

Necessary Setups

Connection Setup

You need to create a **Connection Setup** of **Type File Storage Account** and enter the right **User Id** and **Password** for it to make a connection to your Azure File Storage Account.

The screenshot shows the 'Connection Setup Card' interface. At the top, there's a title 'FS' and a 'File Storage Shares List' button highlighted with a blue box. Below this, the 'General' section contains fields for 'Code' (FS), 'Type' (File Storage Account, highlighted with a red box), 'Authentication Type' (Shared Key, highlighted with a red box), 'User Id' (highlighted with a red box), and 'Password' (highlighted with a red box). The interface also includes icons for edit, share, add, and delete, along with a 'Saved' status and a 'Fewer options' link.

File Storage Share

By clicking **File Storage Shares List**, you can see the Shares that have already been created. I.e.:

The screenshot shows the 'File Storage Share' configuration page. The title is 'Azure Files · email'. The 'General' section includes fields for 'Name' (email, highlighted with a red box), 'Storage Type' (Azure Files, highlighted with a red box), 'Connection Code' (FS, highlighted with a red box), and 'Default' (toggle switch). The interface also includes icons for edit, share, add, and delete, along with a 'Saved' status and a 'Fewer options' link.

Fields on the FastTab **Azure File Share** can be ignored if **Storage Type** is set to **Azure Files**.

File Explorer

By clicking **File Explorer**, you can also make several **Folders** simply by clicking **Create Folder**. I.e., for the attachments of different Document Types:

The screenshot shows the 'File Explorer' interface. It displays a list of folders under the 'email (Azure Files)' share. The 'Create Folder' button is highlighted with a red box. The list of folders includes 'PurchaseOrders', 'SalesInvoices', 'SalesOrders', 'SalesQuotes', and 'SalesShipments'. The interface also includes icons for edit, share, add, and delete, along with a 'Saved' status and a 'Fewer options' link.

Name	Size	Last Changed
PurchaseOrders		
SalesInvoices		
SalesOrders		
SalesQuotes		
SalesShipments		

E-Mail Templates

To store the Attachments of your E-Mails based on an **E-Mail Template** in your Azure File Storage, the field **Log E-Mail** must be set to **Yes (Attachments in File Storage)**.

E-Mail Template Card

SALES_ORD · Sales Order Confirmation

Recipient Setup Activate Deactivate More options

General > SALES_ORD Sales Order Confirmation Active Sales Order (6036701) SO-SEND-961 PDF

Setup

Relations

Table ID Sales Header (36)

Recipient Table ID Customer (18)

Relation Field No. Sell-to Customer No. (2)

Extra Fields Relations (Optional)

Recipient Name Field No. Name (2)

Misc.

Default Template for Report

Log E-Mail Yes (Attachments in File Storage)

Email Account

Codeunit ID Last

This also means that you need to fill in the following fields in the FastTab **File Storage Setup**:

File Storage Setup

File Storage Share Name email

File Storage Folder SalesOrders

File Storage Type Azure Files

I.e., when sending a Sales Order Confirmation, the pdf-file of the Confirmation will now be stored in the **File Storage Share Name** and **File Storage Folder** and can always be found based on the **Name** via the **File Explorer** which can be found via the **File Storage Share Card** or simply be **Search File Explorer**.

Tell me what you want to do

File Explorer

Go to Pages and Tasks

> File Explorer

Lists

You need to select the right Type and Path to see the attachments that were stored based on sending an E-Mail to the customer for i.e., a Sales Order Confirmation:

File Explorer

Information

Share Name and Storage Type email (Azure Files)

Folder Path email > SalesOrders

Update List Upload File Download File Delete File Open Folder Parent Folder Home Folder Create Folder Delete Folder Related Fewer options

Name	Size	Last Changed
→ SO-SEND-S0001_8904_DFD88801-1CA1-4BC2-98B9-A007EC769780.pdf	167.347 KB	8/16/2024 9:54 AM

The first characters of the **Name** come from the **Report File Name** of the E-Mail Template.

E-Mail Template Card

✓ Saved

SALES_ORD · Sales Order Confirmation

Recipient Setup

Activate

Deactivate

Automate

Fewer options

General

No. SALES_ORD

Description Sales Order Confirmation

Status Active

Report

Report ID Sales Order (6036701)

Report File Name SO-SEND-%1

Report File Type PDF

E-Mail Default=Yes ☒