



WHITE PAPER

TRIMIT E-MAIL 24.1

This document contains information about the TRIMIT E-Mail in TRIMIT 24.1 for Microsoft Dynamics 365 Business Central 2024, Wave 1 (W1).

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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 sent by using the **TRIMIT E-Mail** functionality to your users and/or salespersons and in the **Master Reports (PDM Report Set)** which is often send to the Vendor/Manufacturer.

The **TRIMIT E-Mail** functionality is also used regarding 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.

The audience for this document is the Consultant or very skilled User.

It will only describe the TRIMIT fields/functionality and not the standard Business Central fields/functionality.

Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

The functionality described is the functionality as of **TRIMIT 24.1 for Business Central W1 BC24.X**.

The pictures in this White Paper are based on the demo database for **TRIMIT 24.1**, which is based on Microsoft Dynamics 365 Business Central 2024 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	6036562	<i>trm Temp File Storage Explorer</i>
	6036563	<i>trm File Storage Archive</i>
	6036564	<i>trm File Storage Archive Log</i>
	6037700	<i>trm E-Mail Template</i>
	6037701	<i>trm E-Mail Template Line</i>
	6037702	<i>trm E-Mail Template Files</i>
	6037703	<i>trm E-Mail Template Variables</i>
	6037704	<i>trm E-Mail Recipient</i>
	6037705	<i>trm E-Mail Addresses</i>
	6037706	<i>trm E-Mail Log Entry</i>
	6037707	<i>trm E-Mail Log Entry Files</i>
	6037708	<i>trm E-Mail Temporary Variables</i>
	6038119	<i>trm Portal E-Mail Queue</i>
The pages	6036562	<i>trm File Storage Lookup List</i>
	6036563	<i>trm File Storage Explorer</i>
	6036567	<i>trm File Storage Archives</i>
	6036568	<i>trm File Storage Archive Log</i>
	6036846	<i>trm E-Mail Recipient FactBox</i>
	6037700	<i>trm E-Mail Template List</i>
	6037701	<i>trm E-Mail Template Card</i>
	6037702	<i>trm E-Mail Tmpl Text Subpage</i>
	6037703	<i>trm E-Mail Tmpl File Subpage</i>
	6037704	<i>trm E-Mail Tmpl Var. Subpage</i>
	6037705	<i>trm E-Mail Tmpl Recipient List</i>
	6037706	<i>trm E-Mail Tmpl Recipient Card</i>
	6037707	<i>trm E-Mail Template Addresses</i>
	6037708	<i>trm E-Mail Template Text Card</i>
	6037709	<i>trm E-Mail Text Editor</i>
	6037710	<i>trm E-Mail Log Entries</i>
	6037711	<i>trm E-Mail Log Card</i>
	6037712	<i>trm E-Mail Log Files</i>
	6037713	<i>trm Look Up Fields</i>
	6037714	<i>trm E-Mail Template Editor</i>
The report	6037700	<i>trm Delete E-Mail Log</i>
	6037701	<i>trm Delete Sent Emails</i>
	6037702	<i>trm Update E-Mail Log Entries</i>
	6037703	<i>trm Update Sent Emails</i>

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 sent via TRIMIT E-Mail functionality to the Customer, Vendor, Salesperson or User:

The reports **6036650** *trm Statement*
6036651 *trm Reminder*
6036652 *trm Finance Charge Memo*
6036700 *trm Sales Quote*
6036701 *trm Sales Order*
6036702 *trm Sales Invoice*
6036703 *trm Sales Credit Memo*
6036704 *trm Sales Shipment*
6036710 *trm Commission Settlement*
6036730 *trm Purchase Order*
6036850 *trm Sales Statistics Report*
6037208 *trm PDM Report Set*

To make the text easier to read, we have used the following abbreviations:

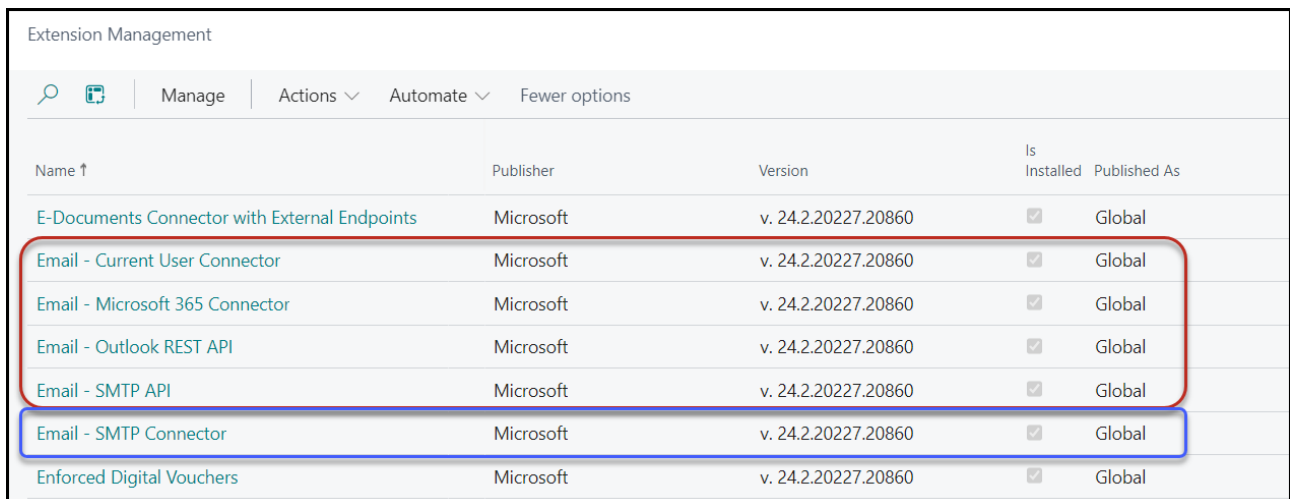
TRIMIT for TRIMIT 24.1 for Business Central 365 2024, Wave 1.

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**.



Name ↑	Publisher	Version	Is Installed	Published As
E-Documents Connector with External Endpoints	Microsoft	v. 24.2.20227.20860	☒	Global
Email - Current User Connector	Microsoft	v. 24.2.20227.20860	☒	Global
Email - Microsoft 365 Connector	Microsoft	v. 24.2.20227.20860	☒	Global
Email - Outlook REST API	Microsoft	v. 24.2.20227.20860	☒	Global
Email - SMTP API	Microsoft	v. 24.2.20227.20860	☒	Global
Email - SMTP Connector	Microsoft	v. 24.2.20227.20860	☒	Global
Enforced Digital Vouchers	Microsoft	v. 24.2.20227.20860	☒	Global

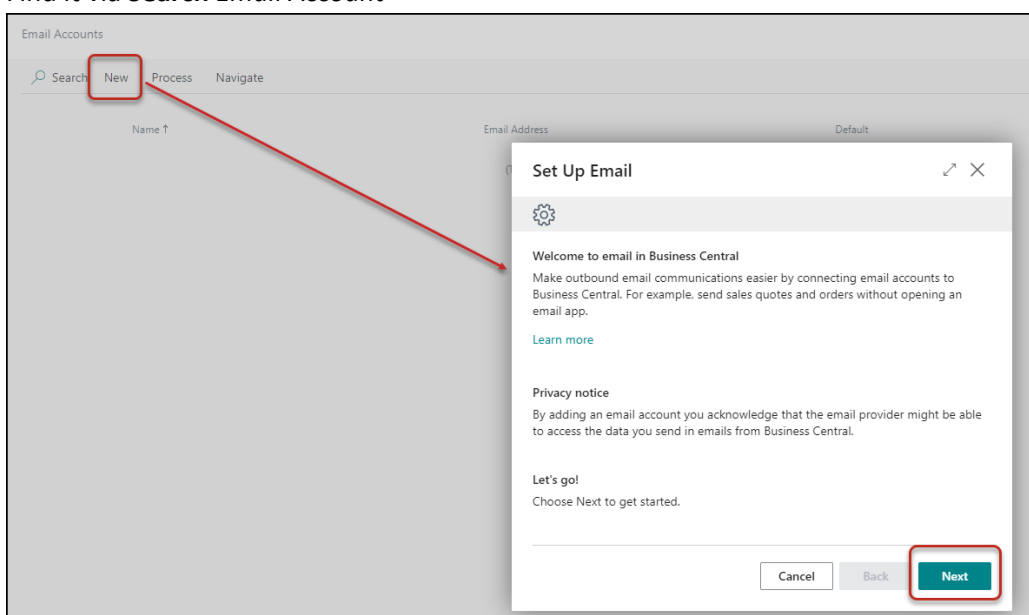
If you do not use the **TRIMIT Portals**, you can also use the other Types for the **Email Accounts** and have to install the appropriate standard BC **Email Apps** for it.

CREATE EMAIL ACCOUNT (STANDARD BC)

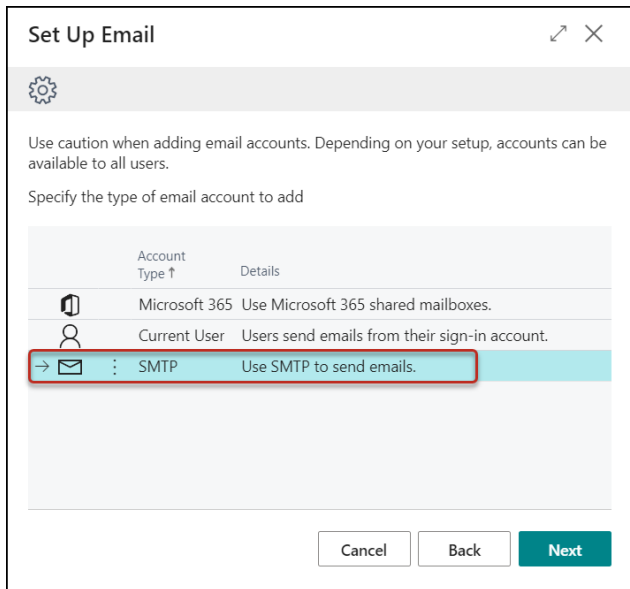
You also need to create at least one **Email Account** with **Type Use SMTP to send emails** when using the **TRIMIT Portals**.

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**



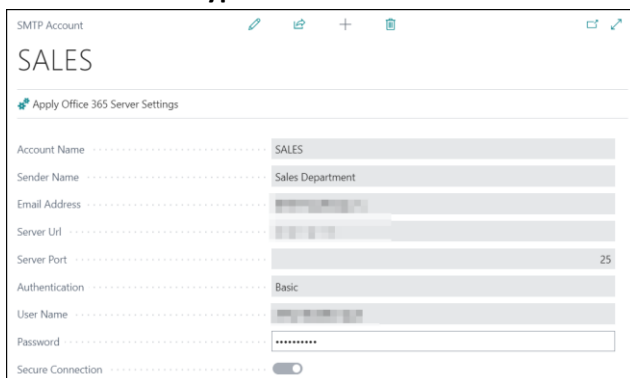
Click **New** and press **Next**



The 'Set Up Email' dialog box shows a list of account types. The 'SMTP' option is highlighted with a red box. Below the list are 'Cancel', 'Back', and 'Next' buttons.

Account Type ↑	Details
Microsoft 365	Use Microsoft 365 shared mailboxes.
Current User	Users send emails from their sign-in account.
SMTP	Use SMTP to send emails.

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



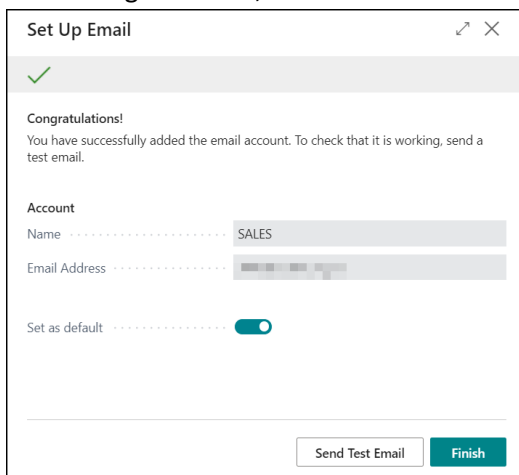
The 'SMTP Account' configuration screen shows fields for Account Name, Sender Name, Email Address, Server Url, Server Port, Authentication, User Name, Password, and Secure Connection. The 'Account Name' field is filled with 'SALES'.

Field	Value
Account Name	SALES
Sender Name	Sales Department
Email Address	[Redacted]
Server Url	[Redacted]
Server Port	25
Authentication	Basic
User Name	[Redacted]
Password	[Redacted]
Secure Connection	Off

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**



The 'Set Up Email' dialog box shows a green checkmark and a message: 'Congratulations! You have successfully added the email account. To check that it is working, send a test email.' Below this, the 'Account' section shows 'Name' as 'SALES' and 'Email Address' as '[Redacted]'. There is a 'Set as default' toggle switch and 'Send Test Email' and 'Finish' buttons.

Field	Value
Account Name	SALES
Email Address	[Redacted]
Set as default	On

Now you are also able to send a **Test Email** to see if the **Setup SMTP Account** is correct.

This might look as follows:

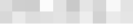
Test Email Message

SD

Sales Department

To  Kitty Bisseling

The user ADMIN sent this message to test their email settings. You do not need to reply to this message.

Sent through SMTP Server: 
SMTP Port: 25
Authentication: Basic
Using Secure Connection: Yes

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.

User Email View Policies

Not saved

Search

+ New

Edit List

Delete

	User ID	Email View Policy
→	ADMIN	View own emails View own emails View all emails View if access to all related records View if access to any related records

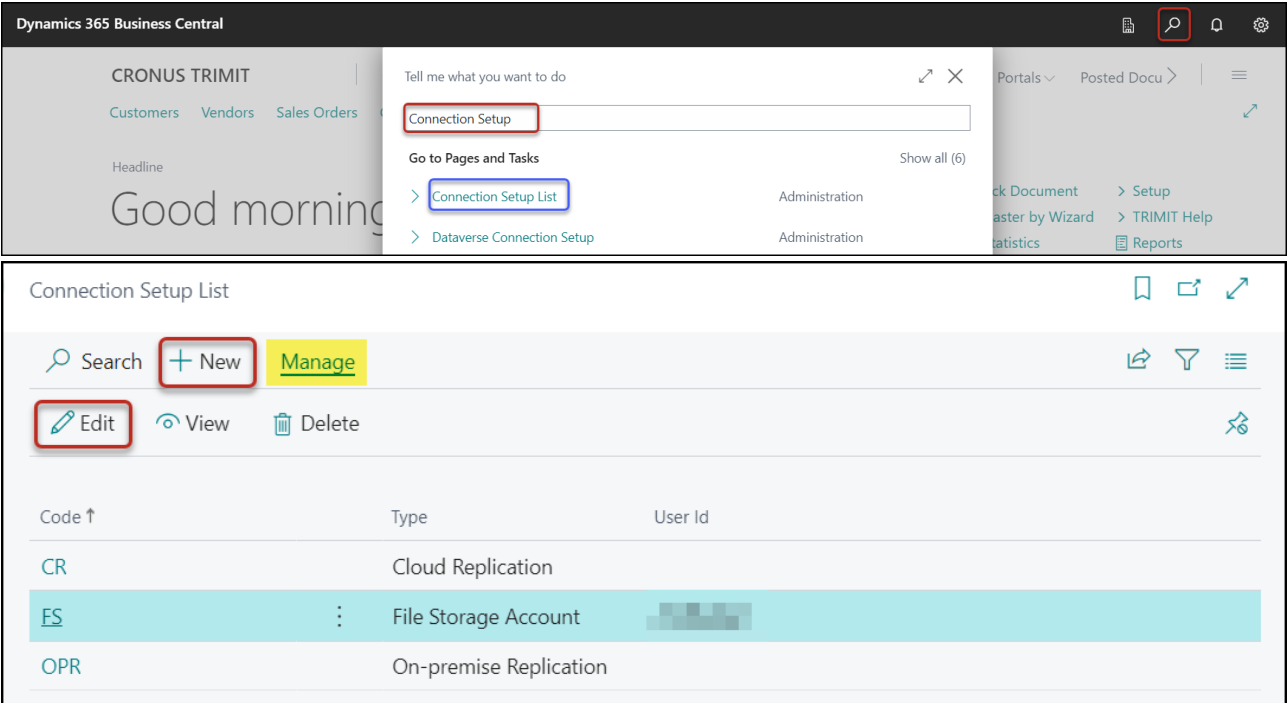
You can control the email messages that a user can access in the **Email Outbox** and **Sent Emails** pages.
You can choose between the following four options for the **Email View Policy**:

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.

Connection Setup Card

FS

Shares List Update Shares More options

General

Code FS

Type File Storage Account

Authentication Type Shared Key

User Id

Password

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 24.1

NEW Permission Set	ADDITION TO BC Permission Set	Object Type	Object	Object Name	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

+

✓ Saved

EMAIL (Tenant)

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
1558 ..... ReportSettings."Split Assortment" := SplitAssortment;
1559
1560 ..... UpdateNoPrinted := true;
1561 ..... if SendMail and
1562 ..... not Mail.IsSlaveReport
1563 ..... then begin
1564 ..... if NumberOfMails = 0 then
1565 .....   NumberOfMails := "sales header".count;
1566 .....   ActualMailNumber := ActualMailNumber + 1;
1567
1568 .....   MailRecRef.GetTable("Sales Header");
1569 .....   Mail.CallClearAll;
1570
1571 .....   // -> Option to specify specific E-Mail Template
1572 .....   Mail.Set_Template('S_ORDER')
1573 .....   // <- Option to specify specific E-Mail Template
1574
1575 ..... if UserSysParam.PortalInstalled then begin
1576 .....   PortalEmailAddress := PortalsMailHandler.GetPortalConfirmationRecipient("Sales Header");
1577 .....   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

E-Mail Template Card

SALES_ORD · Sales Order Confirmation

Recipient Setup **Activate** **Deactivate** More options

General

No.	SALES_ORD	Report	
Description	Sales Order Confirmation	Report ID	Sales Order (6036701) ...
Status	Active	Report File Name	SO-SEND-%1
		Report File Type	PDF
		E-Mail Default=Yes	☒

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

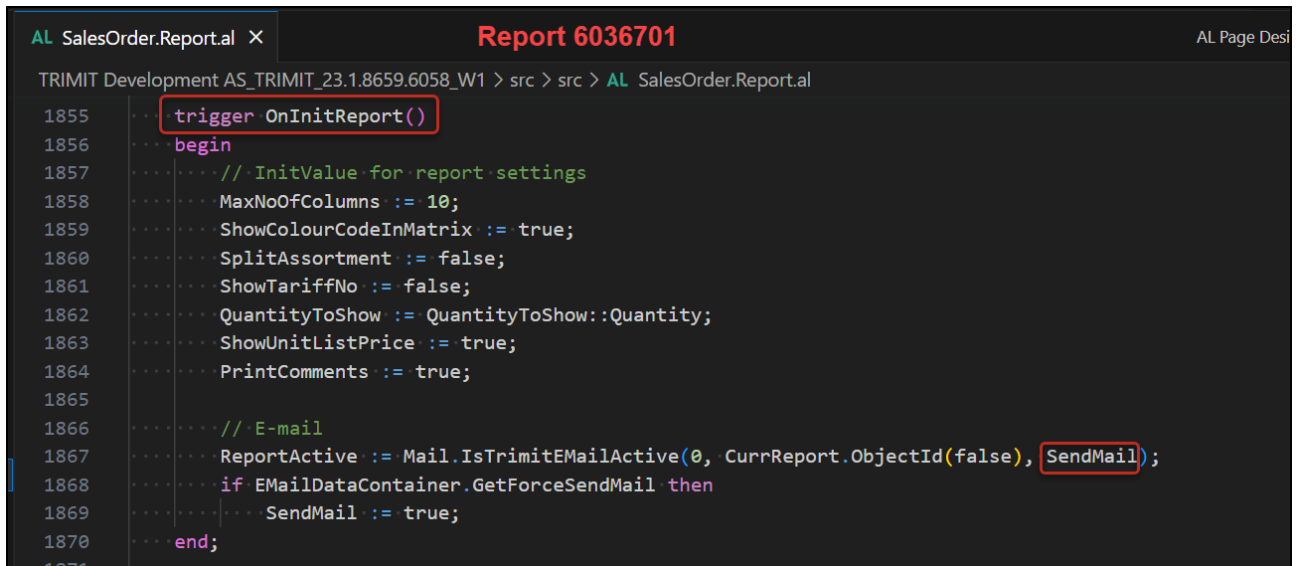
You can choose the **File Type** for the attachment of the document you want to send.

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.

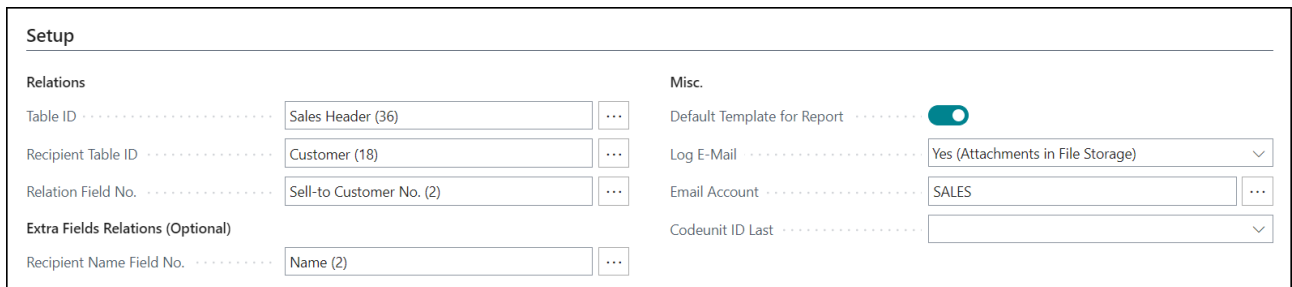
This field will however only be effective if you also have the following line in the AL Code of the **OnInitReport()** trigger of your report where the Variable **SendMail** is the field that will be used in the Request page of the report.



```
AL SalesOrder.Report.al X Report 6036701 AL Page Desi
TRIMIT Development AS_TRIMIT_23.1.8659.6058_W1 > src > AL SalesOrder.Report.al
1855 trigger OnInitReport()
1856 begin
1857     // InitValue for report settings
1858     MaxNoOfColumns := 10;
1859     ShowColourCodeInMatrix := true;
1860     SplitAssortment := false;
1861     ShowTariffNo := false;
1862     QuantityToShow := QuantityToShow::Quantity;
1863     ShowUnitListPrice := true;
1864     PrintComments := true;
1865
1866     // E-mail
1867     ReportActive := Mail.IsTrimitEMailActive(0, CurrReport.ObjectId(false), SendMail);
1868     if EMailDataContainer.GetForceSendMail then
1869         SendMail := true;
1870 end;
```

This already has been done for the reports mentioned in the [Components](#)

FASTTAB SETUP



Setup	
Relations	
Table ID	Sales Header (36)
Recipient Table ID	Customer (18)
Relation Field No.	Sell-to Customer No. (2)
Extra Fields Relations (Optional)	
Recipient Name Field No.	Name (2)
Misc.	
Default Template for Report	☒
Log E-Mail	Yes (Attachments in File Storage)
Email Account	SALES
Codeunit ID Last	

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

	Report ID	Table ID	Recipient Table ID	Relation Field No	Recipient Name Field No.
Statement	6036650	18	18	1	2
Reminder	6036651	297	18	2	2
Finance Charge Memo	6036652	304	18	2	2
Posted Sales Invoice	6036702	112	18	4	2
Posted Sales Shipment	6036704	110	18	2	2
Posted Sales Credit Memo	6036703	114	18	2	2
Sales Quote	6036700	36	18	2	2
Sales Order	6036701	36	18	2	2
Purchase Order	6036720	38	23	2	2
Commission Statement	6036710	23	13	1	2
PDM Master Report Set	6037208	6037103	23	442	2

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

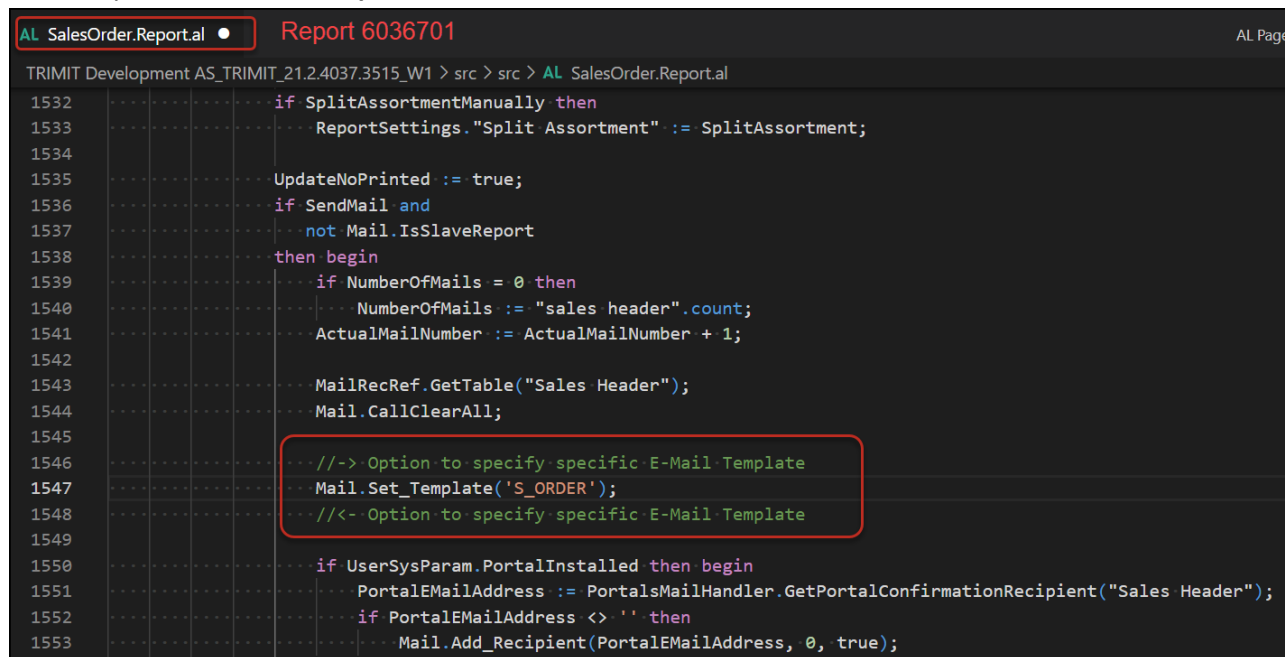
DEFAULT TEMPLATE FOR REPORT

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.

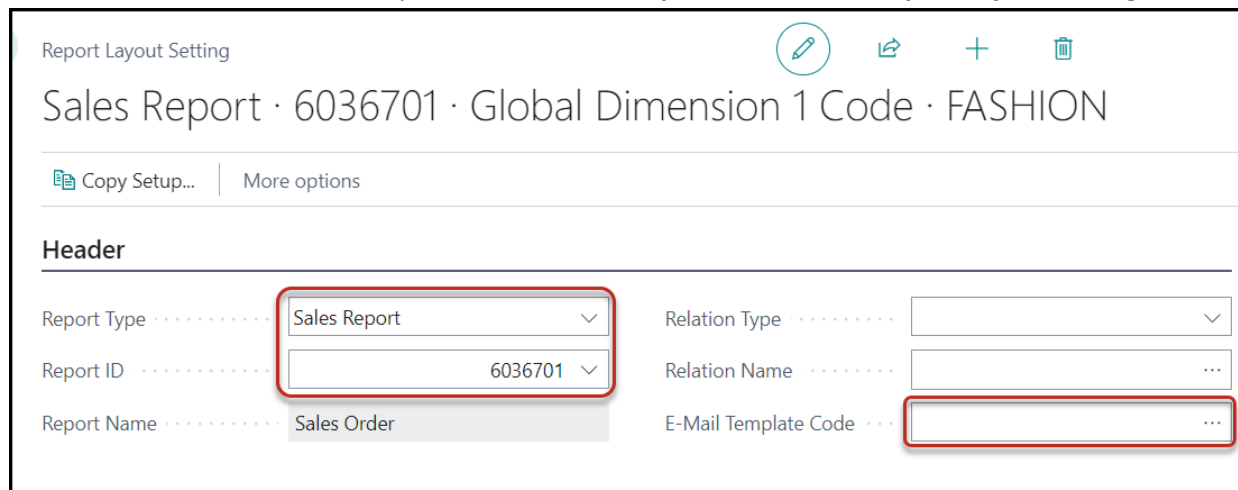
This can however be changed, by using a customized report with specific **AL Code** in the report in which you can easily set the **E-Mail Template** that needs to be used. I.e.:



The screenshot shows the AL code editor for a report named 'SalesOrder.Report.al'. The code is for 'Report 6036701'. A red box highlights the following code block:

```
1546 .....//>-> Option to specify specific E-Mail Template
1547 .....Mail.Set_Template('S_ORDER');
1548 .....//<-<- Option to specify specific E-Mail Template
```

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



The screenshot shows the 'Report Layout Setting' form for 'Sales Report · 6036701 · Global Dimension 1 Code · FASHION'. The form has a 'Header' section with the following fields:

Field	Value
Report Type	Sales Report
Report ID	6036701
Report Name	Sales Order
Relation Type	
Relation Name	
E-Mail Template Code	

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 sent) 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 in the database itself.
Yes (without Attachments)	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 sent 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.

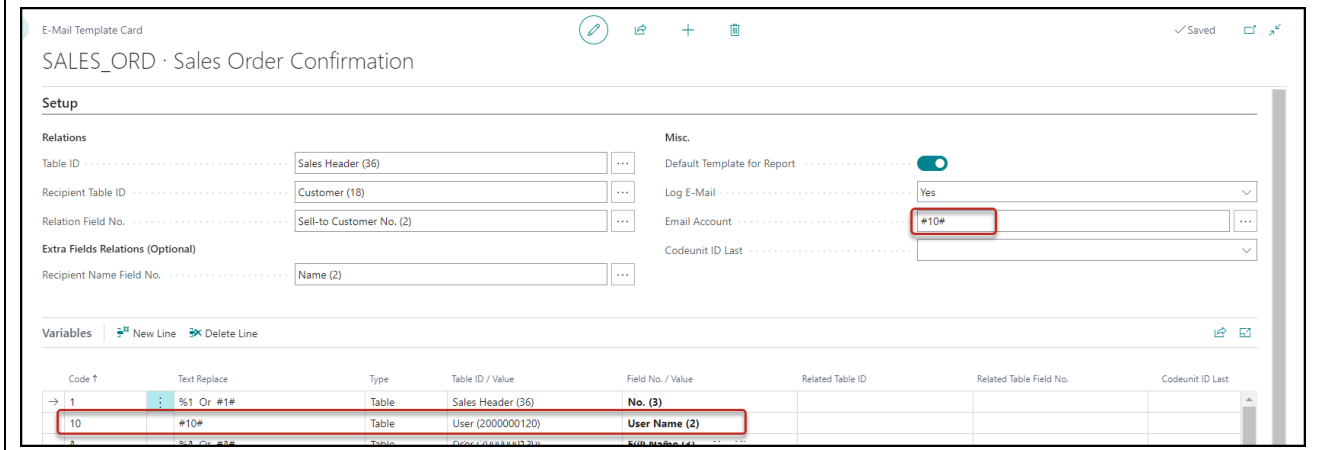
On TRIMIT's demo sites we will not accommodate the possibility by default to use the *Yes (Attachments in File Storage)* based on a specific **Connection Setup**.

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**.



E-Mail Template Card

SALES_ORD · Sales Order Confirmation

Setup

Relations

Table ID Sales Header (36) ...

Recipient Table ID Customer (18) ...

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

Extra Fields Relations (Optional)

Recipient Name Field No. Name (2) ...

Misc.

Default Template for Report ☒

Log E-Mail Yes

Email Account #10#

Codeunit ID Last

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)			
10	#10#	Table	User (2000000120)	User Name (2)			

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 <> <i>Blanc</i>. If it is <i>Blanc</i>, <i>Manual</i> 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 <i>Table Relation</i>, 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 <i>Boolean, Code, Text, Decimal, Integer, Date or Time</i>. If you leave this option <i>Blanc</i>, 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):

☒ **i**
☐ COMPANY
☐ USERID
☐ SID
☐ TODAY
☐ WORKDATE
☐ TIME
☐ TEMPORARYPATH
☐ Application Path
☐ WINDOWSLANGUAGE
☐ Global Language

OK Cancel

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

For the **Sales Order Confirmation** report, you can choose i.e. the following Tables:

Search Open in Excel

OBJECTS

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

18 Customer was filled in the **Recipient Table ID** on the FastTab **Setup**

36 Sales Header was filled in the **Table ID** on the FastTab **Setup**

The other five Tables *79*, *91*, *6037700*, *6037704* and *2000000120* can be chosen in any E-Mail Template.

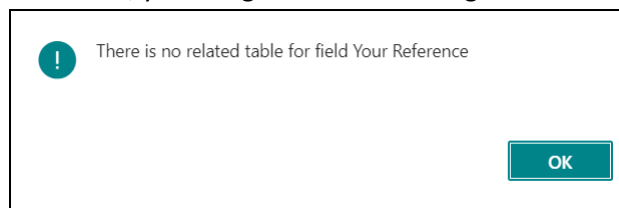
FIELD NO.

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

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

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

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



RELATED TABLE ID

This field is only applicable for **Type Table Relation**.

This field will automatically be filled with the Related Table ID and Name of the Related Table based on the **Field No.** of the **Table ID/Value**.

I.e. if you choose the **Field No. 43** of the **Table ID/Value Sales Header (36)** the system knows there is a Related Table *Salesperson/Purchaser (13)* related to that field **Salesperson Code** in the Sales Header.

RELATED TABLE FIELD NO.

This field is only applicable for **Type Table Relation**.

You can select a **Field No.** of the **Related Table ID**.

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

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

CODEUNIT ID LAST

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

DESCRIPTION

You can enter a **Description** for this Variable.

This field is not by default shown; but you can 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

Addresses

Archive E-Mail (Bcc) sales@cronuscorp.net

Template for E-Mail Addresses

Recipients 8

DESCRIPTION OF THE FIELDS:

ARCHIVE E-MAIL (BCC)

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

NOTE

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

RECIPIENTS

This number will automatically be updated based on the number of Recipients you have connected to this E-Mail Template via **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

Subject and Body Text

Manage

Actions

Delete Line

Edit

View

New

Language Code ↑

Default

Subject

Body

Body Format

Ignore Linebreaks in Body

→

ENU

☒

Sales Order Confirmation %1 from %9

Dear Sir/Madam,\\Based on your agreement with %.

Text

☐

Subject and Body Text		Manage	Actions	
			Delete Line	Edit
			View	New
Language Code ↑	Default	Subject	Body	Body Format
→ ENU	☒	Sales Order Confirmation %1 from %9	Dear Sir/Madam,\\We hereby send you your order c..	HTML

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.

Subject and Body Text		Manage	Actions	
			Delete Line	Edit
			View	New

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

Language Code ↑	Default	Subject
→ ENU	☒	Sales Order Confirmation %1 from %9
Delete Line Edit Select More		

CREATING E-MAIL SUBJECT AND BODY FOR BODY FORMAT TEXT

E-Mail Template RTF Editor - SALES_ORD · ENU

General

Language Code ENU

Body Format Text

Default ☒

Ignore Linebreaks in Body ☐

Subject Sales Order Confirmation %1 from %9

Dear Sir/Madam,

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

Kind regards,

%4

%9

%3

OK Cancel

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

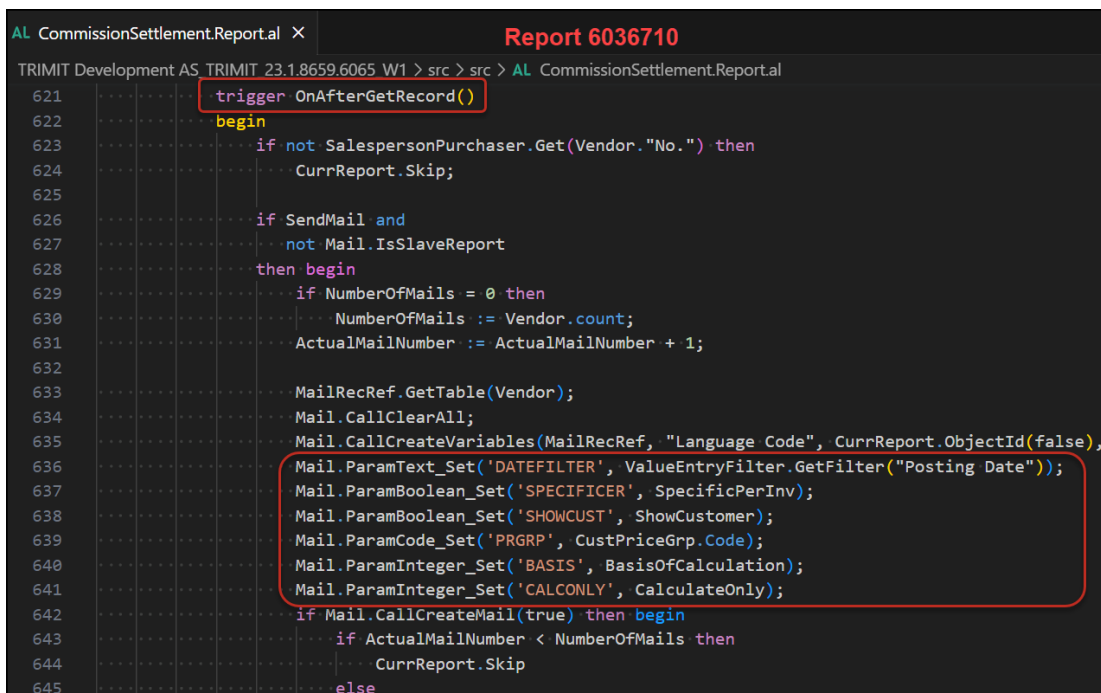
In the **Subject** and **Body** of the layout of the E-Mail, you can use references to Variables you defined in the FastTab **Variables** with a percentage-sign (%) in front of the **Code** of your Variable in case the **Code** only exist out of 1 digit.

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.

If the **Body Format** is set to *Text*, 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.

E-Mail Template RTF Editor - COMM · ENU

General

Language Code

ENU

Body Format

Text

Default

☒

Ignore Linebreaks in Body

☐

Subject

Commission Settlement of %5

Dear Sir/Madam,

Hereby we send you the Commission Settlement for #DATEFILTER#

Kind Regards,

%2

%9

%3

A A° B / U

OK Cancel

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*.

In case you use **Body Format Test**: to include a picture that represents your normal Signature under an E-Mail, you could add

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:

`<a href="https://www.trimit.com/link/LinkedIn">LinkedIn</a>`

This will show the text **LinkedIn** with a link to the website <https://www.trimit.com/link/linkedin>

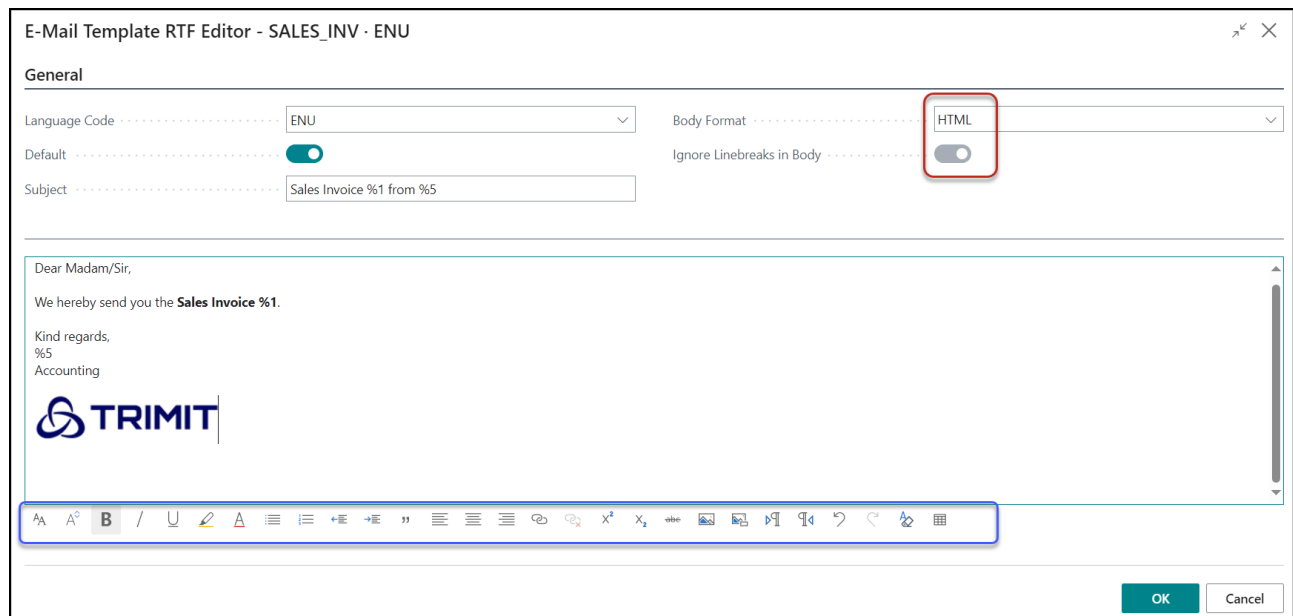
- Specify the **target** in the `<a href=".">`
- Then add the **text** that should work as the link
- Finally add an `</a>` tag to indicate where the link ends

HTML TAGS

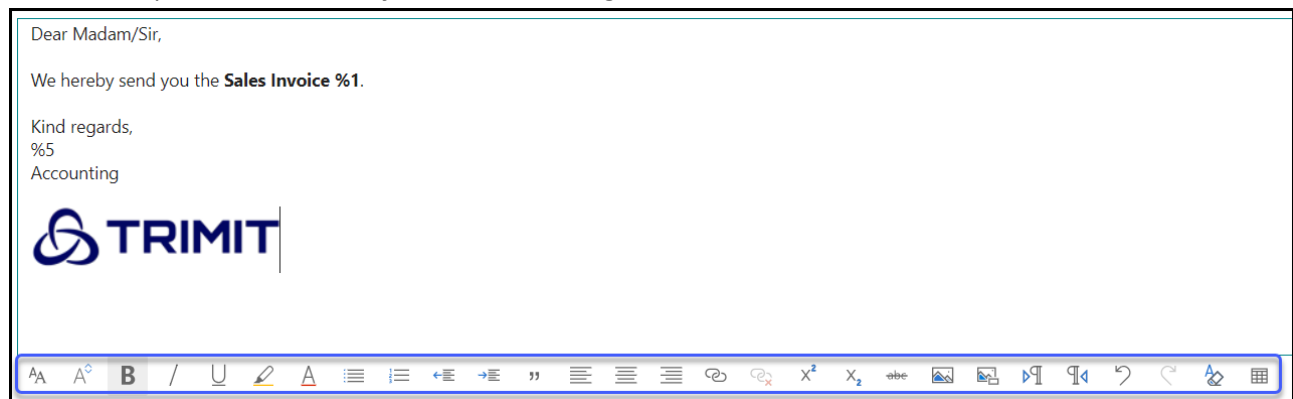
Some other examples of HTML Tags you can use in the **Subject** and **Body** of your E-Mail if **Body Format** is *Text*:

<code></code>	<code>Bold Text</code>	An example of Bold Text
<code><big></code>	<code><big>Big Text</big></code>	An example of Big Text
<code><center></code>	<code><center>Center Text</center></code>	An example of Center Text
<code></code>	<code>Emphasized Text</code>	An example of <i>Emphasized Text</i>
<code><i></code>	<code><i>Italic Text</i></code>	An example of <i>Italic Text</i>
<code><small></code>	<code><small>Small Text</small></code>	An example of Small Text
<code></code>	<code>Strong Text</code>	An example of Strong Text
<code><sub></code>	<code><sub>Subscript Text</sub></code>	An example of Subscript Text
<code><sup></code>	<code><sup>Superscript Text</sup></code>	An example of Superscript Text
<code></code>	<code>Delete Text</code>	An example of Delete Text
<code><s></code>	<code><s>Strike Text</s></code>	An example of Strike Text
<code><strike></code>	<code><strike>Strike Text</strike></code>	An example of Strike Text
<code><u></code>	<code><u>Underline Text</u></code>	An example of <u>Underline Text</u>
<code><tt></code>	<code><tt>Teletype Text</tt></code>	An example of Teletype Text
<code><blockquote></code>	<code><blockquote>Long Quotation</blockquote></code> <code><q>Short Quotation Text</q></code>	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 the bottom 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

```

621 ..... trigger OnAfterGetRecord()
622 ..... begin
623 ..... if not SalespersonPurchaser.Get(Vendor."No.") then
624 ..... CurrReport.Skip;
625 .....
626 ..... if SendMail and
627 ..... not Mail.IsSlaveReport
628 ..... then begin
629 ..... if NumberOfMails = 0 then
630 ..... NumberOfMails := Vendor.count;
631 ..... ActualMailNumber := ActualMailNumber + 1;
632 .....
633 ..... MailRecRef.GetTable(Vendor);
634 ..... Mail.CallClearAll;
635 ..... Mail.CallCreateVariables(MailRecRef, "Language Code", CurrReport.ObjectId(false),
636 ..... Mail.ParamText_Set('DATEFILTER', ValueEntryFilter.GetFilter("Posting Date"));
637 ..... Mail.ParamBoolean_Set('SPECIFICER', SpecificPerInv);
638 ..... Mail.ParamBoolean_Set('SHOWCUST', ShowCustomer);
639 ..... Mail.ParamCode_Set('PRGRP', CustPriceGrp.Code);
640 ..... Mail.ParamInteger_Set('BASIS', BasisOfCalculation);
641 ..... Mail.ParamInteger_Set('CALCONLY', CalculateOnly);
642 ..... if Mail.CallCreateMail(true) then begin
643 ..... if ActualMailNumber < NumberOfMails then
644 ..... CurrReport.Skip
645 ..... else

```

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

E-Mail Template RTF Editor - COMM - ENU

General

Language Code

ENU

Body Format

HTML

Default

☒

Ignore Linebreaks in Body

☐

Subject

Commission Settlement of %5

Dear Sir/Madam,

Hereby we send you the Commission Settlement for #DATEFILTER#.

Kind Regards,

%2

%9

%3



A⁺ A⁻ B / U                                        

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**.

The screenshot shows the 'Subject and Body Text' form. The 'Import File As Body' button is highlighted with a red box. The 'Body Format' dropdown is set to 'HTML', and the 'Ignore Linebreaks in Body' checkbox is checked, also highlighted with a red box.

Language Code ↑	Default	Subject	Body
→ ENU	☐	Sales Order Confirmation %1 from %9	Dear Sir/Madam,\Based on your agreement with %6...

FASTTAB FILES TO ATTACH

The screenshot shows the 'Files to Attach' form. The 'Import File' button is highlighted with a red box. Below the button is a table with columns for Language Code, Default, and Attachment Name.

Language Code ↑	Default	Attachment Name
→ DAN	☐	Vaskeanvisninger Danish.pdf
ENU	☒	Washlabels US.pdf
NLD	☐	Dutch.pdf

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 be compared with the Language Code in the actual document – i.e. in the Posted Sales Invoice Header).

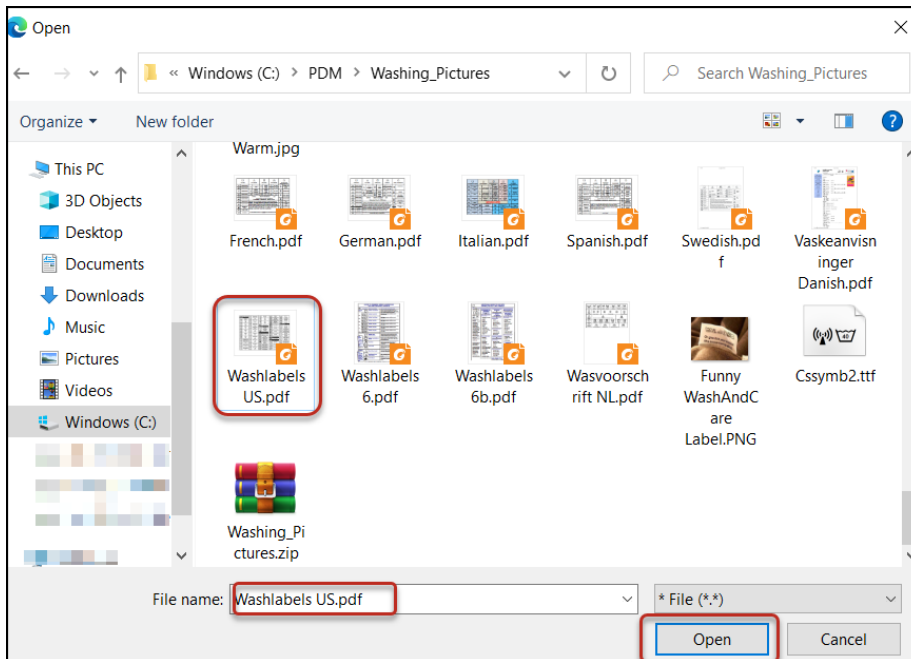
If no **Files to Attach** has been entered for this Language Code, the line with a checkmark in **Default** will be applicable.

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**:

The screenshot shows the 'Import File' dialog box. It has a large dashed blue box in the center with an upward arrow and the text 'Drop a file here to upload, or click here to browse'. A 'Cancel' button is at the bottom right.

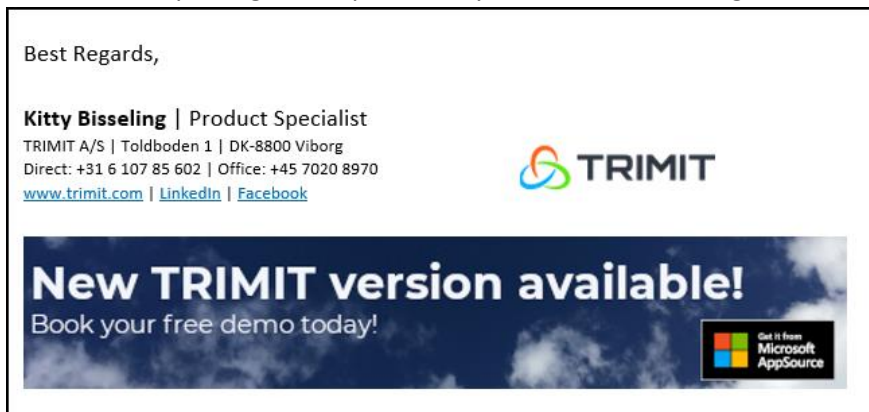
By clicking somewhere, you can import a File:



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

File Storage Setup			
File Storage Share Name	email ...	File Storage Folder	SalesOrders ...
File Storage Type	Azure Files		

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)

Extra Report (Recipient)			
Extra Report ID	Customer - Order Detail (108) ...	Extra Report File Name	Open_Sales_Orders_Details_%2
Extra Report File Type	PDF ▼		

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.

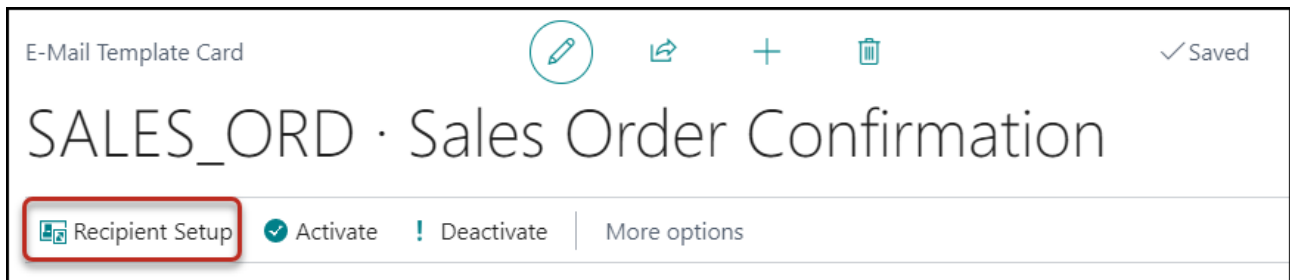
The example in the above picture *Open_Sales_Orders_Detail_%2* is related to the **Variable 2** that you can define in the FastTab [Variables](#).

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



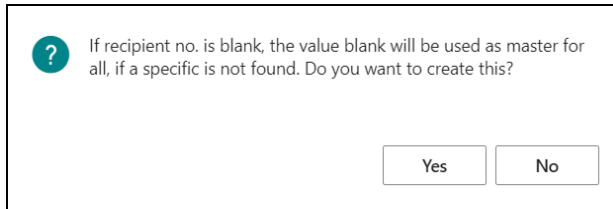
You can enter the **Recipients** of your Customers, Vendors or Salespersons for the E-Mails.

Unless you have entered the **Template for Mail Addresses** in which you can refer to Recipients of another E-Mail Template.



Recipient No.	Relation Name	To E-Mail	Cc E-Mail	Alt. Output File Type	Alt. Output Report ID	Alt. Output Report Name	Extra Addresses	Info
	Used if specific not found	%7					0	
2000	The Fashion Store UK	kbi@trimit.com					0	
2010	The Shoe Store Europe	purchase@cronuscorp.net					0	
2020	Sportswear A/S	purchase@cronuscorp.net					0	
2030	The Surf Shop Ltd.	purchase@cronuscorp.net					0	
3000	The Furniture Shop UK	purchase@cronuscorp.net					0	
3010	Office Supplies & Furniture Europe	purchase@cronuscorp.net					0	
3020	OCH BETT KÖK	purchase@cronuscorp.net					0	

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

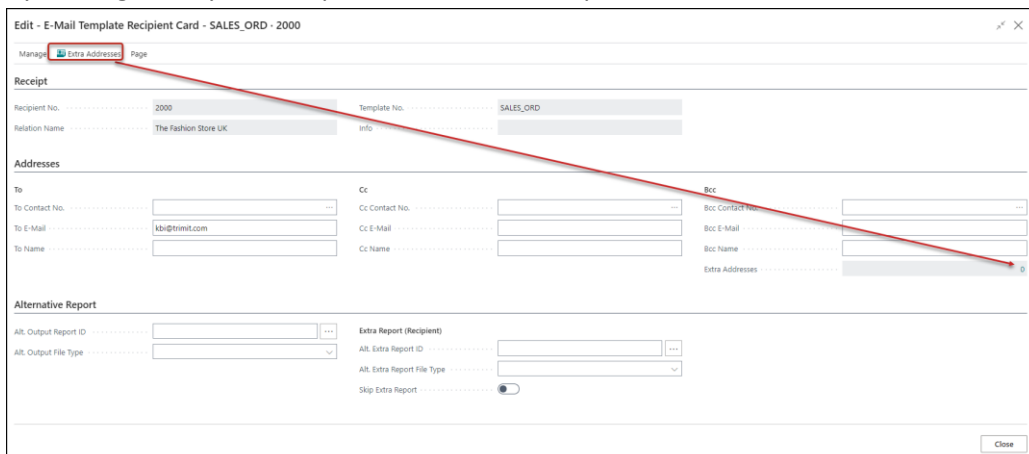


? If recipient no. is blank, the value blank will be used as master for all, if a specific is not found. Do you want to create this?

Yes No

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:



Manage Extra Addresses Page

Receipt

Recipient No. 2000 Template No. SALES_ORD

Relation Name The Fashion Store UK Info

Addresses

To To Contact No. Cc Cc Contact No. Bcc Bcc Contact No.

To E-Mail kbi@trimit.com Cc E-Mail Bcc E-Mail

To Name Cc Name Bcc Name

Extra Addresses 0

Alternative Report

Alt. Output Report ID Alt. Extra Report ID

Alt. Output File Type Alt. Extra Report File Type

Skip Extra Report

Close

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.

i

Limit Recipient Company

All

OK

Cancel

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.

Search + New Edit List Delete Open in Excel

EDIT - E-MAIL TEMPLATE EXTRA ADDRESSES

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

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

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

The screenshot shows a web application interface for editing email template extra addresses. At the top, there is a toolbar with icons for Search, New, Edit List, Delete, and Open in Excel. Below the toolbar, the title 'EDIT - E-MAIL TEMPLATE EXTRA ADDRESSES' is displayed. A yellow error banner at the top of the table area states: 'The page has an error. Correct the error or try to revert the change.' The table has three columns: 'Contact Type', 'Contact No.', and 'E-Mail'. The first row is highlighted in light blue and contains a red 'X' icon in the 'Contact Type' column, the text 'To' in the 'Contact No.' column, and a red 'X' icon in the 'E-Mail' column. A 'Validation Results' tooltip is visible over the 'E-Mail' column, stating: 'The email address "" is not valid.' Below the table, there are several empty rows.

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

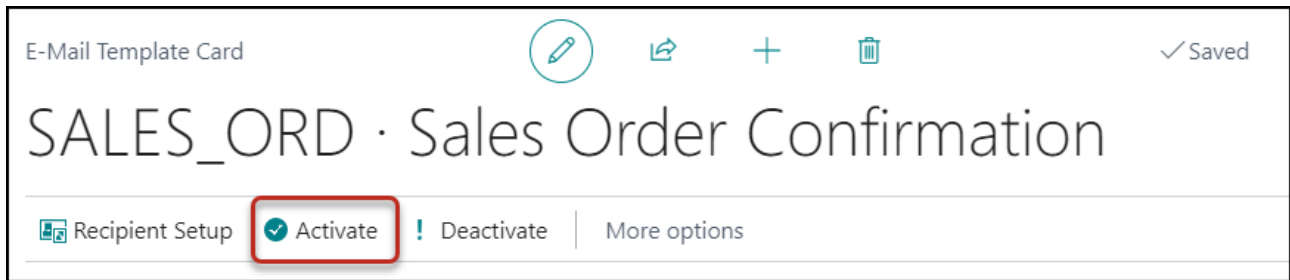
If you have entered an **Alt. Extra Report ID**, you need to decide as which File Type it should be attached to your E-Mail. You can choose between the following four options: *Excel*, *Pdf*, *Word* or *XML*.

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



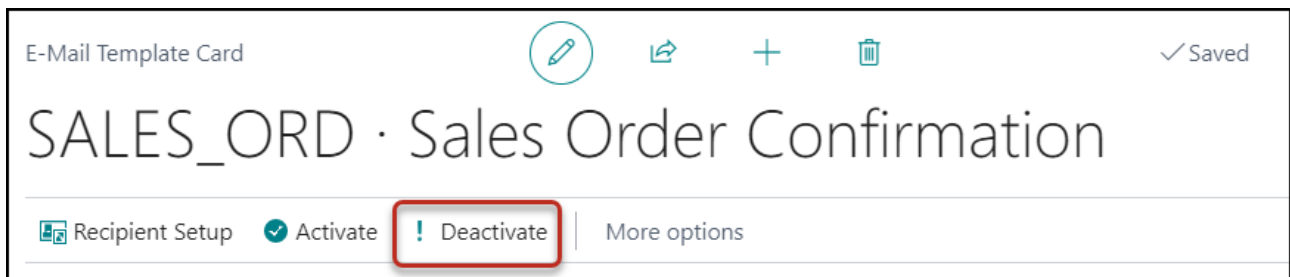
After you have entered all necessary data of the E-Mail Template and the Recipients, you need to **Activate** the E-Mail Template by clicking **Activate**.

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**.

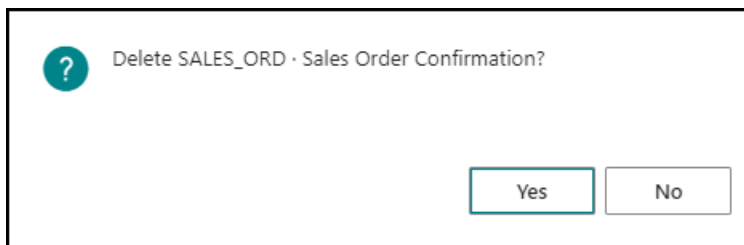
The **Status** in the FastTab **General** will automatically be set to *Deactivated*.

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

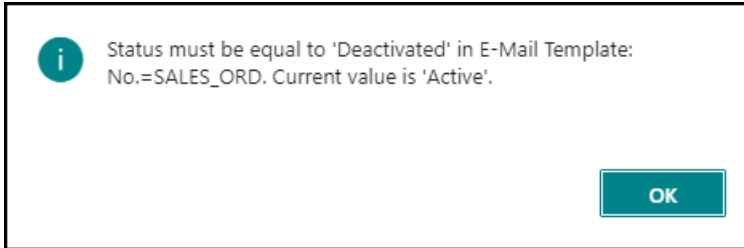
DELETE AN E-MAIL TEMPLATE



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

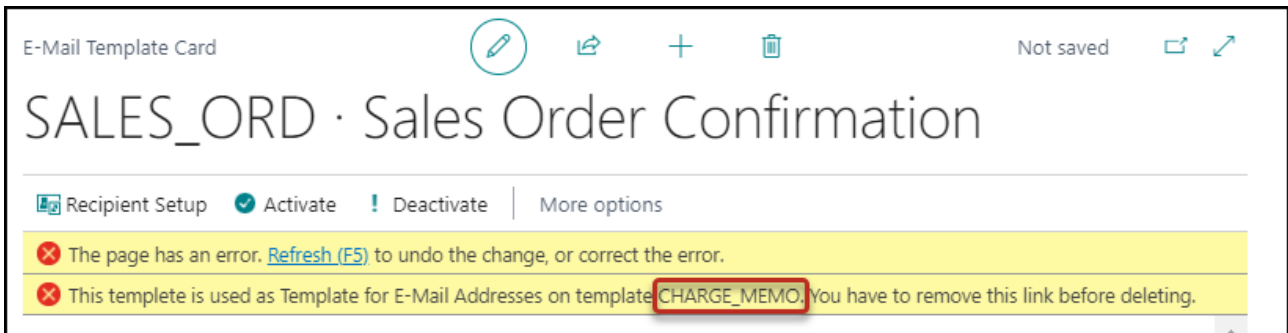


After clicking **Yes**, the system will check if the current **Template** is *Active* or *Deactivated*. A Template needs to be *Deactivated* to be able to delete it.



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**.

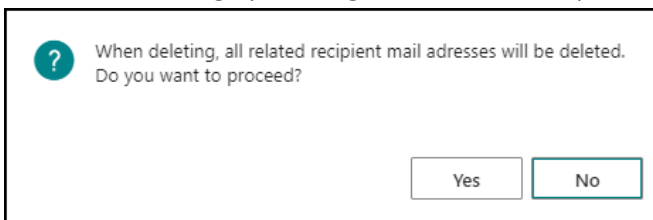
In that case, you will get the following message and need to clear the **Template for E-Mail Addresses** in the other Templates before you can delete the current one:



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**).

Posted Sales Invoices: All ▾ | 🔍 Search 🗑 Delete Home ▾ Print/Send ▾ Invoice ▾ ↶ Correct ▾ | More options

Print...

Send by Email

Send...

Attach as PDF

No.	Customer No.	Customer Name	Amount	Amount Including VAT	Remaining Amount	Location Code
<u>103001</u>	2000	The Fashion Store UK	215.94	269.93	269.93	BLUE

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.

Posted Sales Invoice

Printer: (Handled by the browser)

Report Layout: /Layouts/trmSalesInvoice.rdlc

Options

No. of Copies: 0

Show Unit List Price: ☒

Show Comments: ☒

Show Shipments: ☐

Show Backorder: ☐

E-Mail: ☒

Filter: Sales Invoice Header

× No.: 103001

× Bill-to Customer No.: 2000

+ Filter...

Advanced >

Buttons: Send to... Print Preview & Close Cancel

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

Sales Orders: Search + New Delete Home Release Post... Print/Send Order More options									
No. ↑	Sell-to Customer No.	Sell-to Customer Name	External Document No.	Sales Channel			Location Code	Assigned User ID	Docu Date
101001	10000	Adatum Corporation							4/2/
101002	10000	Adatum Corporation							5/1/
101003	30000	School of Fine Art							4/2/
101004	40000	Alpine Ski House							5/1/

Print Confirmation...
Pick Instruction
Email Confirmation...
Work Order...
Attach as PDF...

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

Sales Order

Printer: (Handled by the browser)

Report Layout: /Layouts/trmSalesOrder.rdlc

Options

No. of Copies: 0

Show Unit List Price: ☒

Show Comments: ☒

E-Mail: ☒

Filter: Sales Header

× Document Type: Order

× No.: 101001

× Bill-to Customer No.: 10000

+ Filter...

Filter totals by:
+ Filter...

Advanced >

Buttons: Send to... Print Preview & Close Cancel

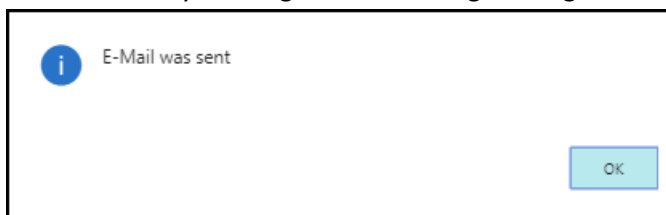
The **Option** for **E-Mail** is now set by default, based on the corresponding E-Mail Template field **E-Mail Default=Yes**, but you can change this.

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.

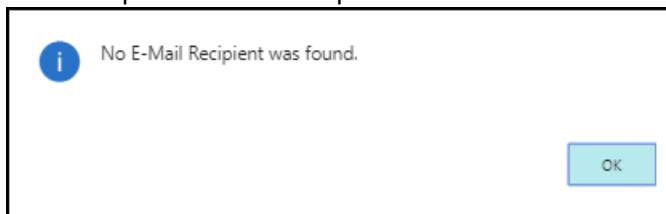
If you click **Print**, an E-Mail will only be created if a **Recipient** is added to the Template for the Customer of the Order and you will get the following message:



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)**.

Edit - Sales Order Confirmation S0006 from CRONUS Townhall

Send email

Discard draft

Use Word template

Show source document

Page

Email details

Show more

From

SMTP (smtpuser@CRONATOR.onmicrosoft.com)

...

To

kbi@trimit.com

...

Subject

Sales Order Confirmation S0006 from CRONUS Townhall

Message

Dear Sir/Madam,

We hereby send you your order confirmation of order S0006

Kind regards,

Kitty Bisseling



Attachments

Add file

Add files from default selection

Add file from source document

...

File Name

→ SO-SEND-S0006.pdf

⋮

Email Information

Template No.

SALES_ORD

Main Report ID

6036701

Close

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.,

Related Records			
Source Record		Type of relation	
→ Customer: 2000	⋮	Primary Source	
Sales Header: Order,S0006		Related Entity	

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.

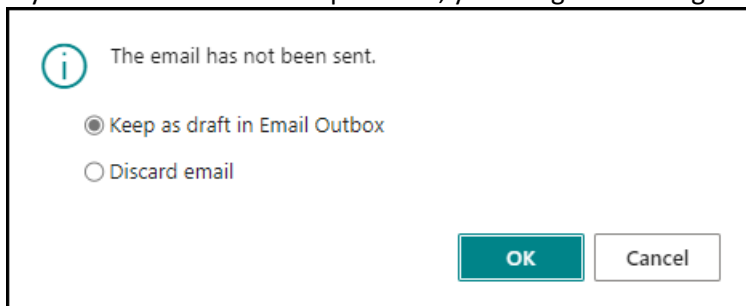
This is an action of standard BC in the preview of the E-Mail.

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

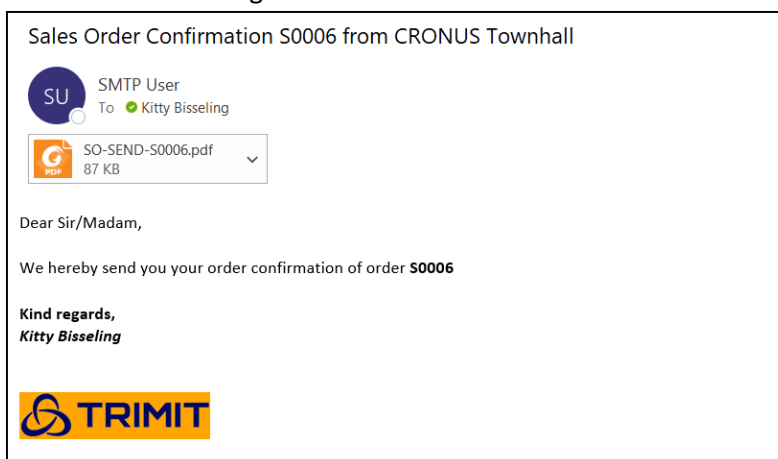
NOTE

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**.

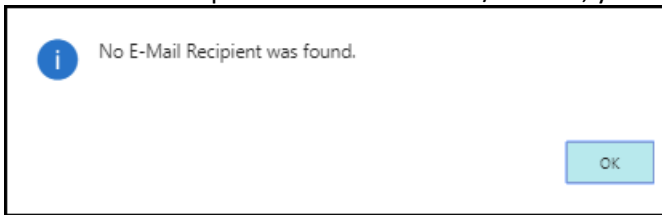
Posted Sales Invoices: All				Search				Delete		Home		Print/Send		Invoice		Correct		More options	
No.	Customer No.	Customer Name	C	Print...		Amount	Amount Including VAT	Remaining Amount	Location Code										
103001	2000	The Fashion Store UK		Send by Email		215.94	269.93	269.93	BLUE										
				Send...															
				Attach as PDF															

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*
 - o Clicking **Print**, will automatically send the E-Mail if the recipient is known.
 - o Clicking **Print**, will automatically preview the E-Mail which can be changed if the recipient is unknown.
 - o 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*
 - o Clicking **Print**, will automatically send all the E-Mails if the recipients are known
 - o Clicking **Print**, will print the document if the recipient is unknown.
 - o 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*
 - o **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.
 - o 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**.

Sent Emails

✓ Saved

Show sent emails after

5/6/2023 3:00 PM

Manage

Refresh

Show Source

Resend

Edit and Send

Description	Sent At	Sender	Sent From	Template No.	Main Report ID
→ Sales Order Confirmation S0001 from CRONUS TRIMIT W1 Ltd.	6/5/2023 3:00 PM			SALES_ORD1	6036701
Purchase Order PU0001 from CRONUS TRIMIT W1 Ltd.	6/5/2023 2:29 PM			PURCHASE_ORD	6036730

NOTE

You will only see the **Sent Emails** based on the settings of standard BC E-Mail functionality in the

User Email View Policies:

User Email View Policies

Search

+ New

Edit List

Delete

User ID	Email View Policy
→	View own emails View own emails View all emails View if access to all related records View if access to any related records

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.

Related Records

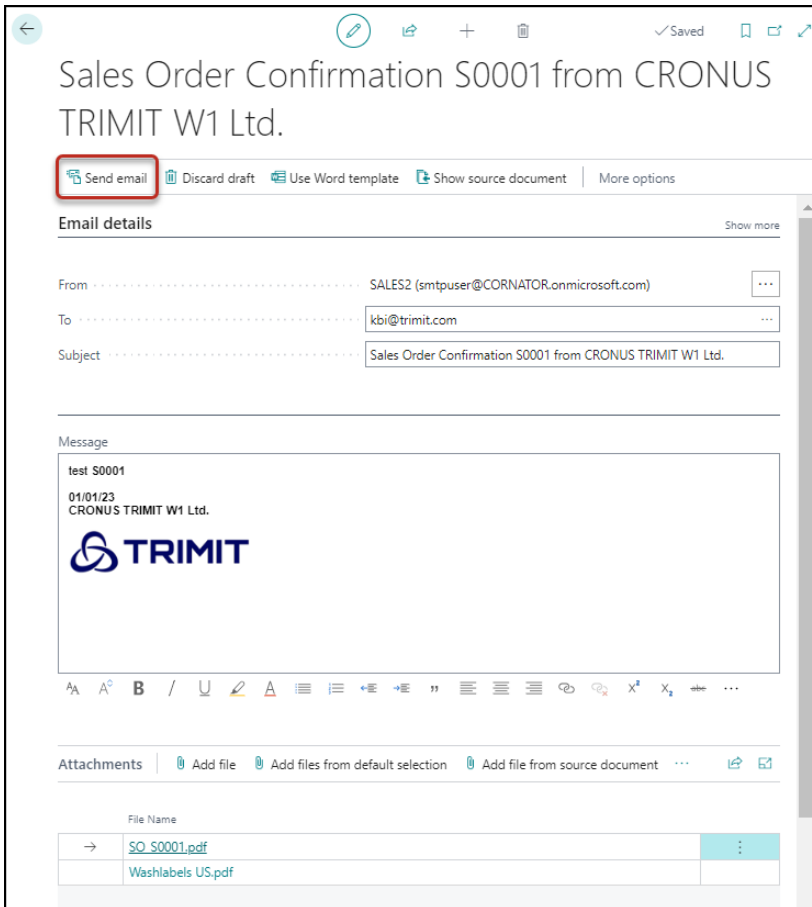
Source Record

Type of relation

→ Customer: 2000	Primary Source
Sales Header: Order.S0001	Related Entity
User: {F00C5FC3-7E1A-4CE8-9E8A-AEA64768554B}	Related Entity

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.

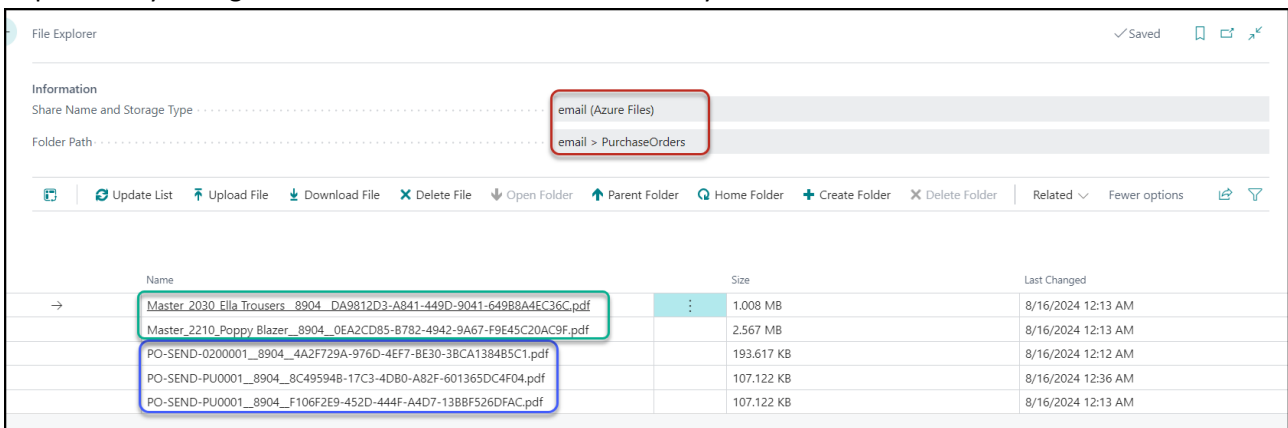


Every **Resend** or **Send email** will generate a new **record** in the *Sent Emails* if **Log E-Mail** is set to a value different from *No*.

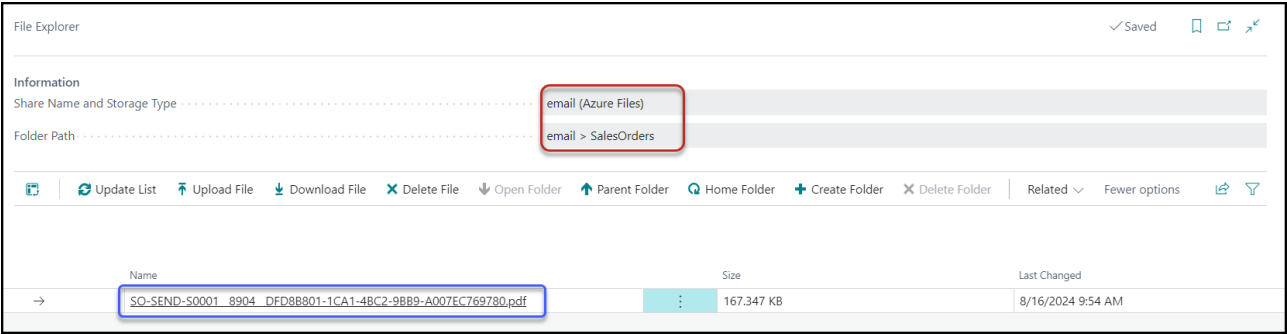
AZURE FILE STORAGE

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 a 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.



For more details regarding the **File Shares: *White Paper* – TRIMIT Azure Storage Services.**

Because you are able to store the Attachments in many different Directories of your File Shares, we also created a **File Storage Archive List** (you can find it via **Search**) with all the Attachments of all the E-Mail Templates:

File Storage Archive Log										
Table Id	System Id	File Name	File Type	File Length	Share Name	Storage Type	Folder Path	Created At	Created By	
8904	{8c49594b-17c3-4db0-a82f-601365dc4f04}	PO-SEND-PU0001.pdf	application/pdf	109693	email	Azure Files	PurchaseOrders	8/16/2024 2:35 PM	ADMIN	
8904	{0ea2cd85-b782-4942-9a67-f9e45c20ac9f}	Master_2210_Poppy Blazer.pdf	application/pdf	2691281	email	Azure Files	PurchaseOrders	8/16/2024 2:13 PM	ADMIN	
8904	{da9812d3-a841-449d-9041-649b8a4ec36c}	Master_2030_Ella Trousers.pdf	application/pdf	1057108	email	Azure Files	PurchaseOrders	8/16/2024 2:13 PM	ADMIN	
8904	{f106f2e9-452d-444f-a4d7-13bbf526dfac}	PO-SEND-PU0001.pdf	application/pdf	109693	email	Azure Files	PurchaseOrders	8/16/2024 2:13 PM	ADMIN	
8904	{4a2f729a-976d-4ef7-be30-3bca1384b5c1}	PO-SEND-0200001.pdf	application/pdf	198264	email	Azure Files	PurchaseOrders	8/16/2024 2:11 PM	ADMIN	
8904	{dfd8b801-1ca1-4bc2-9bb9-a007ec769780}	SO-SEND-S0001.pdf	application/pdf	171363	email	Azure Files	SalesOrders	8/16/2024 11:54 A...	ADMIN	

Table Id 8904 is the table 8904 Email Message Attachment.
It will also show the **File Type** based on the kind of Attachment.

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.

The screenshot displays two parts of the software interface. The top part is the 'Customer Card' for '2000 · The Fashion Store UK'. It features a navigation bar with tabs like 'Home', 'Request Approval', 'New Document', 'Prices & Discounts', 'Customer', 'Report', 'Actions', 'Related', 'Reports', 'Automate', and 'Fewer options'. Below this is a 'General' section with fields for 'No.', 'Name', and 'Balance (LCY)'. A dropdown menu is open from the 'Related' tab, showing options like 'Customer', 'History', 'Prices & Discounts', 'Sales', 'Documents', and 'Service'. The 'History' option is highlighted, and a sub-menu is visible with 'Entry Statistics', 'Statistics by Currencies', 'Item Tracking Entries', 'Sent Emails', and 'Other'. The 'Sent Emails' option is highlighted with a red box. The bottom part of the screenshot shows the 'Customers List' with a table of customer records. A dropdown menu is open from the 'Customer' column, showing options like 'Ledger Entries', 'Statistics', 'Dimensions-Multiple', 'Approvals', 'Comments', 'Contact', 'Sent Emails', 'Item Tracking Entries', 'Item References', and 'Return Orders'. The 'Sent Emails' option is highlighted with a red box.

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.

The screenshot displays two parts of the software interface. The top part is the 'Customer Card' for '2000 · The Fashion Store UK'. It features a navigation bar with tabs like 'Home', 'Request Approval', 'New Document', 'Prices & Discounts', 'Customer', 'Report', 'Actions', 'Related', 'Reports', 'Automate', and 'Fewer options'. Below this is a 'General' section with fields for 'No.', 'Name', and 'Balance (LCY)'. A dropdown menu is open from the 'Related' tab, showing options like 'Customer', 'History', 'Prices & Discounts', 'Sales', 'Documents', and 'Service'. The 'Documents' option is highlighted, and a sub-menu is visible with 'Quotes', 'Invoices', 'Orders', 'Return Orders', 'Issued Documents', 'Blanket Orders', 'Posted', 'Complaints', 'E-Mail', and 'Jobs'. The 'E-Mail' option is highlighted, and a further sub-menu is visible with 'E-Mail Template Setup'. The 'E-Mail Template Setup' option is highlighted with a red box. The bottom part of the screenshot shows the 'Customers List' with a table of customer records. A dropdown menu is open from the 'Customer' column, showing options like 'Ledger Entries', 'Statistics', 'Dimensions-Multiple', 'Approvals', 'Comments', 'Contact', 'Sent Emails', 'Item Tracking Entries', 'Item References', and 'Return Orders'. The 'Sent Emails' option is highlighted with a red box.

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**).

Edit - E-Mail Template Recipient List								
Search + New Edit List Delete Card Extra Addresses								
Template No. ↑	To E-Mail	Cc E-Mail	Alt. Output File Type	Alt. Output Report ID	Alt. Output Report Name	Extra Addresses	Info	
→ SALES_ORD	kbi@trimit.com					0		
SALES_ORD1	kbi@trimit.com					0		
SALES_ORD2	kbi@trimit.com					0		
SALES_SHIP	purchase@cronuscorp....					0	Address information is maintained by template SALES_ORD.	

E-MAIL LOG ENTRIES

This is not visible by default, but you can add it via **Personalize**. It will however only show old E-Mails that have been sent before TRIMIT 24.1.

Customer Card

2000 · The Fashion Store UK

Home Approve Request Approval New Document Prices & Discounts Customer Report Actions Related Reports Automate Fewer options

Contact Apply Template Merge With... Send Email Workflow

General

No. 2000 Credit Limit (LCY) 0.00

Name The Fashion Store UK Blocked 0.00

Balance (LCY) 0.00 Total Sales 0.00

Balance (LCY) As Vendor 0.00 Costs (LCY) 0.00

Balance Due (LCY) 0.00

Address & Contact

Address Station Road, 21 Phone No. Mobile Phone No.

Address 2 Country/Region Code GB Email Home Page

City Cambridge Contact

Related

- Customer
- History
- Prices & Discounts
- Sales
- Documents
- Service
- Quotes
- Invoices
- Orders
- Return Orders
- Issued Documents
- Blanket Orders
- Posted
- Complaints
- Chart
- E-Mail
- Jobs

E-Mail Log Entries

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

View - E-Mail Log Entries										
Search Card										
Entry No. ↓	Status	Template No.	Recipient No. ▼	Recipient Name	Main Report ID	To	Subject	Attachments	Creation Date/Time	Error Text
6		SALES_ORD	2000	The Fashion Store UK	6036701	kbi@trimit.com	Sales Order Confirmation S0001 from TRIMIT Inter..	2	3/31/2023 2:17 PM	
1	Sent	SALES_ORD	2000	The Fashion Store UK	6036701	kbi@trimit.com	Sales Order Confirmation S0001 from TRIMIT Inter..	2	3/31/2023 2:17 PM	

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

E-Mail Log Card

1

General

To kbi@trimit.com

Cc

Bcc

Subject Sales Order Confirmation S0001 from TRIMIT International Ltd.

Body Format Text

B I U G

Dear Sir/Madam,

Hereby the Sales Order.

Kind regards,

Attached Files

Delete Line Show File Add Attachment

File Name

→ SO-SEND-S0001.pdf

Picture_8

VENDORS

SENT EMAILS

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

Vendor Card

2000 · Sewing & Stitching Lda.

Home Request Approval New Document Vendor Prices & Discounts Report Actions Related Reports Automate Fewer options

Ledger Entries Dimensions Statistics Attachments Approvals Comments Document Layouts Sent Emails Bank Accounts Item References

Vendors: All Search + New Delete Home New Document Vendor More options

10000
Fabrikam, Inc.
Krystal York

0.00
0.00

2100
Shoe Materials Inc.
Lorenzo Rantucci

0.00
0.00

2400
Chihuahua Textiles
Antonia Banderas

0.00
0.00

3100
Metal und Komponente...
Uwe Hoffstadter

0.00
0.00

3400

2000
Sewing & Stitching
José Guido

2200
FPI - Fashion Prod
Shalamar Punjab

3000
All Wood Ltd.
Woody Allan

3200
KBL Equipment Lt
Helen Yalaman

40000

Ledger Entries

Statistics

Dimensions-Multiple

Approvals

Comments

Contact

Sent Emails

Item Tracking Entries

Item References

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.

Edit - E-Mail Template Recipient List

Search + New Edit List Delete Card Extra Addresses

Template No. ↑	To E-Mail	Cc E-Mail	Alt. Output File Type	Alt. Output Report ID	Alt. Output Report Name	Extra Addresses	Info
→ PURCHASE_ORD ...	kbi@trimit.com					0	

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**.

User Card

Effective Permissions

Send Email

Sent Emails

Actions

Automate

Fewer options

General

Show less

User Name

ADMIN

Full Name

Status

Active

Contact Email

Telemetry ID

{61198954-6dcb-4457-a1a3-39bb649950d5}

Microsoft 365

Authentication Email

Mapped To Exchange Identifier

Authentication Status

Disabled

Microsoft 365 User Account state

Inactive

Web Service

Web Service Access Key

Web Service Expiry Date

Sent Emails

✓ Saved

Show sent emails after

5/6/2023 4:06 PM

Manage

Refresh

Show Source

Resend

Edit and Send

Description	Sent ↓	Sender	Sent From	Template No.	Main Report ID
Sales Statistic from CRONUS TRIMIT W1 Ltd.	6/5/2023 4:02 PM			SALES_STAT	6036850
→ Commission Settlement of CRONUS TRIMIT W1 Ltd.	6/5/2023 3:52 PM			COMM	6036710
Sales Order Confirmation 50001 from CRONUS TRIMIT W1 Ltd.	6/5/2023 3:00 PM			SALES_ORD1	6036701
Purchase Order PU0001 from CRONUS TRIMIT W1 Ltd.	6/5/2023 2:29 PM			PURCHASE_ORD	6036730

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.

Salesperson/Purchaser Card

CE · Christine Everton

Home

Salesperson

Actions

Related

Automate

Fewer options

Dimensions

Statistics

Sent Emails

Teams

Contacts

Campaigns

Segments

Sent Emails

✓ Saved

Show sent emails after

5/8/2023 11:49 AM

Manage

Refresh

Show Source

Resend

Edit and Send

Description	Sent ↓	Sender	Sent From	Template No.	Main Report ID
Appointment Confirmation Demo	6/5/2023 4:27 PM				
→ Commission Settlement of CRONUS TRIMIT W1 Ltd.	6/5/2023 3:52 PM			COMM	6036710

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)**

System Responsibility	
System Responsible System Data	Yes
System Responsible Finance	Yes
System Responsible Sales	Yes
System Responsible Production	Yes
System Responsible Purchase	Yes
System Responsible PDM	Yes
Maintain Customer Information	Yes

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 24.1, 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)

Delete E-Mails Log

Options

Update Duplicates between Log Entries and Sent Mail

Delete Only Duplicates between Sent Mail and Log Entries

Delete Archived Attachments from Log Entries

Filter: E-Mail Log Entry

× Entry No.

× Sent Date/Time

× Created By

× Status

× Template No.

+ Filter...

Schedule...

OK

Cancel

- **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 Sent Emails

Options

Delete Archived Attachments from Sent Email ☒

Filter: Sent Email

× Id

× Template No.

+ Filter...

Schedule...

OK

Cancel

- 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)

Update E-Mail Log Entries From Template Settings

Options

Delete Archived Attachments from Log Entries ☒

Filter: E-Mail Log Entry

× Entry No.

× Sent Date/Time

× Created By

× Status

× Template No.

+ Filter...

Schedule...

OK

Cancel

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)

Update Sent Emails From Template Settings

Options

Delete Archived Attachments from Sent Email

Filter: Sent Email

× Id

× Template No.

+ Filter...

Schedule...

OK

Cancel

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;  
PortaleEmailAddress: 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
        PortaleEmailAddress :=
PortalsMailHandler.GetPortalConfirmationRecipient("Sales Header");
        if PortaleEmailAddress <> '' then
            Mail.Add_Recipient(PortaleEmailAddress, 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;
end;

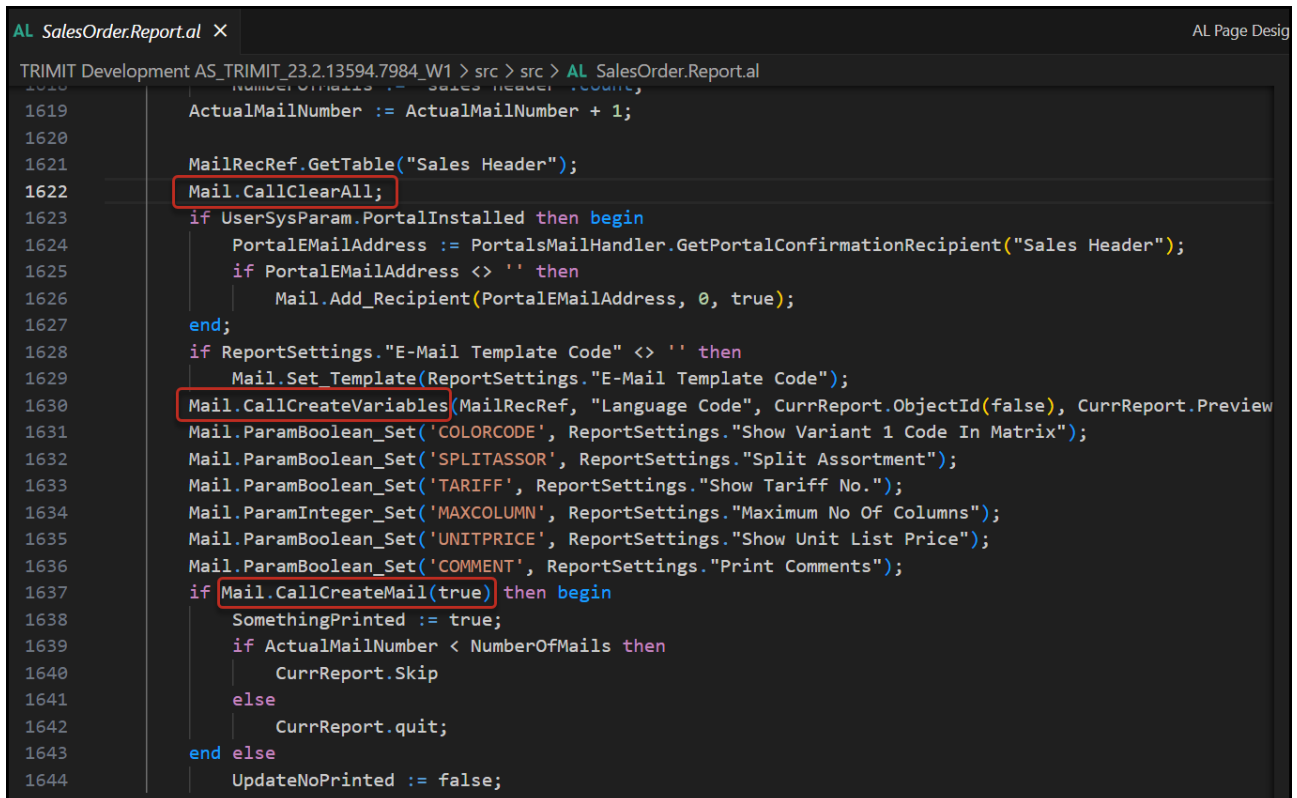
```

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 X AL Page Design
TRIMIT Development AS_TRIMIT_23.2.13594.7984_W1 > src > src > AL SalesOrder.Report.al
1619 ActualMailNumber := ActualMailNumber + 1;
1620
1621 MailRecRef.GetTable("Sales Header");
1622 Mail.CallClearAll;
1623 if UserSysParam.PortalInstalled then begin
1624     PortalEmailAddress := PortalsMailHandler.GetPortalConfirmationRecipient("Sales Header");
1625     if PortalEmailAddress <> '' then
1626         Mail.Add_Recipient(PortalEmailAddress, 0, true);
1627 end;
1628 if ReportSettings."E-Mail Template Code" <> '' then
1629     Mail.Set_Template(ReportSettings."E-Mail Template Code");
1630 Mail.CallCreateVariables(MailRecRef, "Language Code", CurrReport.ObjectId(false), CurrReport.Preview
1631 Mail.ParamBoolean_Set('COLORCODE', ReportSettings."Show Variant 1 Code In Matrix");
1632 Mail.ParamBoolean_Set('SPLITASSOR', ReportSettings."Split Assortment");
1633 Mail.ParamBoolean_Set('TARIFF', ReportSettings."Show Tariff No.");
1634 Mail.ParamInteger_Set('MAXCOLUMN', ReportSettings."Maximum No Of Columns");
1635 Mail.ParamBoolean_Set('UNITPRICE', ReportSettings."Show Unit List Price");
1636 Mail.ParamBoolean_Set('COMMENT', ReportSettings."Print Comments");
1637 if Mail.CallCreateMail(true) then begin
1638     SomethingPrinted := true;
1639     if ActualMailNumber < NumberOfMails then
1640         CurrReport.Skip
1641     else
1642         CurrReport.quit;
1643 end else
1644     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.

Edit - CRONUS TRIMIT W1 Ltd. - Sales Invoice 103003

Send email

Discard draft

Use Word template

Show source document

Page

Email details

From

To

Subject

CharleyNelson@contoso.com

CRONUS TRIMIT W1 Ltd. - Sales Invoice 103003

Message

Attachments

Add file

Add files from default selection

Add file from source document

Add file from Word template

Delete

File Name

Sales Invoice 103003.pdf

Email Information

Template No.

Main Report ID

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 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.

File Storage Setup			
File Storage Share Name	test	File Storage Folder	KBI-EMAIL
File Storage Type	Azure Blobs	File Storage Share Id	{88416fe8-7190-4dc6-817c-b870440a8df2}

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 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 webservice 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 screenshot shows the 'Basic Setup' configuration page. Under the 'General' section, there are several settings. The 'Environment is a Sandbox' toggle switch is located at the bottom left of the settings and is highlighted with a red rectangular box. Other visible settings include 'Formula Decimal Separator' set to 'Comma', 'Time Unit' set to 'Clock Minutes', and 'No TRIMIT Functionality in Use' which is also a toggle switch.

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;
```