WHITE PAPER

TRIMIT E-MAIL 22.1

This document contains information about the TRIMIT E-Mail in TRIMIT 22.1 for Microsoft Dynamics 365 Business Central 2022, Wave 1 (W1).

Version: 22.1
Date: 13-05-2022

CONTENTS

INTRODUCTION

The **TRIMIT E-Mail** functionality has been developed to automate the process of sending out E-Mails including attachments of Reports by setting up **E-Mail Templates**, in which you are able to determine the complete content of your E-Mail related to a specific Report.
Simply printing the Reports can automatically send out the E-Mails to your Customers, Vendors, Salespersons or Users. And this is even possible in a batch job for printing.
This will be done directly via your SMTP Server, and not via your normal E-Mail Program (like i.e. Outlook).

Besides setting up the **E-Mail Template,** you also need to setup the **Email Account(s)** from which the E-Mails will be send using the **Email - SMTP Connector App** (which also needs to be published and installed).

In the **TRIMIT External Documents** (like Sales Quote, Sales Order, Sales Shipment, Sales Invoice, Sales Credit Memo, Purchase Order, Commission Settlement, Customer Statement, Reminder and Finance Charge Memo), we have implemented the option to send these documents via the **TRIMIT E-Mail** functionality to the Recipients of the Customer/Vendor/Salesperson.
We also implemented this option in the **TRIMIT Extended Sales Statistics** so statistics can be sent by using the **TRIMIT E-Mail** functionality to your users and/or salespersons and in the **Master Reports (PDM Report Set)** which is often send to the Vendor/Manufacturer.

The **TRIMIT E-Mail** functionality is also used in regards to the TRIMIT Portals:
- Sending Sales Order Confirmations based on entered Orders in the B2C Webshop, B2B Webshop and SalesAgent Portal.
- Sending E-Mail to a Customer after he has been authorized for using the B2B Webshop.

The functionality can however easily be used for customized reports by setting up the right **E-Mail Templates** and extra added **AL Code** or an **Extension** in the reports themselves.

The functionality described is the functionality as of **TRIMIT 22.1 for Business Central W1 BC20.X**.
The pictures in this White Paper are based on the demo database for **TRIMIT 22.1,** which is based on Microsoft Dynamics 365 Business Central 2022 Release Wave 1, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT E-Mail contains the following objects:

The tables	***6037700***	***trm E-Mail Template***
	6037701	***trm E-Mail Template Line***
	6037702	***trm E-Mail Template Files***
	6037703	***trm E-Mail Template Variables***
	6037704	***trm E-Mail Recipient***
	6037705	***trm E-Mail Addresses***
	6037706	***trm E-Mail Log Entry***
	6037707	***trm E-Mail Log Entry Files***
	6037708	***trm E-Mail Temporary Variables***
	6038119	***trm Portal E-Mail Queue***
The pages	***6036846***	***trm E-Mail Recipient FactBox***
	6037700	***trm E-Mail Template List***
	6037701	***trm E-Mail Template Card***
	6037702	***trm E-Mail Tmpl Text Subpage***
	6037703	***trm E-Mail Tmpl File Subpage***
	6037704	***trm E-Mail Tmpl Var. Subpage***
	6037705	***trm E-Mail Tmpl Recipient List***
	6037706	***trm E-Mail Tmpl Recipient Card***
	6037707	***trm E-Mail Template Addresses***
	6037708	***trm E-Mail Template Text Card***
	6037709	***trm E-Mail Text Editor***
	6037710	***trm E-Mail Log Entries***
	6037711	***trm E-Mail Log Card***
	6037712	***trm E-Mail Log Files***
	6037713	***trm Look Up Fields***
The report	***6037700***	***trm Delete E-Mail Log***
The codeunits	***6037700***	***trm E-Mail Handling***
	6037701	***trm E-Mail Data Container***

Besides the specific TRIMIT E-Mail objects, also specific TRIMIT Reports have been changed, so they can be sent via TRIMIT E-Mail functionality to the Customer, Vendor, Salesperson or User:

The reports	***6036650***	***trm Statement***
	6036651	***trm Reminder***
	6036652	***trm Finance Charge Memo***
	6036700	***trm Sales Quote***
	6036701	***trm Sales Order***
	6036702	***trm Sales Invoice***
	6036703	***trm Sales Credit Memo***
	6036704	***trm Sales Shipment***

6036710	***trm Commission Settlement***
6036730	***trm Purchase Order***
6036850	***trm Sales Statistics Report***
6037208	***trm PDM Report Set***

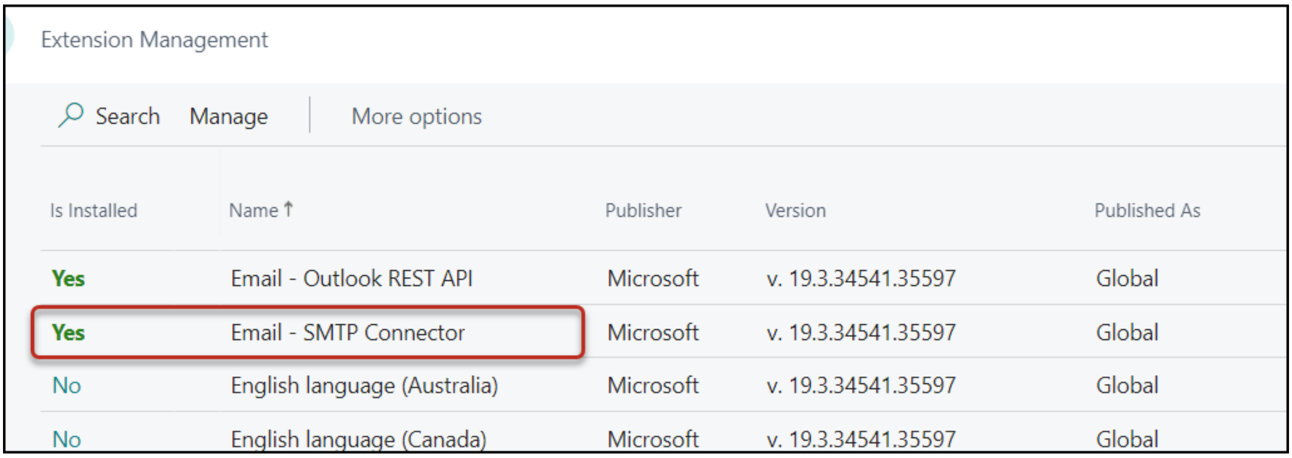
To make the text easier to read, we have used the following abbreviations:
TRIMIT for TRIMIT 22.1 for Business Central 365 2022, Wave 1.
BC20 for standard Microsoft Dynamics 365 Business Central.

PRECONDITIONS

PUBLISH/INSTALL EMAIL – SMTP CONNECTOR

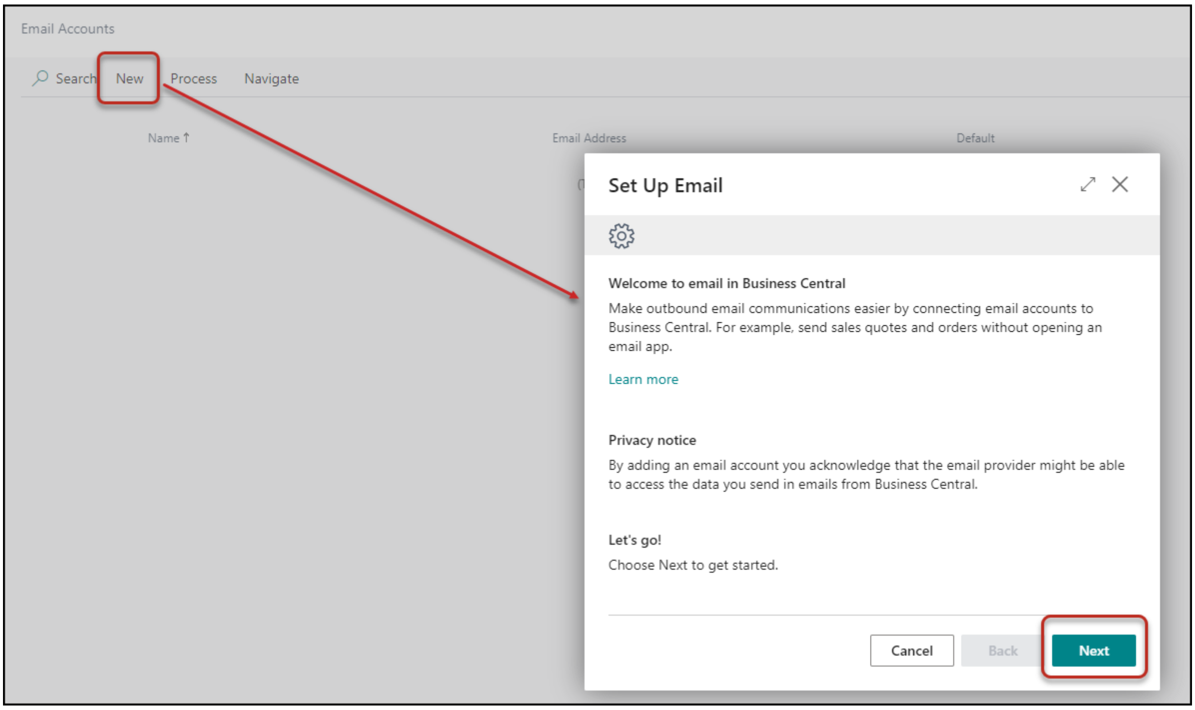
Because we send the E-Mails directly via the SMTP Server, you need to publish and install a standard app from Microsoft called:

Email – SMTP Connector

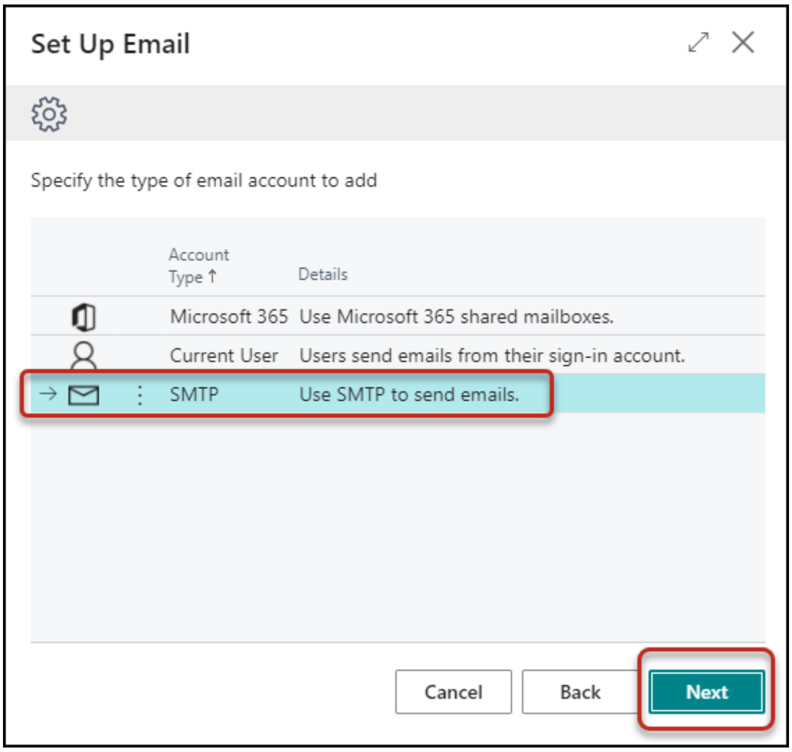


CREATE EMAIL ACCOUNT

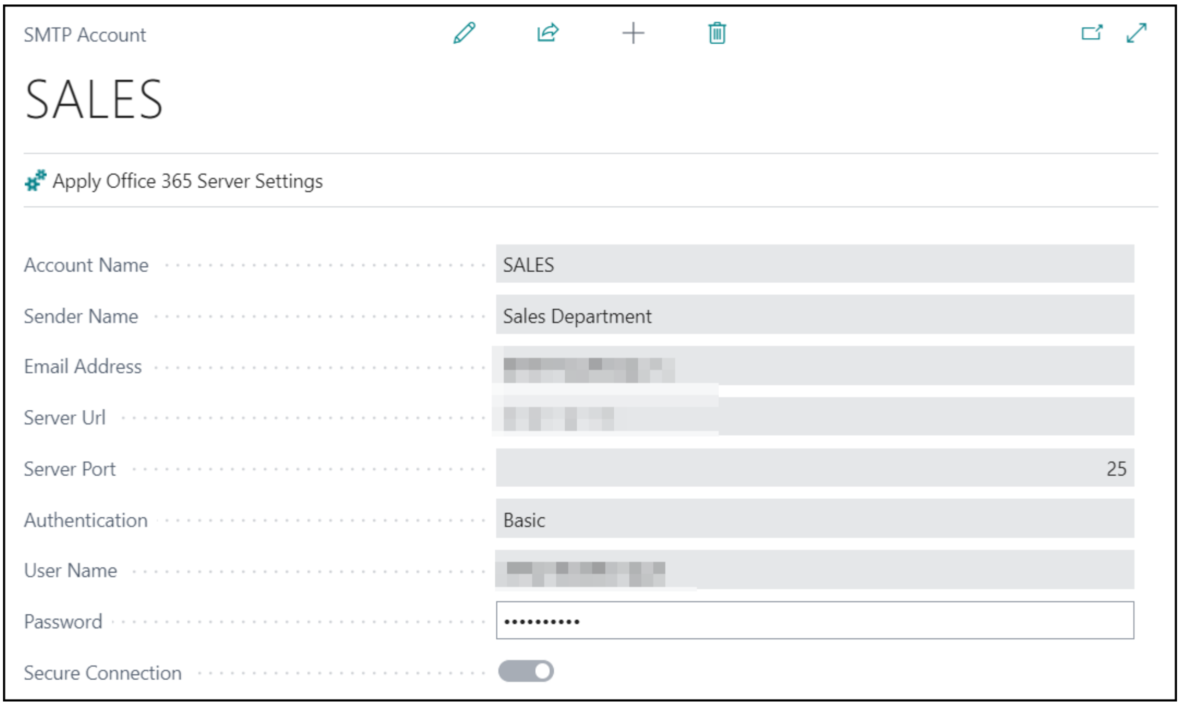
You also need to create **Email Account(s)** with **Type** *Use SMTP to send emails*.
This is the E-Mail address from which the E-Mails will be send with the TRIMIT E-Mail Template.
Find it via **Tell me** *Email Account*



Click ***New*** and press ***Next***



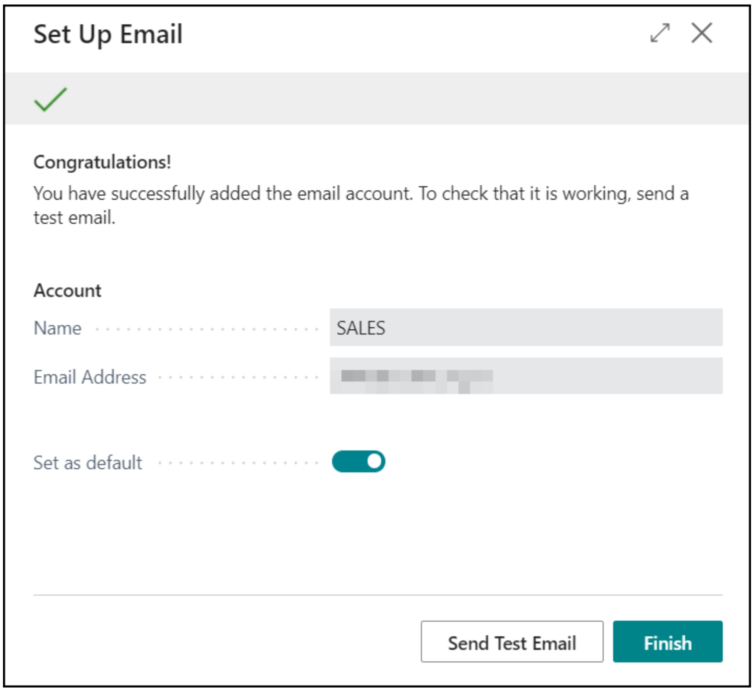
Select **Account Type** *SMTP* and click ***Next***



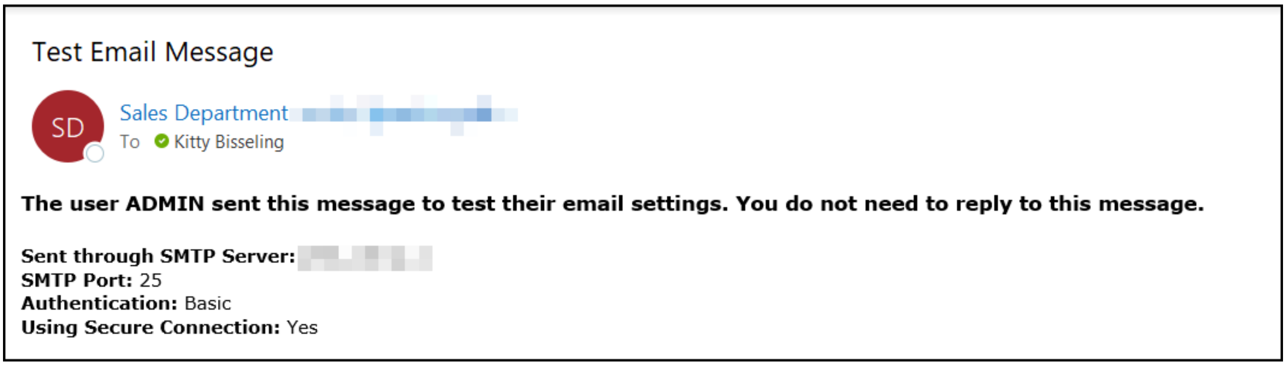
Fill in the data for the general E-Mail address that usually would send the E-Mails (like Order Confirmation or Invoice).

You can read more about setting up the Email Account in https://docs.microsoft.com/en-us/dynamics365/business-central/admin-how-setup-email

After filling the fields, click ***Next***



Now you are also able to send a **Test Email** to see if the **Setup SMTP Account** is correct.
This might look as follows:



NOTE
You might create at least 2 Email Accounts:
one for the Sales Documents (Quote, Order, Shipment, Invoice)
and one for the Purchase Order.
Keep in mind that all users sending E-Mails via these Email Accounts, needs to have the permission to do so.

E-MAIL TEMPLATE

For the layout of the E-Mail that will be send to Recipients of Customers or Vendors, you need to create the **E-Mail Template.** This can be done via **Tell me** *E-Mail Template.*

E-MAIL TEMPLATE LIST | WORK DATE: 6-9-2020

Search | + New | Manage | Recipient Setup | Activate | ! Deactivate | Open in Excel | More options

No. ↑	Description	Report ID	Report Name	Default Template for Report	E-Mail Default=Yes	Status	Recipients	Template for E-Mail Addresses
CHARGE_MEMO	Finance Charge Memo	6036652	trm Finance Charge Memo	☑	☐	Active	0	SALES_ORD
COMM	Commission Settlement	6036710	trm Commission Settlement	☑	☐	Active	2	
PDM_REPORT_SET	PDM Report Set	6037208	trm PDM Report Set	☑	☑	Active	0	PURCHASE_ORD
PURCHASE_ORD	Purchase Orders	6036730	trm Purchase - Order	☑	☑	Active	10	
REMINDER	Reminder	6036651	trm Reminder	☑	☐	Active	0	SALES_ORD
SALES_CRE	Sales Credit Memo	6036703	trm Sales Credit Memo	☑	☐	Active	0	SALES_ORD
SALES_INV	Sales Invoice	6036702	trm Sales Invoice	☑	☐	Active	0	SALES_ORD
SALES_ORD	Sales Order Confirmation	6036701	trm Sales Order	☑	☑	Active	8	
SALES_QUO	Sales Quote	6036700	trm Sales Quote	☑	☑	Active	0	SALES_ORD
SALES_SHIP	Sales Shipment	6036704	trm Sales Shipment	☑	☐	Active	8	
SALES_STAT	Sales Statistics to Users	6036850	trm Sales Statistics Report	☑	☐	Active	1	
STATEMENT	Customer Statement	6036650	trm Statement	☑	☐	Active	0	SALES_ORD

For every report (**Report ID**) that you want to send to a Recipient of a Customer, Vendor, Salesperson or User you need to create a specific **E-Mail Template**.

If you would create several **E-Mail Templates** for the same report, the system will automatically choose the **E-Mail Template** with a checkmark in **Default Template for Report.**
If there is no **E-Mail Template** with a checkmark for a specific **Report ID**, the system will automatically choose the first **E-Mail Template** for the report.
This can however be changed, by using extra **AL Code** in a customized report in which you can easily set the **E-Mail Template** that needs to be used**.** I.e. when Template you want to use is called *S_ORDER*:

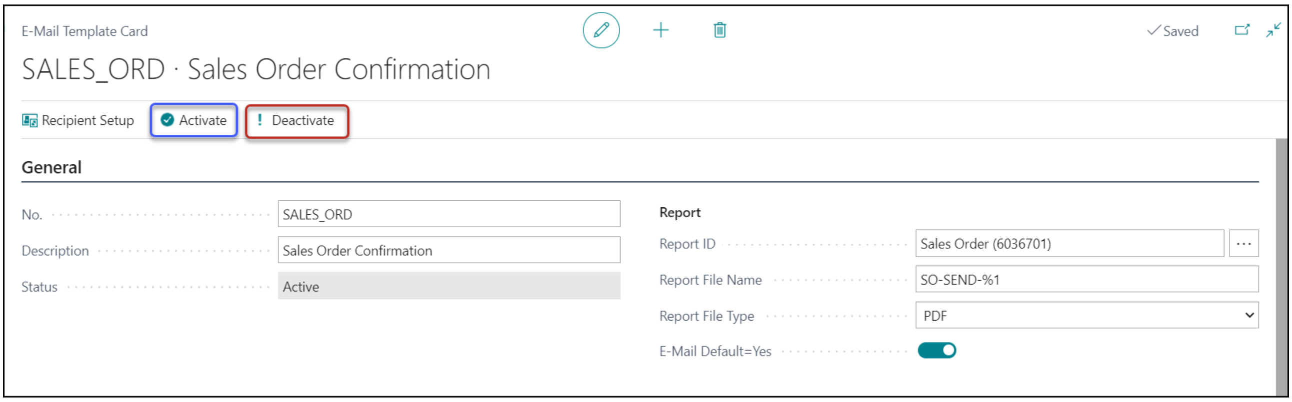
AL SalesOrder.Report.al ● Report 6036701 AL Page

TRIMIT Development AS_TRIMIT_21.2.4037.3515_W1 > src > src > AL SalesOrder.Report.al

```
                if SplitAssortmentManually then
                    ReportSettings."Split Assortment" := SplitAssortment;

                UpdateNoPrinted := true;
                if SendMail and
                   not Mail.IsSlaveReport
                then begin
                    if NumberOfMails = 0 then
                        NumberOfMails := "sales header".count;
                    ActualMailNumber := ActualMailNumber + 1;

                    MailRecRef.GetTable("Sales Header");
                    Mail.CallClearAll;

                    //-> Option to specify specific E-Mail Template
                    Mail.Set_Template('S_ORDER');
                    //<- Option to specify specific E-Mail Template

                    if UserSysParam.PortalInstalled then begin
                        PortalEMailAddress := PortalsMailHandler.GetPortalConfirmationRecipient("Sales Header");
                        if PortalEMailAddress <> '' then
                            Mail.Add_Recipient(PortalEMailAddress, 0, true);
```

If no **E-Mail Template** with **Status** *Active* has been created for a report, it will simply be sent with the standard BC20 options: Print, E-Mail according to standard BC20 E-Mail Functionality, saved as file, etc.

FASTTAB GENERAL



DESCRIPTION OF THE FIELDS:

NO.

This is the unique **No.** for the E-Mail Template

DESCRIPTION

You can enter a **Description** for the E-Mail Template

STATUS

The **Status** will change automatically when clicking ***Activate*** or ***Deactivate***.
You can't change this field manually.

REPORT ID

In this field you need to enter the **Report ID** Number of the Report you want to send as an attachment in the E-Mail. After entering/choosing the Report Number, the system will automatically show the Caption of the Name of the Report and the Report Number. But you only need to enter the Number of the Report.
I.e. entering *6036701* will show *Sales Order (6036701)*.

> **NOTE**
> If the **Report ID** is not mentioned under Components the report needs to be customized.

REPORT FILE NAME

This is the name for the pdf-file (or other type of file based on **Report File Type**) that will be created for the attachment of this specific **Report ID**.
The *%1* is related to the **Variable** that you can define in the FastTab ***Variables*.**

> **NOTE**
> The **Report File Name** for **Report ID** *6036208 PDM Report Set* will have **no** influence on the actual name of the attachment. This will always have the name of the first Master for which you want to send the PDM Master Report Set as an attachment in an E-Mail.

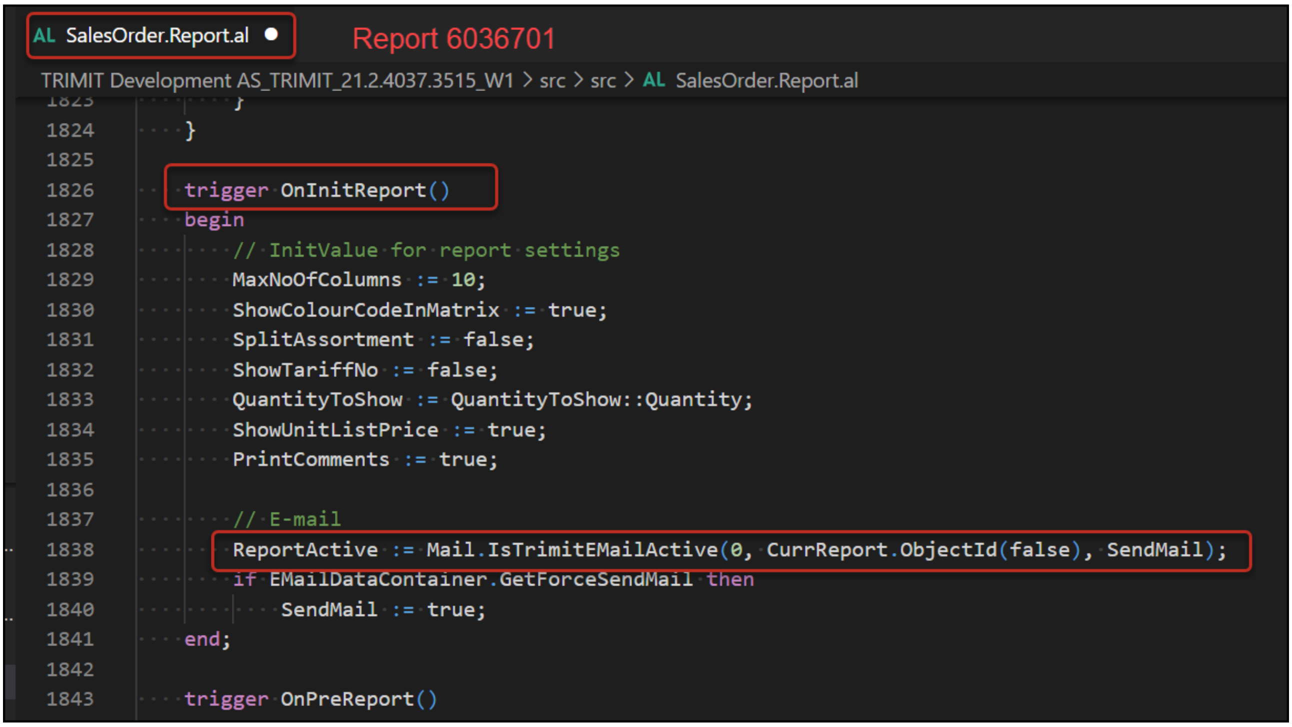
REPORT FILE TYPE

You can choose the **File Type** for the attachment of the document you want to send.
You can choose between the following four options: *Excel, Pdf, Word* or *XML*.

E-MAIL DEFAULT=YES

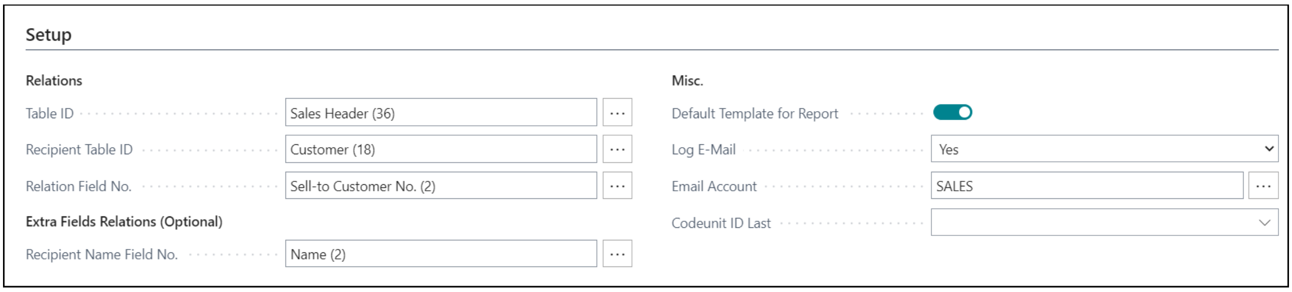
A checkmark in this field will set by default a checkmark in the Option Variable for **Send E-Mail** (in the below picture it is called **SendMail**) in a report.

This field will however only be effective if you also have the following line in the AL Code of the **OnInit Report()** of your report where the Variable **SendMail** is the field that will be used in the Request page of the report.



This already has been done for the reports mentioned in the Components

FASTTAB SETUP



In this FastTab, you need to connect the right Tables based on the chosen **Report ID.**

	Report ID	Table ID	Recipient Table ID	Relation Field No	Recipient Name Field No.
Statement	6036650	18	18	1	2
Reminder	6036651	297	18	2	2
Finance Charge Memo	6036652	304	18	2	2
Posted Sales Invoice	6036702	112	18	4	2
Posted Sales Shipment	6036704	110	18	2	2
Posted Sales Credit Memo	6036703	114	18	2	2

Sales Quote	6036700	36	18	2	2
Sales Order	6036701	36	18	2	2
Purchase Order	6036720	38	23	2	2
Commission Statement	6036710	23	13	1	2
PDM Master Report Set	6037208	6037103	23	442	2
Sales Statistics	6036850	91	91	1	10
B2B Authorization	6038101	18	18	1	2

If you have customized Reports for the same purpose, the Tables/Fields mentioned will be the same.

DESCRIPTION OF THE FIELDS:

TABLE ID

The main Table for the **Report ID**.
After entering/choosing the Table Number, the system will automatically show the Caption of the Name of the Table and the Table Number. But you only need to enter the Number of the Table.
I.e. entering *36* will show *Sales Header (36)*

RECIPIENT TABLE ID

This is the Table that represents the Recipient of your **Table ID.**
After entering/choosing the Table Number, the system will automatically show the Caption of the Name of the Table and the Table Number. But you only need to enter the Number of the Table.
I.e. entering *18* will show *Customer (18)*

Examples for the **Recipient Table ID**: Table *18 Customer* for the *Posted Sales Invoice, 23 Vendor* for the *Purchase Order or 13 Salesperson/Purchaser* for the *Commission Statement*.
This is also the Table that is used as Main Record for the **Extra Report ID** in the FastTab ***Extra Report (Recipient).***

RELATION FIELD NO.

This is the Field No. in the **Table ID** for the **Recipient Table ID.**
After entering/choosing the Field Number, the system will automatically show the Caption of the Name of the Field and the Field Number. But you only need to enter the Number of the Table.
I.e. entering *2* will show *Sell-to Customer No. (2)*

Examples: The *Bill-to Customer* is Field *4* in the Table *112 Sales Invoice Header*
The *Vendor* is Field *442* in the Table *6037103 Master*

You are only able to choose fields from the **Table ID.**

RECIPIENT NAME FIELD NO.

This is the Field No. in the **Recipient Table ID** that will give you the Name of the Recipient.
After entering/choosing the Field Number, the system will automatically show the Caption of the Name of the Field and the Field Number. But you only need to enter the Number of the Table.
I.e. entering *2* will show *Name (2)*

You are only able to choose fields from the **Recipient Table ID**.

DEFAULT TEMPLATE FOR REPORT

This Field determines if the current Template is the Default Template for your **Report ID** mentioned on the FastTab ***General*.**

If you would create several **E-Mail Templates** for the same report, the system will automatically choose the **E-Mail Template** with a checkmark in **Default Template for Report.**

If there is no **E-Mail Template** with a checkmark, the system will automatically choose the first **E-Mail Template** for the report.
This can however be changed, by using a customized report with specific **AL Code** in the actual report in which you can easily set the **E-Mail Template** that needs to be used**.** I.e.:

AL SalesOrder.Report.al ● Report 6036701 AL Page
TRIMIT Development AS_TRIMIT_21.2.4037.3515_W1 > src > src > AL SalesOrder.Report.al

```
if SplitAssortmentManually then
    ReportSettings."Split Assortment" := SplitAssortment;

UpdateNoPrinted := true;
if SendMail and
   not Mail.IsSlaveReport
then begin
    if NumberOfMails = 0 then
        NumberOfMails := "sales header".count;
    ActualMailNumber := ActualMailNumber + 1;

    MailRecRef.GetTable("Sales Header");
    Mail.CallClearAll;

    //-> Option to specify specific E-Mail Template
    Mail.Set_Template('S_ORDER');
    //<- Option to specify specific E-Mail Template

    if UserSysParam.PortalInstalled then begin
        PortalEMailAddress := PortalsMailHandler.GetPortalConfirmationRecipient("Sales Header");
        if PortalEMailAddress <> '' then
            Mail.Add_Recipient(PortalEMailAddress, 0, true);
```

LOG E-MAIL

With this Field, you can determine if every created (TRIMIT) E-Mail (even if it is not send) should be logged in the [E-Mail Log Entries](#).
You can choose between the following three options:

Yes	A created E-Mail will be logged in the E-Mail Log Entries including the attachments.
Yes (without Attachments)l	A created E-Mail will be logged in the E-Mail Log Entries, but the attachments will not be stored in the Log Entries as well.
No	A created E-Mail will not be logged in the E-Mail Log Entries

EMAIL ACCOUNT

You need to select the right Email Account via …. It is not possible to enter the name directly.
This will be the Email Account from which the E-Mails will be send.

CODEUNIT ID LAST

In this Field you can enter a number of a Codeunit that needs to be executed after the whole E-Mail has been created.

FASTTAB VARIABLES

Variables | Manage

Code ↑	Text Replace	Type	Table ID / Value	Field No. / Value	Related Table ID	Related Table Field No.	Codeunit ID Last
1	%1 Or #1#	Table	Sales Header (36)	**No. (3)**			
2	%2 Or #2#	Table	Sales Header (36)	**Bill-to Customer No. (4)**			
3	%3 Or #3#	System	**WORKDATE**				
4	%4 Or #4#	Table	User (2000000120)	**Full Name (3)**			
5	%5 Or #5#	Table	User (2000000120)	**Contact Email (14)**			
6	%6 Or #6#	Table Relation	Sales Header (36)	Salesperson Code (43)	Salesperson/Purchaser (13)	**Name (2)**	
7	%7 Or #7#	Table	Customer (18)	**Email (102)**			
8	%8 Or #8#	Table	Company Information (79)	**Picture (29)**			

In this FastTab, you can define the Variables that you want to use in the **Subject** and **Body** of your E-Mail, but also in the **Archive E-Mail (Bcc), Report File Name, Extra Report File Name** and in the **Recipients** of the Template.

DESCRIPTION OF THE FIELDS:

CODE

Unique code for this Variable with a maximum length of *10* digits.
I.e. *1* in that case you use can use *%1* or *#1#* in your E-Mail Template, or *NAME* in that case you can use *#NAME#* in your E-Mail Template.

TEXT REPLACE

The system will determine automatically – based on the length of the **Code** – how you can use this **Code** in your E-Mail Template.
I.e. if the **Code** is *1* you can use it as *%1* or *#1#.* If the **Code is** *NAME,* you can only use it as *#NAME#*.

Code ↑	Text Replace
1	%1 Or #1#
2	%2 Or #2#
3	%3 Or #3#
4	%4 Or #4#
5	%5 Or #5#
50	#50#
6	%6 Or #6#
7	%7 Or #7#
8	%8 Or #8#
A	%A Or #A#
NAME	#NAME#
NO	#NO#

TYPE

The **Type** determines which Type of Variable it is.

You can choose between four different options:

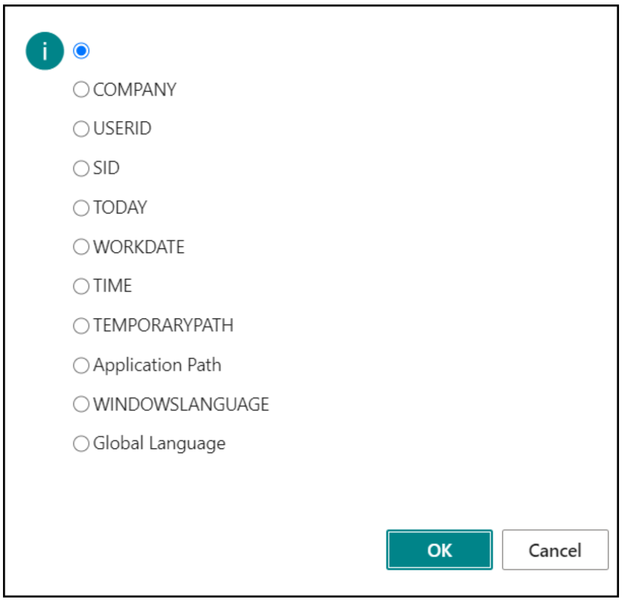
Table	You want to choose a Field from one of the following Tables: **Table ID, Recipients ID**, **Company Information** (79), **User Setup** (91), **E-Mail Template** (6037700), **E-Mail Recipient** (6037704) or **User** (20000000120)
Manual	You can enter a fixed value for this Variable in the field **Field ID / Value** that you want to add to your E-Mail. In that case the **Table ID / Value** needs to have an option <> *Blanc*. If it is *Blanc, Manual* can be set by customized **C/AL Code** in the Report or by **Codeunit Call** and not in this FastTab. You do not need to create the Variable in this FastTab to address from in the C/AL Code. If not defined, it will still be set and can be used, but sometimes it's good to create those for future maintenance. In that case, we can only advise to enter the **Description** to describe the **Manual** Variable that you will use in the **C/AL Code**.
System	You want to choose one of the **System Variables.**
Table Relation	You want to choose a Field from a Related Table based on a Field in one of the following Tables: **Table ID, Recipients ID**, **Company Information** (79), **User Setup** (91), **E-Mail Template** (6037700), **E-Mail Recipient** (6037704) or **User** (20000000120) With the option *Table Relation,* the possibilities are endless to get information of related Tables into your E-Mail.

TABLE ID/VALUE

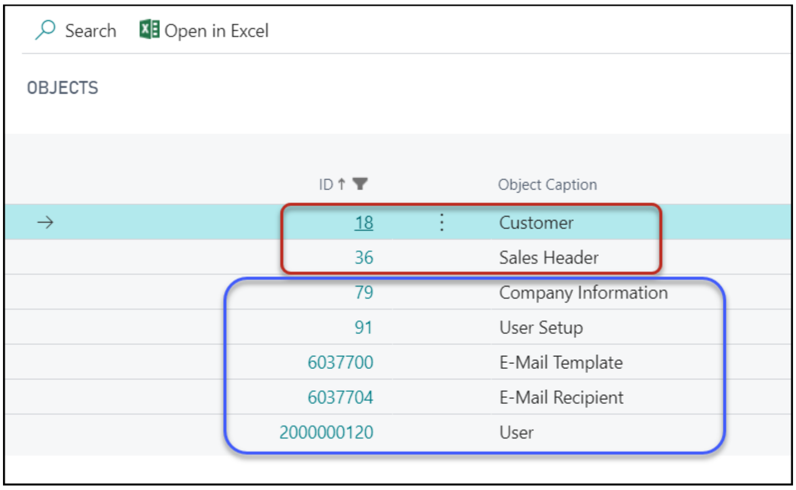
The content of **Table ID/Value** depends on the chosen content of **Type**.

Table	Select a **Table Number** (**Table ID, Recipient Table ID, Company Information** (79), **User Setup** (91), **E-Mail Template** (6037700), **E-Mail Recipient** (6037704) or **User** (20000000120)
Manual	You can choose which Type of Value the fixed value can be *Boolean, Code, Text, Decimal, Integer, Date* or *Time***.** If you leave this option *Blanc,* it means that you only want to use this Variable in your own C/AL Code**.**
System	Select one of the **System Variables**.
Table Relation	Select a **Table Number** (**Table ID, Recipient Table ID, Company Information** (79), **User Setup** (91), **E-Mail Template** (6037700), **E-Mail Recipient** (6037704) or **User** (20000000120)

- Possible **System Variables** are the following (Press **Look up value** to see the list):



- After you selected a **Table ID Number** (for **Type** is *Tables* or *Table Relations*), the system will automatically fill this field with the Caption of the Name of this Table and the Table Number. But you only need to enter the Table Number.
  I.e. if you enter *36* it will show *Sales Header (36)*
  For the **Sales Order Confirmation** report, you can choose i.e. the following Tables:


Search Open in Excel

OBJECTS

ID ↑	Object Caption
18	Customer
36	Sales Header
79	Company Information
91	User Setup
6037700	E-Mail Template
6037704	E-Mail Recipient
2000000120	User

18 Customer was filled in the ***Recipient Table ID*** on the FastTab ***Setup***
36 Sales Header was filled in the ***Table ID*** on the FastTab ***Setup***
The other five Tables *79, 91, 6037700, 6037704* and *2000000120* can be chosen in any E-Mail Template.

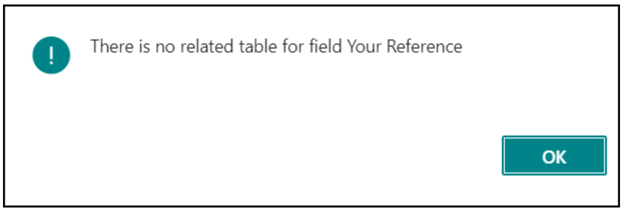
FIELD NO.

If **Type** is *Table* or *Table Relations,* and you have entered the **Table ID/Value**, you can select a **Field No.** of this **Table ID/Value.**

After you selected a **Field No.** the system will automatically fill this field with the Caption of the Name of the Field and the Field Number. But you only need to enter the Field Number.

I.e. If you enter **Field No.** *3* of the **Table ID/Value** *Sales Header (36)* it will show *No. (3)*

If you have chosen **Type** *Table Relations,* the **Field No.** you enter must have a Related Table connected; otherwise, you will get an error message. I.e.:



RELATED TABLE ID

This field is only applicable for **Type** *Table Relation*.
This field will automatically be filled with the Related Table ID and Name of the Related Table based on the **Field No.** of the **Table ID/Value**.
I.e. if you choose the **Field No.** *43* of the **Table ID/Value** *Sales Header (36)* the system knows there is a Related Table *Salesperson/Purchaser (13)* related to that field **Salesperson Code** in the Sales Header.

RELATED TABLE FIELD NO.

This field is only applicable for **Type** *Table Relation*.
You can select a **Field No.** of the **Related Table ID.**

After you selected a **Related Table Field No.** the system will automatically fill this field with the Caption of the Name of this Field and the Field Number. But you only need to enter the Field Number.

I.e. if you enter **Related Table Field No.** *2* of the **Related Table ID** *Salesperson/Purchaser (13)* it will show *Name (2)*

CODEUNIT ID LAST

You can enter a **Codeunit** that should be executed after the system has determined the variable for the E-Mail.

DESCRIPTION

You can enter a **Description** for this Variable.
This field is not by default shown; but you can easily add it.
Especially for the **Variable** = *Manual* the **Description** can explain which Manual Variable might have been added to the C/AL Code or by using a Codeunit Call to the Report.

NOTE
Description is not by default visible. You need to add it via “Personalize”.

After you have entered all the necessary fields of the **Variables** the actual content that will be added to your text or field when using this **Variable** will be shown **bold**.

Variables | Manage

Code ↑	Text Replace	Type	Table ID / Value	Field No. / Value	Related Table ID	Related Table Field No.	Codeunit ID Last
1	%1 Or #1#	Table	Sales Header (36)	**No. (3)**			
2	%2 Or #2#	Table	Sales Header (36)	**Bill-to Customer No. (4)**			
3	%3 Or #3#	System	**WORKDATE**				
4	%4 Or #4#	Table	User (2000000120)	**Full Name (3)**			
5	%5 Or #5#	Table	User (2000000120)	**Contact Email (14)**			
6	%6 Or #6#	Table Relation	Sales Header (36)	Salesperson Code (43)	Salesperson/Purchaser (13)	**Name (2)**	
7	%7 Or #7#	Table	Customer (18)	**Email (102)**			
8	%8 Or #8#	Table	Company Information (79)	**Picture (29)**			

I.e.:
Variable *1* is showing the Number (**Field No.**) of the Sales Order.
Variable *6* is showing the Name (**Related Table Field No.**) of the Salesperson of the Sales Order.

FASTTAB ADDRESSES

Addresses

Archive E-Mail (Bcc)	sales@cronuscorp.net	Template for E-Mail Addresses	
Recipients	8		

DESCRIPTION OF THE FIELDS:

ARCHIVE E-MAIL (BCC)

You can enter an E-Mail Address to which the created E-Mail should be send as the Bcc of the E-Mail as well. Usually this could be the Sales Manager or Customer Service.
You can also use a **Variable** to fill this field.
You are also able to enter two or more E-Mail Addresses just as you are able in a normal E-Mail.
I.e. sales@cronuscorp.net;finance@cronuscorp.net

NOTE
Because the E-Mail will be sent via the SMTP Server, it will not automatically get in the "Send Post" Folder in the E-Mail Program (i.e. Outlook) from the person who sends the E-Mail.

RECIPIENTS

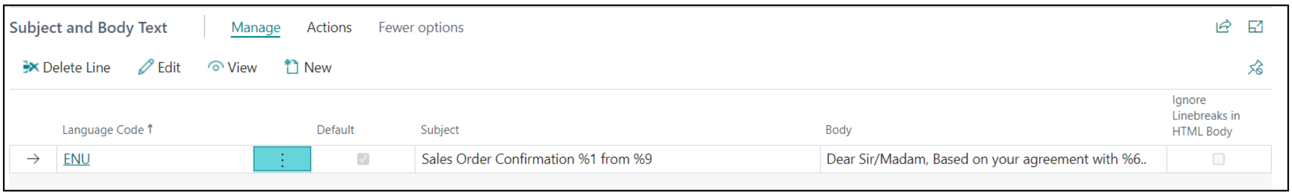
This number will automatically be updated based on the number of Recipients you have connected to this E-Mail Template via *Process, **Recipient Setup***. See Recipient Setup.
If you click on the Assist-Button behind this fields, the page **E-Mail Template Recipients List** will open in which you can see/maintain the Recipients.

TEMPLATE FOR MAIL ADDRESSES

If the Recipients of this E-Mail Template are the same as for another created E-Mail Template, you don't have to enter the individual Recipients again. You can simply enter the **E-Mail Template No.** that already has the right Recipients connected.
I.e. we assume that the Recipients of the **Posted Sales Invoices** are the same as for the Sales Order Confirmations. Therefore, the **Template for Mail Addresses** for the Template for the Posted Sales Invoices can be filled with *SALES_ORD* (the default Template for the Sales Order Confirmations).

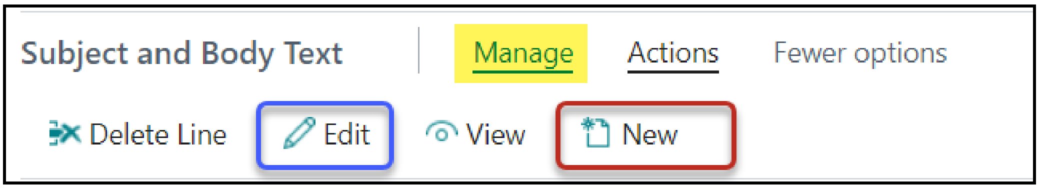
NOTE
You can only fill the **Template for Mail Addresses** after you have filled the fields in the FastTab ***Setup***.

FASTTAB SUBJECT AND BODY TEXT

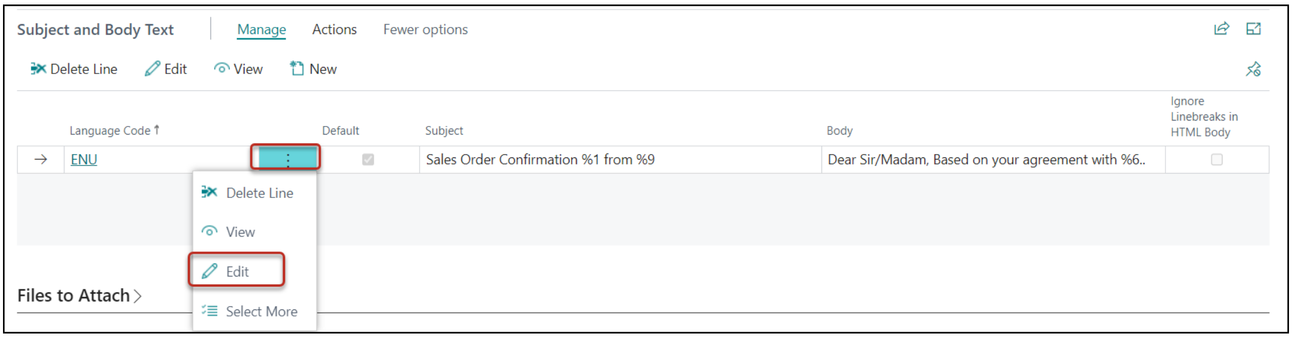


In this FastTab you can create the layouts for your E-Mails related to a specific **Language Code** (that will be compared with the Language Code in the actual document – i.e. in the Posted Sales Invoice Header).
If no **Subject and Body Text** has been entered for this Language Code, the line with a checkmark in **Default** will be applicable.

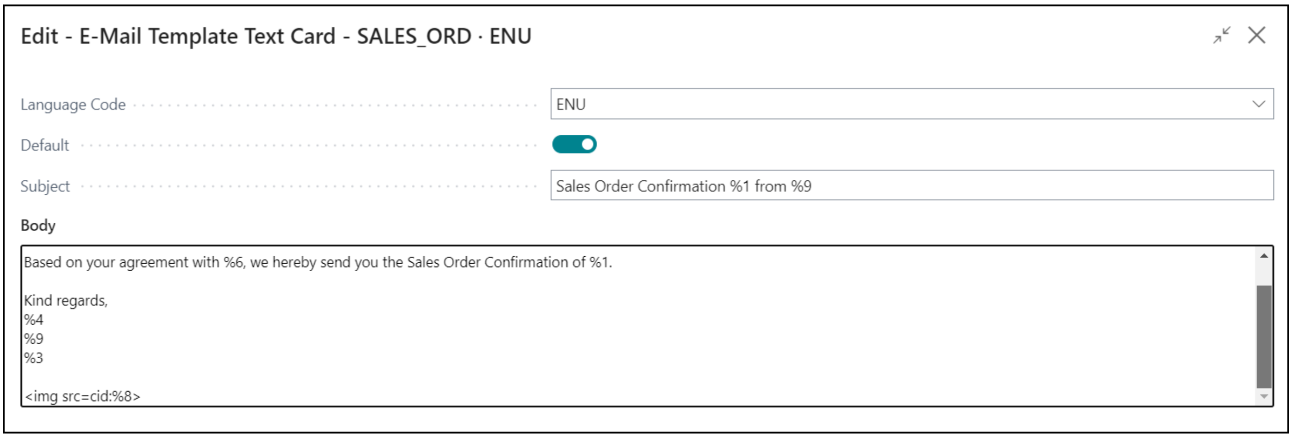
You can create a new layout by click ***Manage***, click ***New*** in the Line Actions.



You can change an existing layout click ***Manage,*** click ***Edit*** or via the ***Show more options*** on the Line.



CREATING E-MAIL SUBJECT AND BODY MANUALLY



In this example, we have a **Body** with the following text:

Dear Sir/Madam,

Based on your agreement with %6, we hereby send you the Sales Order Confirmation of %1.

Kind regards,
%4
%9
%3

<img src=cid:%8>

In the **Subject** and **Body** of the layout of the E-Mail, you can use references to Variables you define in the FastTab ***Variables*** with a percentage-sign (%) in front of the **Code** of your Variable in case the **Code** only exist out of 1 digit.
If the **Code** consists of more than 1 digit (but also with 1 digit), it needs to be placed between hashtags (#). I.e. Variable *1* is the number of the Sales Invoice Header. Then with *%1* or *#1#* you will see the actual number of the Sales Invoice Header in your E-Mail. See ***FastTab Variables*** for more details.

You are also able to 'import' a picture: i.e. a picture of your normal signature under an E-Mail or your company logo.

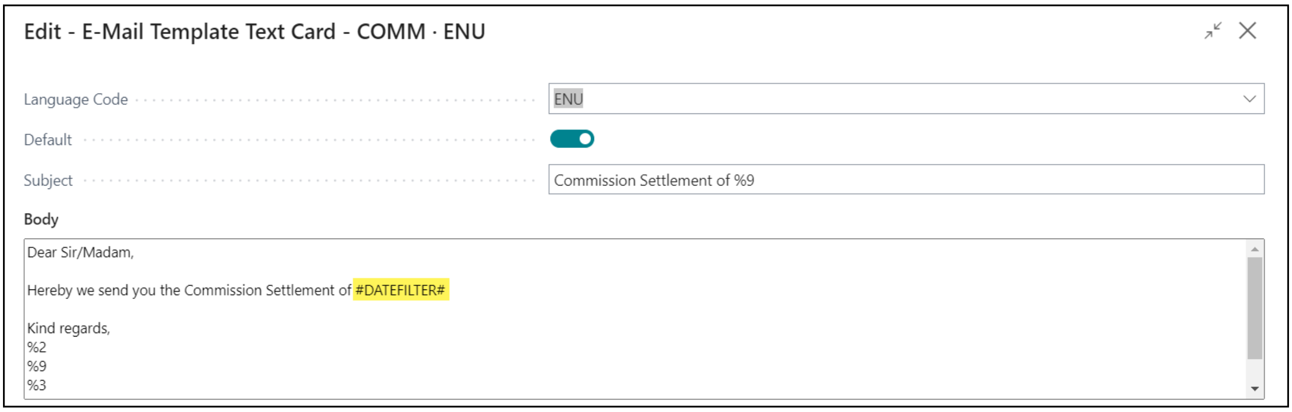
You can also use the names of Variables that you might have defined in your (customized) Report. Keep in mind that the length of the Variables has a maximum: *10* digits.
I.e. for the Commission Settlement you want to show the Date Filter that you used to create the Commission Settlement report. In the actual report ***6036710 Commission Settlement*** AL Code it is mentioned:

AL CommissionSettlement.Report.al X Report 6036710 AL Page Desig

TRIMIT Development AS_TRIMIT_21.2.4037.3515_W1 > src > src > AL CommissionSettlement.Report.al

```
            }

            trigger OnAfterGetRecord()
            begin
                if not SalespersonPurchaser.Get(Vendor."No.") then
                    CurrReport.Skip;

                if SendMail and
                   not Mail.IsSlaveReport
                then begin
                    if NumberOfMails = 0 then
                        NumberOfMails := Vendor.count;
                    ActualMailNumber := ActualMailNumber + 1;

                    MailRecRef.GetTable(Vendor);
                    Mail.CallClearAll;
                    Mail.CallCreateVariables(MailRecRef, "Language Code", CurrReport.ObjectId(false), CurrReport.Pre
                    Mail.ParamText_Set('DATEFILTER', ValueEntryFilter.GetFilter("Posting Date"));
                    Mail.ParamBoolean_Set('SPECIFICER', SpecificPerInv);
                    Mail.ParamBoolean_Set('SHOWCUST', ShowCustomer);
                    Mail.ParamCode_Set('PRGRP', CustPriceGrp.Code);
                    Mail.ParamInteger_Set('BASIS', BasisOfCalculation);
                    Mail.ParamInteger_Set('CALCONLY', CalculateOnly);
                    if Mail.CallCreateMail(true) then begin
                        if ActualMailNumber < NumberOfMails then
                            CurrReport.Skip
                        else
                            CurrReport.quit;
                    end;
                end;
```

So, in the layout of your E-Mail template, you can use *#DATEFILTER#* to show the Date Filter of the Commission Settlement.



The possibilities for creating your own layout for an E-Mail are endless – if you know how to develop in **AL Code,** and you can use the standard HTML Tags as well.

To include a picture that represents your normal Signature under an E-Mail, you could add <img src=cid:*PICTURENAME*>
The *PICTURENAME* should then also be connected under the FastTab ***Files to Attach*** and should be the same as the **Attachment Name**. It can however also be related to a **Variable** that has been defined on the FastTab ***Variables***. In that case, it might look like <img src=cid:%8>

NOTE
Don't use **Variables** that are **Variables** themselves. I.e. if **Variable** *%2* might be the field **Sender Name** but the field **Sender Name** is filled with *%4* then you will see *%4* in the E-Mail and not the content of the Variable *%4*.
So, make sure that your Variable is not a Variable itself.

NOTE
You can add the usual HTML Tags for HTML-Files as well in the **Subject** and **Body** of your E-Mail.
I.e. if you want to add a link to a specific website:
LinkedIn
This will show the text **LinkedIn** with a link to the website https://www.trimit.com/link/linkedin
- Specify the **target** in the ****
- Then add the **text** that should work as the link
- Finally add an **** tag to indicate where the link ends

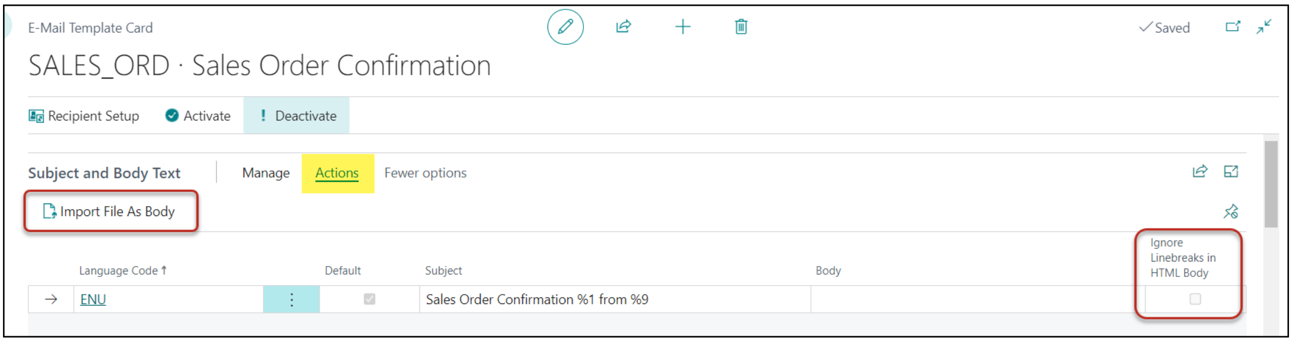
HTML TAGS

Some other examples of HTML Tags you can use in the **Subject** and **Body** of your E-Mail:

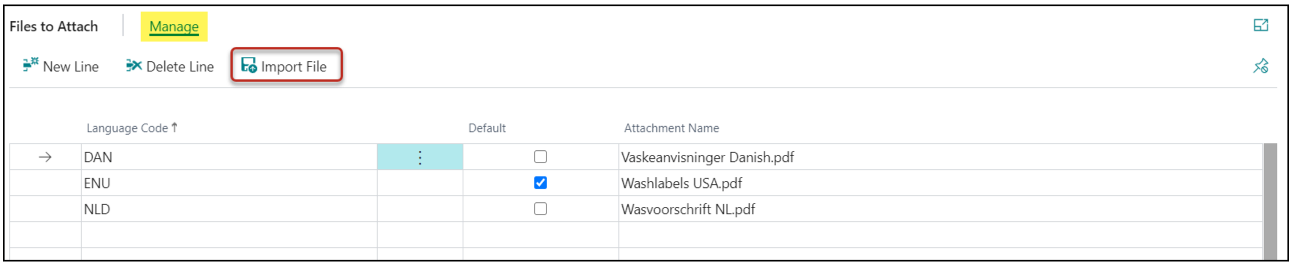
	Bold Text	An example of **Bold Text**
<big>	<big>Big Text</big>	An example of Big Text
<center>	<center>Center Text</center>	An example of Center Text
	Emphasized Text	An example of *Emphasized Text*
<i>	<i>Italic Text</i>	An example of *Italic Text*
<small>	Small Text	An example of Small Text
	Strong Text	An example of **Strong Text**
<sub>	_{Subscript Text}	An example of Subscript Text
<sup>	^{Superscript Text}	An example of Superscript Text
<del> <s> <strike>	~~Delete Text~~ <s>Strike Text</s> <strike>Strike Text</strike>	An example of ~~Delete Text~~ An example of ~~Strike Text~~ An example of ~~Strike Text~~
<u>	<u>Underline Text</u>	An example of Underline Text
<tt>	<tt>Teletype Text</tt>	An example of `Teletype Text`
<blockquote>	<blockquote>Long Quotation</blockquote> <q>Short Quotation Text</q>	An example of „Long Quotation Text" An example of „Short Quotation Text"

CREATING E-MAIL BODY BY IMPORTING FILE

Besides creating the E-Mail Body manually as shown before, you are also able to import a File for the Body by clicking ***Actions, Import File As Body***. This can be a TXT-File or a HTML-File.
This File can also be a File with lots of HTML Tags in it.
In that case, you can also set the **Ignore Line Breaks in HTML Body**.



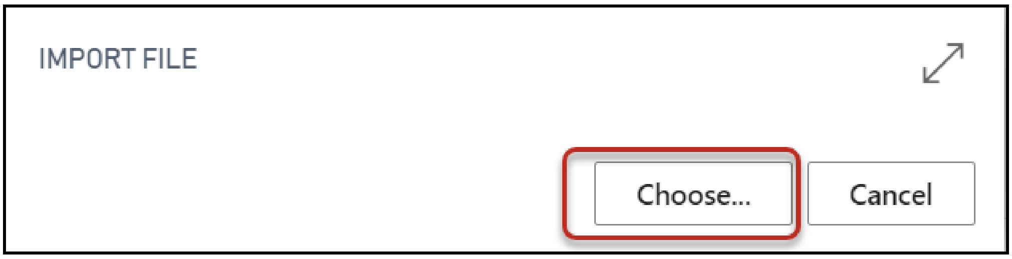
FASTTAB FILES TO ATTACH



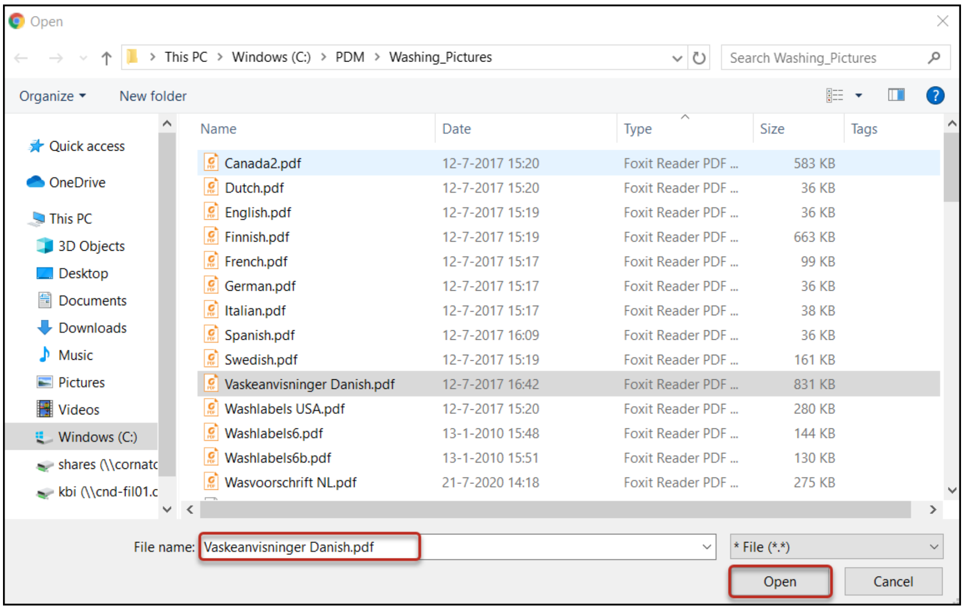
In the FastTab ***Files to Attach***, you can make a list of extra Files you want to attach to your E-Mail.
You can attach as many Files as you want.

Again, you can attach Files related to a specific **Language Code** (that will he compared with the Language Code in the actual document – i.e. in the Posted Sales Invoice Header).
If no **Files to Attach** has been entered for this Language Code, the line with a checkmark in **Default** will be applicable.
And if no **Language Code** is entered the attachment will always be applied no matter the Language Code of the actual Document.

After you have entered the **Language Code,** you can click ***Manage,*** click ***Import File***:



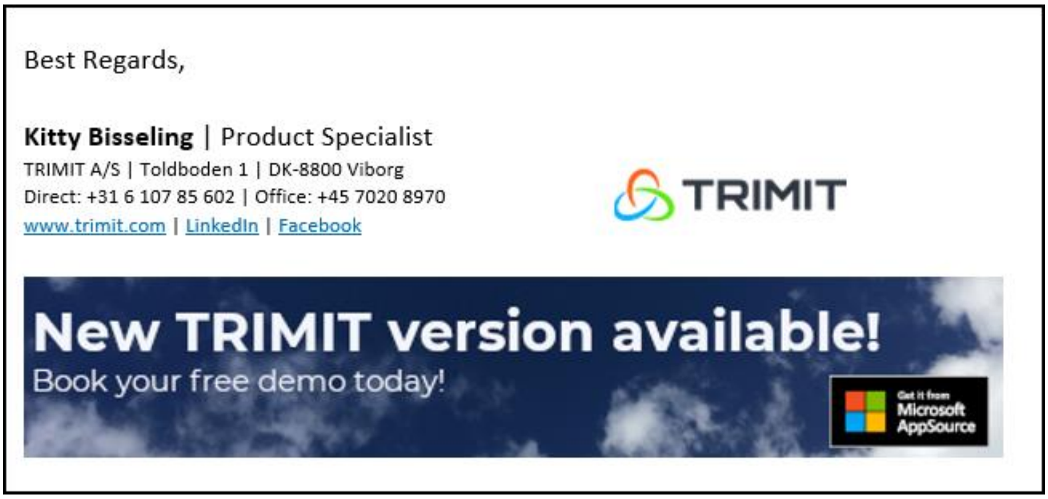
Click **Choose**



Select the file and click **Open**.

Examples for Files to Attach could be extra Safety Restrictions, or a nice Christmas card picture or when sending PDM Report Set an explanation of Care Label symbols.

Another example might be a picture of your normal E-Mail Signature.



Keep in mind however, that the links (as in above picture for www.trimit.com, LinkedIn, Facebook and the New TRIMIT version available) will not work if it is in the picture! Therefore, you need to use the special HTML Tags as mentioned earlier.

NOTE
The attached files must be accessible by the SMTP Server. This means that the documents you want to attach should be placed on a general accessible server.
Referring to local files on your own C-Drive might not work for everyone who uses the E-Mail Template.

FASTTAB EXTRA REPORT (RECIPIENT)

Besides the **Report ID** in FastTab ***General,*** you are also able to send another Report as an extra attachment to your E-Mail – if this **Extra Report ID** has a main record of the **Recipient Table ID,** which is filled in the FastTab ***Setup***.

EXTRA REPORT ID

In this field you need to enter the **Extra Report ID** Number of the Extra Report you want to send as an attachment in the E-Mail. After entering/choosing the Report Number, the system will automatically show the Caption of the Name of the Report and the Report Number.
But you only need to enter the Number of the Report.
I.e. entering *108* will show *Customer – Order Detail (108)*

EXTRA REPORT FILE TYPE

You can choose the **File Type** for the attachment of the Extra Report you want to send.
You can choose between the following four options: *Excel, PDF, Word* or *XML*.

EXTRA REPORT FILE NAME

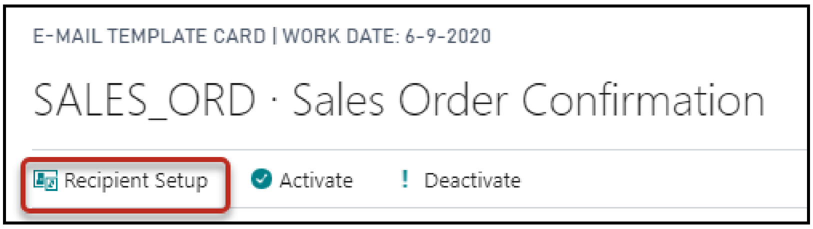
This is the name for the PDF-file (or other type of file based on **Extra Report File Type**) that will be created for the attachment of this specific **Extra Report ID**.
You can also use a **Variable** to fill this field.
The example in the above picture *Open_Sales_Orders_Detail_%2* is related to the **Variable** *2* that you can define in the FastTab ***Variables*.**

If this **Extra Report ID** has not been customized, this **Extra Report ID** will be executed with the default Request Options when running this report and the data of the current record of the **Recipient Table ID**.

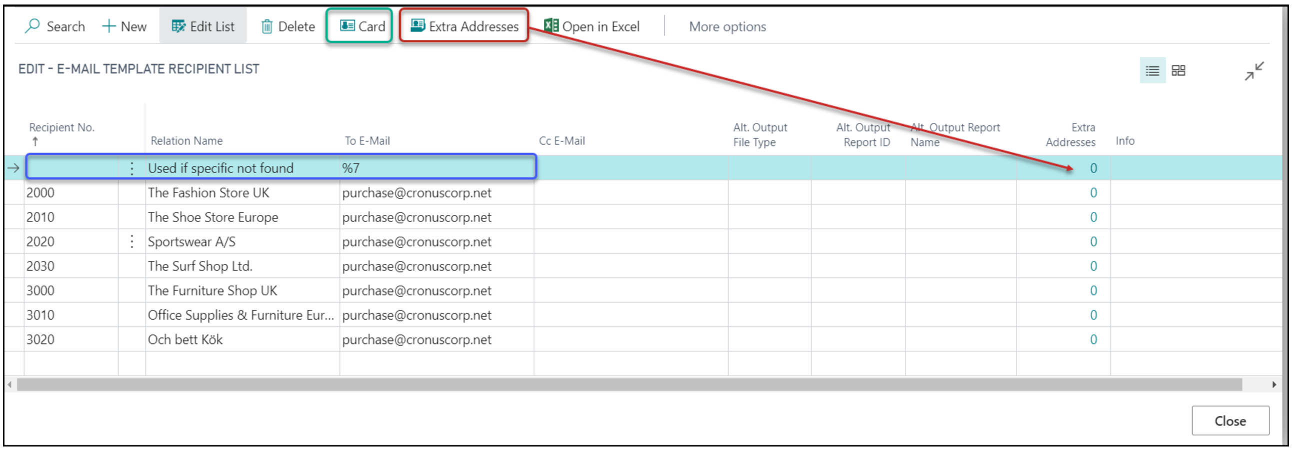
But you are also able to change the AL Code in a customized report of the **Extra Report ID**, so the Request Options might be set differently or based on fields of the Request Page of the **Report ID.**

ACTIONS

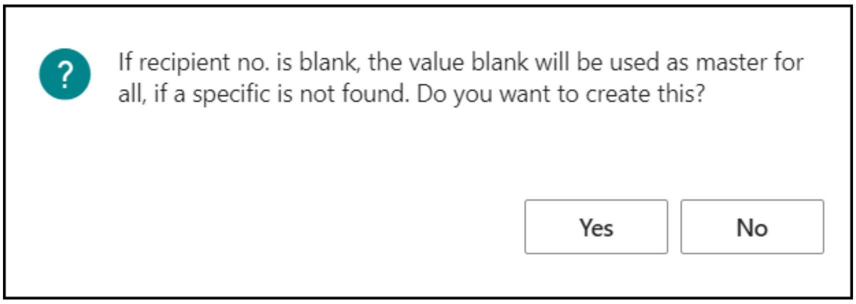
RECIPIENT SETUP



You can enter the **Recipients** of your Customers, Vendors or Salespersons for the E-Mails.
Unless you have entered the **Template for Mail Addresses** in which you can refer to Recipients of another E-Mail Template.

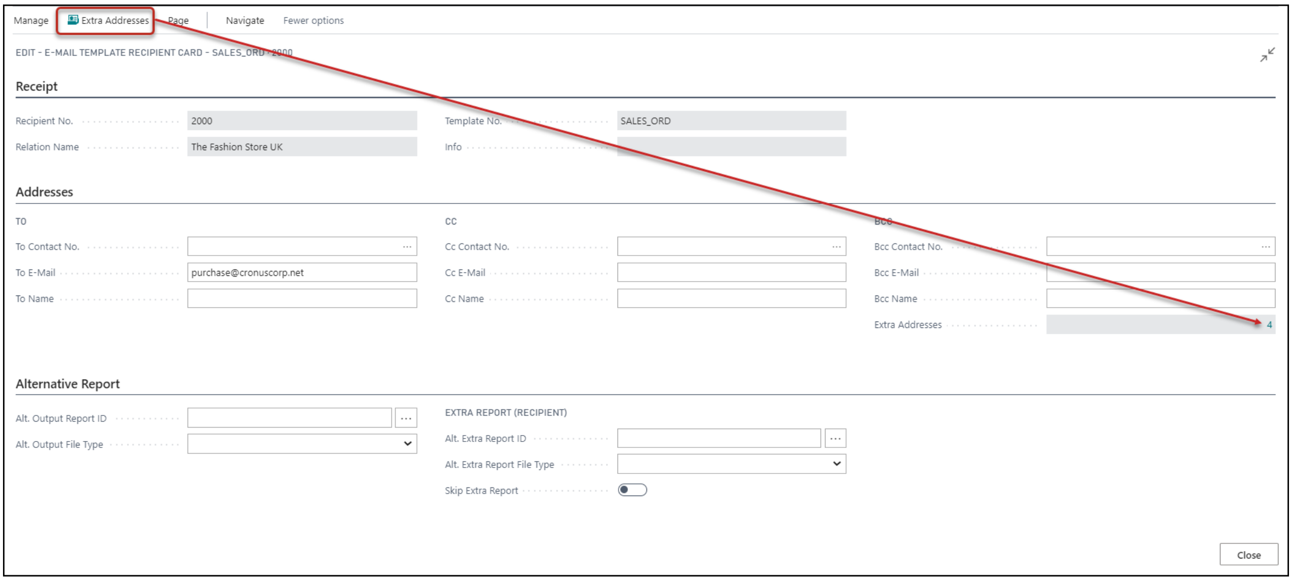


If you create a **Recipient No.** *<blank>* you will get a message:



In that case, you can refer in **To E-Mail** i.e. to the **E-Mail** field from the **Customer Table** (18) in a Variable.
In that case, when creating an E-Mail, the system will take the **E-Mail** field from the Customer if no specific **Recipient No.** has been created for that Customer.

By clicking ***Card*** on the ribbon *Home,* you can open the Card of a Recipient:



DESCRIPTION OF THE FIELDS

RECIPIENT NO.

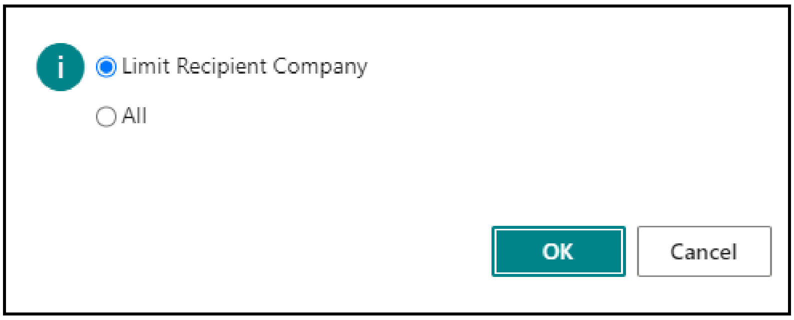
The number of the Customer/Vendor/Salesperson for the E-Mails.

RELATION NAME

The name of the **Recipient No.** will automatically be shown.

TO / CC / BCC CONTACT NO.

The number of a Contact in the Contact List that should get the E-Mail on the *To, CC* or *BCC* of your E-Mail.
It doesn't have to be a Contact related to your **Recipient No.** You can choose any Contact.
If you press **Look up value**, you will get an option which Contacts you want to see in your Lookup:
Limited Recipient Company will only show the Contacts of the current **Recipient No.**
All will show you all the Contacts.



TO / CC / BCC E-MAIL

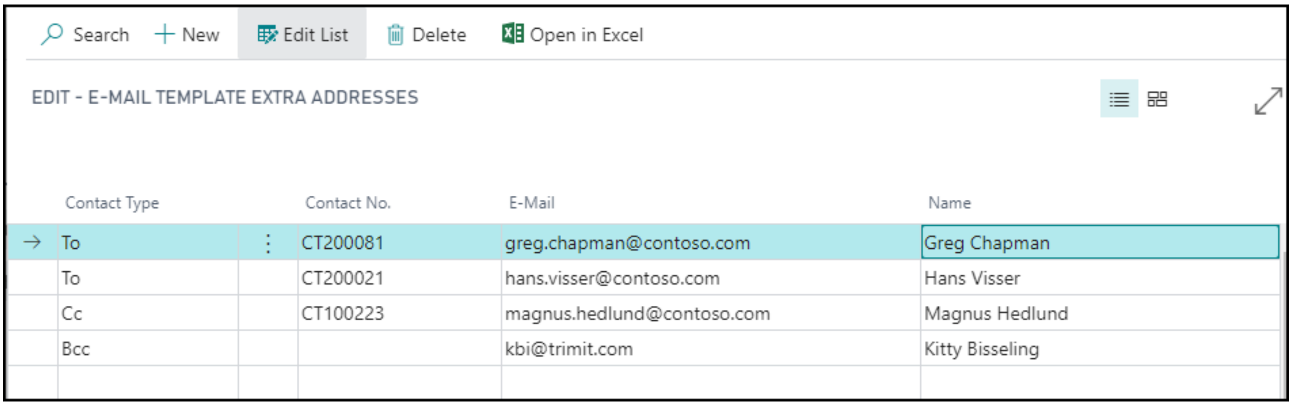
Will be filled with the E-Mail Address of the **Contact.**
Or you can enter the E-Mail Address manually of the person/department of your **Recipient No.** that should get the E-Mail on the *To, CC* or *BCC* of your E-Mail.
You are also able to enter two or more E-Mail Addresses just as you are able in a normal E-Mail. I.e.: Sales@cronuscorp.net;finance@cronuscorp.net

TO / CC / BCC NAME

Will default be filled with the Name of the **Contact**.
Or you can enter a Name manually.

EXTRA ADDRESSES

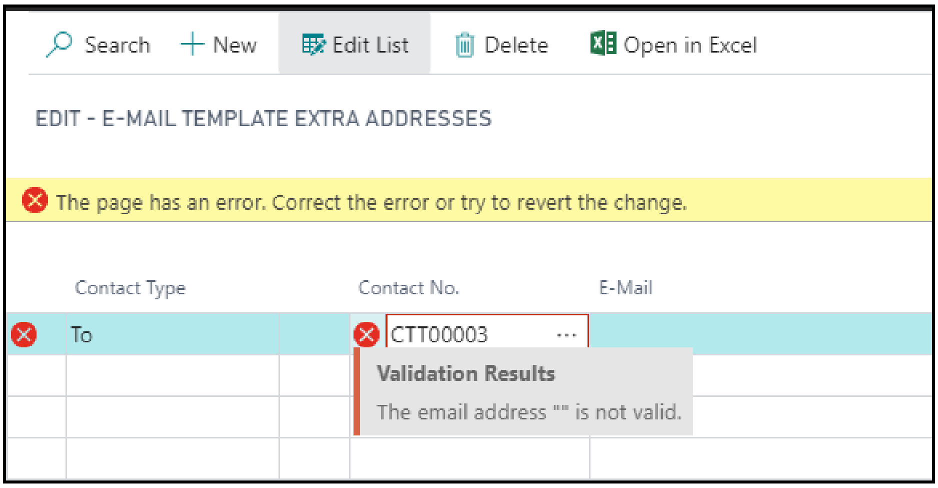
This field will show you the number of **Extra Addresses** you have entered for this Recipient.
Via click ***Extra Addresses,*** you can open an extra page to enter more E-Mail Addresses to which the E-Mail should be send for this Recipient.



Contact Type	Contact No.	E-Mail	Name
To	CT200081	greg.chapman@contoso.com	Greg Chapman
To	CT200021	hans.visser@contoso.com	Hans Visser
Cc	CT100223	magnus.hedlund@contoso.com	Magnus Hedlund
Bcc		kbi@trimit.com	Kitty Bisseling

Contact Type can be *To, CC* or *BCC*, and you can choose from existing **Contact Nos.** but also enter an **E-Mail** and **Name** directly.

If an entered **Contact No.** does not have an E-Mail Address in the Contact Card, you will get an error message:



ALT. OUTPUT REPORT ID

You can decide for this **Recipient No.** that you want an alternative Output Report ID that might be different from the **Report ID** in the FastTab ***General*** of the E-Mail Template.
After you have entered the Report ID Number, in this field the Name of the Report and the Report Number will be shown.
I.e. *50010* could be shown as *Danish Sales Invoices (50010)*

ALT. OUTPUT FILE TYPE

If you have entered an **Alt. Output Report ID,** you need to decide as which File Type it should be attached to your E-Mail. You can choose between the following four options: *Excel, Pdf, Word* or *XML*.

ALT. EXTRA REPORT ID

You can decide for this **Recipient No.** that you want an alternative Extra Report ID that might be different from the **Extra Report ID** in the FastTab ***Extra Report (Recipient)*** of the E-Mail Template.
After you have entered the Extra Report ID Number, in this field the Name of the Report and the Report Number will be shown.
I.e. *50012* could be shown as *Danish Statement (50012)*

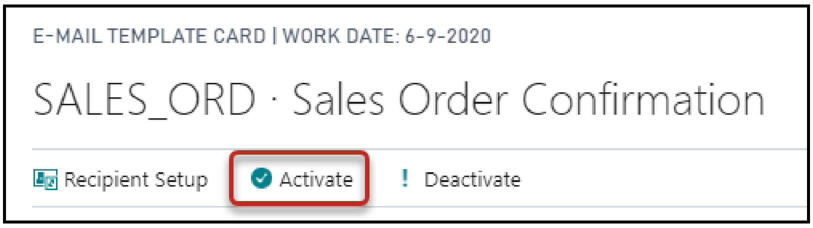
ALT. EXTRA REPORT FILE TYPE

If you have entered an **Alt. Extra Report ID,** you need to decide as which File Type it should be attached to your E-Mail. You can choose between the following four options: *Excel, Pdf, Word* or *XML*.

SKIP EXTRA REPORT

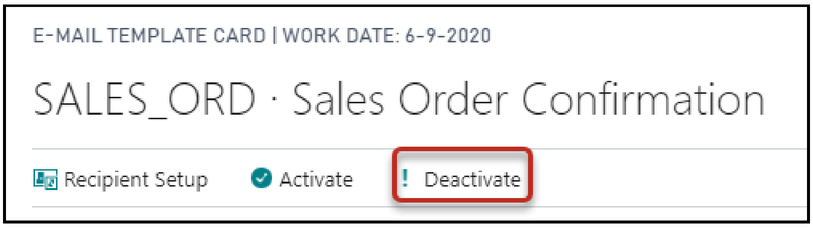
With a checkmark in this field, no Extra Report will be attached for this Recipient No.
Not even the Extra Report you might have entered in the FastTab ***Extra Report (Recipient)*** of the E-Mail Template.

ACTIVATE



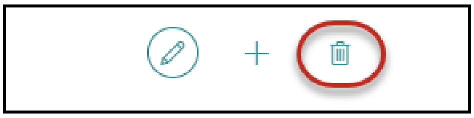
After you have entered all necessary data of the E-Mail Template and the Recipients, you need to **Activate** the E-Mail Template by clicking ***Activate***.
Otherwise, no TRIMIT E-Mails will be send based on this Template.
You are only able to activate an E-Mail Template if the fields in FastTab ***Setup*** have been filled and if there are Recipients connected or if the **Template Mail Addresses** is filled.
The **Status** in the FastTab ***General*** will automatically be set to *Active* when clicking ***Activate*** on the ribbon *Home*.

DEACTIVATE

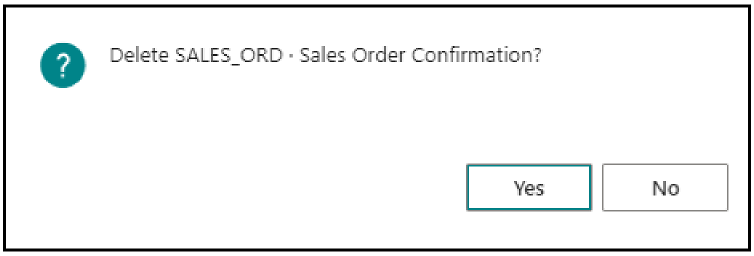


You can deactivate your E-Mail Template again by clicking ***Deactivate***.
The **Status** in the FastTab ***General*** will automatically be set to *Deactivated*.
You can only delete an E-Mail Template if the **Status** is *Deactivated*.

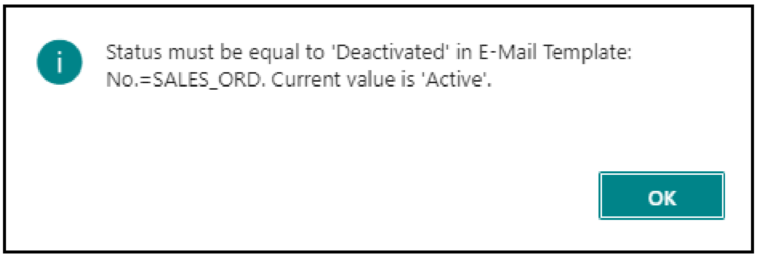
DELETE AN E-MAIL TEMPLATE



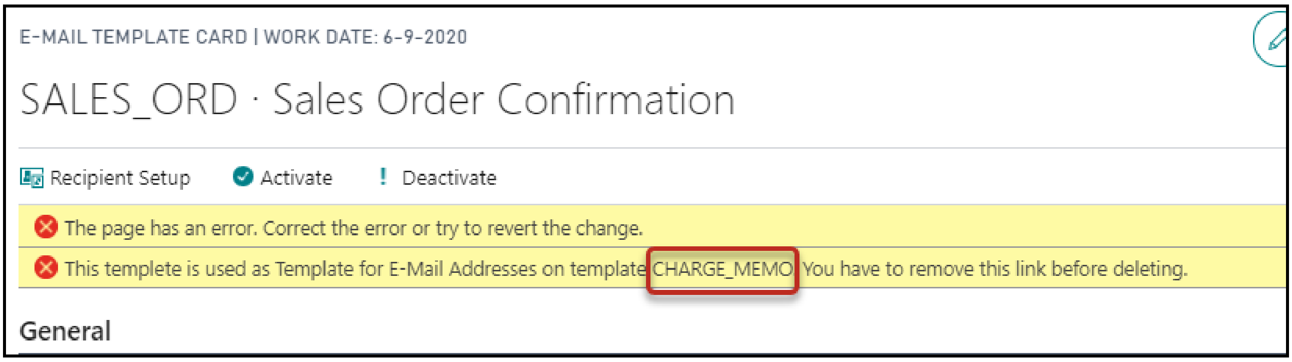
If you want to **Delete** a Template, you will get the following message that needs to be confirmed by clicking **Yes**:



After clicking **Yes,** the system will check if the current **Template** is *Active* or *Deactivated*. A Template needs to be *Deactivated* to be able to delete it.

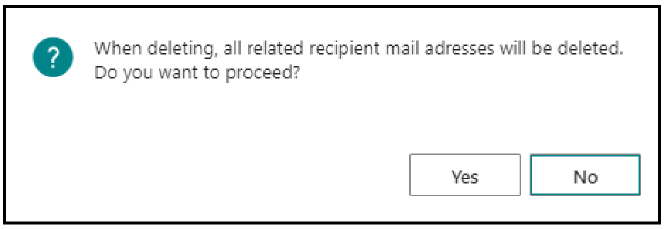


After clicking **Yes** in the first message and have changed the **Status**, the system will check if the current **Template** is not connected to other Templates as the **Template for E-Mail Addresses**.
In that case, you will get the following message and need to clear the **Template for E-Mail Addresses** in the other Templates before you can delete the current one:



The *CHARGE_MEMO* is the first E-Mail Template with a connection to *SALES_ORD*.
If it might be connected to other E-Mail Templates as well, you need to check them all before you could delete *SALES_ORD*.

The fourth message you can get before the Template is deleted:



This needs to be confirmed by clicking **Yes**.

GENERATING TRIMIT E-MAIL

After setting up the necessary **TRIMIT E-Mail Templates** you are now able to send the documents by E-Mail by using the specific TRIMIT E-Mail Functionality to the Recipients when you print the documents of the **Report ID** you entered in the FastTab ***General*** of the E-Mail Template or by using the action for sending an E-Mail. Also, in this case, the **Report ID** must be in the FastTab ***General*** of the appropriate E-Mail Template.

PRINT REPORT ➔ TRIMIT E-MAIL

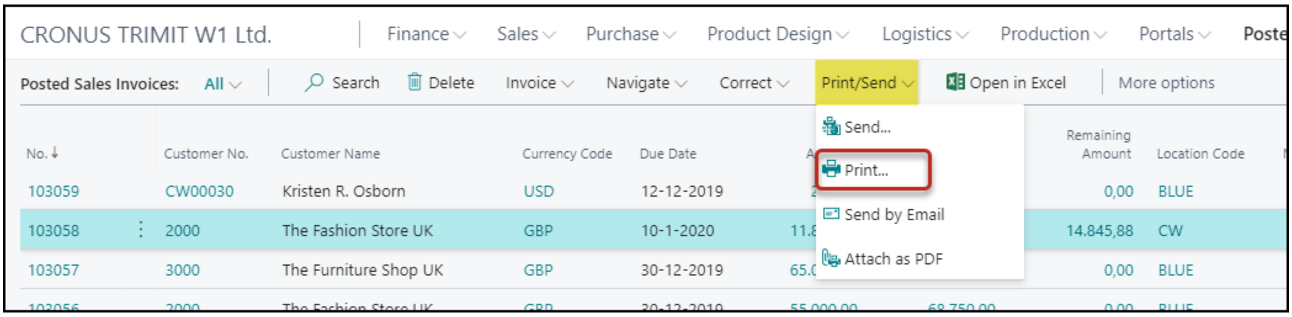
To use the specific **TRIMIT E-Mail Templates**, you can **PRINT** the Report, and the Number of the Report (based on the Business Central Report Selections) must be the **Report ID** of an *Active* E-Mail Template.
The Reports need to be customized for the TRIMIT E-Mail functionality which has already been done for the TRIMIT Reports mentioned in Components.

This is applicable for:

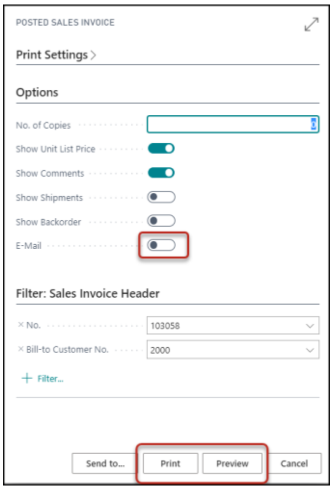
- Sales Quote List/Card: Click *Print/Send, **Print***
- Sales Order List/Card: Click *Print/Send, **Print Confirmation***
- Posted Sales Shipment List/Card : Click *Print/Send, **Print***
- Posted Sales Invoice List/Card: Click *Print/Send, **Print***
- Posted Credit Memo List/Card: Click *Print/Send, Send, **Print***
- Purchase Order List/Card: Click *Print/Send, Print, **Print***
- Customer List: Click *Report, Reports, Finance Reports, **Statement***.
- Customer Card: Click *Report, **Statement***
- Issued Reminder List: Click *Process, **Print***
- Issued Reminder Card: Click *Print/Send, **Print***
- Issued Finance Charge Memo List: Click *Process, **Print***
- Issued Finance Charge Memo Card: Click *Print/Send, **Print***
- Extended Sales Statistics (Report) choose ***E-Mail***
- Extended Sales Statistics Setups (Page): click *Report, **E-Mail***

PRINTING VIA PRINT

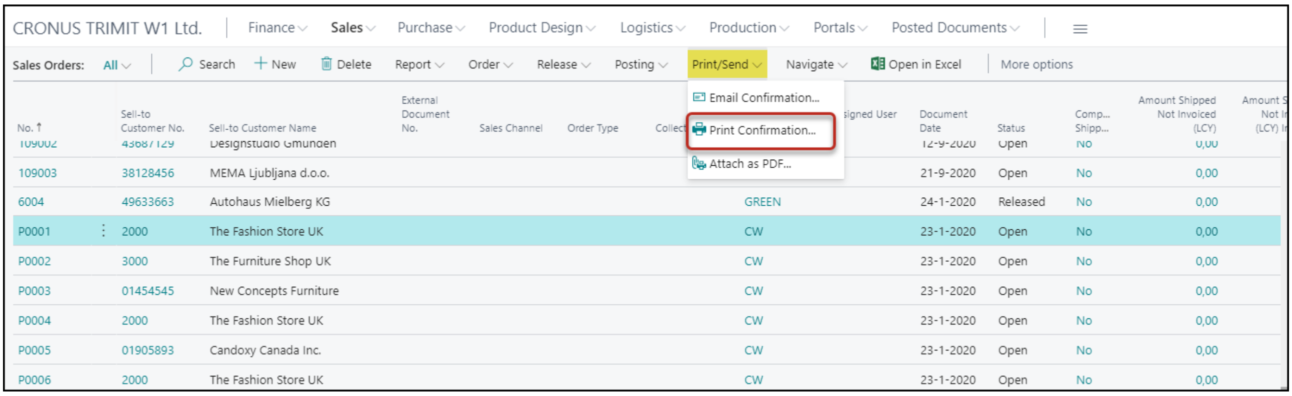
I.e. the **Posted Sales Invoice**, when clicking *Print/Send*, ***Print,*** you will get the normal Request Page for Printing, based on the **Report ID** (in our example ***6036702 trm Sales Invoice***.



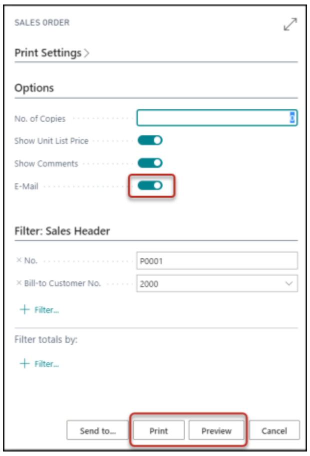
In this case, the option **E-Mail** will be set by default based on the field **E-Mail=Yes** in the E-Mail Template for this report, but the field **E-Mail** in the Request Page can be changed.



Another example is printing the **Sales Order Confirmation** via the Sales Order List:
Click *Print/Send,* ***Print Confirmation***



The Request Page will look as follows (for report ***6036701 trm Sales Order***)



The **Option** for **E-Mail** is now set by default, based on the corresponding E-Mail Template field **E-Mail Default=Yes**, but you can change this.

The system will create a TRIMIT E-Mail, because there is a **TRIMIT E-Mail Template** for the Report of i.e. the **Sales Order Confirmation** that is *Active.*

If you click **Preview** an E-Mail will be generated – even if no **Recipient** is added to the Template for the Customer of the Order – and you can see the generated E-Mail and can change it manually before sending the E-Mail. After sending the E-Mail you can still see the details via **E-Mail Log Entries**.

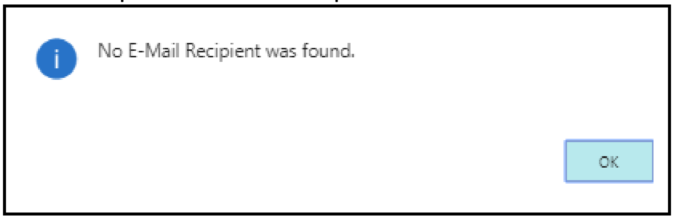
If you click **Preview**, only a Preview of the first selected Order will be shown – even if you have selected several Sales Orders.

If you click **Print,** an E-Mail will only be created if a **Recipient** is added to the Template for the Customer of the Order and you will get the following message:

In addition, this E-Mail will be saved in the **E-Mail Log Entries**.

As mentioned in Recipient Setup, if no record is created for the specific Customer/Vendor/Salesperson/User as a Recipient, the E-Mail can be send to the **To E-Mail** from a <blank> **Recipient No.**

If there is no Recipient for the Customer/Vendor, you can get a warning, or based on the report, simply the choice to print the actual report.

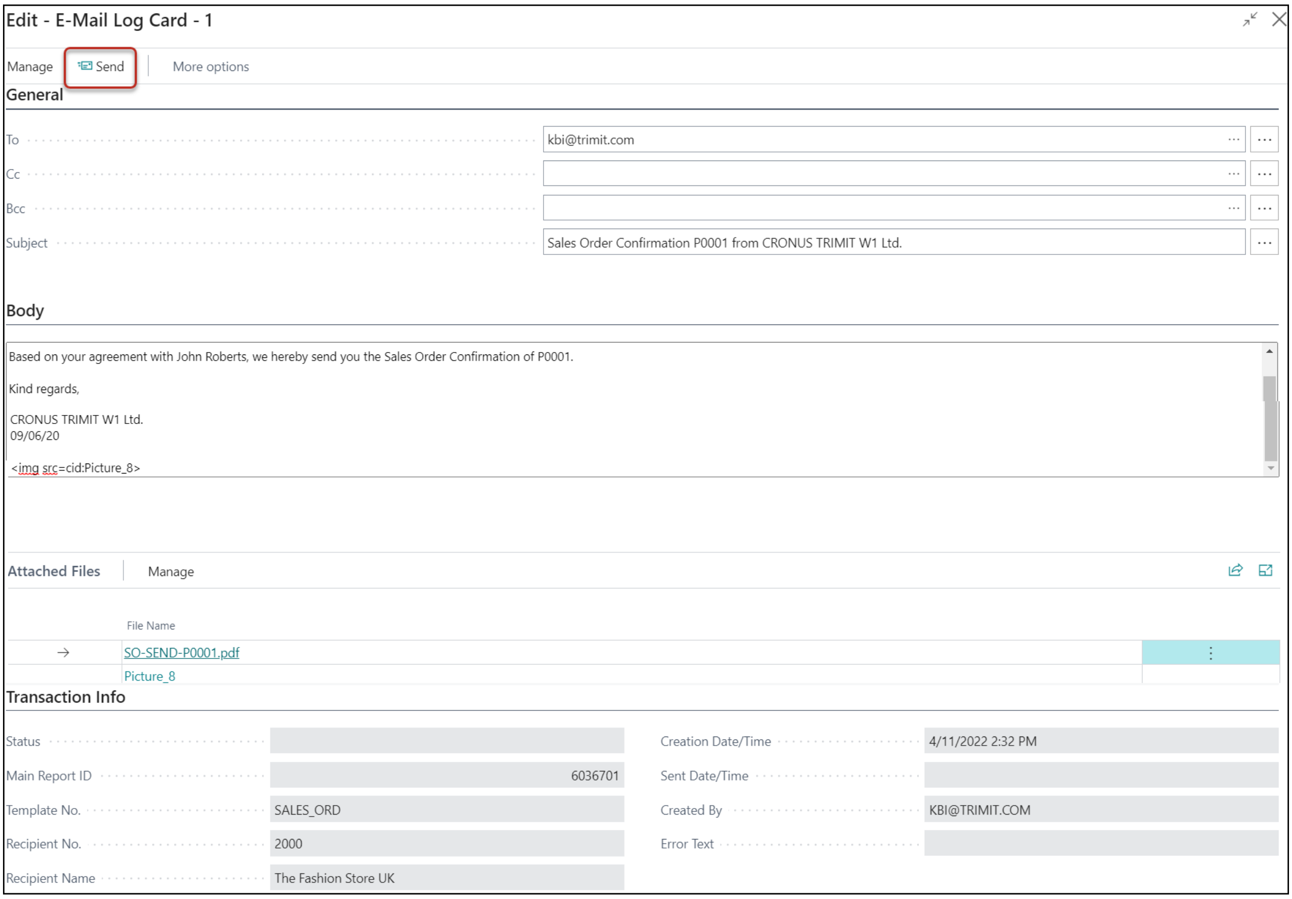


However, if you wanted to send the E-Mail from only 1 document, the generated E-Mail will be shown (see Preview of an E-Mail) and you have the opportunity to enter the Recipient directly in the E-Mail before sending it.

If you wanted to send several documents at the same time, only for the first selected document, the generated E-Mail will be shown (see Preview of an E-Mail) and you have the opportunity to enter the Recipient directly in the E-Mail before sending it.

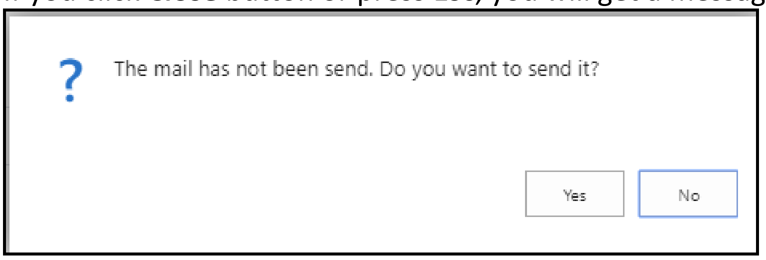
PREVIEW OF AN E-MAIL

This example is for an **Order Confirmation** of a **Sales Order** (*P0001*).



Only when clicking ***Send,*** the E-Mail will be sent!

If you click **Close** button or press **Esc**, you will get a message:



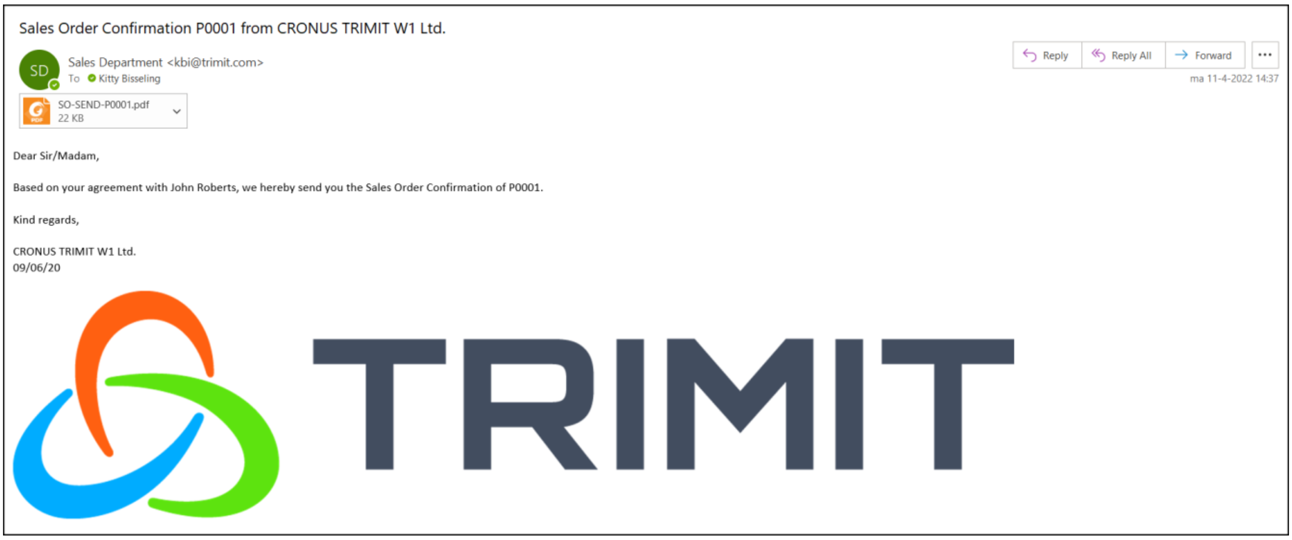
Click **Yes**, if you want the E-Mail send.

NOTE

If you did include a picture for the Signature in the Body of the E-Mail, you will still see the text <img src=cid:*PICTURENAME*> in the **Message** of the E-Mail (see example above).
But in the actual E-Mail the picture will be shown.

ACTUAL E-MAIL

The actual E-Mail might look as follows:


Sales Order Confirmation P0001 from CRONUS TRIMIT W1 Ltd.

SD Sales Department <kbi@trimit.com>
To Kitty Bisseling

Reply | Reply All | Forward | ...
ma 11-4-2022 14:37

SO-SEND-P0001.pdf
22 KB

Dear Sir/Madam,

Based on your agreement with John Roberts, we hereby send you the Sales Order Confirmation of P0001.

Kind regards,

CRONUS TRIMIT W1 Ltd.
09/06/20

TRIMIT

SEND E-MAIL ➔ TRIMIT E-MAIL

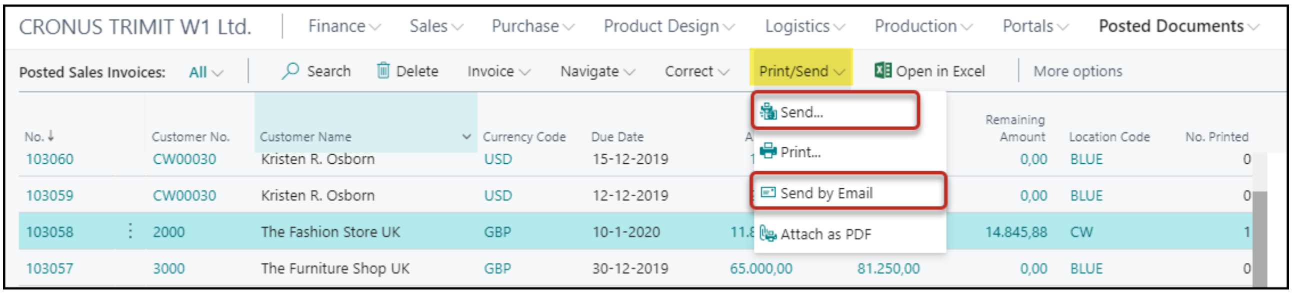
Besides printing Reports as described in Print Report -> TRIMIT E-Mail, you are also able to send an E-Mail directly via the mentioned documents that will make use of the TRIMIT E-Mail functionality if the Number of the Report (based on the Business Central Report Selections) will be a **Report ID** of an *Active* TRIMIT E-Mail Template. If there is no *Active* TRIMIT E-Mail Template, the standard Business Central E-Mail functionality will be used instead.
The Report needs to be customized for the TRIMIT E-Mail functionality which has already been done for the TRIMIT Reports mentioned in Components.

This is applicable for:

- Sales Quote List/Card: click *Print/Send, **Send by Email***
- Sales Order List/Card: click *Print/Send, **Email Confirmation***
- Posted Sales Invoice List/Card: click *Print/Send, **Send*** and choose **Email** *Yes* or *Print/Send, **Send by Email.***
- Posted Credit Memo List: click *Process, **Send*** and choose **Email** *Yes*
- Posted Credit Memo Card: click *Print/Send, **Send*** and choose **Email** *Yes* or *Print/Send, **Send by Email.***
- Purchase Order List/Card: click *Print/Send, **Send*** and choose **Email** *Yes*.
- Issued Reminder List/Card: click *Process, **Send by Email***
- Issued Finance Charge Memo List/Card: click *Process **Send by Email***
- Extended Sales Statistics (Report) choose ***E-Mail***
- Extended Sales Statistics Setups (Page): click *Report, **E-Mail***

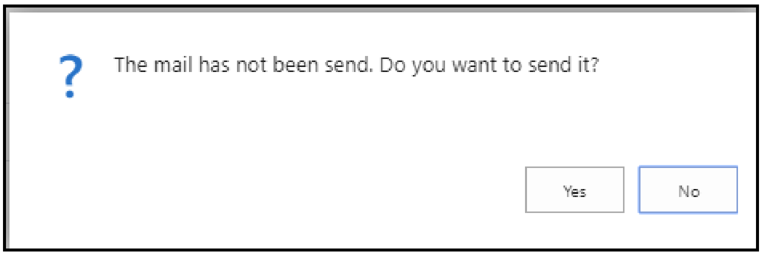
SENDING E-MAIL VIA SEND BY EMAIL (OR SIMPLY EMAIL)

I.e. the **Posted Sales Invoice**, when clicking *Print/Send*, ***Send by Email,*** this will show the created TRIMIT E-Mail which can be changed before sending. Actual send TRIMIT E-Mails via the **TRIMIT E-Mail Template** will be saved in the **E-Mail Log Entries**.



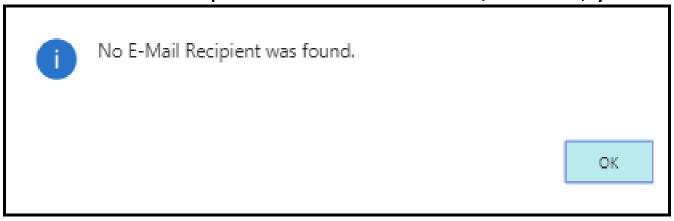
PREVIEW OF AN E-MAIL

If you only selected 1 document for sending by E-Mail, an E-Mail will be generated (even if there is no **Recipient** info) and the preview of the E-Mail will be shown as mentioned in Preview of an E-Mail which can be changed before actual sending the E-Mail by clicking ***Send*** or clicking the **Close** button and confirming the message by clicking the **Yes** button.



If you want to send E-Mails for several documents at the same time, you need to Print the report!! Otherwise only for the first selected document and E-Mail will be generated and previewed, which can be send.

If there is no Recipient for the Customer/Vendor, you can get a warning:



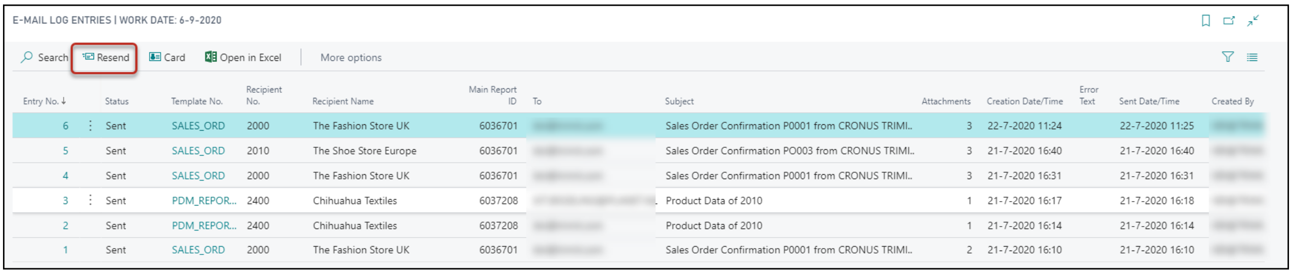
However, if you wanted to send the E-Mail from only 1 document, the generated E-Mail will be shown (see Preview of an E-Mail) and you have the opportunity to enter the Recipient directly in the E-Mail before sending it.
If you wanted to send several documents at the same time, only for the last selected document, the generated E-Mail will be shown (see Preview of an E-Mail) and you have the opportunity to enter the Recipient directly in the E-Mail before sending it.

PROCESS SUMMARY

- Setup the E-Mail Templates
- Reports need to be customized for TRIMIT E-Mail functionality – reports mentioned in Components are already customized.
- Printing 1 document with Option **E-Mail** is *Yes*, for which the report is mentioned in an *Active* **E-Mail Template**
    - Clicking **Print,** will automatically send the E-Mail if the recipient is known.
    - Clicking **Print,** will automatically preview the E-Mail which can be changed if the recipient is unknown.
    - Clicking **Preview,** will automatically preview the E-Mail which can be changed, and the user needs to click ***Send*** (or the **Close** button and confirm the message by clicking the **Yes** button) before the E-Mail is send (regardless if the Recipient is known or not)
- Printing several documents with option **E-Mail** is *Yes,* for which the report is mentioned in an *Active* **E-Mail Template**
    - Clicking **Print,** will automatically send all the E-Mails if the recipients are known
    - Clicking **Print**, will print the document if the recipient is unknown.
    - Clicking **Preview** will give you an error message.
- Sending E-Mail for 1 document for which the report is mentioned in an *Active* **E-Mail Template** will generate and preview the E-Mail which can be changed before the user needs to click ***Send*** (or the **OK** button and confirm the message by clicking the **Yes** button) before the E-Mail is actually send (regardless if the Recipient is known or not)
- Sending E-Mails for several documents for which the report is mentioned in an *Active* **E-Mail Template**
    - **THIS IS NOT AN OPTION**: the system will generate and preview only the E-Mail of the first selected document and preview the E-Mail which can be changed before the user needs to click ***Send*** (or the **OK** button and confirm the message by clicking the **Yes** button) before the E-Mail is actually send (regardless if the Recipient is known or not).
      In this case you need to PRINT the document to send several E-Mails at the same time for several documents.

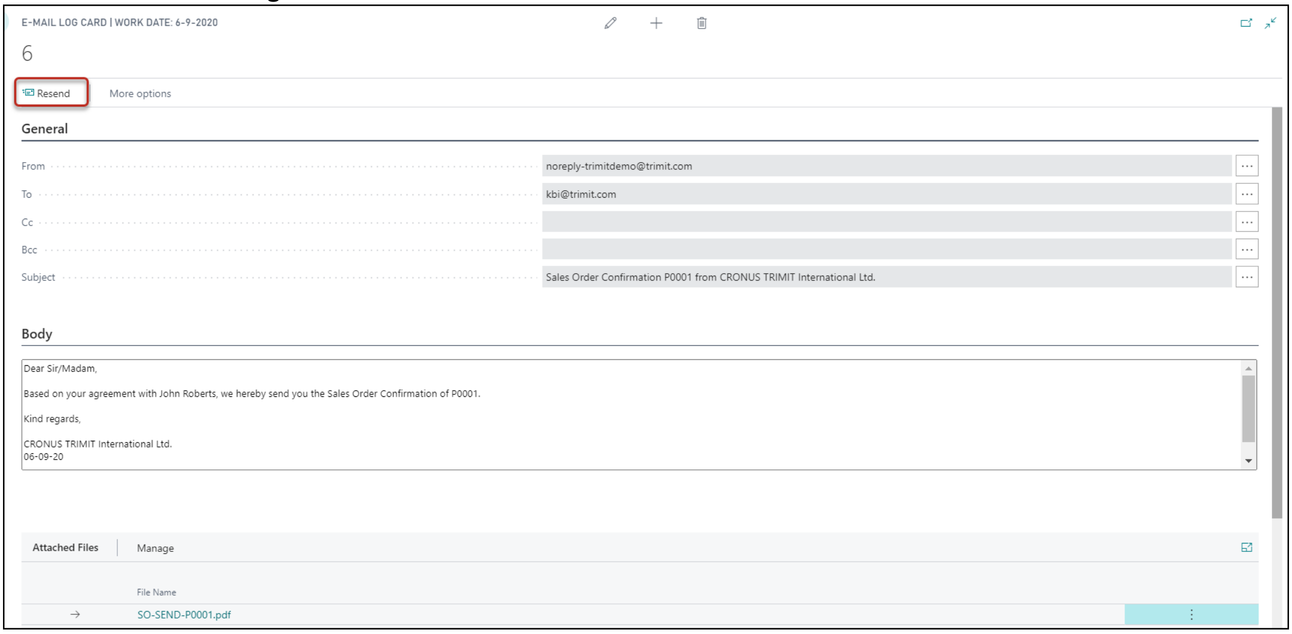
E-MAIL LOG ENTRIES

All **send** E-Mails related to the **TRIMIT E-Mail Templates** will be registered in a log.
You can find that log via **Tell me** *E-Mail Log Entries*



By clicking ***Resend,*** you can resend the E-Mail of a specific **Entry No.** (which is simply an automatic generated number). In that case a new **Entry No.** will be created in the log.

By clicking ***Card,*** you will see the preview of the E-Mail, and via the Card, you are also able to click ***Resend,*** to resend the E-Mail again.

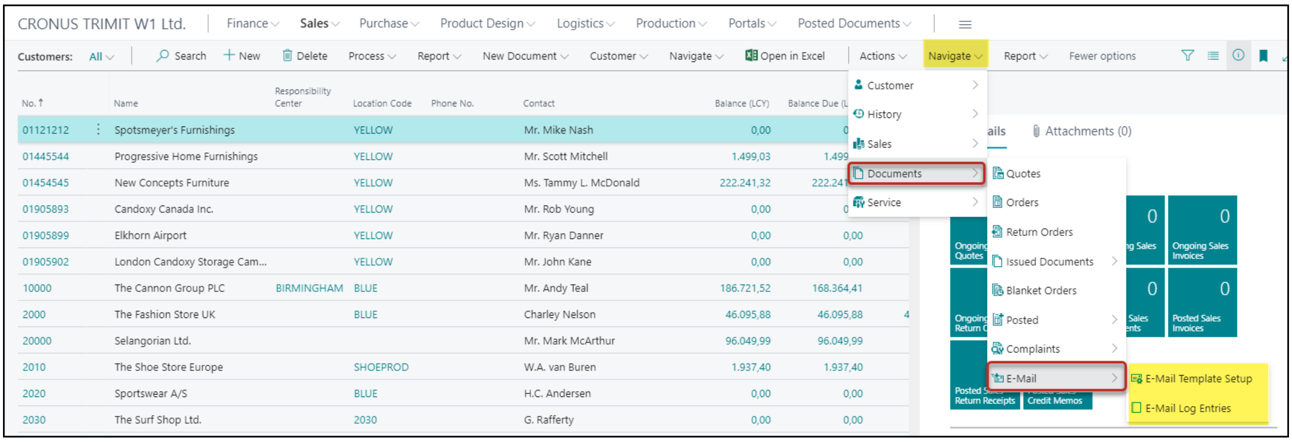


Every **Resend** will generate a new **Entry No.** in the E-Mail Log.

CUSTOMERS

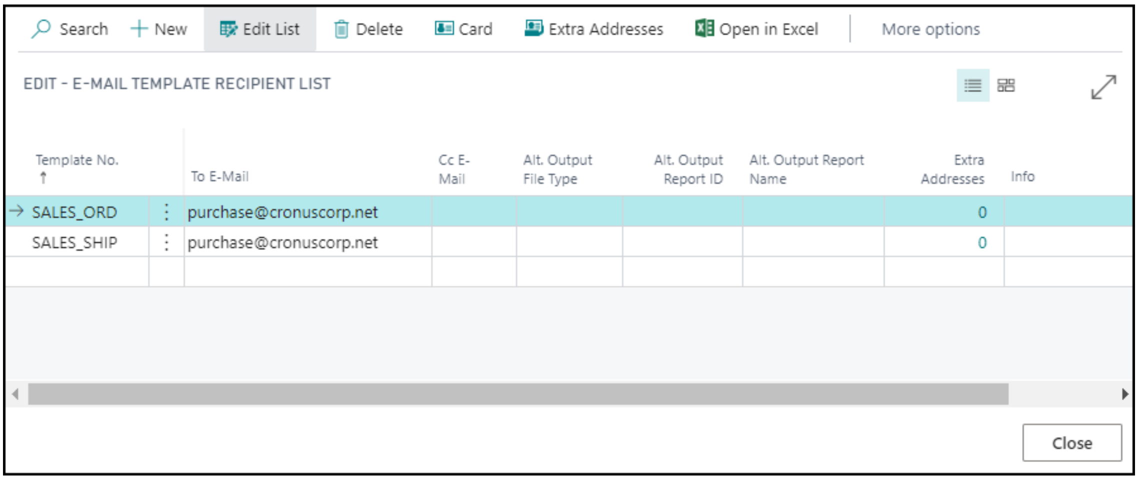
It is also possible to access the **E-Mail Templates** and the **E-Mail Log Entries** via the Customer List/Card.
This can be done via **Tell me** *Customer*

On the Customers List/Card by clicking *Navigate, **Documents, E-Mail***:



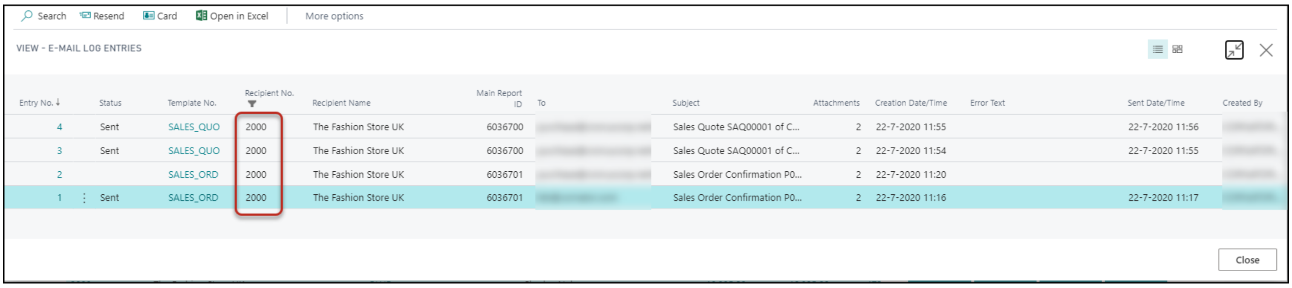
E-MAIL TEMPLATE SETUP

This will show you the **E-Mail Templates** to which the current **Customer** has been connected as a **Recipient** directly.
It will not show the **E-Mail Templates** to which the current **Customer** has been connected indirectly via the field **Template for Mail Addresses** of the E-Mail Template.



E-MAIL LOG ENTRIES

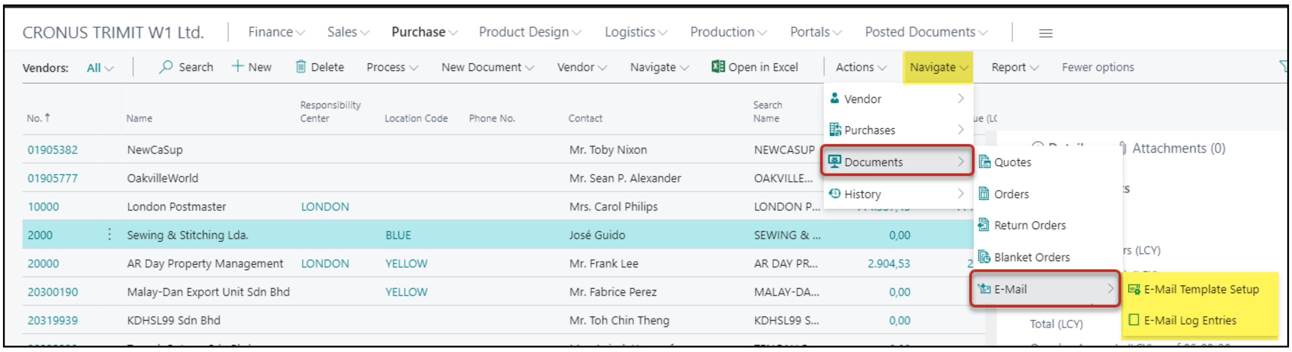
This will show all the **E-Mail Log Entries** for this specific Customer as **Recipient No**. I.e.:



VENDORS

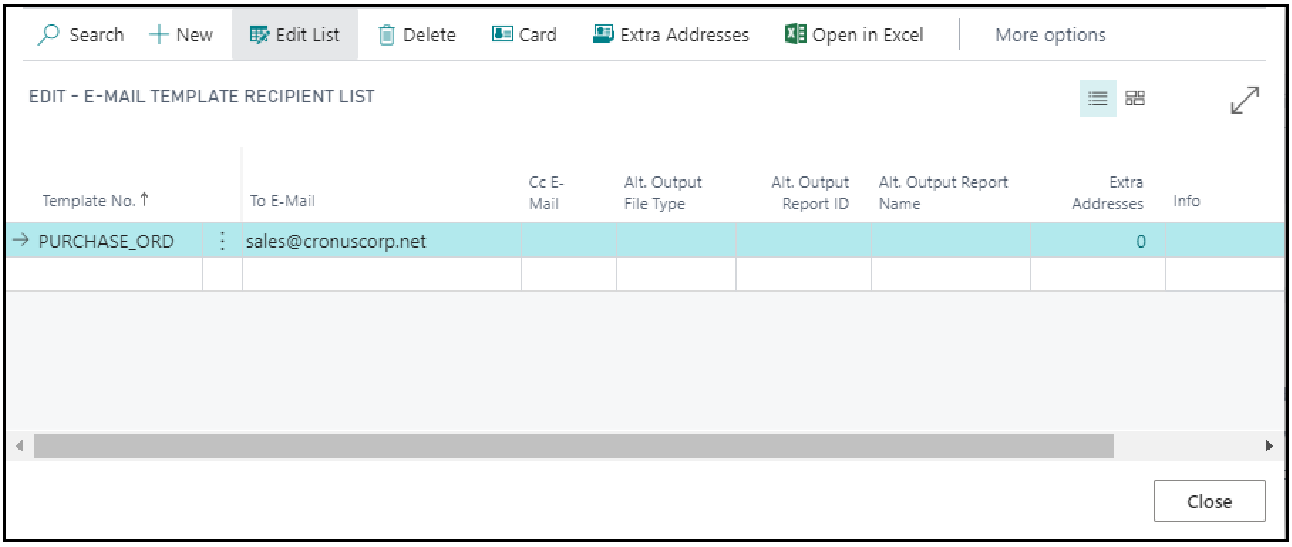
It is also possible to access the **E-Mail Templates** and the **E-Mail Log Entries** via the Vendor List/Card. This can be done via **Tell me** *Vendor*.

On the Vendors List/Card by clicking *Navigate,* ***Documents, E-Mail***:



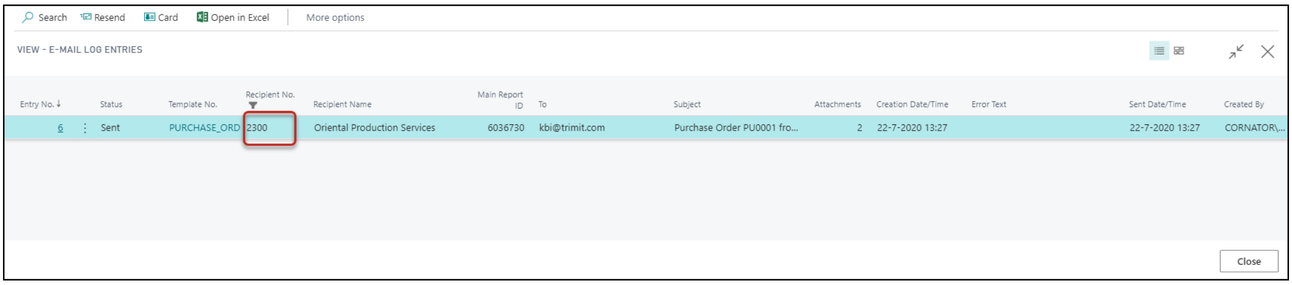
E-MAIL TEMPLATE SETUP

This will show you the **E-Mail Templates** to which the current **Vendor** has been connected as a **Recipient** directly.
It will not show the **E-Mail Templates** to which the current **Vendor** has been connected indirectly via the field **Template for Mail Addresses** of the E-Mail Template.



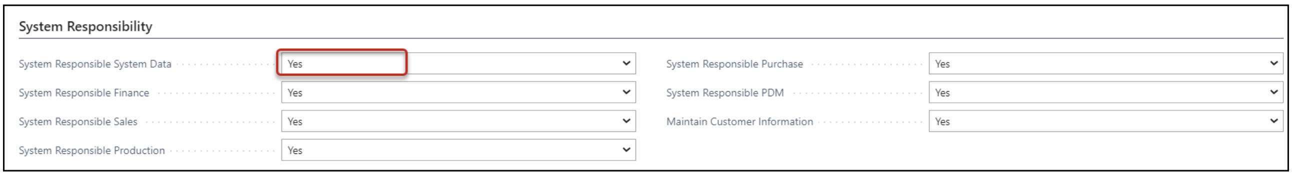
E-MAIL LOG ENTRIES

This will show all the **E-Mail Log Entries** for this specific Vendor as **Recipient No**. I.e.:

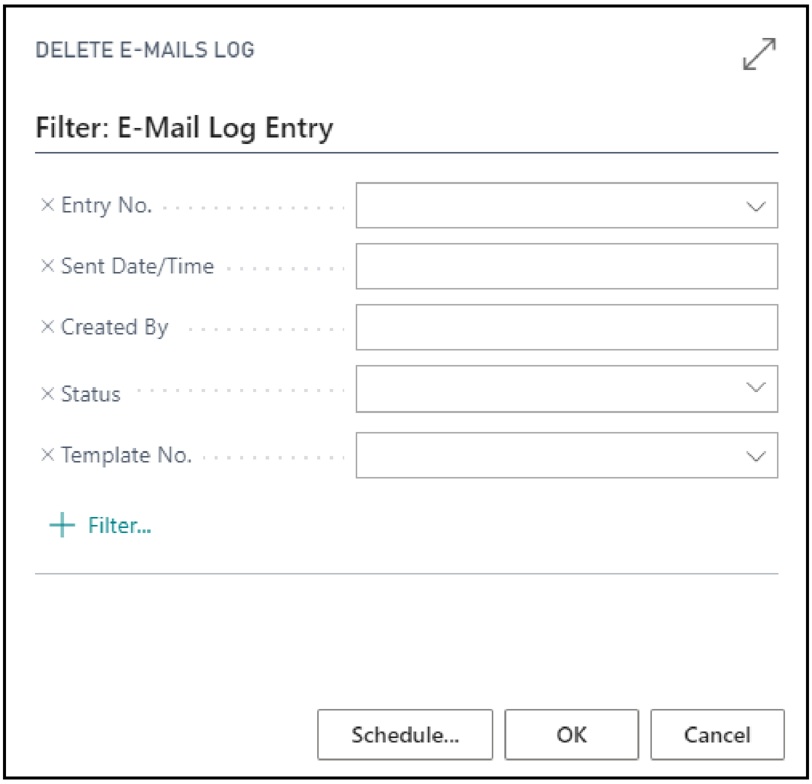


DELETE E-MAIL LOG ENTRIES

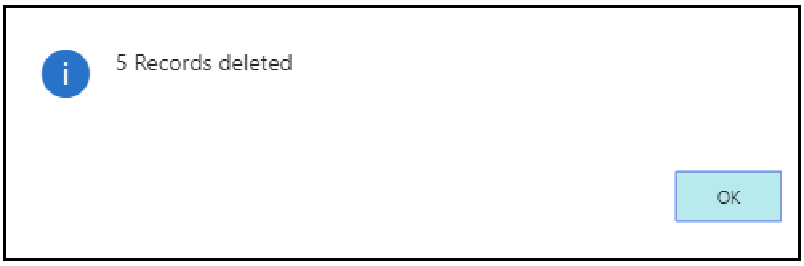
You are only able to delete the **E-Mail Log Entries** if you have the field **System Responsible System Data** set to *Yes* in the **User Setup** (**Tell me** *User Setup*)



You can delete the Entries via **Tell me** *Delete E-Mail* or add report ***6037700 trm Delete E-Mail Log*** to the **My Actions** FactBox of a TRIMIT Role Center.



After pressing **OK,** you will get a message regarding the number of records that have been deleted. I.e.



Press **OK**.

CUSTOMIZATION OF REPORTS

If you want to be able to use the **TRIMIT E-Mail** functionality in other Reports as mentioned in Components the only extra **C/AL Code** needed for the Report is as follows:

You need to create new Global **Variables**:

```
SomethingPrinted: Boolean;
SendMail: Boolean;
EMailDataContainer: Codeunit "trm E-Mail Data Container";
UserSysParam: Codeunit "trm User Syst Param Handling";
Mail: Codeunit "trm E-Mail Handling";
MailRecRef: RecordRef;
PortalEMailAddress: Text;
NumberOfMails: Integer;
ActualMailNumber: Integer;
```

In addition, **Local Variable** for OnAfterGetRecord:

```
PortalsMailHandler: Codeunit "trm Portals Mail Handler";
```

Keep in mind that **SomethingPrinted** might already be used in a report, so you might have to choose another name for it.

SendMail is a variable used in the Request Page to allow the user to decide whether the report should be printed or send by **TRIMIT E-Mail** functionality. It will then be set by default with the field **E-Mail by Default=Yes** from the Template.
This **SendMail** also needs to be added to the Request Page.

In the **OnInit Report()** of the report you need to add:

```
// E-mail
ReportActive := Mail.IsTrimitEMailActive(0, CurrReport.ObjectId(false), SendMail);
If EMailDataContainer.GetForceSendMail then
   SendMail := true;
```

In the **OnPreDataItem()** of the main record of the report you need to add:

```
begin
    SomethingPrinted := false;

    If Mail.IsSlaveReport and
       Mail.ParamExist
       Then begin
           ShowColourCodeInMatrix := Mail.ParamBoolean_Get('COLORCODE');
           SplitAssortment := Mail.ParamBoolean_Get('SPLITASSOR');
           ShowTariffNo := Mail.ParamBoolean_Get('TARIFF');
           MaxNoOfColumns := Mail.ParamInteger_Get('MAXCOLUMN');
           ShowUnitListPrice := Mail.ParamBoolean_Get('UNITPRICE');
           PrintComments := Mail.ParamBoolean_Get('COMMENT');
```

```
      end;
   end;
```

In the **OnAfterGetRecord()** of the main record of the report you need to add:

```
If SendMail and
   not Mail.IsSlaveReport
then begin
    if NumberOfMails = 0 then
        NumberOfMails := "sales header".count;
    ActualMailNumber := ActualMailNumber + 1;

    MailRecRef.GetTable("Sales Header");
    Mail.CallClearAll;

    if UserSysParam.PortalInstalled then begin
        PortalEMailAdress :=
PortalsMailHandler.GetPortalConfirmationRecipient("Sales Header");
        if PortalEMailAdress <> '' then
           Mail.Add_Recipient(PortalEMailAdress, 0, true);
    end;
    Mail.CallCreateVariables(MailRecRef, "Language
Code",CurrReport.ObjectId(false), CurrReport.Preview, (not GuiAllowed));
    Mail.ParamBoolean_Set('COLORCODE', ShowColourCodeInMatrix);
    Mail.ParamBoolean_Set('SPLITASSOR', SplitAssortment);
    Mail.ParamBoolean_Set('TARIFF', ShowTariffNo);
    Mail.ParamInteger_Set('MAXCOLUMN', MaxNoOfColumns);
    Mail.ParamBoolean_Set('UNITPRICE', ShowUnitListPrice);
    Mail.ParamBoolean_Set('COMMENT', PrintComments);
    if Mail.CallCreateMail(true) then begin
        SomethingPrinted := true;
        if ActualMailNumber < NumberOfMails then
            CurrReport.Skip
        else
            CurrReport.quit;
    end;
end;
```

This AL Code is placed at the Main Record of the Report and will split the standard Business Central e.mailing into one E-Mail per Main Record – in this example per Sales Header. This needs to be changed to the Main Record of your report.

The call to the E-Mail system is divided into 3 Calls:

- CallClearAll
- CallCreateVariables
- CallCreateMail.

The reason for this is to allow the developer to set Parameters in between to make the system react differently. Most commonly changes are shown below:

AL SalesOrder.Report.al

TRIMIT Development AS_TRIMIT_21.2.4037.3515_W1 > src > src > AL SalesOrder.Report.al

```
        NumberOfMails := "sales header".cour
    ActualMailNumber := ActualMailNumber + 1

    MailRecRef.GetTable("Sales Header");
    Mail.CallClearAll;
    if UserSysParam.PortalInstalled then begin
        PortalEMailAddress := PortalsMailHandler.GetPortalConfirmationRecipient("Sales Header");
        if PortalEMailAddress <> '' then
            Mail.Add_Recipient(PortalEMailAddress, 0, true);
    end;
    Mail.CallCreateVariables(MailRecRef, "Language Code", CurrReport.ObjectId(false), CurrReport.Pre
    Mail.ParamBoolean_Set('COLORCODE', ReportSettings."Show Variant 1 Code In Matrix");
    Mail.ParamBoolean_Set('SPLITASSOR', ReportSettings."Split Assortment");
    Mail.ParamBoolean_Set('TARIFF', ReportSettings."Show Tariff No.");
    Mail.ParamInteger_Set('MAXCOLUMN', ReportSettings."Maximum No Of Columns");
    Mail.ParamBoolean_Set('UNITPRICE', ReportSettings."Show Unit List Price");
    Mail.ParamBoolean_Set('COMMENT', ReportSettings."Print Comments");
    if Mail.CallCreateMail(true) then begin
        SomethingPrinted := true;
        if ActualMailNumber < NumberOfMails then
            CurrReport.Skip
        else
            CurrReport.quit;
    end else
        UpdateNoPrinted := false;
end;
```

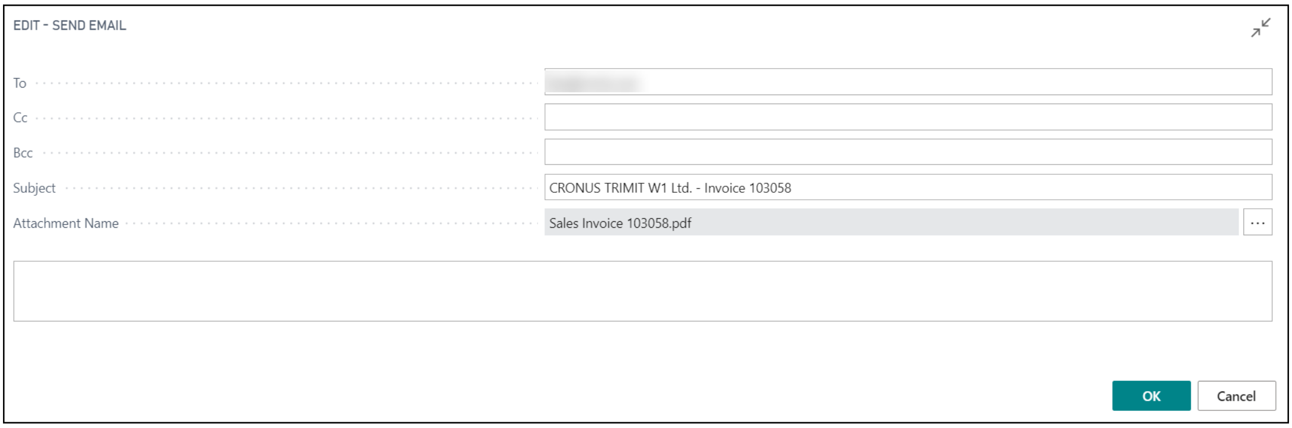
If you would set the **Mail.CallCreateMail** to *FALSE,* the E-Mail would not be sent, but a record will be created in the E-Mail Log Entries. So, you are still able to send the E-Mail via the **E-Mail Log Entries** afterwards.

EXTRA REMARKS

BUSINESS CENTRAL E-MAIL

When using the **TRIMIT E-Mail** functionality you are not able to use the Business Central E-Mail functionality at the same time for the same report if there is an **E-Mail Template** with **Status** *Active* for that same report.

If no active **E-Mail Template** is available, and you would send the report by E-Mail, you would get the standard Business Central E-Mail functionality.
I.e. click *Print/Send, **Send*** in the **Posted Sales Invoice** would result in:
The **To:** is simply the E-Mail Address in the Customer Card.



EXTRA SETUP INSTRUCTIONS

TEST OF SMTP SERVER SETUP

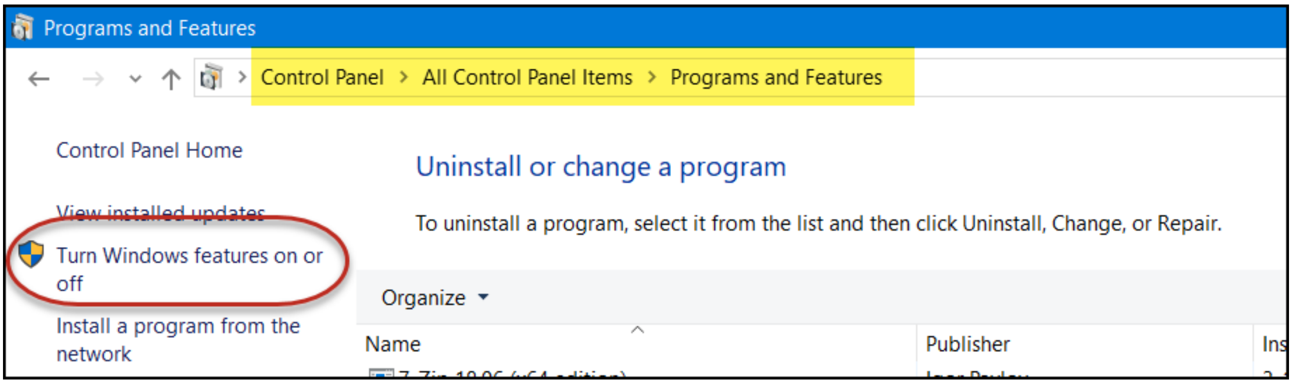
From Windows 7/Server 2008 R2 onward the telnet command needed for testing, is no longer installed by default. It can be installed by navigating to

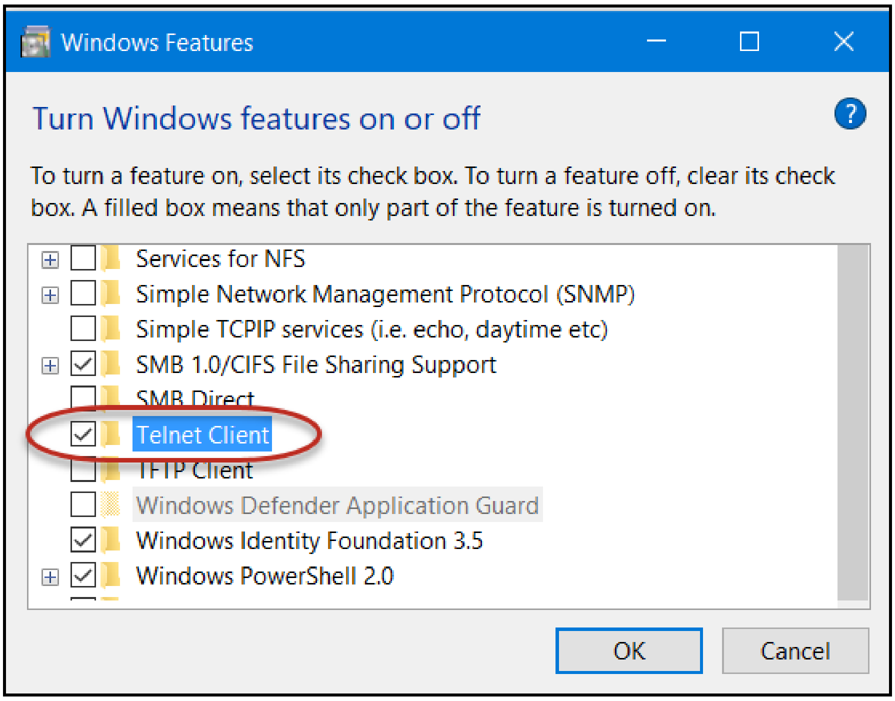
Control Panel

Programs and Features

Turn Windows features on or off

In addition, enter a checkmark in **Telnet client**, and then click **OK**.





There are two ways to test an SMPT Server: [With Anonymous Access] and [With Authorization].

TEST WITH ANONYMOUS ACCESS

To test an SMTP Server with Authorization, see With Authorization.

To test an SMTP with Anonymous Access, start a command prompt and type:

```
telnet ip-or-name-of-the-customers-mailserver 25
```

This creates the initial connection to the server. The server responds with something like this:

```
220 name-of-the-customers-mailserver Microsoft ESMTP MAIL Service,
Version: 6.0.3790.4675
ready at  Thu, 16 Jun 2011 11:50:21 +0200
```

This means the server is ready to accept connections and send E-Mails.

To test whether relaying is set up properly, type in the following.

Red is what you need to type, green is the server response.

```
Helo customers-mail-domain
250 name-of-the-customers-mailserver Hello [10.1.1.93]
mail from:mail@customers-mail-domain
250 2.1.0 mail@customers-mail-domain....Sender OK
rcpt to:yourown@emailaddress
250 2.1.5 yourown@emailaddress
data
354 Start mail input; end with <CRLF>.<CRLF>
Subject: Testmail
Test.
.
250 2.6.0 <customers-mail-domain4yBdFXEdDs000002af8@name-of-the-
customers-mailserver> Queued mail for delivery
```

It is important to put in the last dot, since this tells the server that you're done with the input.

NOTE

It is no error that the first red line starts with "Helo"; that is correct!

TEST WITH AUTHORIZATION

If the SMTP Server requires username and password authorization, it gets a bit more tricky.
Username and password will have to be converted to base64. This can be done on this webpage:
http://www.motobit.com/util/base64-decoder-encoder.asp
If the username is mail, the base64 equivalent is bWFpbA==.

Red is what you need to type, green is the server response.

```
ehlo customers-mail-domain
250 name-of-the-customers-mailserver Hello [10.1.1.93]
auth login
334 VXNlcm5hbWU6
Your-base64-encoded-username
334 UGFzc3dvcmQ6
Your-base64-encoded-password
235 2.7.0 Authentication successful
mail from:mail@customers-mail-domain
250 2.1.0 mail@customers-mail-domain....Sender OK
rcpt to:yourown@emailaddress
250 2.1.5 yourown@emailaddress
data
354 Start mail input; end with <CRLF>.<CRLF>
Subject: Testmail
Test.
.
250 2.6.0 <customers-mail-domain4yBdFXEdDs000002af8@name-of-the-
customers-mailserver> Queued mail for delivery
```

Not all SMTP Servers are born equally, so some of the responses you get might differ, the commands are the same for all though.

NOTE
It is no error that the first red line starts with “ehlo”; that is correct!