WHITE PAPER

TRIMIT E-MAIL 23.1

This document contains information about the TRIMIT E-Mail in TRIMIT 23.1 for Microsoft Dynamics 365 Business Central 2023, Wave 1 (W1).

Version: 23.1
Date: 14-02-2023

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 (especially for our TRIMIT Portals), 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 send 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 or Sales Quote Confirmations based on entered Orders in the B2C Webshop, B2B Webshop and Sales Agent 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.

As of TRIMIT 23.1, the **TRIMIT E-Mail** functionality will make more use of the standard Business Central Email functionality to send the E-Mails, but the **TRIMIT E-Mail Template** can remain the basis for the content of the E-Mails.

The functionality described is the functionality as of **TRIMIT 23.1 for Business Central W1 BC22.X**.
The pictures in this White Paper are based on the demo database for **TRIMIT 23.1,** which is based on Microsoft Dynamics 365 Business Central 2023 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	***6036562***	***trm File Storage Lookup List***
	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***
	6037714	***trm E-Mail Template Editor***
The report	***6037700***	***trm Delete E-Mail Log***
	6037701	***trm Delete Sent Emails***
	6037702	***trm Update E-Mail Log Entries***
	6037703	***trm Update Sent Emails***
The codeunits	***6037700***	***trm E-Mail Handling***
	6037701	***trm E-Mail Data Container***
	6037702	***trm Retired E-Mail Handling***

TRIMIT E-Mail functionality makes use of the standard BC functions – as we did before as well -, but now we also make use of the standard BC **Email Outbox** and **Sent Emails** instead of the **trm E-Mail Log Entries** which was used before.

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

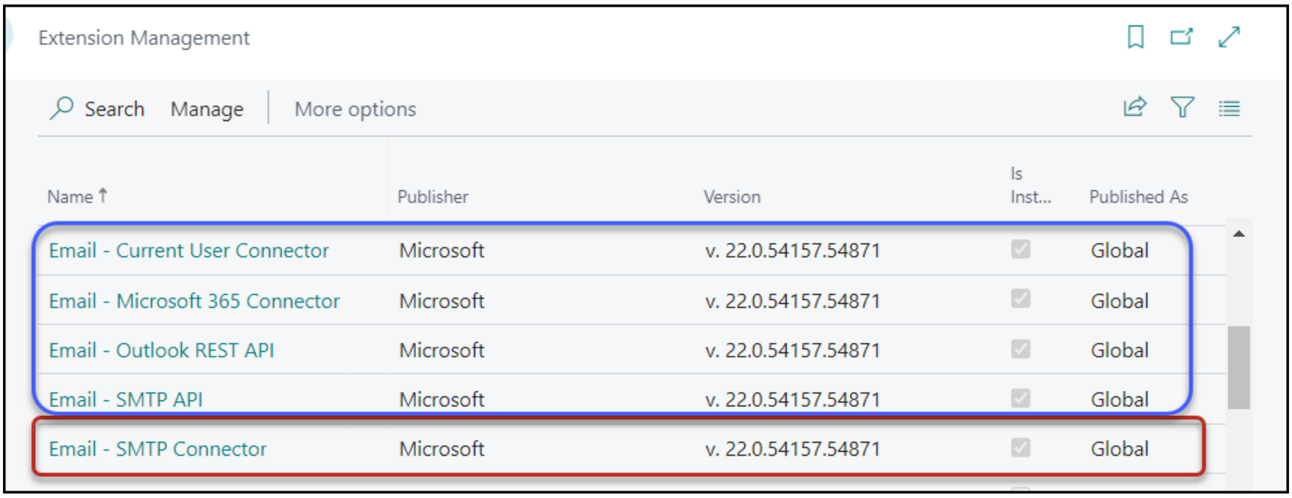
The reports	***6036650***	***trm Statement***
	6036651	***trm Reminder***
	6036652	***trm Finance Charge Memo***
	6036700	***trm Sales Quote***
	6036701	***trm Sales Order***
	6036702	***trm Sales Invoice***
	6036703	***trm Sales Credit Memo***
	6036704	***trm Sales Shipment***
	6036710	***trm Commission 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 23.1 for Business Central 365 2023, Wave 1.
BC for standard Microsoft Dynamics 365 Business Central.

PRECONDITIONS

INSTALL EMAIL – SMTP CONNECTOR FOR TRIMIT PORTALS

Because we send the E-Mails directly via the SMTP Server for our **TRIMIT Portals**, you need to publish and install standard BC App called: **Email – SMTP Connector** and create an **Email Account** of **Type** *Use SMTP to send emails.*



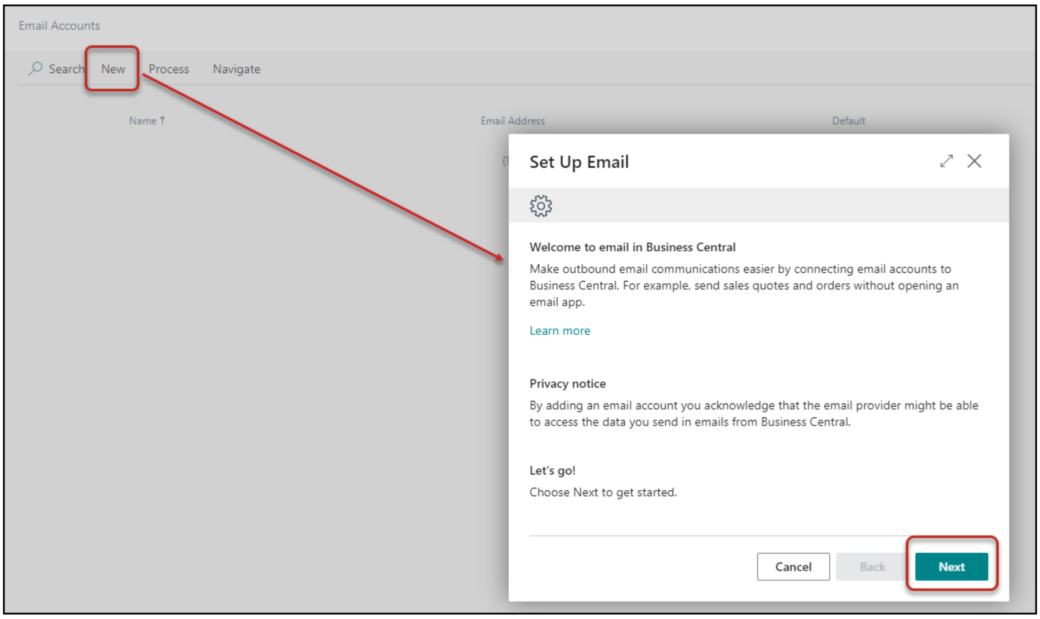
If you do not use the **TRIMIT Portals**, you can also use the other Types for the **Email Accounts** and have to install the appropriate standard BC **Email** Apps for it.

CREATE EMAIL ACCOUNT (STANDARD BC)

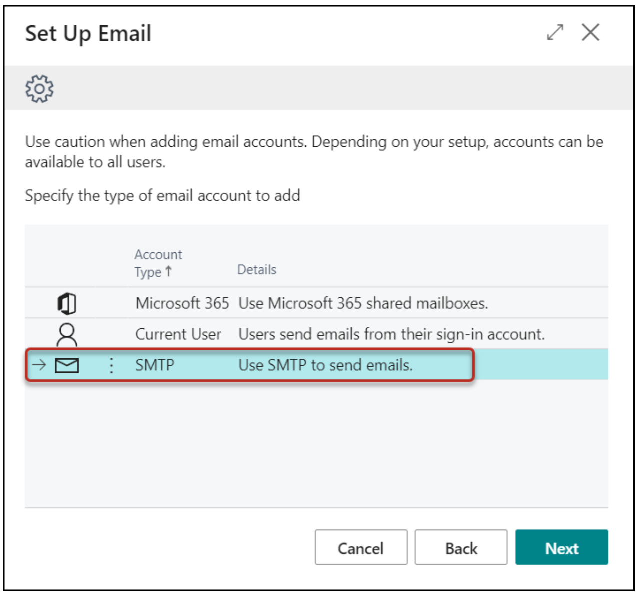
You also need to create at least one **Email Account** with **Type** *Use SMTP to send emails* when using the **TRIMIT Portals**.

This is the E-Mail address from which the E-Mails will be send with the TRIMIT E-Mail Templates.

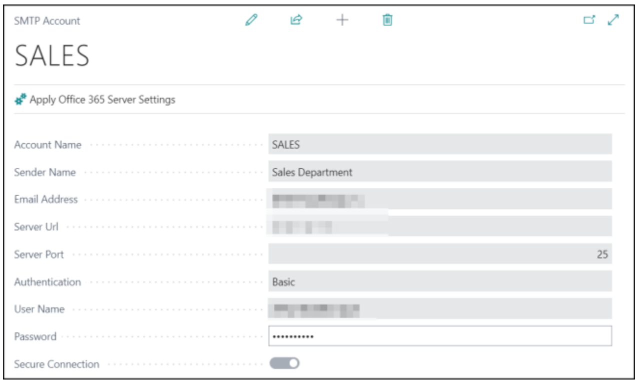
Find it via **Search** *Email Account*



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



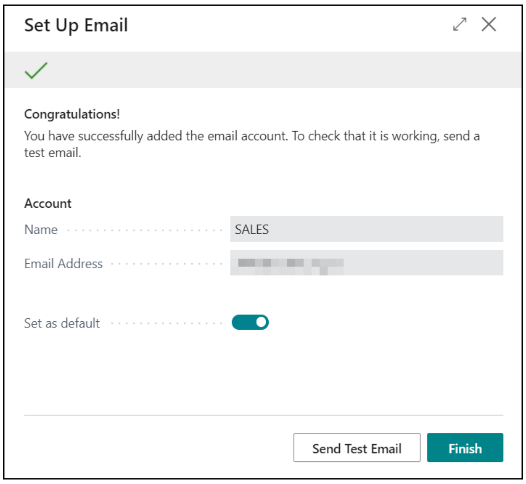
Select **Account Type** *Use SMTP to send emails* and click ***Next***



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

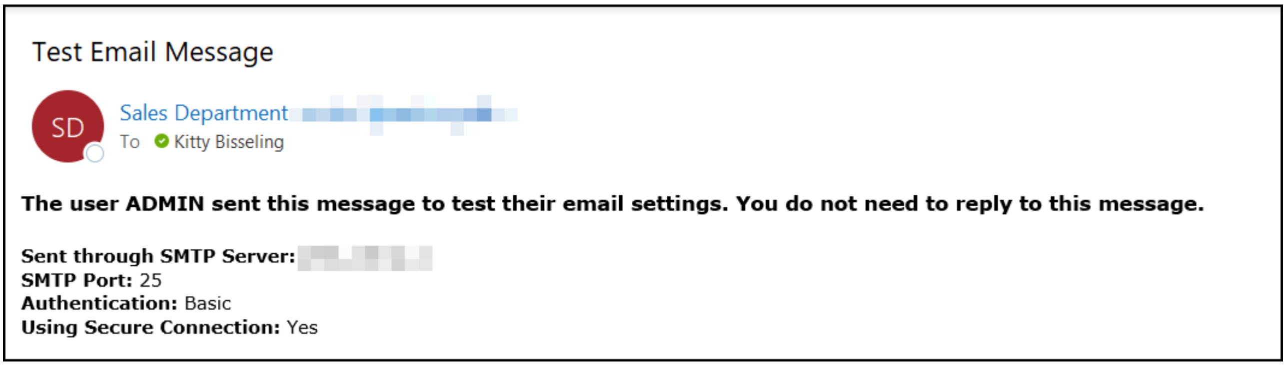
You can read more about setting up the Email Account in https://docs.microsoft.com/en-us/dynamics365/business-central/admin-how-setup-email

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.

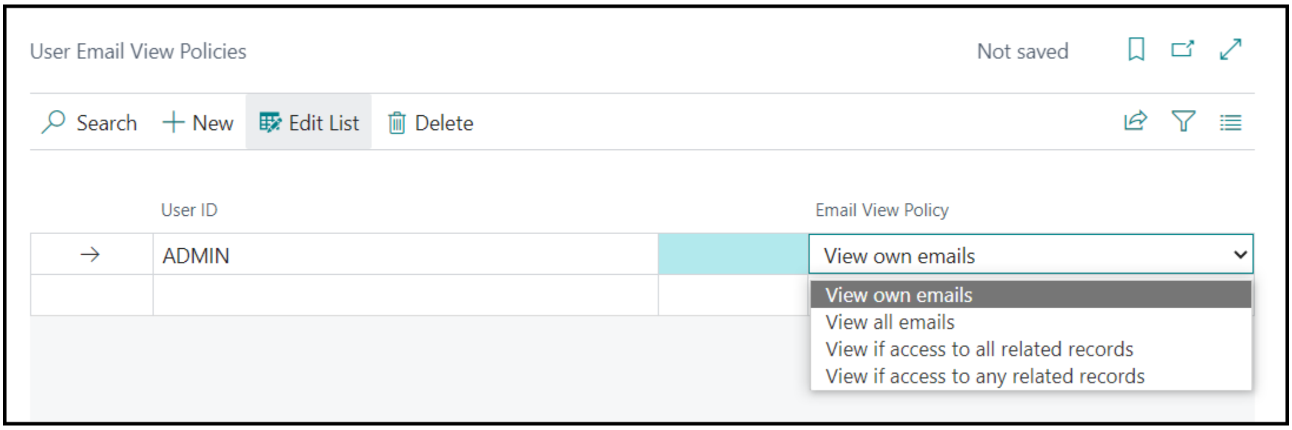
This might look as follows:



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.

USER EMAIL VIEW POLICIES (STANDARD BC)

For Users to review the **Sent Email** you need to setup the **User Email View Policies** per User.

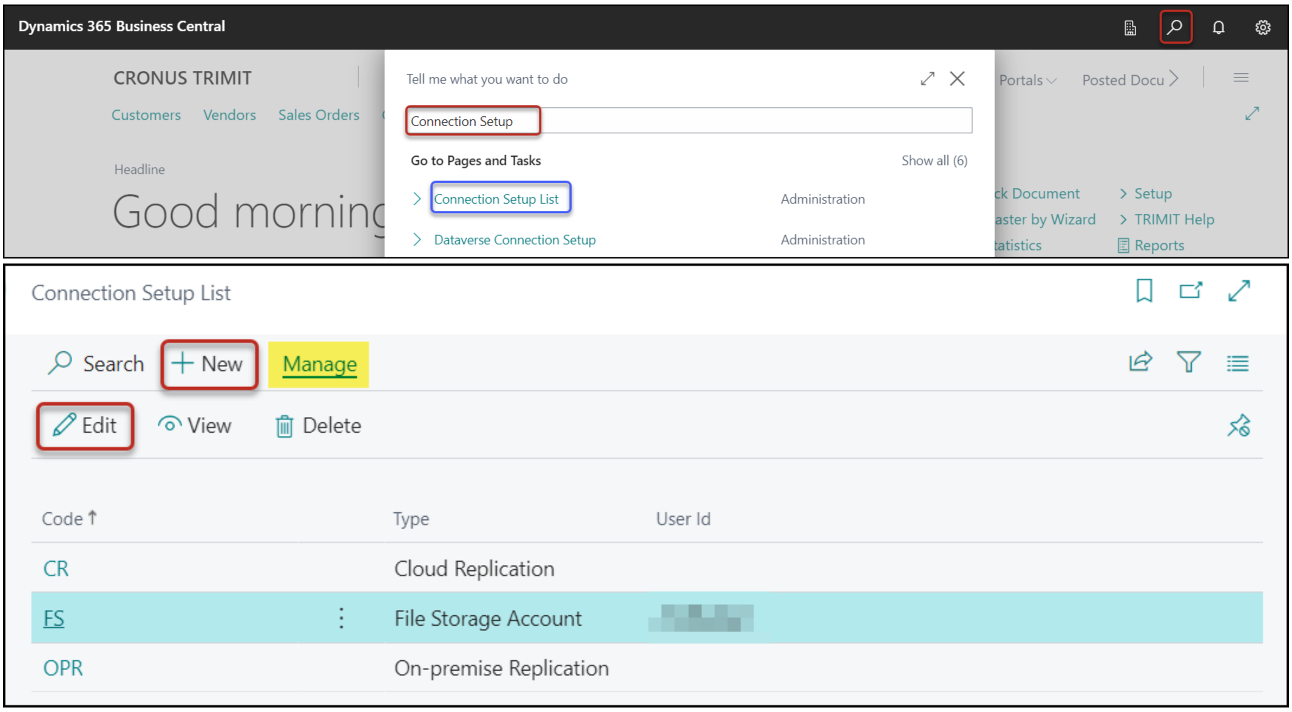


You can control the email messages that a user can access in the **Email Outbox** and **Sent Emails** pages. You can choose between the following four options for the **Email View Policy**:

View own emails	The user can view only their own email messages.
View all emails	The user can view all email messages, including emails that were sent by other users.
View if access to all related records	This view policy is used if no other policy is specified. A user can view email messages that other users sent if the user has access to the record that was sent and all of the related records. For example, User A sent a posted sales invoice to a customer. User B can see the email message if they have access to both the invoice and the customer.
View if access to any related records	The user can view email messages that were sent by other people if the user has access to at least one record that is related to the record that was sent. For example, User A sent a posted sales invoice to a customer. User B can see the email message if they have access to either the invoice or the customer.

CONNECTION SETUP

The **Connection Setup** might be necessary if you want to log the E-Mails, and want the attachments (like the pdf of the Report) to be stored in Azure Storage.
You can find it via **Search** *Connection Setup List.*



DESCRIPTION OF THE FIELDS:

CODE

Unique **Code** for this Connection Setup.

TYPE

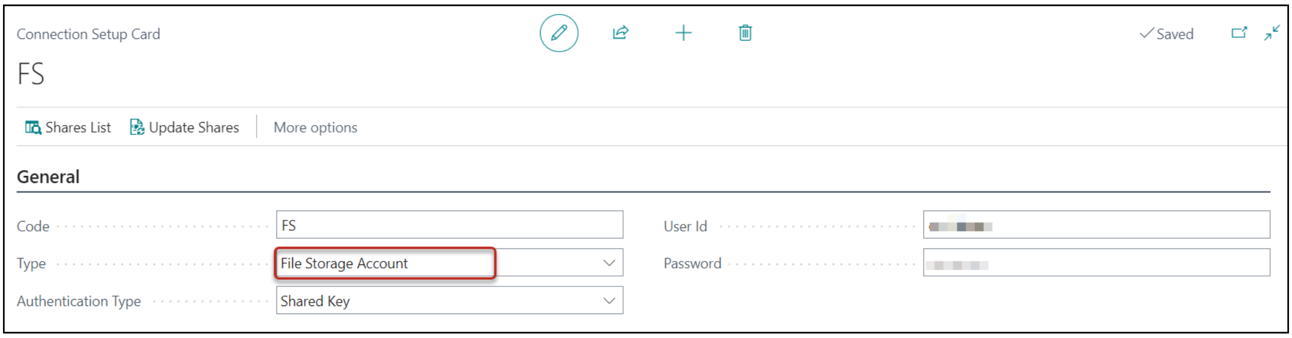
You can choose between the following three options, but you must choose the *File Storage Account* for the purpose of storing the attachments of logged E-Mails:

On-premise Replication	Connection for replicating Data in an on-premises installation
Cloud Replication	Connection for replicating Data in a cloud installation
File Storage Account	**Connection for Azure File Storage**

USER ID

The **User Id** for your Connection.
In case of **Type** = *File Storage Account* it is the **Account** of your Azure Storage Services.

By clicking ***Manage, Edit***, the Card will open in which you can also enter other necessary fields.



For **Type** *File Storage Account*

AUTHENTICATION TYPE

With this field you can determine how the Authentication takes place based on your **User Id** and **Password**.

For **Type** *File Storage Account* – the only option that you can choose is *Shared Key*, which is also filled as default. Any other option will give you an error message.

PASSWORD

The Password belonging to your **User Id.**
In case of **Type** = *File Storage Account* it is the **Password** of your Azure Storage Services.

For **Type** *File Storage Account,* click ***Update Shares***, to update the Shares of your File Storage Account.

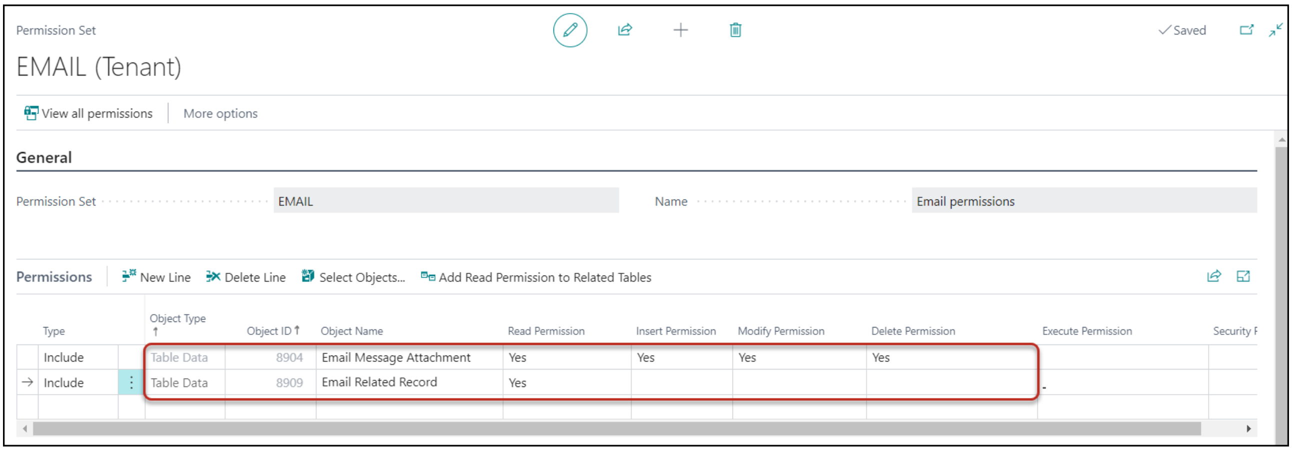
For more info see ***White Paper – TRIMIT Azure Storage Services***.

PERMISSIONS REVISED E-MAIL FUNCTIONALITY

Because the usage of the standard BC **Email Outbox** and the **Sent Email**, we also had to change the permissions: The below mentioned permissions are in the AL Codes for Permissions of TRIMIT 23.1

NEW Permission Set	ADDITION TO BC Permission Set	Object Type	Object	Object Nam	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	Security Filter
TRM-BASIC ISV,EXT	D365 BASIC ISV	Table Data	8888	Email Outbox	Yes	Yes	Yes	Yes		
TRM-BASIC, EXT	D365 BASIC	Table Data	8888	Email Outbox	Yes	Yes	Yes	Yes		
TRM-FULL ACC, EXT	D365 BUS FULL ACCES	Table Data	8888	Email Outbox	Yes	Yes	Yes	Yes		
TRM-BASIC ISV,EXT	D365 BASIC ISV	Table Data	8889	Sent Email	Yes	Yes	Yes	Yes		
TRM-BASIC, EXT	D365 BASIC	Table Data	8889	Sent Email	Yes	Yes	Yes	Yes		
TRM-FULL ACC, EXT	D365 BUS FULL ACCES	Table Data	8889	Sent Email	Yes	Yes	Yes	Yes		

We also need the permissions on TableData ***8904 Email Message Attachment*** and TableData ***8909 Email Related Record.***
Unfortunately, we are not able to add this in the AL Code for Permissions – because several used objects of BC regarding Email can not be addressed.
Therefore, you **need** to create a *User-defined* Permission Set for the permissions of TableData ***8904*** and ***8909*** manually and users that needs to be able to send E-Mails using the TRIMIT E-Mail functionality must have this Permission Set.


Permission Set
EMAIL (Tenant)
✓ Saved
View all permissions
More options
General
Permission Set
EMAIL
Name
Email permissions
Permissions
New Line
Delete Line
Select Objects...
Add Read Permission to Related Tables
Type
Object Type
Object ID
Object Name
Read Permission
Insert Permission
Modify Permission
Delete Permission
Execute Permission
Security F
Include
Table Data
8904
Email Message Attachment
Yes
Yes
Yes
Yes
Include
Table Data
8909
Email Related Record
Yes

E-MAIL TEMPLATE

For the layout of the E-Mail that will be send to Recipients of a specific report, you need to create the **E-Mail Template.** This can be done via **Search** *E-Mail Template.*

E-Mail Template List

Search | New | Manage | Recipient Setup | Activate | Deactivate | More options

No. ↑	Description	Report ID	Report Name	Default Template for Report	E-Mail Default=Yes	Status	Recipients	Template for E-Mail Addresses	Email Account
B2B AUTHORIZATI...	B2B Authorization	6038101	trm Create B2B Author. Code	☐	☐	Active	1		
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	9		SALES
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
SALES_QUO	Sales Quote	6036700	trm Sales Quote	☑	☑	Active	0	SALES_ORD	
SALES_SHIP	Sales Shipment	6036704	trm Sales Shipment	☑	☐	Active	8	SALES_ORD	
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*:

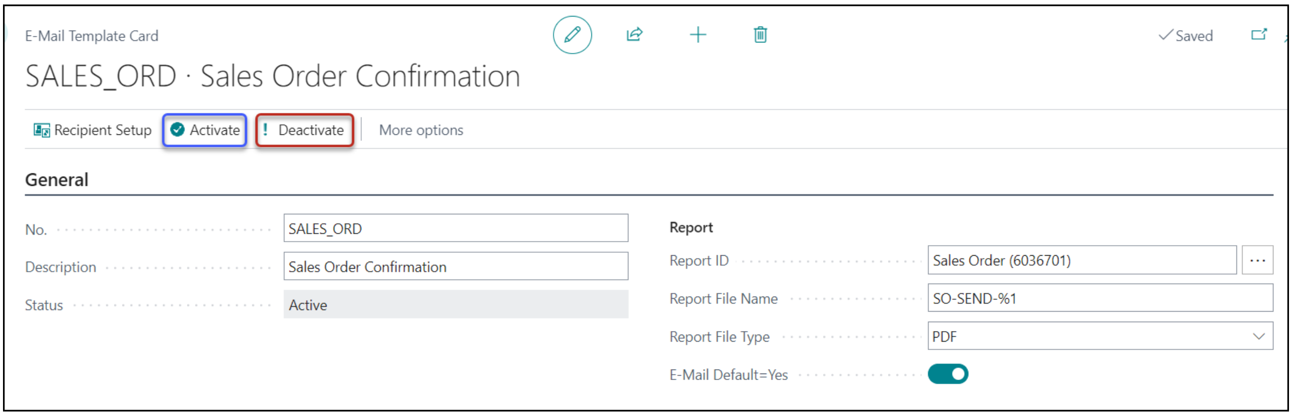
AL SalesOrder.Report.al ● **Report 6036701** AL Page De

TRIMIT Development AS_TRIMIT_23.1.8659.6058_W1 > src > src > AL SalesOrder.Report.al

```
                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
```

If no **E-Mail Template** with **Status** *Active* has been created for a report, it will simply be send with the standard BC options: Print, E-Mail according to standard BC 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 **OnInitReport()** trigger of your report where the Variable **SendMail** is the field that will be used in the Request page of the report.

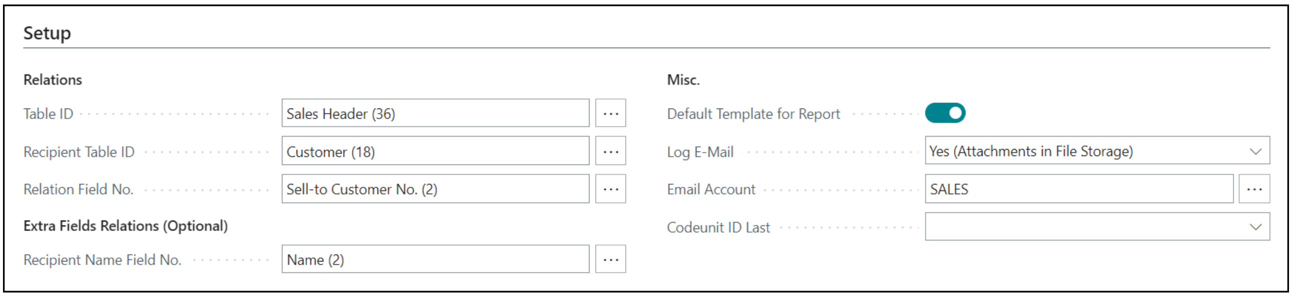
AL SalesOrder.Report.al × Report 6036701 AL Page Desi

TRIMIT Development AS_TRIMIT_23.1.8659.6058_W1 > src > src > AL SalesOrder.Report.al

```
    trigger OnInitReport()
    begin
        // InitValue for report settings
        MaxNoOfColumns := 10;
        ShowColourCodeInMatrix := true;
        SplitAssortment := false;
        ShowTariffNo := false;
        QuantityToShow := QuantityToShow::Quantity;
        ShowUnitListPrice := true;
        PrintComments := true;

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

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

	Report ID	Table ID	Recipient Table ID	Relation Field No	Recipient Name Field No.
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.

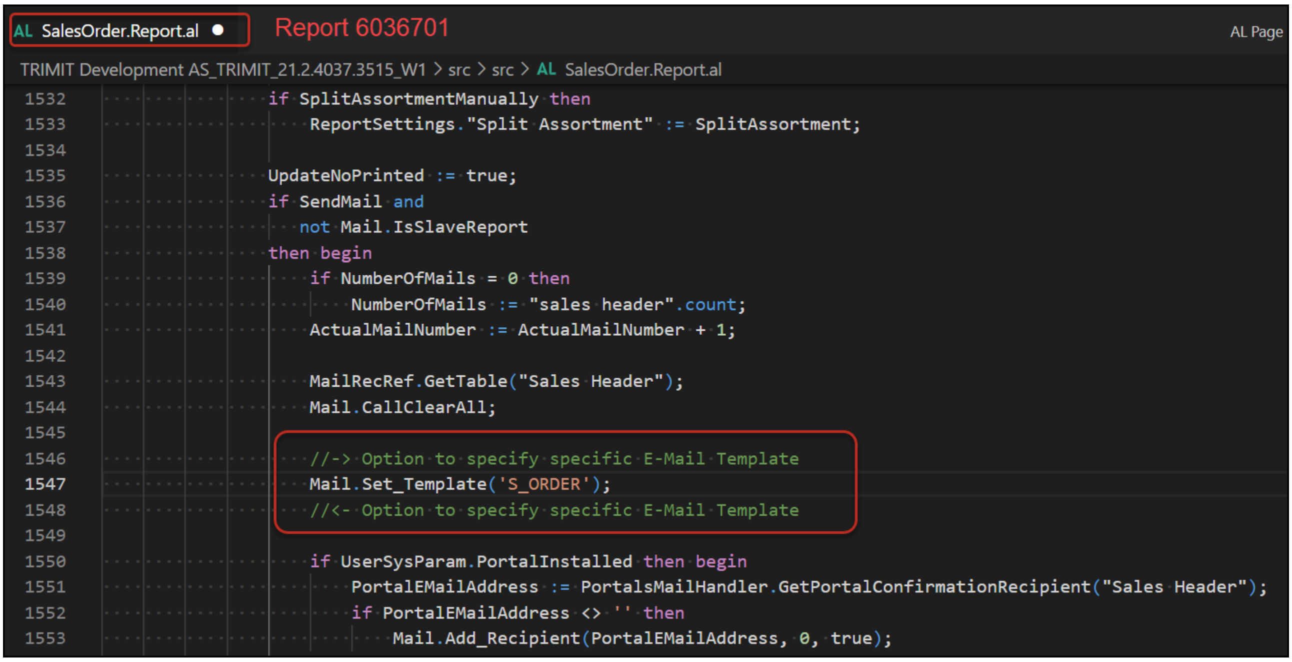
This is the Field No. in the **Recipient Table ID** that will give you the Name of the Recipient.
After entering/choosing the Field Number, the system will automatically show the Caption of the Name of the Field and the Field Number. But you only need to enter the Number of the Table.
I.e. entering *2*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

DEFAULT TEMPLATE FOR REPORT

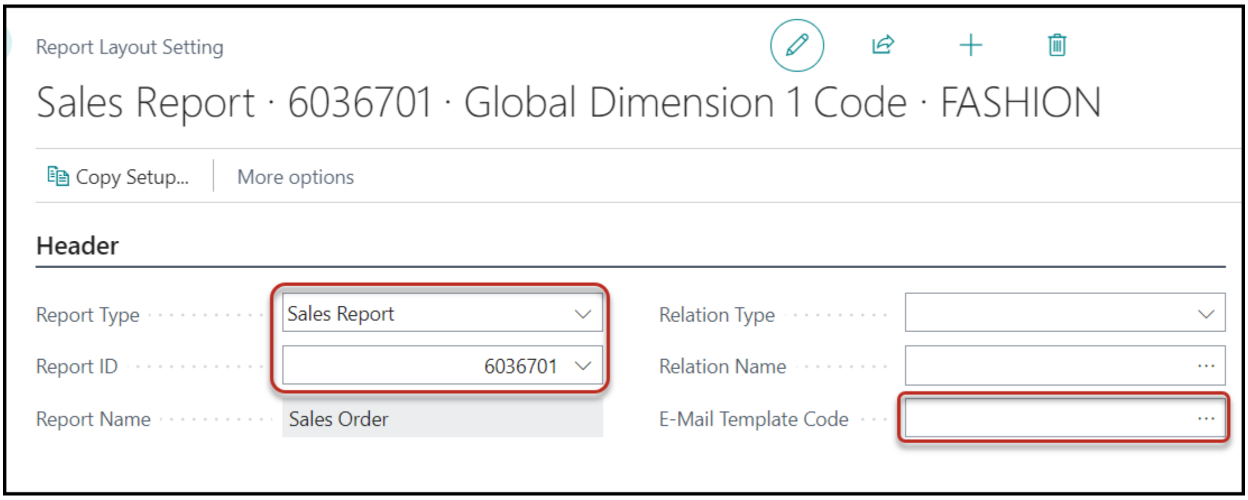
This Field determines if the current Template is the Default Template for your **Report ID** mentioned on the FastTab ***General*.**

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 report in which you can easily set the **E-Mail Template** that needs to be used**.** I.e.:



This will however be overruled by the field **E-Mail Template Code** in the **Report Layout Setting**:



If the **Report ID** of the **Report Layout Setting** is the same as the **Report ID** from the **E-Mail Template** it will overrule the content of the **Default Template for Report.**

LOG E-MAIL

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

Yes	A created E-Mail will be logged in the **Sent Emails (BC)** including the attachments.
Yes (without Attachments)l	A created E-Mail will be logged in the **Sent Emails (BC)**, but the attachments will not be stored in the Log Entries as well.
No	A created E-Mail will not be logged in the **Sent Emails (BC)**
Yes (Attachments in File Storage)	A created E-Mail will be logged in the **Sent Emails (BC)**, but the attachments will be stored in the File Storage that you specify in the FastTab ***File Storage Setup***

NOTE

If the created E-Mail is not send to the Recipient – because of an error or you did not click **Send email** in the preview, the E-Mail will be logged in the **Email Outbox** instead of the **Sent Emails** as described above.

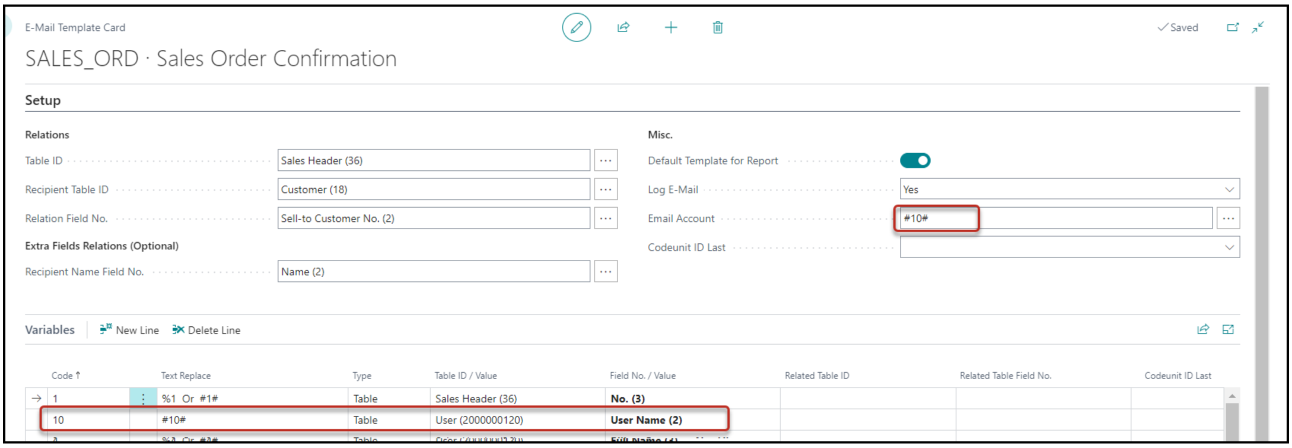
On TRIMIT's demo sites we will not accommodate the possibility by default to use the *Yes (Attachments in File Storage)* based on a specific **Connection Setup**.

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.

NOTE

You can also use a Variable (i.e. the **User Name** from Table ***User***) if you want to send it via a specific User related Email Account. In that case, the Email Account has the same name as the **User Name**.



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 | New Line | Delete Line

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)**			
9	%9 Or #9#	Table	Company Information (79)	**Name (2)**			

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)

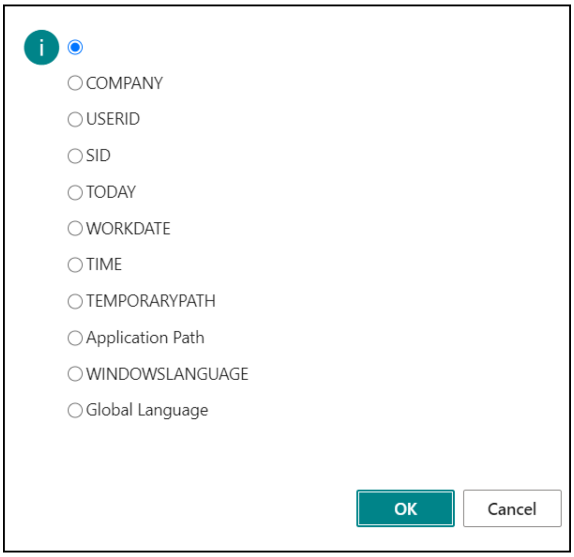
Manual	You can enter a fixed value for this Variable in the field **Field ID / Value** that you want to add to your E-Mail. In that case the **Table ID / Value** needs to have an option <> *Blanc*. If it is *Blanc, Manual* can be set by customized **C/AL Code** in the Report or by **Codeunit Call** and 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

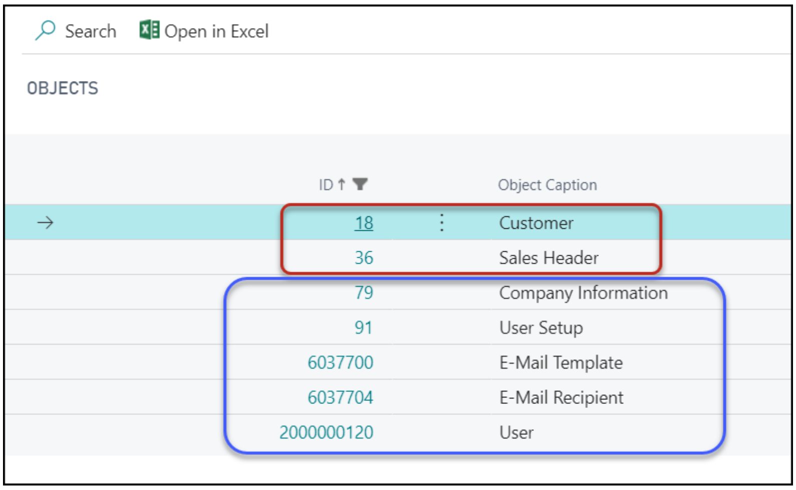
The content of **Table ID/Value** depends on the chosen content of **Type**.

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:



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.

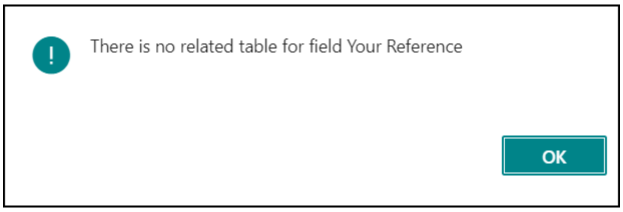
FIELD NO.

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 add it via ***Personalize***.
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.

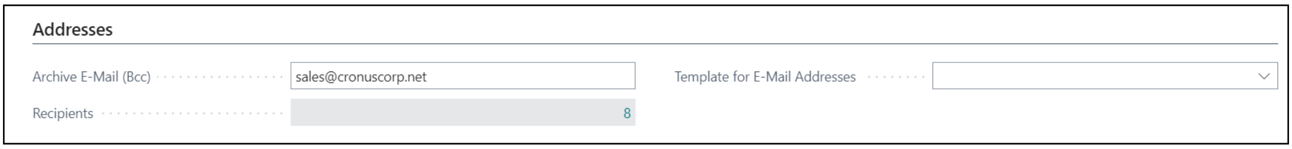
After you have entered all the necessary fields of the **Variables** the actual content that will be added to your text or field when using this **Variable** will be shown **bold**.

Variables | New Line | Delete Line

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)**			
9	%9 Or #9#	Table	Company Information (79)	**Name (2)**			

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



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 send 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

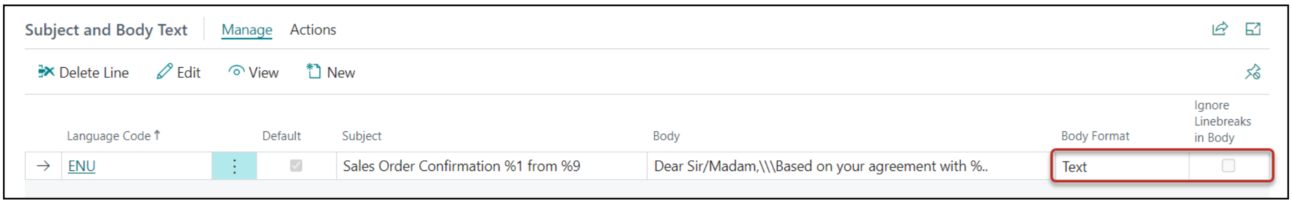
This number will automatically be updated based on the number of Recipients you have connected to this E-Mail Template via ***Recipient Setup***. See Recipient Setup.
If you click on the Assist-Button behind this fields, the page **E-Mail Template Recipients List** will open in which you can see/maintain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

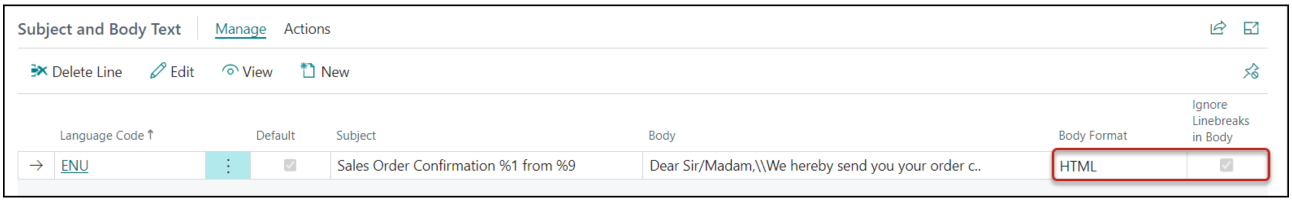
TEMPLATE FOR MAIL ADDRESSES

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





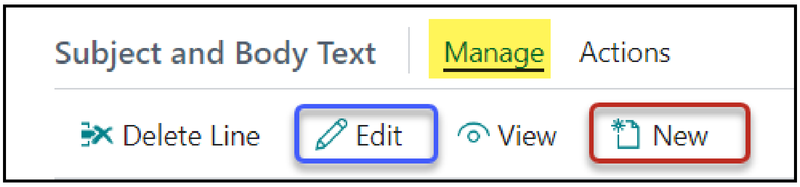
In this FastTab you can create the layouts for your E-Mails related to a specific **Language Code** (that will be compared with the Language Code in the actual document – i.e. in the Posted Sales Invoice Header).
If no **Subject and Body Text** has been entered for this Language Code, the line with a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

You can create a **Body** by using **Body Format** *Text* or *HTML*.

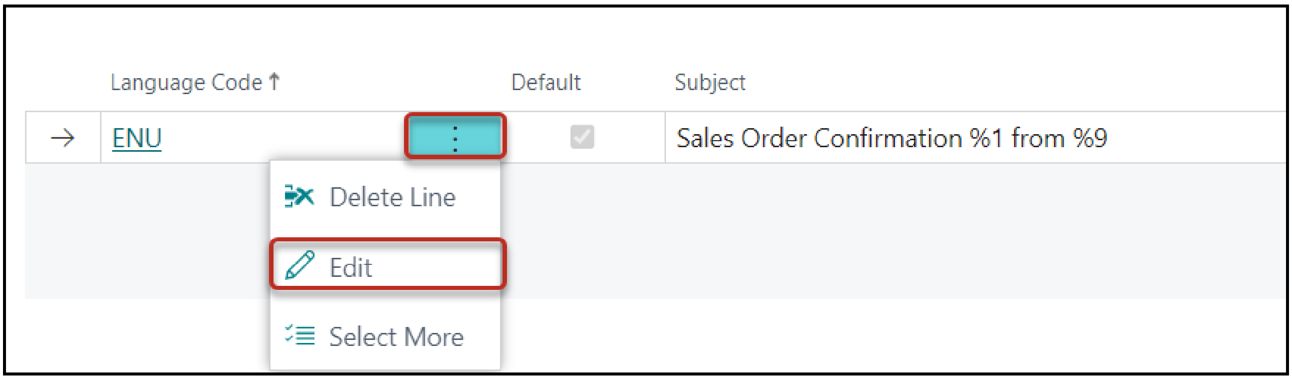
When **Body Format** is *Text*, you can use HTML Tags in the text of the Body.

When **Body Format** is *HTML*, you can NOT use HTML Tags in the text, but you can make use of the functions of the Editor itself and set text i.e. to **Bold** or *Italic* or import a Picture. That can also be used in the **Subject** of the E-Mail.
In that case, you should not have a **Variable** that represents the Company Logo from the Company Information.

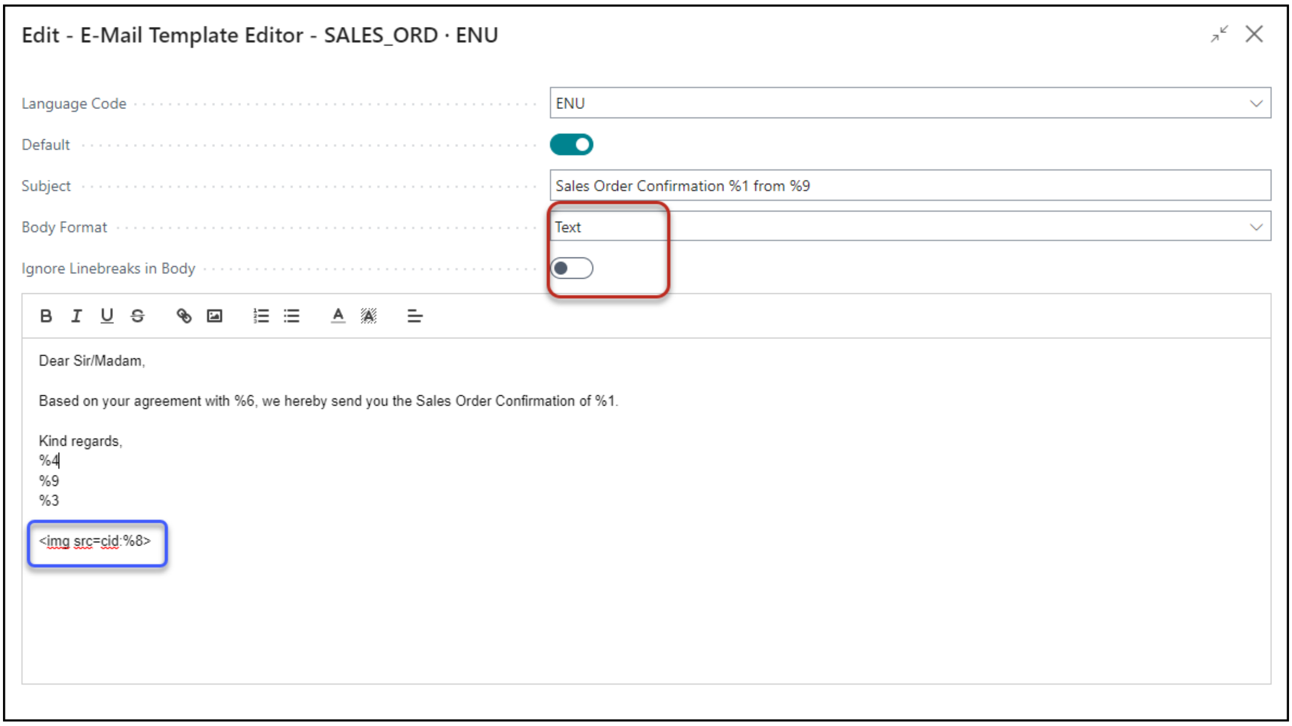
You can create a new layout by click ***Manage,*** click ***New*** in the Line Actions.



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



CREATING E-MAIL SUBJECT AND BODY FOR BODY FORMAT TEXT



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

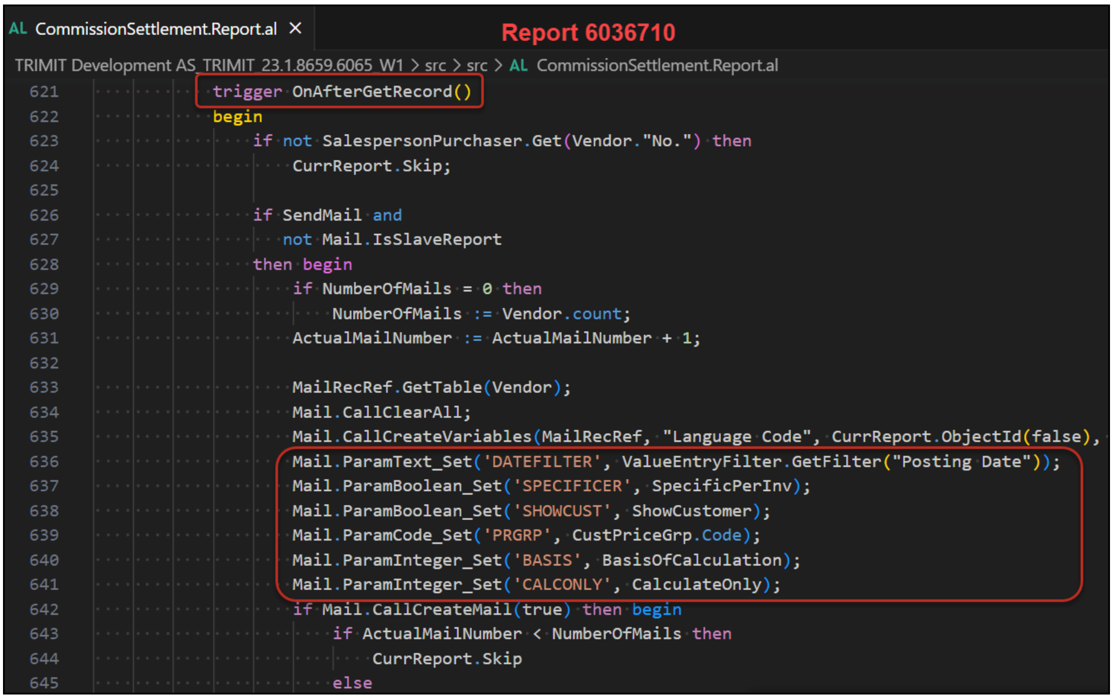
Dear Sir/Madam, Based on your agreement with %6, we hereby send you the Sales Order Confirmation of %1. Kind regards, %4 %9 %3 <img src=cid:%8>

In the **Subject** and **Body** of the layout of the E-Mail, you can use references to Variables you defined 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.

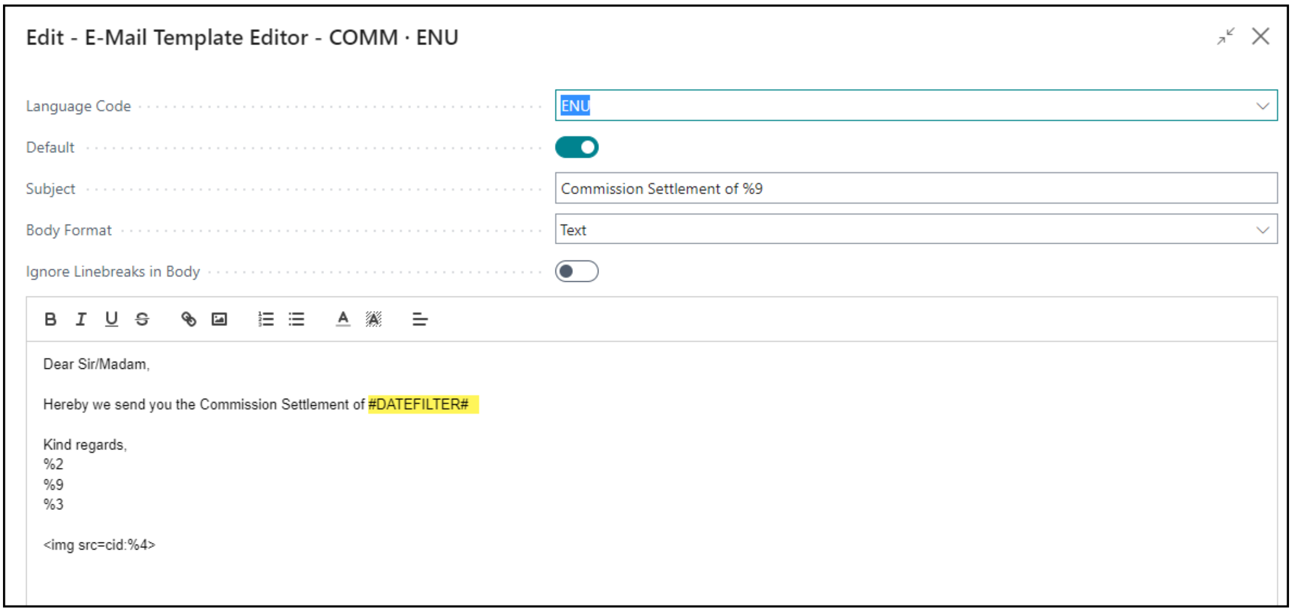
You are also able to 'import' a picture by using an HTML Tag: i.e. a picture of your normal signature under an E-Mail or your company logo.

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:



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 when **Body Format** is *Text*.

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:%4>

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 if **Body Format** is *Text*.
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

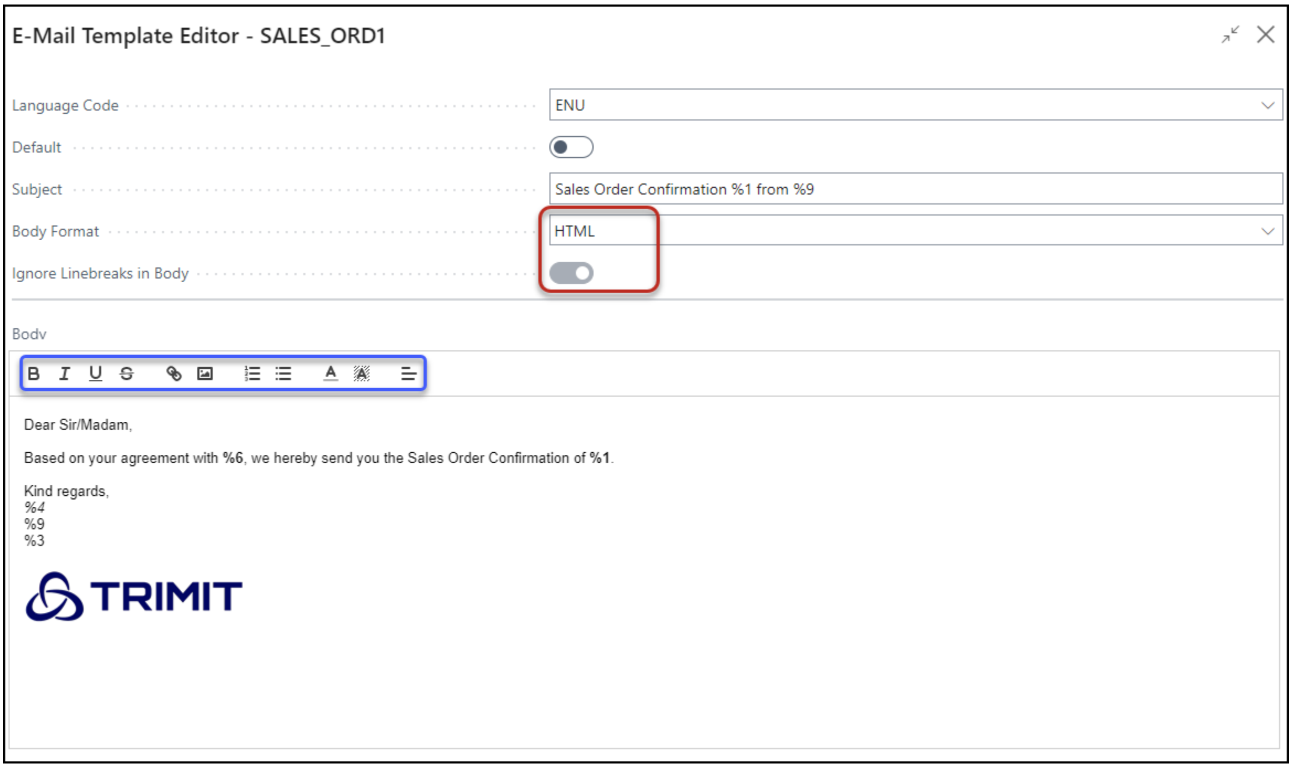
- Specify the **target** in the ****
- Then add the **text** that should work as the link
- Finally add an **** tag to indicate where the link ends

HTML TAGS

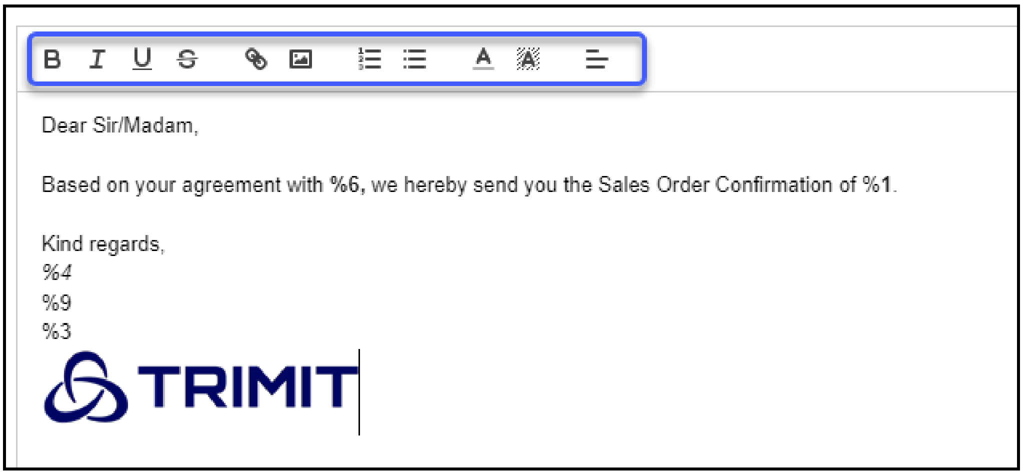
Some other examples of HTML Tags you can use in the **Subject** and **Body** of your E-Mail if **Body Format** is *Text*:

	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 SUBJECT AND BODY FOR BODY FORMAT HTML



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



In the **Subject** and **Body** of the layout of the E-Mail, you can use references to Variables you defined 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 use the signs in top of the Body to make text **Bold** or *Italic* or 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.

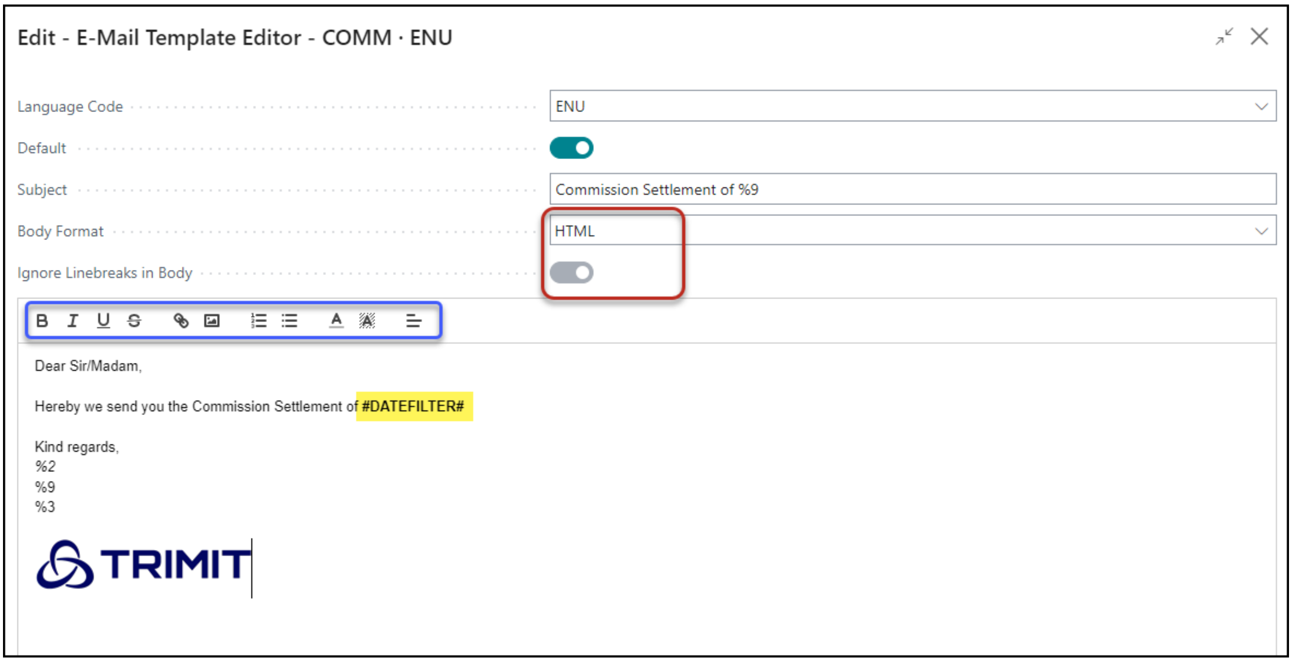
I.e. for the Commission Settlement you want to show the Date Filter that you used to create the Commission Settlement report. In the actual report ***6036710 Commission Settlement*** AL Code it is mentioned:

AL CommissionSettlement.Report.al ✕ **Report 6036710**

TRIMIT Development AS_TRIMIT_23.1.8659.6065_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),
        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
```

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



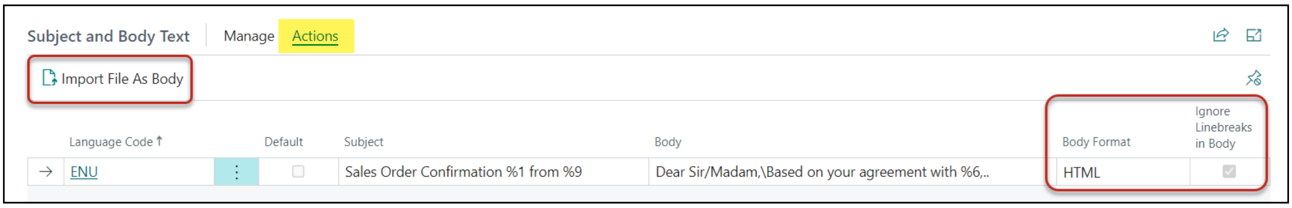
The possibilities for creating your own layout for an E-Mail are endless – if you know how to develop in **AL Code**.

NOTE

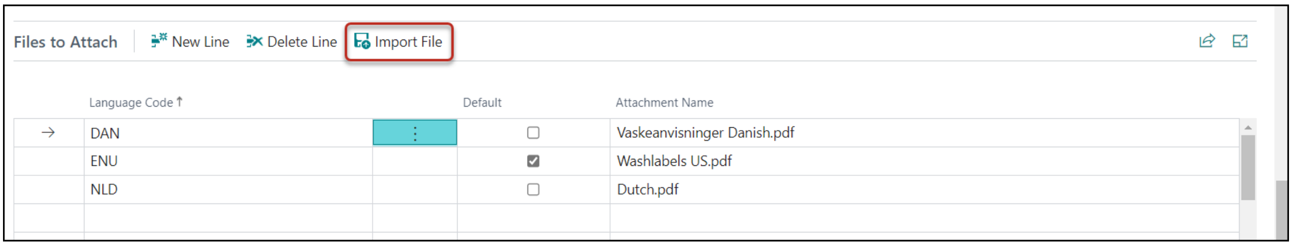
Don't use **Variables** that are **Variables** themselves. I.e. if **Variable** *%2* might be the field **Sender Name** but the field **Sender Name** is filled with *%4* then you will see *%4* in the E-Mail and not the content of the Variable *%4*.
So, make sure that your Variable is not a Variable itself.

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**.



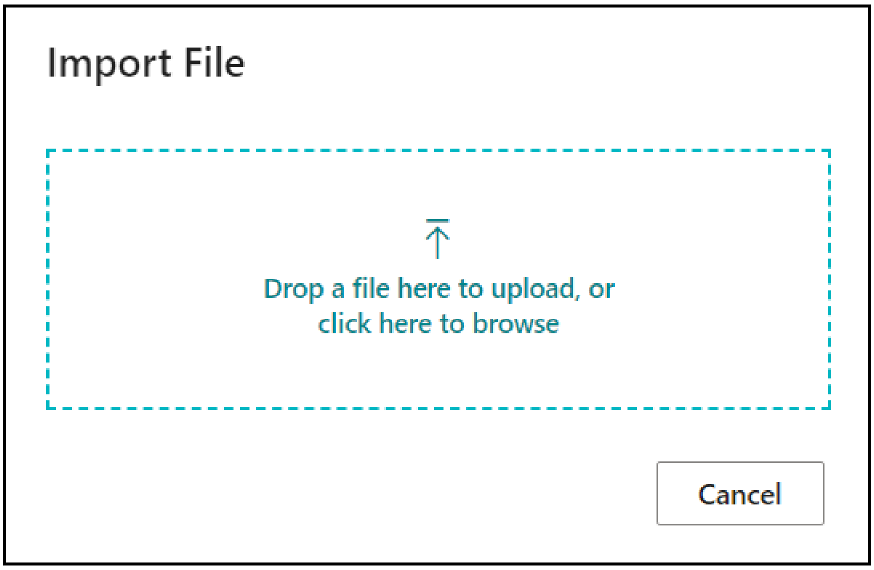
FASTTAB FILES TO ATTACH



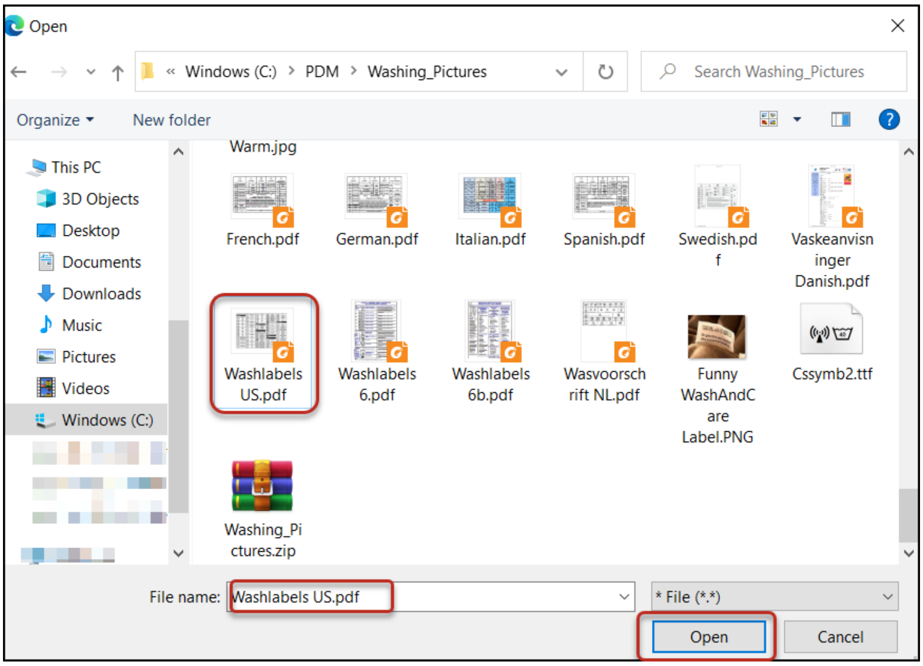
In the FastTab ***Files to Attach***, you can make a list of extra Files you want to attach to your E-Mail.
You can attach as many Files as you want.

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 ***Import File***:



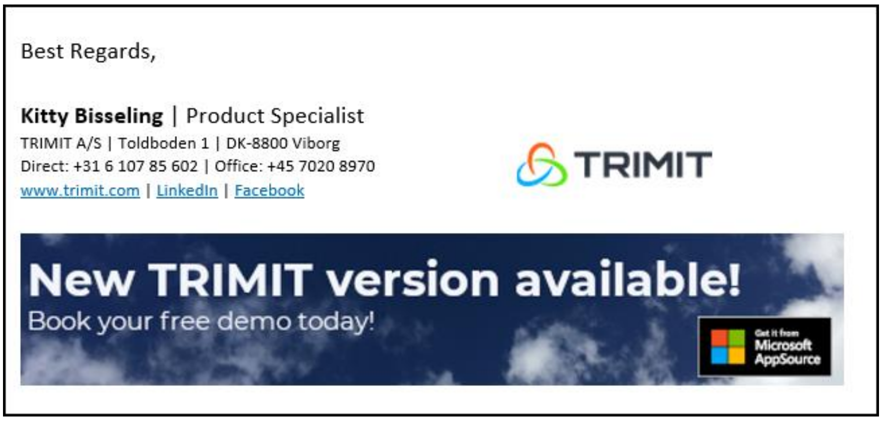
By clicking somewhere, you can import a File:



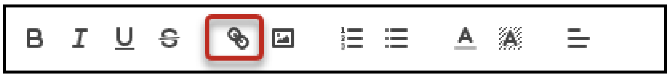
Select the file and click **Open**.

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 simply in the picture! Therefore, you need to use the special [HTML Tags]() as mentioned earlier if your **Body Format** is *Text* or insert a **link** if your **Body Format** is *HTML*.

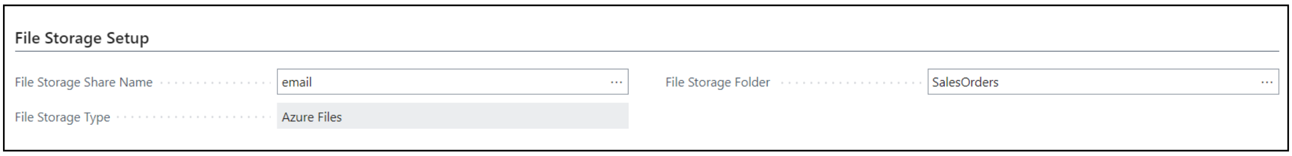


NOTE

The attached files must be accessible by the SMTP Server. This means that the documents you want to attach – when using an on-premises installation -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.

In case of a cloud installation the files must be linkable e.g. on a web server.

FASTTAB FILE STORAGE SETUP



Only applicable if **Log E-Mails** is set to *Yes (Attachments in File Storage).*
You can choose an existing **File Storage Share Name** and **File Storage Folder** where you want to store (save) the attachments of an E-Mail that has been send.
The **File Storage Type** will automatically be shown based on the chosen **File Storage Share Name**.

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. This is only possible if this **Extra Report ID** has the same main record as 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

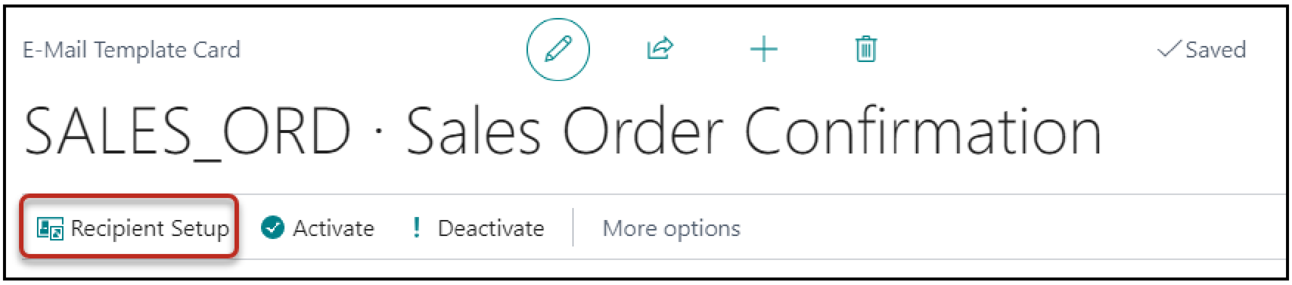
This is the name for the PDF-file (or other type of file based on **Extra Report File Type**) that will be created for the attachment of this specific **Extra Report ID**.
You can also use a **Variable** to fill this field.
The example in the above picture *Open_Sales_Orders_Detail_%2* is related to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

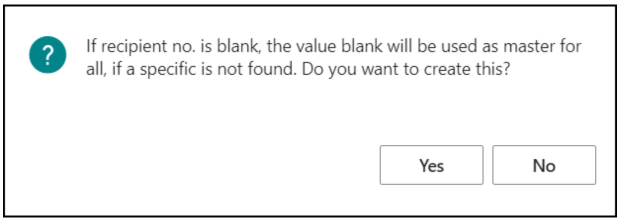
ACTIONS

RECIPIENT SETUP



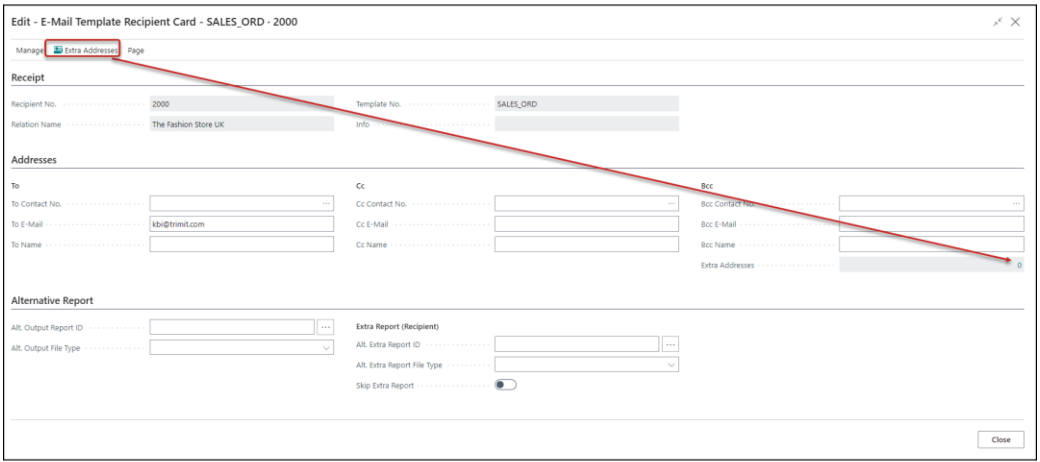
You can enter the **Recipients** of your Customers, Vendors or Salespersons for the E-Mails.
Unless you have entered the **Template for Mail Addresses** in which you can refer to Recipients of another E-Mail Template.

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,*** you can open the Card of a Recipient:



DESCRIPTION OF THE FIELDS

RECIPIENT NO.

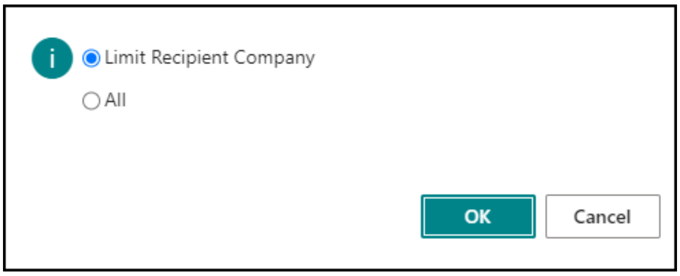
The number of the Customer/Vendor/Salesperson for the E-Mails.

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

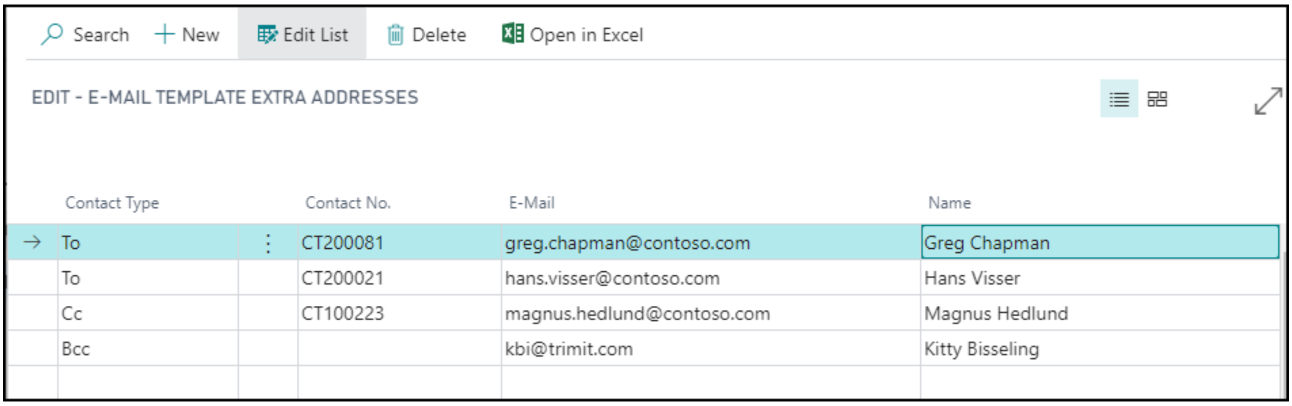
Will be filled with the E-Mail Address of the **Contact.**
Or you can enter the E-Mail Address manually of the person/department of your **Recipient No.** that should get the E-Mail on the *To, CC* or *BCC* of your E-Mail.
You are also able to enter two or more E-Mail Addresses just as you are able in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

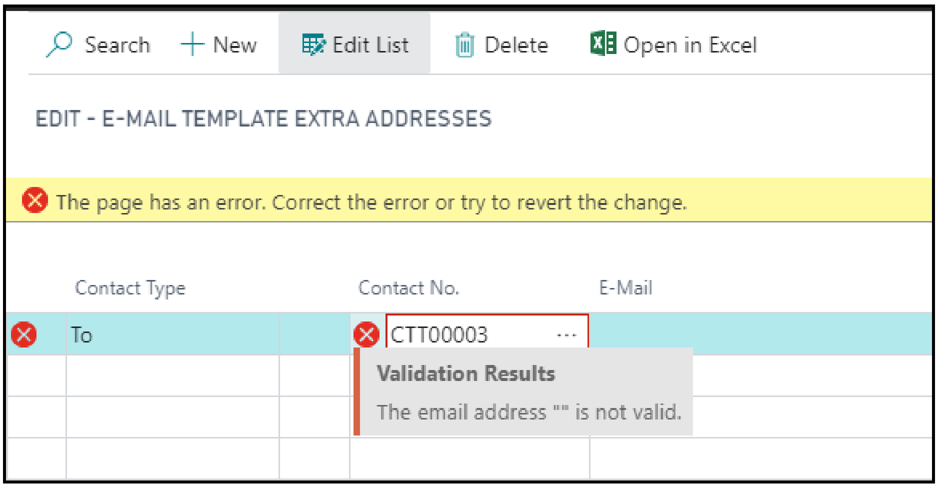
EXTRA ADDRESSES

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 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)*

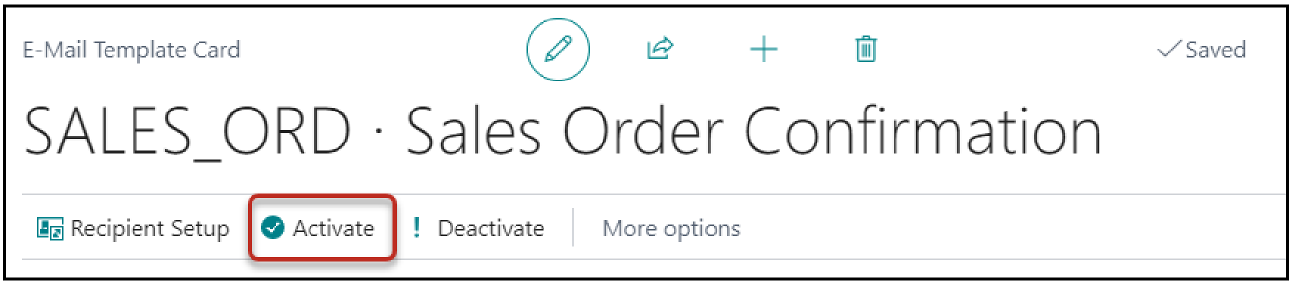
ALT. EXTRA REPORT FILE TYPE

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



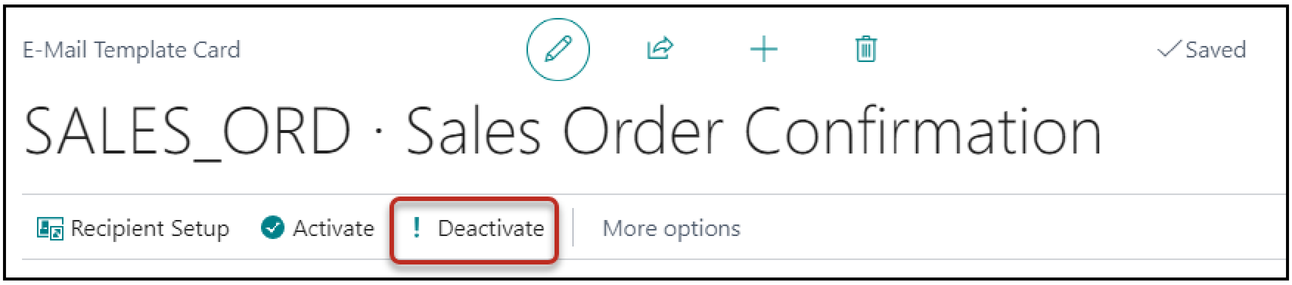
After you have entered all necessary data of the E-Mail Template and the Recipients, you need to **Activate** the E-Mail Template by clicking ***Activate***.

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

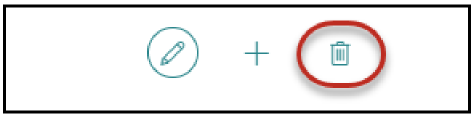


You can deactivate your E-Mail Template again by clicking ***Deactivate***.

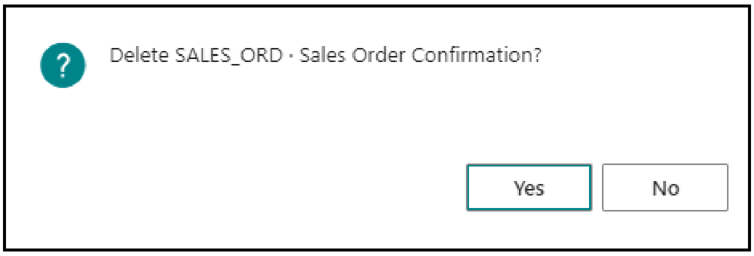
The **Status** in the FastTab ***General*** will automatically be set to *Deactivated*.

You can only delete an E-Mail Template if the **Status** is *Deactivated*.

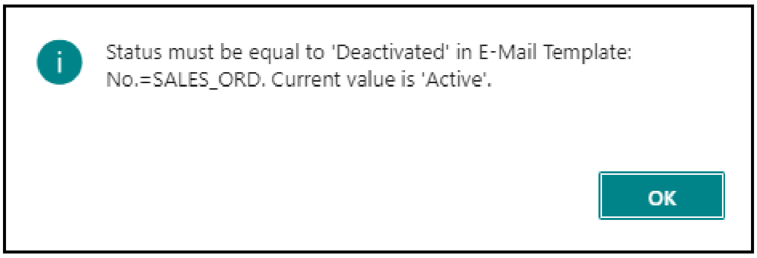
DELETE AN E-MAIL TEMPLATE



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

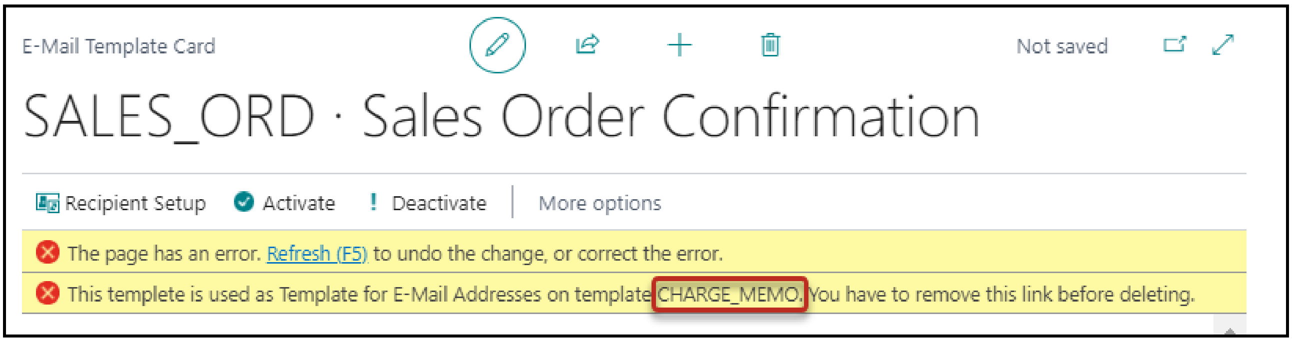


After clicking **Yes,** the system will check if the current **Template** is *Active* or *Deactivated*. A Template needs to be *Deactivated* to be able to delete it.



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**.

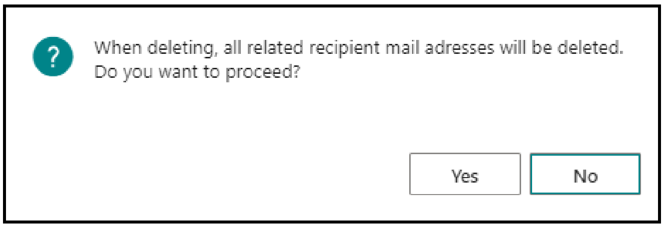
In that case, you will get the following message and need to clear the **Template for E-Mail Addresses** in the other Templates before you can delete the current one:



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

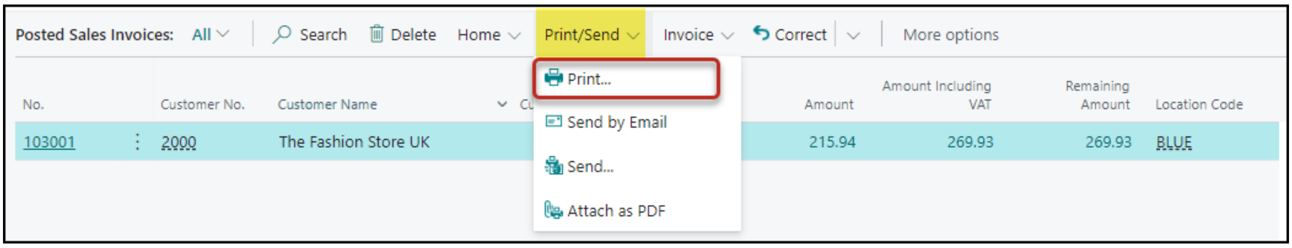
To use the specific **TRIMIT E-Mail Templates**, you can **PRINT** the Report, and the Number of the Report (based on the standard BC Report Selections) must be the **Report ID** of an *Active* E-Mail Template.
The Reports need to be customized for the TRIMIT E-Mail functionality which has already been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

This is applicable for:

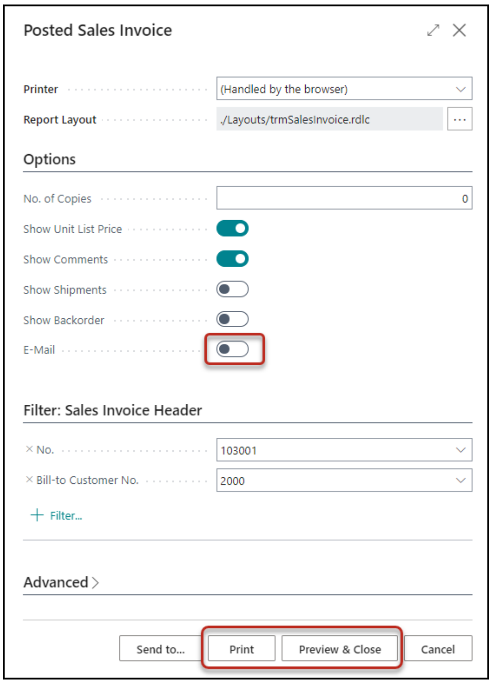
- Sales Quote List/Card: Click *Print/Send, **Print***
- Sales Order List/Card: Click *Print/Send, **Print Confirmation***
- Posted Sales Shipment List/Card : Click *Print/Send, **Print***
- Posted Sales Invoice List/Card: Click *Print/Send, **Print***
- Posted Credit Memo List/Card: Click *Print/Send, 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

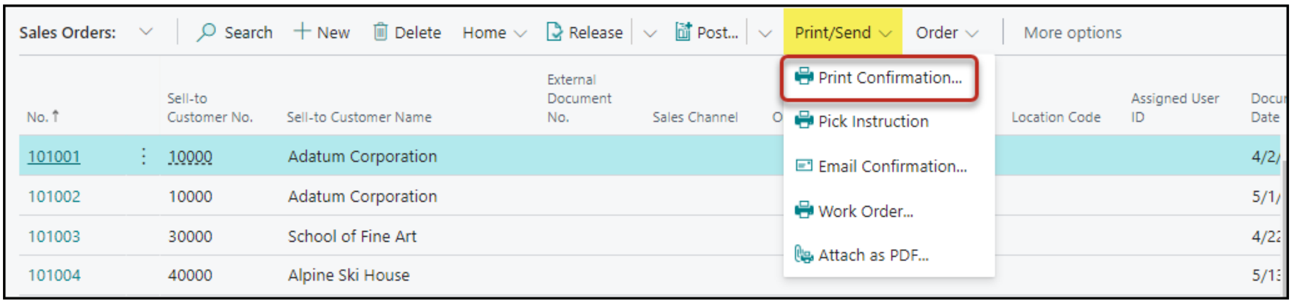
I.e. the **Posted Sales Invoice**, when clicking *Print/Send*, ***Print,*** you will get the normal Request Page for Printing, based on the **Report ID** (in our example ***6036702 trm Sales Invoice***.



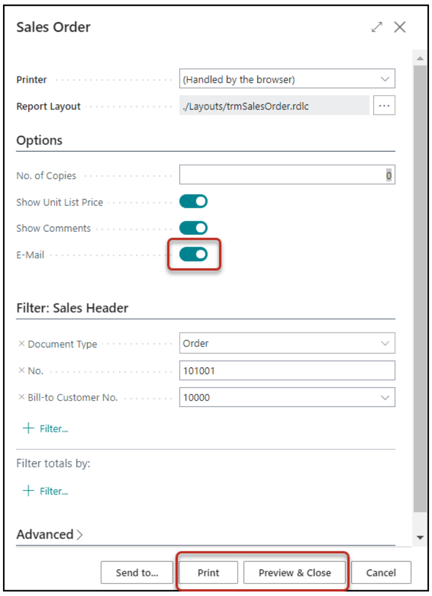
In this case, the option **E-Mail** will be set by default based on the field **E-Mail=Yes** in the E-Mail Template for this report, but the field **E-Mail** in the Request Page can be changed.



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 the standard BC ***Sent Emails*** – at least if you have **Log E-Mail** set to a value different from *No*.

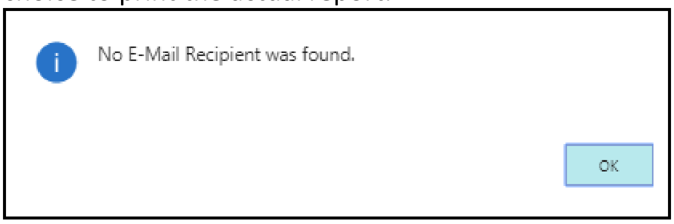
If you click **Preview**, only a Preview of the first selected Order will be shown – even if you have selected several Sales Orders.

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 standard BC ***Sent Emails*** – at least if you have **Log E-Mail** set to a value different from *No*.

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.

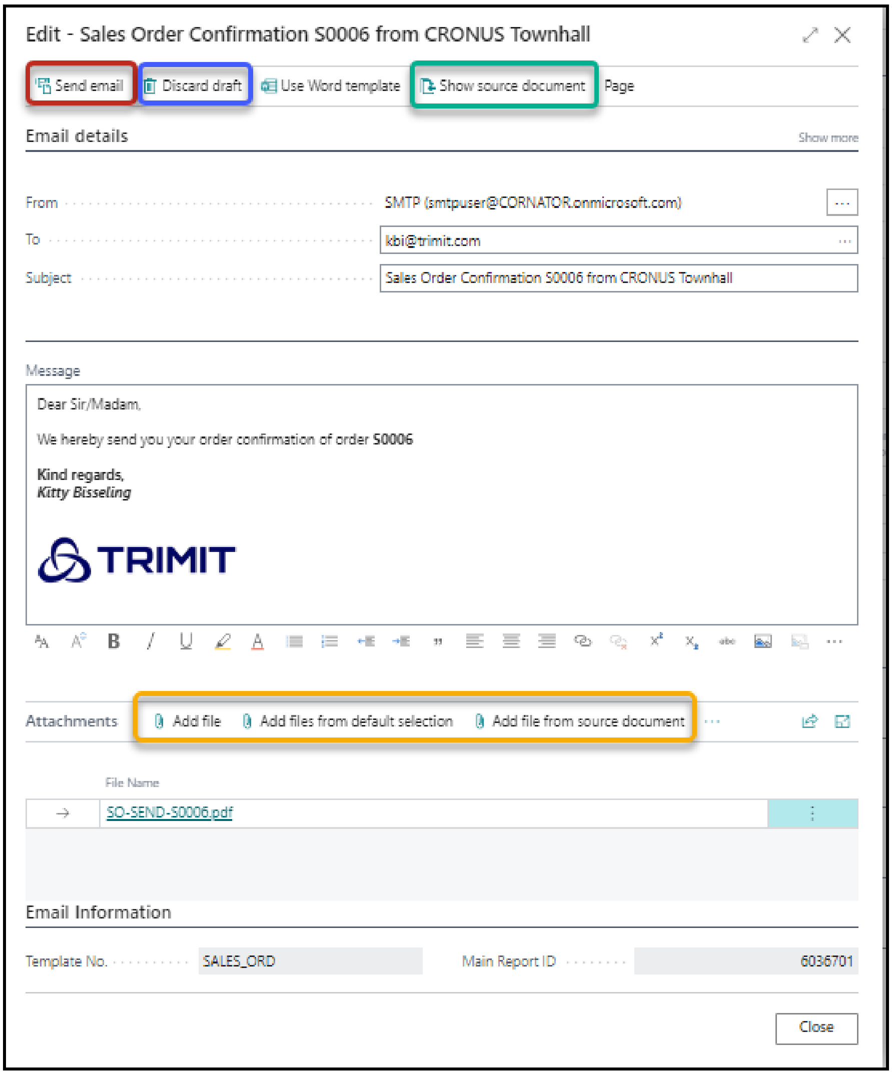


However, if you wanted to send the E-Mail from only 1 document, the generated E-Mail will be shown (see Preview of an E-Mail) and you have the opportunity to enter the Recipient directly in the E-Mail before sending it.

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*) and it is now the standard BC page ***Email Editor (13)***.



SEND EMAIL

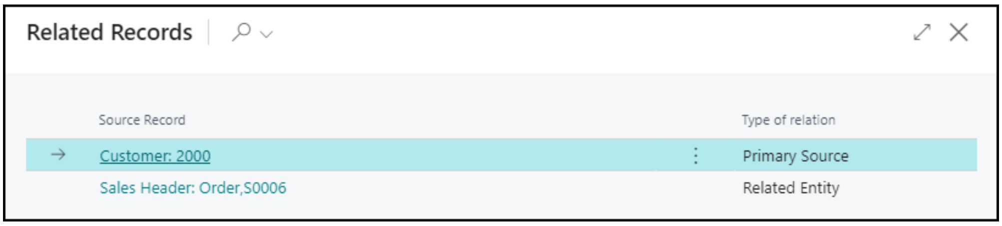
Only when clicking ***Send email,*** the E-Mail will be send!

DISCARD DRAFT

This created E-Mail will not be stored and will not be send.

SHOW SOURCE DOCUMENT

This will show the Source Document and the Recipient, and you can click on them to see the Cards. I.e.,



ADD FILE

You can add any File as an attachment to your E-Mail.
This is an action of standard BC in the preview of the E-Mail.

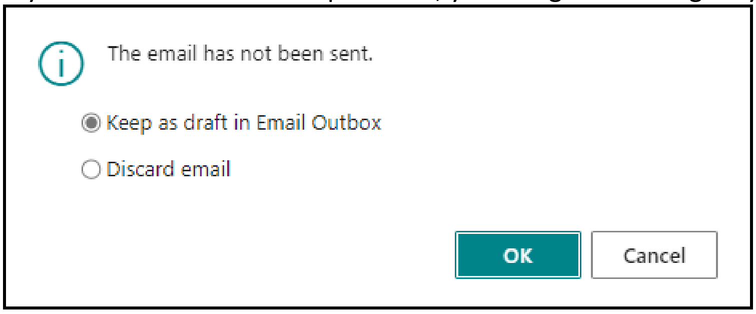
ADD FILES FROM DEFAULT SELECTION

You can add Files from the E-Mail Scenario's.
This action is not applicable when using TRIMIT E-Mail functionality, because we do not use the E-Mail Scenario's.
This is an action of standard BC in the preview of the E-Mail.

ADD FILE FROM SOURCE DOCUMENT

You can select Attachments of the Source Document that you want to include in your E-Mail.
This is an action of standard BC in the preview of the E-Mail.

If you click **Close** button or press **Esc**, you will get a message if you did not click ***Send email***:

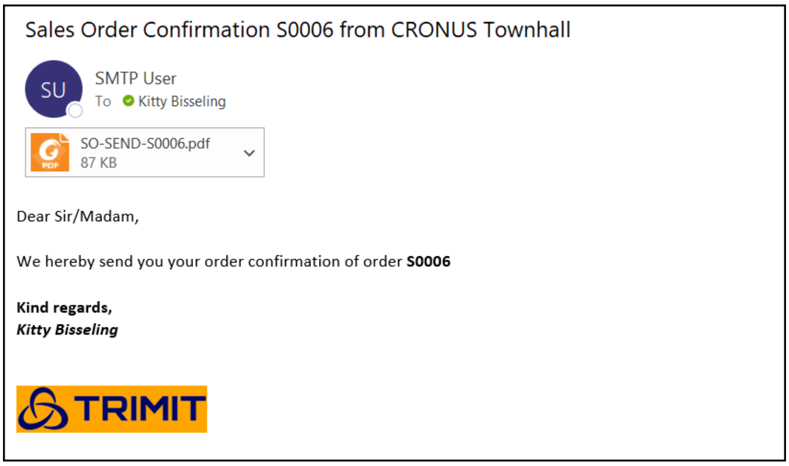


Keep as draft in Email Outbox: you keep the draft, and you can click ***Send email*** if you go to the **Email Outbox**.
Discard email: the draft will be deleted

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

ACTUAL E-MAIL

The actual E-Mail might look as follows:



SEND E-MAIL → TRIMIT E-MAIL

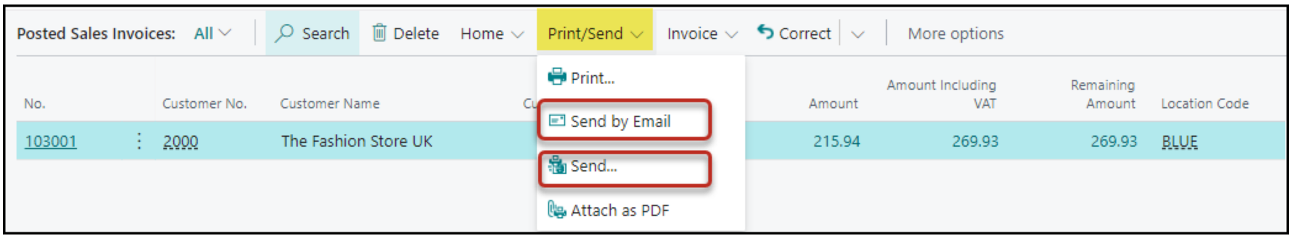
Besides printing Reports as described in Print Report -> TRIMIT E-Mail, you are also able to send an E-Mail directly via the mentioned documents that will make use of the TRIMIT E-Mail functionality if the Number of the Report (based on the standard BC Report Selections) will be a **Report ID** of an *Active* TRIMIT E-Mail Template. If there is no *Active* TRIMIT E-Mail Template, the standard BC 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 **Sent Emails.**

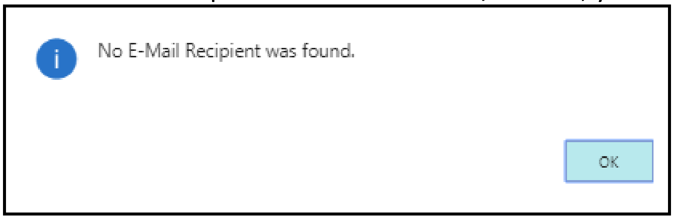


PREVIEW OF AN E-MAIL

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 email***.

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

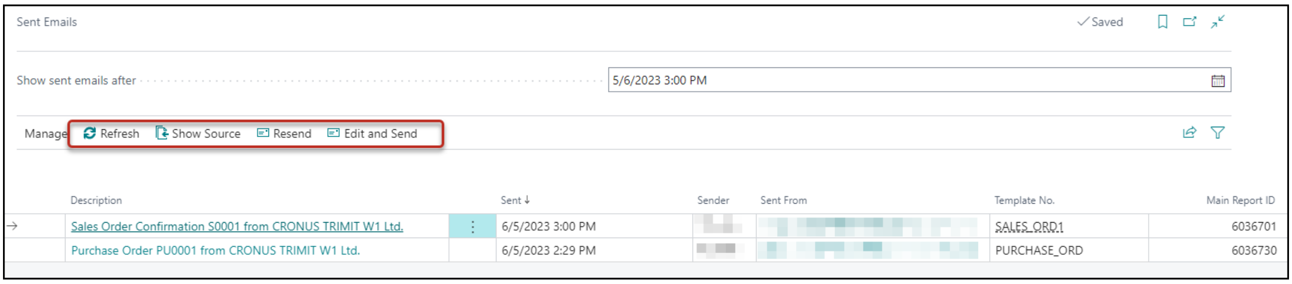
- Setup the **Connection Setup** if you want to store attachments in Azure File Storage.
- Setup the **Email Accounts** and **E-Mail Templates**
- Reports need to be customized for TRIMIT E-Mail functionality – reports mentioned in Components are already customized.
- Printing 1 document with Option **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 email***
- 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 email***
- 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 email*** before the E-Mail is actually send.
    - In this case you need to PRINT the document to send several E-Mails at the same time for several documents.

SENT EMAILS

All **sent** E-Mails related to the **TRIMIT E-Mail Templates** will be registered in a log if **Log E-Mail** is set to a value different from *No.*

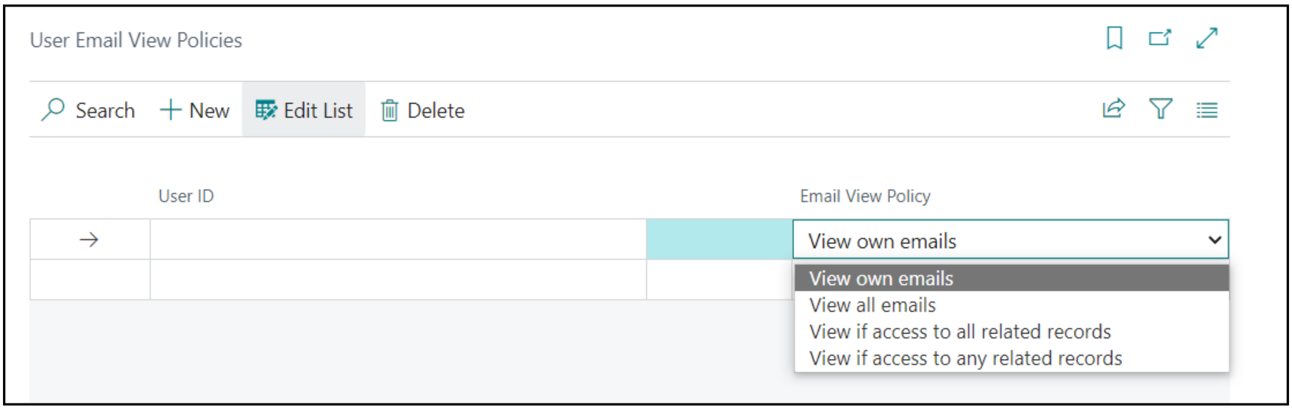
You can find that log via **Search** *Sent Emails*

This is a standard BC page in which we added the **Template No.** and the **Main Report ID**.



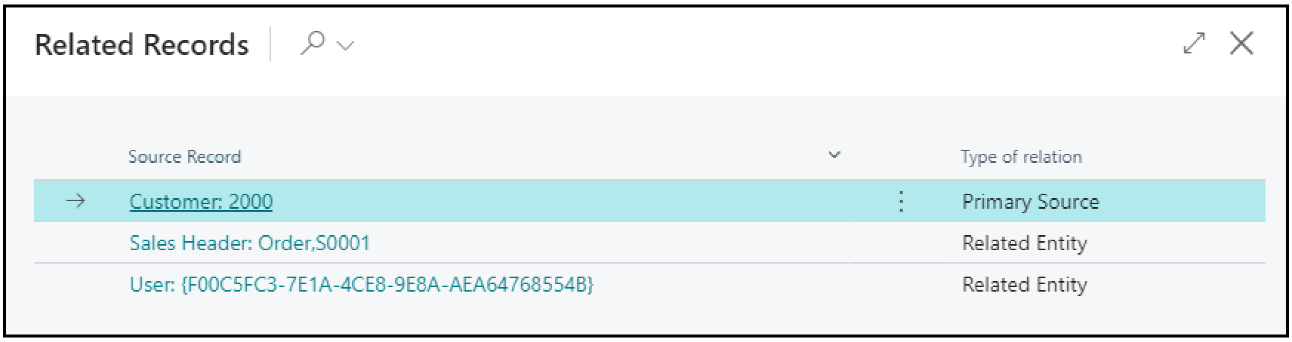
NOTE

You will only see the **Sent Emails** based on the settings of standard BC E-Mail functionality in the **User Email View Policies**:



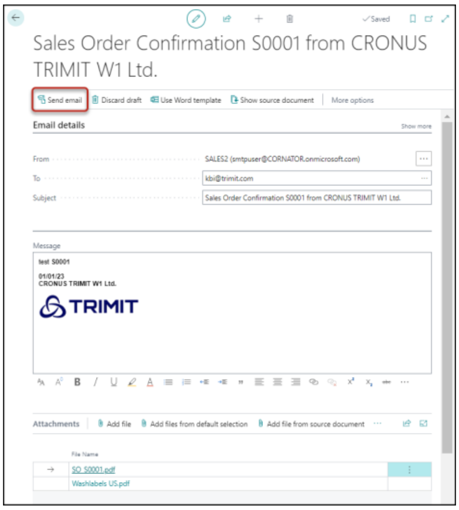
By clicking ***Refresh***, the system will refresh the page – showing E-Mails that have been created since you opened the page.

By clicking ***Show Source***, it will show the Source Document and Recipient, as well as the User that sent the E-Mail.



By clicking ***Resend,*** you can resend the sent E-Mail. In that case a new **record** will be created in the log.

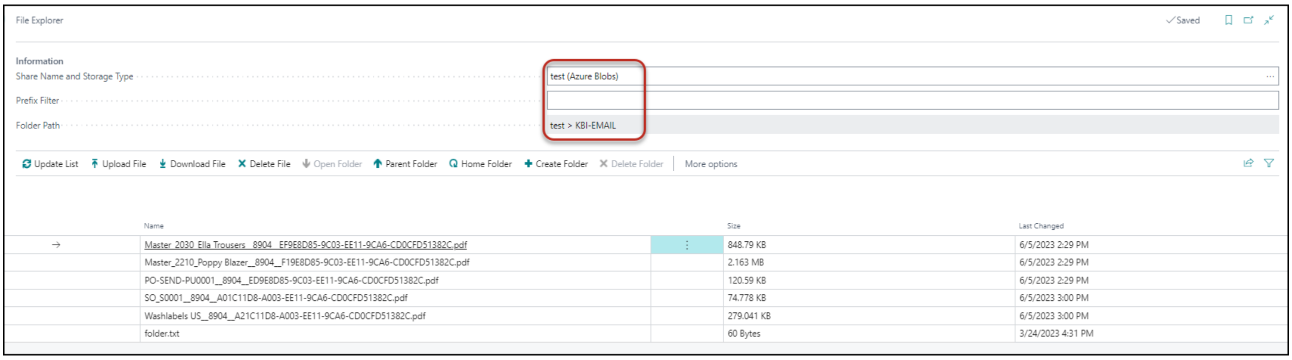
By clicking ***Edit and Send,*** you will see the preview of the E-Mail, and via this Card, you are also able to click ***Send email,*** to resend the E-Mail again.



Every **Resend** or **Send email** will generate a new **record** in the *Sent Emails* if **Log E-Mail** is set to a value different from *No.*

AZURE FILE STORAGE

If the **Log E-Mail** in the E-Mail Template was set to *Yes (Attachments in File Storage)*, you can also see the Attachments of an logged E-Mail via **Search** *File Explorer* if you choose the right **Share Name and Storage Type** that also was filled in the E-Mail Template. I.e.:

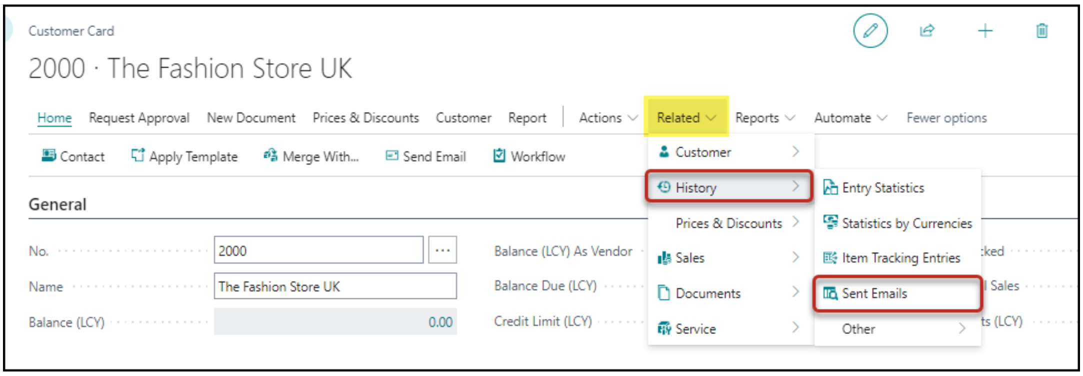


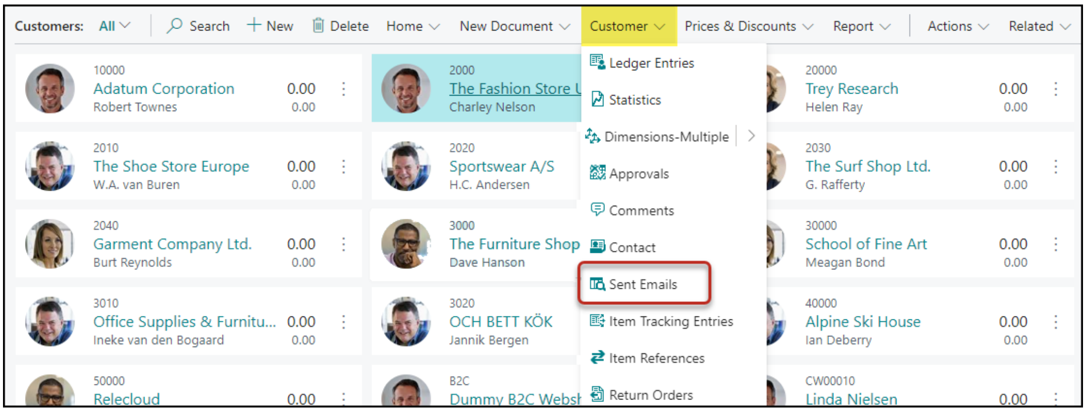
For a **Purchase Order**, the Purchase Order Confirmation will be stored as well as the pdf-files of the PDM Report that you might have chosen for the Masters and any additional attachments.
For a **Sales Order**, the Sales Order Confirmation will be stored as well as any additional attachments.

CUSTOMERS

SENT EMAILS

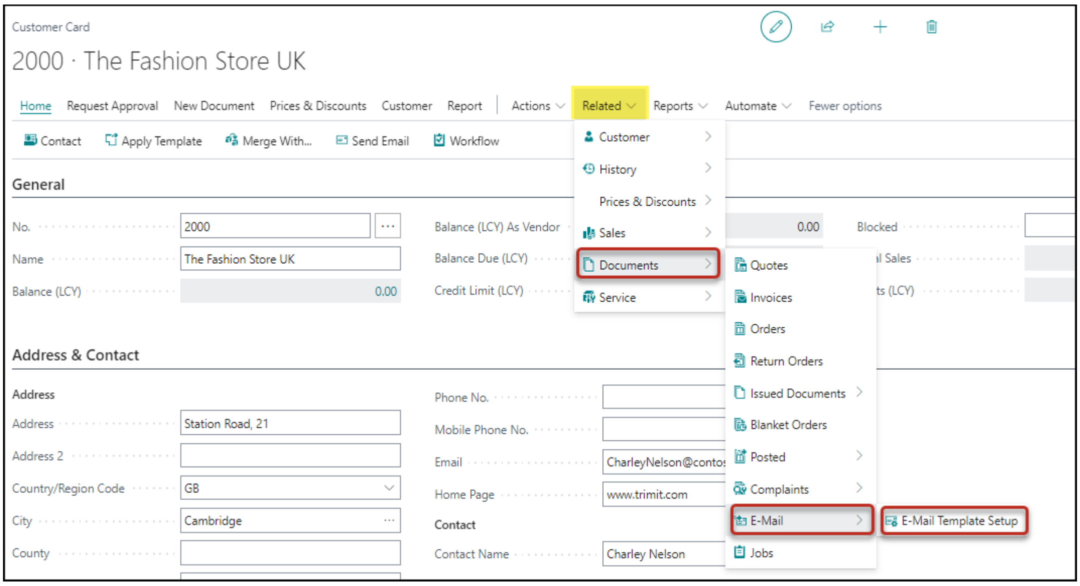
On the Customers Card by clicking ***Related, History, Sent Emails*** or in the Customers List by clicking ***Customer, Sent Emails***, *you* can see the E-Mails that have been sent to the Customer.



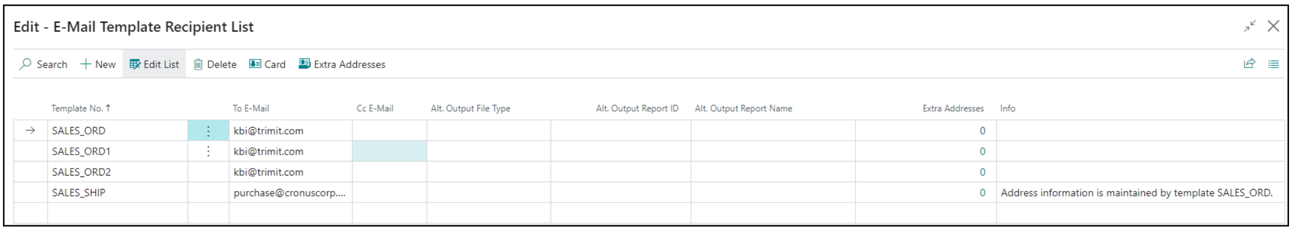


E-MAIL TEMPLATE SETUP

On the Customers Card/List by clicking ***Related, Documents, E-Mail Template Setup***, you are able to see who the Recipients are for this Customer based on the E-Mail Templates.

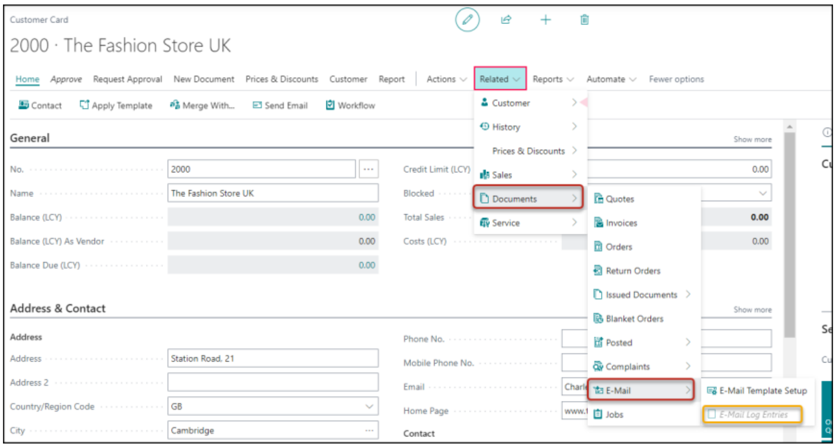


This will show you the **E-Mail Templates** to which the current **Customer** has been connected as a **Recipient** directly.
It will also show the **E-Mail Templates** to which the current **Customer** has been connected indirectly via the field **Template for Mail Addresses** of the E-Mail Template (see **Info**).

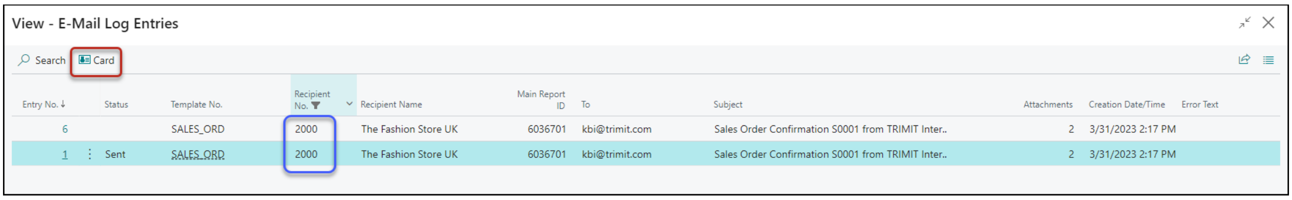


E-MAIL LOG ENTRIES

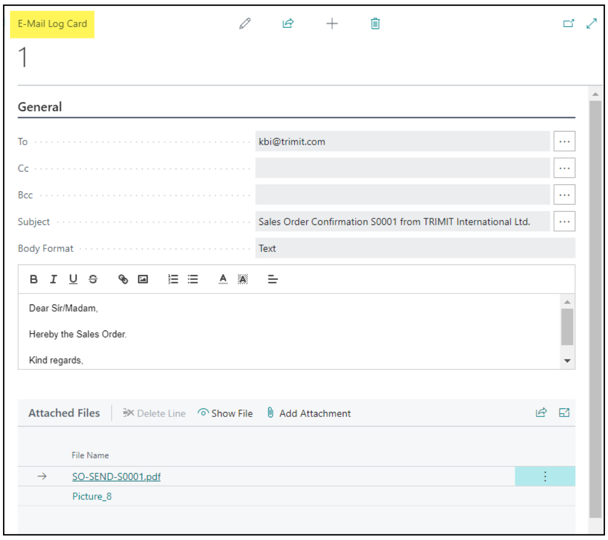
This is not visible by default, but you can add it via ***Personalize*.** It will however only show the old E-Mails that have been sent before TRIMIT 23.1.



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



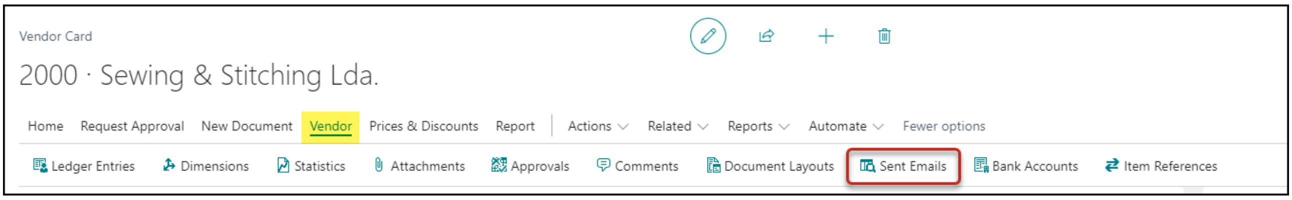
By clicking ***Card***, you see the details of the E-Mail Log, but it is not possible to resend these E-Mails.

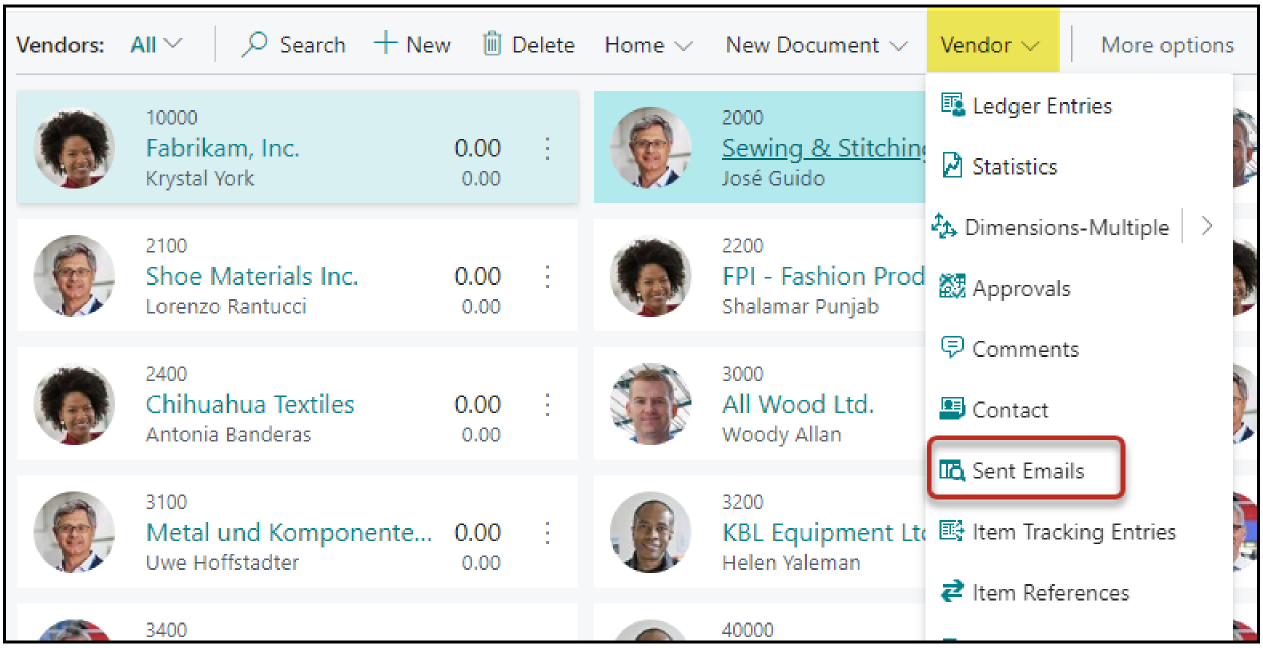


VENDORS

SENT EMAILS

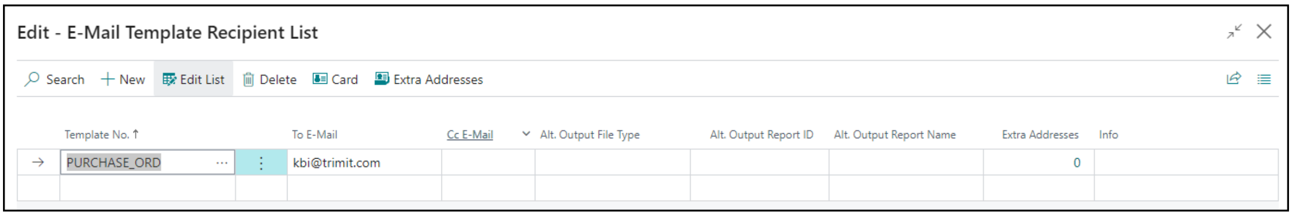
On the Vendors List/Card by clicking ***Vendor, Sent Emails***:





E-MAIL TEMPLATE SETUP

On the Vendor Card/List by clicking ***Related, Documents, E-Mail Template Setup***, you are able to see who the Recipients are for this Vendor based on the E-Mail Templates.



This will show you the **E-Mail Templates** to which the current **Vendor** has been connected as a **Recipient** directly.

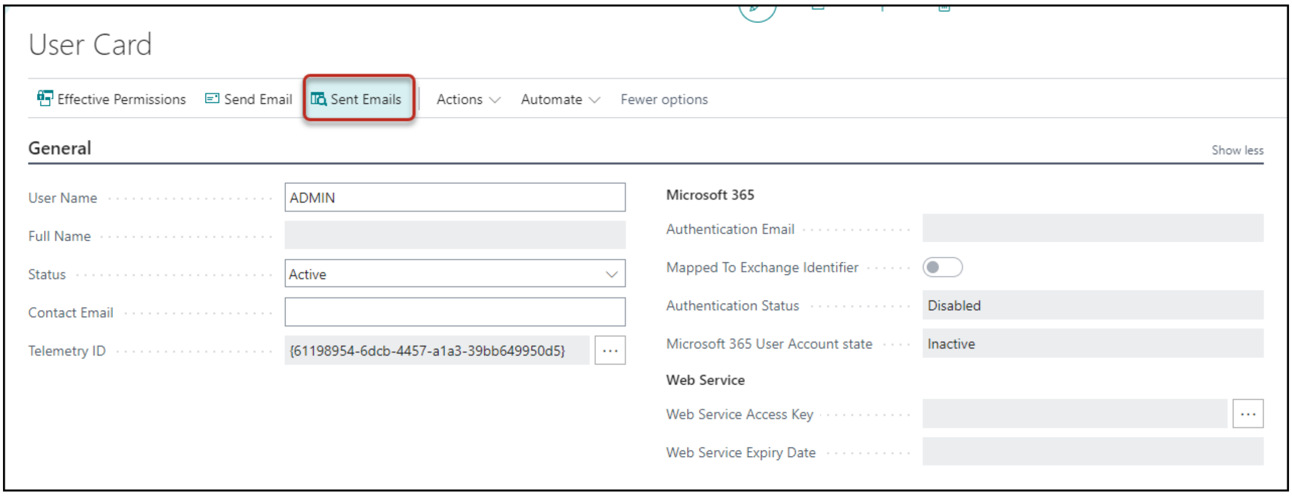
It will also show the **E-Mail Templates** to which the current **Vendor** has been connected indirectly via the field **Template for Mail Addresses** of the E-Mail Template (see **Info**).

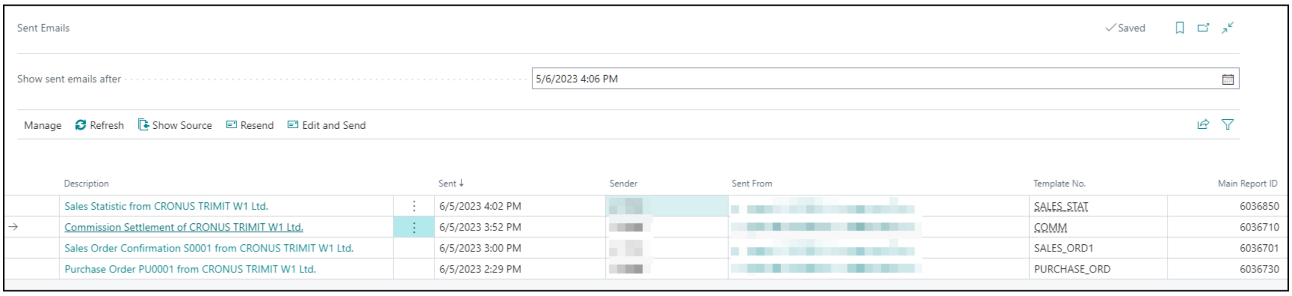
E-MAIL LOG ENTRIES

See E-Mail Log Entries.

USERS

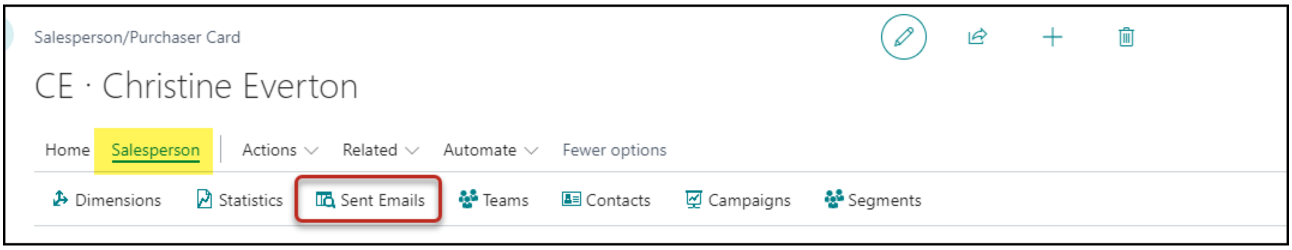
In the Users, you are able to see which E-Mails have been sent by a specific User via ***Sent Emails***.

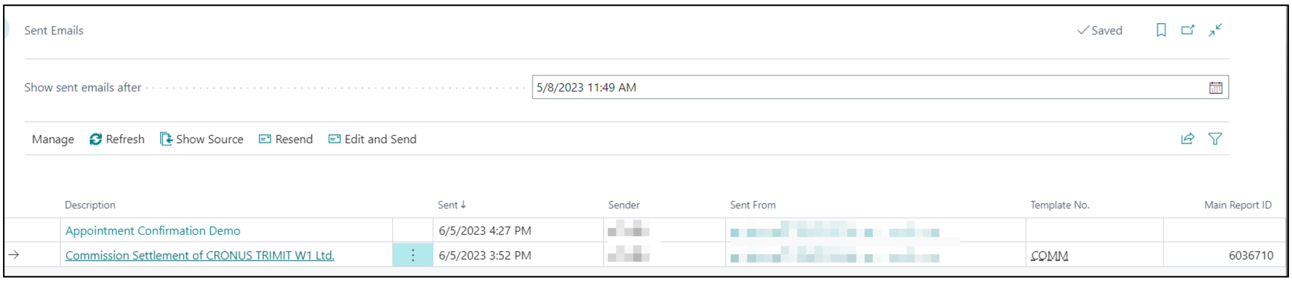




SALESPERSONS

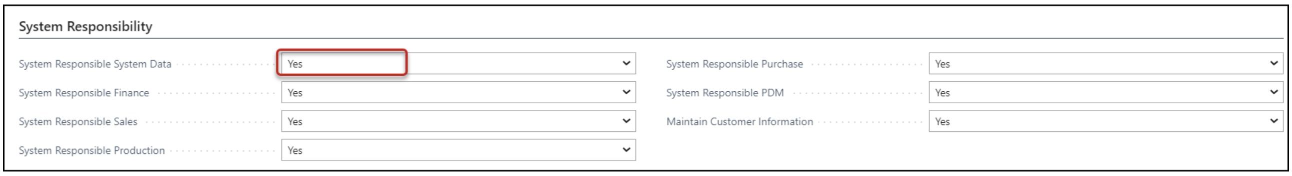
In the Salesperson/Purchase Card, you are able to see which E-Mails have been sent by a specific Salesperson by clicking ***Salesperson, Send Emails***, but also the E-Mails that were sent to this Salesperson.





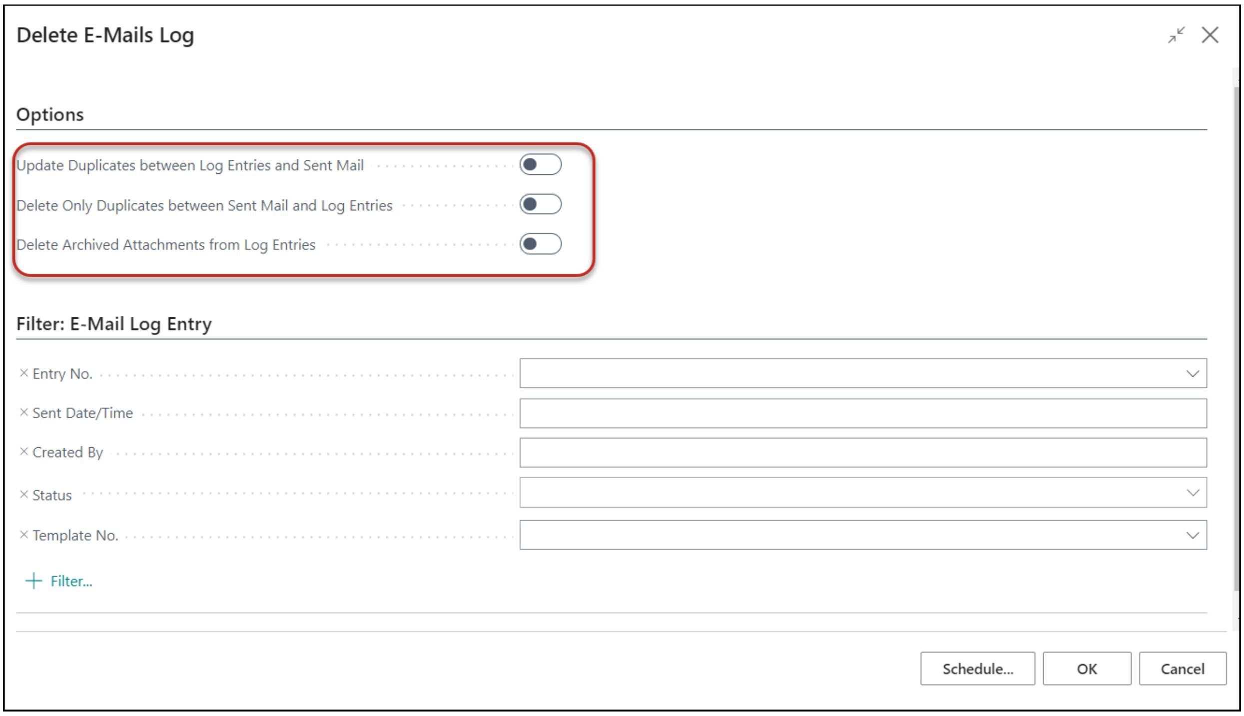
DELETE/CHANGE E-MAIL LOG

You are only able to delete/change the **Sent Emails** or **E-Mail Log Entries** if you have the field **System Responsible System Data** set to *Yes* in the **User Setup** (**Search** *User Setup*)



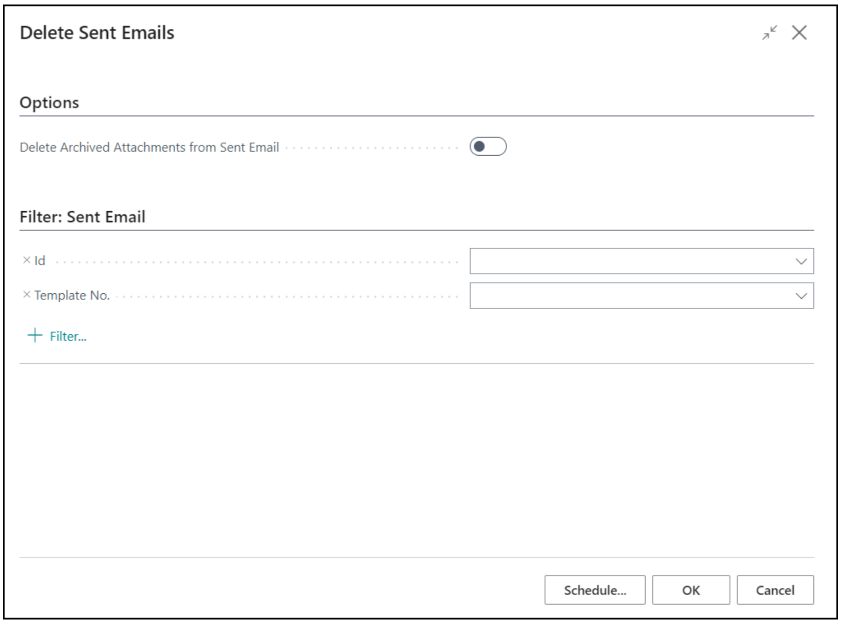
As of TRIMIT 22.2, logged E-Mails based on TRIMIT E-Mail functionality were logged in the **TRIMIT E-Mail Log Entry** and in the standard BC **Sent Email**.
As of TRIMIT 23.1, logged E-Mails based on TRIMIT E-Mail functionality will only be logged in standard BC **Sent Email**.
That is why we added extra options and reports for deleting the E-Mail Log:

DELETE E-MAILS LOG (REPORT 6037700)



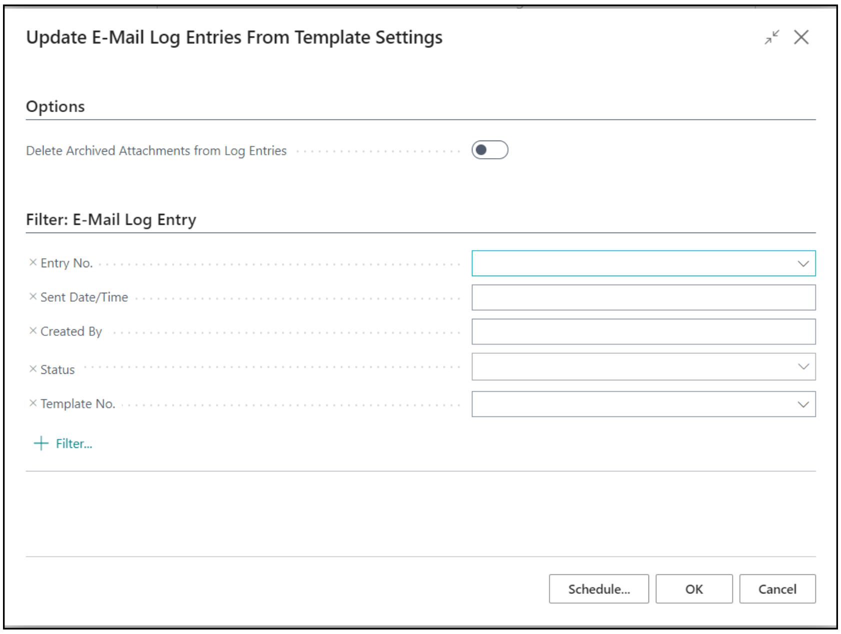
- **Update Duplicates between Log Entries and Sent Mail**
  New TRIMIT fields in **Sent Email** will be filled with corresponding fields of **TRIMIT E-Mail Log Entry** data and **TRIMIT E-Mail Log Entry** will be filled with the **Sent Email ID**.
- **Delete Only Duplicates between Sent Mail and Log Entries**
  Only **TRIMIT E-Mail Log Entries** will be deleted if there is also a **Sent Email** if there is a **Sent Email ID** in the **TRIMIT E-Mail Log Entries**. Therefore, you first need to do the first options, before you can execute this second option.
- **Delete Archived Attachments from Log Entries**
  This will delete the archived attachments in the Azure File Storage of logged E-Mails from **TRIMIT E-Mail Log Entry**.

DELETE SENT EMAILS (6037701)



- **Delete Archived Attachments from Sent Emails**
  This will delete the archived attachments in the Azure File Storage of logged E-Mails from the **Sent Emails** that will be deleted.

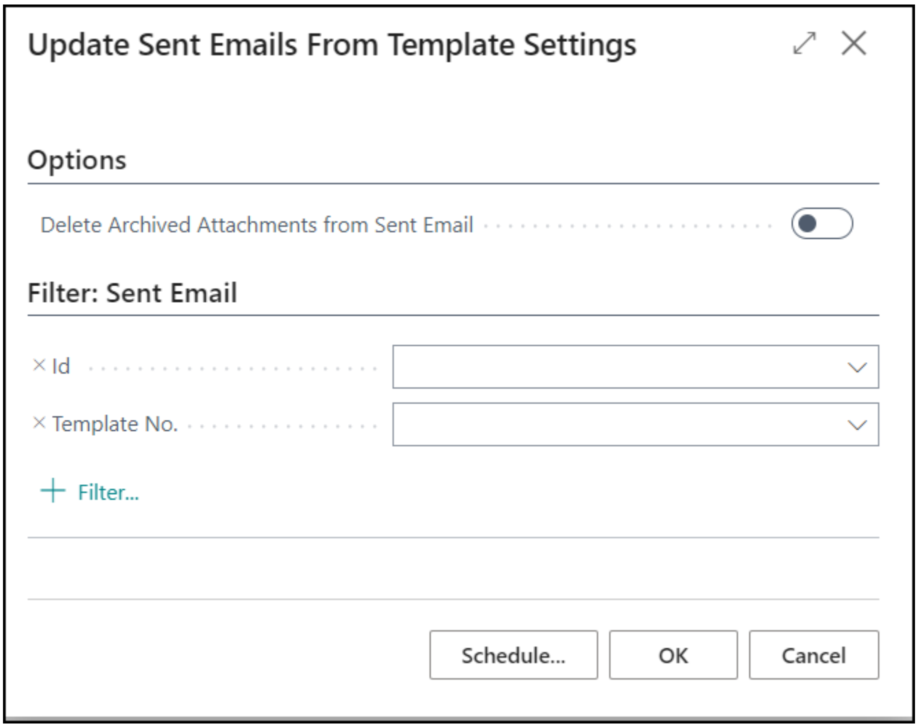
UPDATE E-MAIL LOG ENTRIES FROM TEMPLATE SETTINGS (6037702)



This report will update the logged E-Mails from **E-Mail Log Entries** based on the settings in the TRIMIT E-Mail Template, especially regarding the field **Log E-Mail**.

- **Delete Archived Attachments from Log Entries:**
  This will delete the archived attachments in the Azure File Storage of logged E-Mails from **TRIMIT E-Mail Log Entry**.

UPDATE SENT EMAILS FROM TEMPLATE SETTINGS (6037703)



This report will update the logged E-Mails from **Sent Email** based on the settings in the TRIMIT E-Mail Template, especially regarding the field **Log E-Mail**.

- **Delete Archived Attachments from Sent Emails**
  This will delete the archived attachments in the Azure File Storage of logged E-Mails from **Sent Emails**.

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
        PortalEMailAddress :=
PortalsMailHandler.GetPortalConfirmationRecipient("Sales Header");
        if PortalEMailAddress <> '' then
           Mail.Add_Recipient(PortalEMailAddress, 0, true);
    end;
    if ReportSettings."E-Mail Template Code" <> '' then
       Mail.Set_Template(ReportSettings."E-Mail Template Code");
    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 else
       UpdateNoPrinted := false;
end;
```

This AL Code is placed at the Main Record of the Report and will split the standard BC 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 × AL Page Desig

TRIMIT Development AS_TRIMIT_23.2.13594.7984_W1 > src > src > AL SalesOrder.Report.al

```
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;
if ReportSettings."E-Mail Template Code" <> '' then
    Mail.Set_Template(ReportSettings."E-Mail Template Code");
Mail.CallCreateVariables(MailRecRef, "Language Code", CurrReport.ObjectId(false), CurrReport.Preview
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;
```

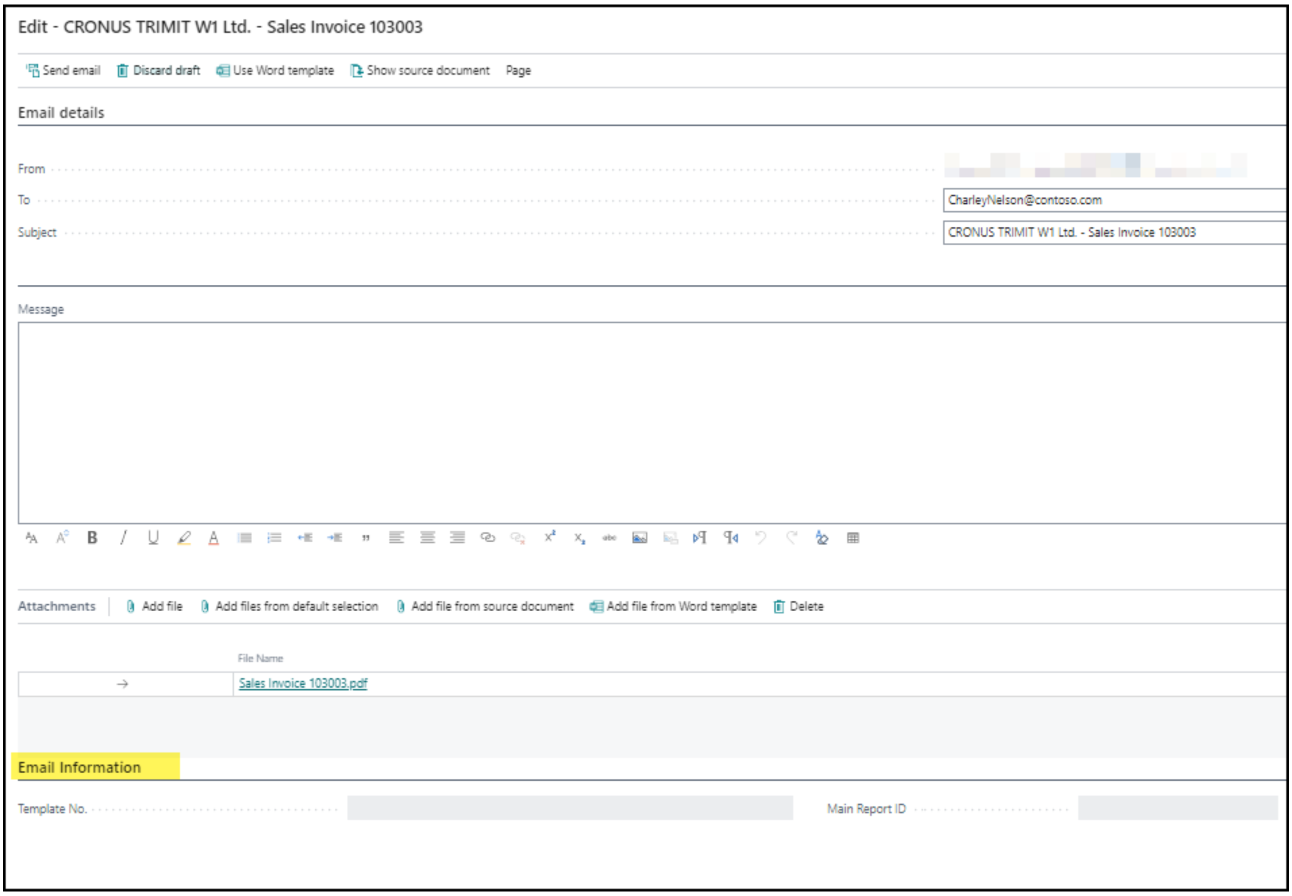
If you would set the **Mail.CallCreateMail** to *FALSE,* the E-Mail would not be send, but a record will be created in the **Email Outbox**. So, you are still able to send the E-Mail via the **Email Outbox** afterwards.

EXTRA REMARKS

BUSINESS CENTRAL E-MAIL

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

If no active **E-Mail Template** is available, and you would send the report by E-Mail, you would get the standard BC 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.



UPGRADING FROM TRIMIT 22.2 TO TRIMIT 23.1 REGARDING E-MAILS

The created **TRIMIT E-Mail Log Entries** remain, and you can still view them; they will not be deleted by the upgrade, but you are not able to Resend them again to the Recipient.
For new created E-Mails you can look in the **Sent Email** page from BC – assuming you have the **Log E-Mail** field in the E-Mail Template set to a value different from *No*.

E-MAIL CHANGE ON TECHNICAL LEVEL FROM TRIMIT 22.2 TO TRIMIT 23.1

E-MAIL HANDLING HAS BEEN REPLACED

Overall, the Codeunit ***6037700 trm E-Mail Handling*** has been totally refurbished, and the old E-Mail Handling has been copied to a new Codeunit ***6037702 trm Retired E-Mail Handling***.

This means that third party extenders will be able to still use the functions in the old Codeunit, if they move their references to the new retired Codeunit. But off course it is best if they use the new E-Mail Handling and upgrade their old code to the new scenario. The new Codeunit is now using **Base App** functionality to create and send E-Mails and has been supplied with new procedures for creating Draft Mails (directly to **Email Outbox**) and for copying of Email Messages from **Sent Emails** (used in Resend and EditAndSend from Email Outbox).

To support the new scheme, we have extended the Tables ***8888 Email Outbox*** and ***8889 Sent Emails*** with selected fields from the Table ***6037706 trm E-Mail Log Entries***, which in effect has been made obsolete. These new fields will be filled when using the E-Mail Templates e.g., TRIMIT E-Mail functionality for sending and resending. Also, the pages for Edit-And-Send and View **Sent Email**, and the corresponding actions for Edit-And-Send and Resend has been replaced with TRIMIT versions to support this.

DUPLICATE E-MAIL HANDLING

Since Microsoft introduced the new mailing system with the new **Email Accounts** and different setups, all E-Mails have been created in duplicate (one **TRIMIT E-Mail Log Entry** with attachments, and a **Sent Email** with the same attachments).
We have extended the batch Job for Deleting Log Entries, with a new option for detecting these duplicate mails and a possibility to automatically remove the E-Mail Log Entries, after having updated the Sent Emails with prudent information. This makes it possible to remove the duplicate data, and free up space in the database.

We have also made a new batch job for Deleting Sent Emails, just like the old one for deleting the E-Mail Log Entries.

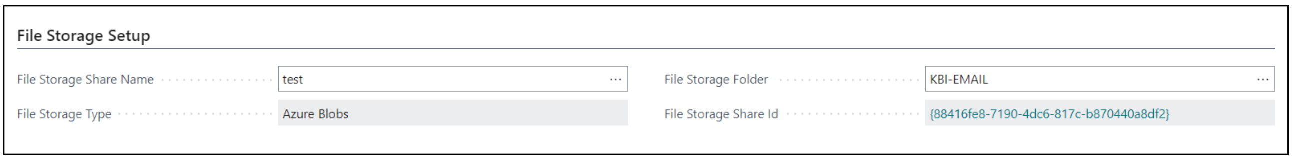
BATCH ARCHIVE/DELETE JOBS

Two new batch Jobs (reports) has been created for Archive/Delete Log Entries (Report ***6037700 trm Delete E-Mail Log***) and Archive/Delete Sent Emails (Report ***6037701 trm Delete Sent Emails***). The two jobs can invoke E-Mail Template changes to already created E-Mail Log Entries or Sent Emails.
This means that if someone changes an E-Mail Template from saving all on the Sent Email to not saving anything, then these batch jobs can run through the selected E-Mails and use the new setting from the Template. This could also be going from saving all to archived attachments on the E-Mail. This means that space can be freed up in the system.

E-MAIL TEMPLATES

The E-Mail Template is now using the Editor from the **Base App** to edit data, therefore new functionality is in place for creating Text and HTML Body on the E-Mail Template.
Furthermore, it is now possible to have variables (substitution) in **Email Account** and this field has been made editable.

The E-Mail Template has also been extended with a new FastTab ***File Storage setup*** for setting up the new archiving of attachments in Azure File Storage.



NEW E-MAIL ARCHIVING FUNCTIONALITY

The new Archiving Functionality allows archiving of files in Azure Storage Files or Blobs.
It consists of a Codeunit with functions for handling save, load, and delete of archived files. There is also a log which tracks where and when the files are stored.

Currently this is only used for attachments on Sent Emails but may be possible to use on documents also in versions to come.

UPGRADED FILE STORAGE

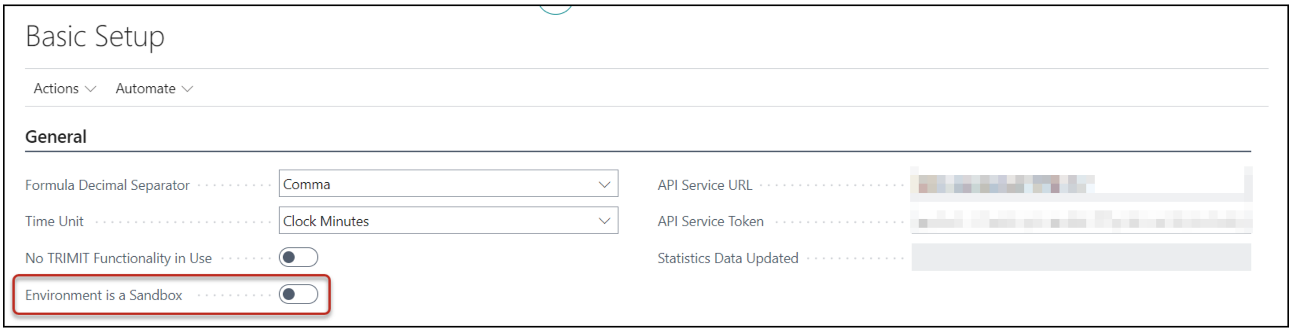
To support the new Archiving functionality, a few upgrades has been made to the File Storage functionality. It is now possible to select the tier on Azure Blobs (hot, cold and archive) when saving the blob file.
A new prefix filter has also been implemented, which allows filtering on the request to Azure Storage Services before getting a File and Folder List. This allows the requests to be much smaller, and speed up retrieval of the list, especially when using in conjunction with very large folders e.g., with many files. This filter is hidden on the File Explorer as Default and need to be made visible through Personalization.

NEW TEXT AND HTML EDITOR

Everywhere in the system where an action with Text Editor is present our TRIMIT HTML Editor will in future be replaced with the standard Base App editor.
This will then also be the cause on Extended Text and E-Mail Templates.

NEW SANDBOX DETECTION MECHANISM WHEN MAILING

Many people have tried to make a sandbox and by mistake sent E-Mails to a customer, when testing new functionality. We have introduced a new system where E-Mails in sandboxes will not be send if the user has not accepted it. If job queues and webservices tries to use the Send functionality they will be denied outright.
It is possible to override the default functionality by subscription to a specific publisher method.
Furthermore, on OnPrem systems (where the sandbox detection cannot work) a flag in Basic Setup, although the field is in the table ***trm User System Parameter*** has been introduced, where **Environment is a Sandbox** can be set to *Yes*.



The subscription must be to **Pf_OnIsSandboxDetected** in the codeunit ***trm E-Mail Handling***.
The flag **isSandbox_par** and can be set to false if one want to send E-Mails anyway.

```
[IntegrationEvent(false, false)]
Local procedure Pf-OnIsSandboxDetected (var emailMessage_par: Codeunit “Email
Message”; var emailAccount_par: Record “Email Account” temporary; var
isSandbox_par: Boolean)
Begin
End;
```