mail and Print 🗸
Period Statement			^
Last period statement (Start Date):	~	Last period statement (End Date):	~
Balance Due Statement			^
Last balance due statem. (Start D	~	Last balance due statem. (End D	~

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.

🚮 Documen	it Output Customer	Setup List - Mici	rosoft Dynamics N	IAV							
<b>G)</b> -	CRONUS Inte	rnational Ltd. 🕨	Departments	Administration +	Application Setup	Document Out	put 🔸 Document Output Custo	mer Setup List			
- НОМЕ	E ACTIONS										
New E	Edit Xiew	Update Customers	Show Show a show a	s OneNote Notes	s Links Refr	esh Clear Find					
New Manage Process View Show Attached Page											
Departmen ▷ Financial N ▷ Sales & Ma	nts Nanagement arketing	Docun	nent Output	: Customer Set	up List 🝷						
<ul> <li>Purchase</li> <li>Warehouse</li> </ul>	2	Custo	Customer No. 🔔 Customer Name		Automati statemen	Send Statement	Code First statement start date	Template On E-Mail Setup (SMTP)	Always send using Outlook		
▷ Manufactu	iring	<u>10000</u>	TI (	e Cannon Group PLC	Manual	BAL-1M	01-01-2017	0 E-Mail			
Jobs		20000	Se	langorian Ltd.	Automatic	ENTBAL-1M	01-01-2017	0 E-Mail			
Resource P Service Human Res	lanning	30000	Jo	hn Haddock Insurance	e Co. Automatio	ENTBAL-1M	01-01-2017	0 E-Mail			

#### **Buttons:**

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

Edit - Update Doc. Output Cust. Setup	– 🗆 🗙
▼ ACTIONS	CRONUS International Ltd. 🕜
Clear Filter Page	
Options	^
Automatic statement:     Manual       Send Statement Code:     ~       First statement start date:     ~       Change Existing setup:     _	~
Customer	^
Sorting: No. ▼ Au	
X Where No. ▼ is Enter a value.	
X And Customer Posting Group ▼ is Enter a value.	
X And Country/Region Code ▼ is Enter a value.	
X And Currency Code ▼ is Enter a value.	
+ Add Filter	
Limit totals to: + Add Filter	
	OK 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.

<b>`</b>	Edit - Customer Card - 01121212 - Spotsmeyer's Furnishings – 🗖												
HOME	ACTIONS	NAVIGATE	REPORT					CI	RONUS Internation	nal Ltd	I. 🕜		
Sales Invoice	View X	Gales Jo C Apply T C E-Mail	ournal Template Recipients	Customer - Balance to Date	<ul> <li>Dimensions</li> <li>Ship-to Addresses</li> <li>Comments</li> </ul>	Ledger Entries Statistics	Image: Statistics     Microsoft       Image: State st		Clear Filter → Go to	•			
New	Manage	Pro	cess	Report	Customer	History	Send To	Show Attached	Page				
01121212	<ul> <li>Spotsmey</li> </ul>	/er's Furn	nishings										
General								Sell-to Cus	stomer Sal	^	^		
No.:	0112	1212		Co	Contact: Mr. Mike Nash			Customer N	lo.: 0112	1212			
Name:	Spot	smeyer's Furr	nishings	Se	arch Name: S	POTSMEYER'S FURNISH	IINGS	Blanket Ord	ers:	0			
Address:	612 S	South Sunset	Drive	Ba	Balance (LCY): 0,00					0			

Customer sample:

Au				Edit - E-M	ail Recipients - C	1121212	· Spot	smeyer's	Furnishings		×
- H	HOME									CRONUS International	Ltd. 🕜
New	View List	Edit List lanag	Delete	Show as List View	Notes Links	<b>P</b> Refresh	Clear Filter Page	Find			
E-Mai	l Recipie	nts	*						Type to filter (F3)	Document Type 👻 - Filter: Customer • 011212	➤
Docu	iment Type	*	Docum Code	Recipie Type	E-Mail C	Contact No.	Con	tact Name	E-Mail		
E-Ma	iltemplate Gr	roup	FINANCIAL	То	E-Mail address				finance	@customer.com	
All		¥		To	E-Mail address				sales@c	ustomer.com	
E-Ma	iltemplate		SHIPMENT	То	E-Mail address				invento	ryreceiver@customer.com	
										S	

### 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)

<u>//i</u>		Log - Microsoft E	ynamics NAV		- • ×
G 🕞 🗸 🔟 CRONUS Interna	ational Ltd.	ion + Application Setup + Document	: Output 🕨 Log	Ø	Search (Ctrl+F3)
Back to Document Output ()					CRONUS International Ltd. 🕜
Open Show Show as as List Chart	otes Links Refresh Clear Find Filter				
Departments           Financial Management           Sales & Marketing	Log -			Type to filter	(F3)   Entry No, ▼   → No filters applied
<ul> <li>Purchase</li> <li>Warehouse</li> </ul>	Entry E-Mail Languag No, Templat Code	e UserlD Date Time	Table No. Filter	Report-ID To	Cc
Manufacturing	1 SALESINV	SBH-WIN8 18-02-2015 13:43	112 No.: 103003, No. Printed: 0	206 john.had	dock.insurance.co@cron
Jobs	2 SALESINV	SBH-WIN8 18-02-2015 13:43	112 No.: 103005, No. Printed: 0	206 beef.hou	se@cronuscorp.net
Resource Planning	3 SALESINV	SBH-WIN8 18-02-2015 13:43	112 No.: 103006, No. Printed: 0	206 beef.hou	se@cronuscorp.net
Service	4 SALESINV	SBH-WIN8 18-02-2015 13:43	112 No.: 103007, No. Printed: 0	206 hotel.pfe	rdesee@cronuscorp.net
Administration	5 SALESINV	SBH-WIN8 18-02-2015 13:43	112 No.: 103008, No. Printed: 0	206 hotel.pfe	rdesee@cronuscorp.net
IT Administration	6 SALESINV	SBH-WIN8 18-02-2015 13:43	112 No.: 103009, No. Printed: 0	206 hotel.pfe	rdesee@cronuscorp.net
<ul> <li>Application Setup</li> </ul>	7 SALESINV	SBH-WIN8 18-02-2015 13:43	112 No.: 103010, No. Printed: 0	206 autohaus	.mielberg.kg@cronusco
Document Output	8 SALESINV	SBH-WIN8 18-02-2015 13:43	112 No.: 103011, No. Printed: 0	206 designst	idio.gmunden@cronusc
C1					

**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.

CRONUS Intern	ational Ltd.  ► Departments  ► Administration	Application Setup     Docume
HOME ACTIONS NA	WIGATE	
Edit View Manage	rge Copy Download Ids Template Download Template Template	Show Show as List View Show
Departments Financial Management Sales & Marketing Burkharing	Templates ×	Devent ID Devent Marrie
Warehouse	Code Document Group	Report-ID Report Name
Manufacturing	FINCHRGMEMO BOOKKEEPING	118 Finance Charge
Jobs	PACKAGETRACK SALES	
Resource Planning	PURCHORDER PURCHASE	405 Order
Service	PURCHQUOTE PURCHASE	404 Purchase - Quote
Human Resources	REMINDER SALES	117 Reminder
<ul> <li>Administration</li> <li>IT Administration</li> </ul>	RETURNORDER SALES	6631 Return Order Co
<ul> <li>Application Setup</li> </ul>	RETURNRECEIPT SALES	6646 Sales - Return Re
Document Output	SALESCRMEMO BOOKKEEPING	1307 Standard Sales
General	SALESINVOICE BOOKKEEPING	1306 Standard Sales
Users	SALESORDER SALES	1305 Standard Sales
Financial Management	SALESOUOTE SALES	1304 Standard Sales
Sales & Marketing	SERVCONTRACT SALES	5970 Service Contract
Purchase	SERVCRMEMO BOOKKEEPING	5912 Service - Credit
Warenouse     Manufacturing	SERVINVOICE BOOKKEEPING	5911 Service - Invoice
Resource Planning	SERVITEM SALES	5936 Service Item Wo
Service	SERVORDER SALES	5900 Service Order
Human Resources	SERVOLIOTE SALES	5902 Service Quote
Job Queue	SERVSHIPMENT SALES	5013 Service - Shipme
Workflow		200 Sales - Shipment
Document Approval		1216 Standard States
Notifications	STATEMENT BOUKKEEPING	1310 Standard Statem

#### **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)

🖬 Edit - E-Mail Template Card - SALI	SORDER • 1305 • Standard Sales - Order Conf.						– 🗆 X
HOME ACTIONS NAV	IGATE					CRO	NUS International Ltd. 🕜
View Delete Manage	Log Ate Ate Ate Ate Ate Ate Ate Ate	→ Go to ← Previous ear ter ▶ Next Page					
SALESORDER · 1305 · St	andard Sales - Order Conf.						
General							∦* ^
Code: Report-ID: Report Name: First Table in Report: First Table in Report Name: Template Variant Field No.: Template Variant Field Caption: Dimension Code: Merge Fields: <b>Recipients</b> Document Group: E-Mail Recipients Field: E-Mail Recipients Field: E-Mail Address Field: E-Mail Madress Field: E-Mail is mandatory: Fixed Cc Recipient(s): Fixed Bcc Recipient(s): Test Recipient:	SALESORDER         1305 ~         Standard Sales - Order Conf.         36 ~         Sales Header         ~         33         SALES         2 ~         Sell-to Customer No.         Sell-to Contact No> Contact - Email		From E-Mail From E-Mail: From E-Mail Address: From E-Mail Name: Linked To Linked to Linked to Field No.: Linked to Field Caption: Advanced Document Folder: Do Not Save to Document Folder: Log E-Mails: On E-Mail (SMTP): Engine: SMTP Server:	Fixed	P V		>
							<ul> <li>Show fewer fields</li> </ul>
E-Mail Template Lines							^
🖹 E-Mail Template 👻 🔒 Backgro	und PDF 👻 🔒 Merge PDF 👻 Request Page 👻 🎦 M	New 🎢 Find 🛛 Filter	🔨 Clear Filter				
Ena Langua Templa Code Variant	File Name From	E-Mail Address	From E-Mail Name	Show Saved Req Req	Bac Mer. PDF PDF.	Atta Ope	Attach Open Doc. File N
	Order Confirmation %1.pdf						

#### 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 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 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.

😰 🔛 🖓 🗗 🔺 🧃	►    <del>↓</del>	Invoice	e %1 - Meddelelse (HTN	ML)			×			
Filer Meddelels	e Indsæt Indstillinger	Formater tek	st Gennemse				~ ?			
Calili Sæt ind • V Udklipshol G	rri (Br • 11 • A A ▲ E E E E E Grundlæggende tekst	- ;= -   ❷ =   :≢ :≢ ⊡	Adressekartotek Kontroller navne Navne	<ul> <li>↓ Vedhæft fil</li> <li>↓ Vedhæft element ▼</li> <li>↓ Signatur ▼</li> <li>↓ Inkluder</li> </ul>	<ul> <li>Opfølgning </li> <li>Høj prioritet</li> <li>Lav prioritet</li> <li>Mærker 5</li> </ul>	<b>Zoom</b> Zoom	Start håndskrift Håndskrift			
Fra *       svend@birk-hansen.dk         Fila       This is a template, do not send. Close the e-mail when finished.         Cc       Cc         Bcc       %1 = Doc. No., %2 = Sell-to Contact, %4 = Sell-to Customer Name, %5 = Your Reference, %30 = User Name (Salesperson), %31 = User Phone No. (Salesperson), %32 = User E-Mail (Salesperson), %33 = User Job Title (Salesperson), %40 = Company Name, 2, %42 = Company Address 2, %44 = Company Address 2, %44 = Company Home No. 2, %48 = Company E-Mail, %49 = Company Home Page, %50 = Company VAT Registration No.										
Emne:	Company Phone No. 2, %48 = Co Invoice %1	mpany E-Mail,	%49 = Company Home Page,	%50 = Company VAT Regis	tration No.					
Dear %2, Please find your in It is always a please Best Regards %30 %40 %42, %44 %45 %46 %33 Mail: %32 Web: %49 CCOODU	nvoice attached to this e-mail sure to do business with you a	and we wish 	you a very nice day.							

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 email.

📊 Edit -	- E-Mai	l Template	Merge Field	I - SALESORDE	R • 1305								-		)	×
<b>•</b> F	HOME											CRON	JS Intern	ationa	l Ltd.	0
X New	Vie	w Edit t List Manage	X Delete	Show Show as List Cha	v as On art	eNote Notes	Links	<b>P</b> Refresh	Clear Filter Page	Find						
E-Mai	E-Mail Template Merge Field -									Type to filter (F3)	Number F	ilter: SAl	÷   ESORI	→ Der	~	
Nun	nber	Descrip	tion		Туре	Get Fiel From	d	Get From T	able		Get From Fie	ld			Web	<u>م</u>
		1 Doc. No			Text	Table		36 (Sales He	ader)		3 (No.)					
		2 Sell-to C	Contact		Text	Table		36 (Sales He	ader)		84 (Sell-to Co	ntact)				
		3 Version	No.		Text	Table		36 (Sales He	ader)		5043 (No. of /	Archived Versio	ns)			
		4 Sell-to C	Customer N	lame	Text	Table		36 (Sales He	ader)		79 (Sell-to Cu	stomer Name)				
		5 Your Ref	ference		Text	Table		36 (Sales He	ader)		11 (Your Refe	rence)				
		6 Shinmer	nt Date		Text	Table		36 (Sales He	ader)		21 (Shinment	Date)				

### 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 first contacts Formal Salutation Contact2FormalSalutation – The first 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.

🚮 Edit - E-Mail Recipient Templates				—		×
▼ HOME				CRONUS Inte	rnational Lt	.d. 🕜
New View Edit Delete List New Manage	Show as Chart View	Note Notes	Links Refresh	Clear Filter Page		
E-Mail Recipient Templates 🔹		Ту	vpe to filter (F3)	Table	▼ →ters applied	] •
Table 🔔 Document Type 🔺	Document Code	Recipie Type	E-Mail Type			
Customer 🗸 E-Mail Template Group	BOOKKEEPING	То	E-Mail Address	;		
Customer E-Mail Template Group	SALES	То	E-Mail Address	;		
Vendor E-Mail Template Group	PURCHASE	То	E-Mail Address	;		
					ОК	

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.

🚮 Edit - E-Mail Recipients - 10000 · The Ca	annon Group PLC			– 🗆 X
▼ HOME				CRONUS International Ltd. 🕜
New     View     Edit     Delete     Show       New     Manage	ow Show as List View Show Attached	Refresh Clear Filter Page		
E-Mail Recipients 🔹			Type to filter (F3) Document T	ype 👻 🚽 🗸
				Filter: Customer • 10000
Document Type 🔔 Docum 🔺 Code	Recipie E-Mail Contact Type Type No.	🔔 Contact Name	E-Mail	Do not Attach Open Documents
E-Mail Template Group BOOKKEEPI	To E-Mail Addr			
E-Mail Template Group SALES	To E-Mail Addr			
				ОК

# 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 <u>Doc. Output</u> <u>Setup</u>.
- 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**".

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Send Custor	mer Statem	ents •		Ту	/pe to filter (F3)	Code		▼ No filters app	→ v	
Code 🔺	Send statement if	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		
BAL-14D	Balance	14D	-5D		$\checkmark$	$\checkmark$	STATEMENT	Journal		
BAL-1M	Balance	1M	-5D				STATEMENT	Journal		
BALDUE-14D	Balance Due	14D	-5D		$\checkmark$	$\checkmark$	STATEMENT	Journal		
BALDUE-1M	Balance Due	1M	-5D		$\checkmark$	$\checkmark$	STATEMENT	Journal		
ENTBAL-14D	Entries in per	14D	-5D		$\checkmark$	$\checkmark$	STATEMENT	Journal		
ENTBAL-1M	Entries in per	1M	-5D		$\checkmark$	$\checkmark$	STATEMENT	Journal		
ENTDUE-14D	Entries in per	14D	-5D		$\checkmark$	$\checkmark$	STATEMENT	Journal		
ENTDUE-1M	Entries in per	1M	-5D		$\checkmark$	$\checkmark$	STATEMENT	Journal		
ENTRY-14D	Entries in per	14D	-5D		$\checkmark$	$\checkmark$	STATEMENT	Journal		
ENTRY-1M	Entries in per	1M	-5D		$\checkmark$	$\checkmark$	STATEMENT	Journal		
								(	OK	

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:** 

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Automatic statement: Send Statement Code: First statement start date:	Manual	~	Template Setup: On E-Mail (SMTP): Always send using C	Dutlook:	E-Mail	0	
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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

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### 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 <u>www.bullzip.com</u>)
  - bioPDF (Uses the PDF driver from <u>www.biopdf.com</u>)
  - 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)

NAVCDO2W111-00-00 - (Ru	inning)			
General				*
Database	Instance Name			~
Client Services		SOAP Port number	8865	~
SOAP Services				^
Enable SOAP Services:	$\checkmark$	Port:	8866	
Enable SSL:		SOAP Base URL:		
Max Message Size:	1024			
OData Services			8867	*

# SMTP Mail Setup

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General					** ^
SMTP Server Address:	localhost	Password:			
From E-Mail Address:	invoice@contoso.com	Use SSL:			
Authentication:	Anonymous	Port:			
User ID:		Connection Timeout (sec):			
		Max. no. of mails per minute:			
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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.

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Jobs INVOICE E-Mail Template SALESINVOICE	Sales Invoice Header: No. Printed=0 Sales Invoice	ce He		¥ 1					
Resource Planning QUEUE E-Mail Queue									
D Service									
Human Resources									
<ul> <li>Administration</li> </ul>									

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).