WHITE PAPER – TRIMIT E-MAIL BC13

This document contains information about the TRIMIT E-Mail functionality in TRIMIT for Business Central BC13.

Version: BC13.1
Date: 11-02-2019

CONTENTS

INTRODUCTION

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

There are no extra licenses or setups necessary besides setting up the **E-Mail Templates** and the objects are part of the TRIMIT Basic License. But you might have to change the **SMTP Mail Setup** based on the E-Mail Program and security level you use.

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

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

The functionality described is the functionality in **TRIMIT for Business Central BC13**.
The pictures in this White Paper are based on the demo database for **TRIMIT Business Central W1 BC13** (based on Microsoft Dynamics 365 Business Central) in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

COMPONENTS

TRIMIT E-Mail contains the following objects:

The tables	***6037700***	***E-Mail Template***
	6037701	***E-Mail Template Line***
	6037702	***E-Mail Template Files***
	6037703	***E-Mail Template Variables***
	6037704	***E-Mail Recipient***
	6037705	***E-Mail Addresses***
	6037706	***E-Mail Log Entry***
	6037707	***E-Mail Log Entry Files***
	6037708	***E-Mail Temporary Variables***
	6038119	***Portal E-Mail Queue***

The pages	***6036846***	***E-Mail Recipient FactBox***
	6037700	***E-Mail Template List***
	6037701	***E-Mail Template Card***
	6037702	***E-Mail Template Text Subpage***
	6037703	***E-Mail Template File Subpage***
	6037704	***E-Mail Template Var. Subpage***
	6037705	***E-Mail Template Recipient List***
	6037706	***E-Mail Template Recipient Card***
	6037707	***E-Mail Template Addresses***
	6037708	***E-Mail Template Text Card***
	6037709	***E-Mail Text Editor***
	6037710	***E-Mail Log Entries***
	6037711	***E-Mail Log Card***
	6037712	***E-Mail Log Files***
	6037713	***Look Up Fields***

The report	***6037700***	***Delete E-Mail Log***

The codeunits	***6037700***	***E-Mail Handling***
	6037701	***E-Mail Data Container***

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

The reports	***6036700***	***Sales - Quote TRIMIT***
	6036701	***Sales - Order TRIMIT***
	6036702	***Sales - Invoice TRIMIT***
	6036703	***Sales - Credit Memo TRIMIT***
	6036704	***Sales - Shipment TRIMIT***
	6036710	***Commission Settlement***
	6036730	***Purchase - Order TRIMIT***
	6036850	***Sales Statistics Report***
	6037208	***PDM Master Report Set***

This is also applicable for some Microsoft Dynamics 365 Business Central Reports:

The reports	***116***	***Statement***
	117	***Reminder***
	118	***Finance Charge Memo***

To make the text easier to read, we have used the following abbreviations:
TRIMIT for TRIMIT for Business Central BC13.
BC13 for standard Microsoft Dynamics 365 Business Central.

E-MAIL TEMPLATE

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

E-MAIL TEMPLATE LIST

Search | + New | Manage | Process | Show Attached | Open in Excel | Navigate | Less options

NO.	DESCRIPTION	REPORT ID	REPORT NAME	DEFAULT TEMPLA... FOR REPORT	E-MAIL DEFAUL...	STATUS	RECIPIENTS	TEMPLATE FOR E-MAIL ADDRESSES
CHARGE_MEMO	Finance Charge Memo	118	Finance Charge Memo	☑	☐	Active	0	SALES_ORD
COMM	Commission Settlement	6036710	Commission Settlement	☑	☐	Active	2	
PDM_REPORT_SET	PDM Report Set	6037208	PDM Report Set	☑	☑	Active	0	PURCHASE_ORD
PURCHASE_ORD	Purchase Orders	6036730	Purchase - Order TRIMIT	☑	☑	Active	10	
REMINDER	Reminder	117	Reminder	☑	☐	Active	0	SALES_ORD
SALES_CRE	Sales Credit Memo	6036703	Sales - Credit Memo TRIMIT	☑	☐	Active	0	SALES_ORD
SALES_INV	Sales Invoice	6036702	Sales - Invoice TRIMIT	☑	☐	Active	0	SALES_ORD
SALES_ORD	Sales Order Confirmation	6036701	Sales - Order TRIMIT	☑	☑	Active	8	
SALES_QUO	Sales Quote	6036700	Sales - Quote TRIMIT	☑	☑	Active	0	SALES_ORD
SALES_SHIP	Sales Shipment	6036704	Sales - Shipment TRIMIT	☑	☐	Active	8	
STATEMENT	Customer Statement	116	Statement	☑	☐	Active	0	SALES_ORD
SALES_STAT	Sales Statistics to Users	6036850	Sales Statistics Report	☑	☐	Active	1	

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, the system will automatically choose the first **E-Mail Template** for the report.
This can however be changed, by using extra **C/AL Code** in the actual 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*:

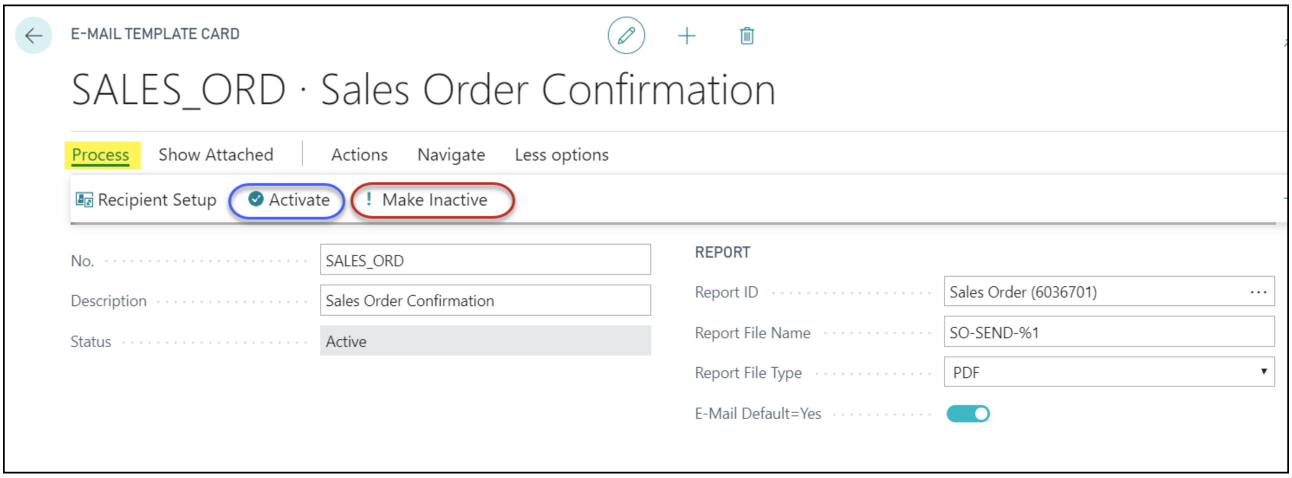
```
Sales Header - OnAfterGetRecord()
IF SendMail AND
   NOT Mail.IsSlaveReport
THEN BEGIN
  MailRecRef.GETTABLE("Sales Header");
  Mail.CallClearAll;

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

```

If no **E-Mail Template** with **Status** *Active* has been created for a report, it will simply be send with the standard BC13 options: Print, E-Mail according to standard BC13 E-Mail Functionality, saved as file, etc.

FASTTAB GENERAL



DESCRIPTION OF THE FIELDS:

NO.

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

DESCRIPTION

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

STATUS

The **Status** will change automatically when clicking *Process, **Activate*** or *Process, **Make Inactive***.
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 Master 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.

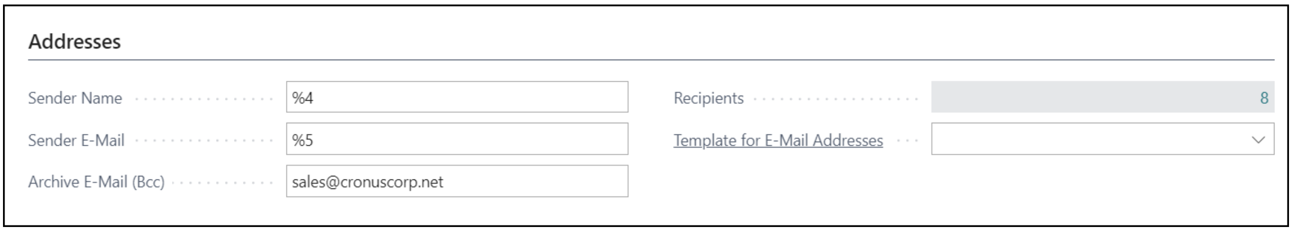
This field will however only be effective if you also have the following line in the C/AL Code of the **OnInit Report()** of your report where the Variable **SendMail** is the field that will be used in the Request page of the report.

```
OnInitReport()
ShowMatrixAsMatrix := TRUE;
ShowColourCodeInMatrix := TRUE;
SplitAssortment := TRUE;  // If TRUE assortments will be shown split up into each size etc.
ShowTariffNo := FALSE;
MaxNoOfColumns := 10;  // Remember not to set this to more than the actual number of columns on the layout
GetUnitListPrice := TRUE;
ShowShipmentDate := ShowShipmentDate::"In Header";  //3 options: No, "In Header", "On Lines"
ShowComments := TRUE;
ReportActive := Mail.IsTrimitEMailActive(0,CurrReport.OBJECTID(FALSE),SendMail);

```

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

FASTTAB ADDRESSES



DESCRIPTION OF THE FIELDS:

SENDER NAME

Name of the person who will send the E-Mail.
You can also use a **Variable** to fill this field.
The *%4* is related to the **Variable** (i.e. Full Name of the User) that you can define in the FastTab ***Variables***.

SENDER E-MAIL

E-Mail Address that will be used as the **From** in the E-Mail.
You can also use a **Variable** to fill this field.
The *%5* is related to the **Variables** (i.e. Contact Email of the User) that you can define in the FastTab ***Variables***.

ARCHIVE E-MAIL (BCC)

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

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

RECIPIENTS

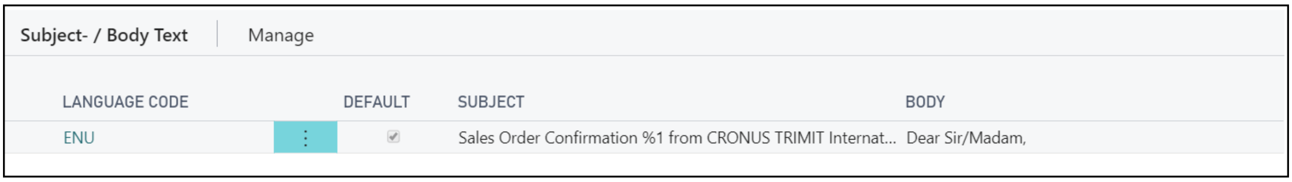
This number will automatically be updated based on the number of Recipients you have connected to this E-Mail Template via *Process, **Recipient Setup***. See Recipient Setup.
If you click on the Assist-Button behind this fields, the page **E-Mail Template Recipients List** will open in which you can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

TEMPLATE FOR MAIL ADDRESSES

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

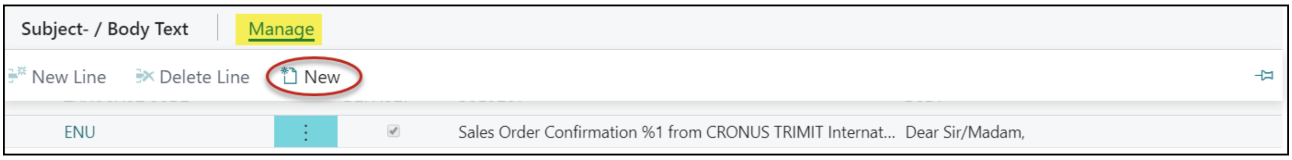
NOTE
You can only fill the **Template for Mail Addresses** after you have filled the fields in the FastTab ***Setup***.

FASTTAB SUBJECT- / BODY TEXT

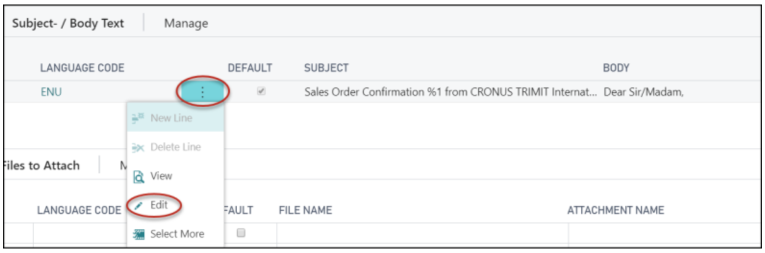


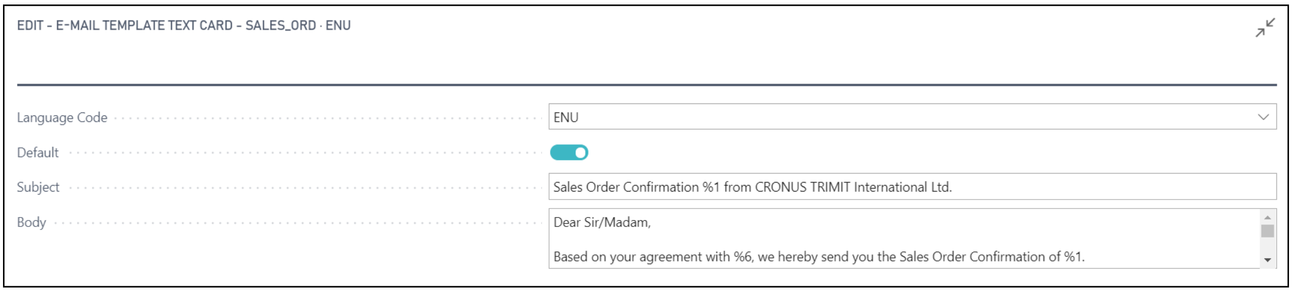
In this FastTab you can create the layouts for your E-Mails related to a specific **Language Code** (that will be compared with the Language Code in the actual document – i.e. in the Posted Sales Invoice Header).
If no **Subject- / Body Text** has been entered for this Language Code, the line with a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

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



You can change an existing layout by double-click on the **Language Code** or click *Show more options, **Edit***.




EDIT - E-MAIL TEMPLATE TEXT CARD - SALES_ORD · ENU

Language Code	ENU
Default	
Subject	Sales Order Confirmation %1 from CRONUS TRIMIT International Ltd.
Body	Dear Sir/Madam, Based on your agreement with %6, we hereby send you the Sales Order Confirmation of %1.

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
CRONUS TRIMIT International Ltd.
%3

<img src=cid:%8>

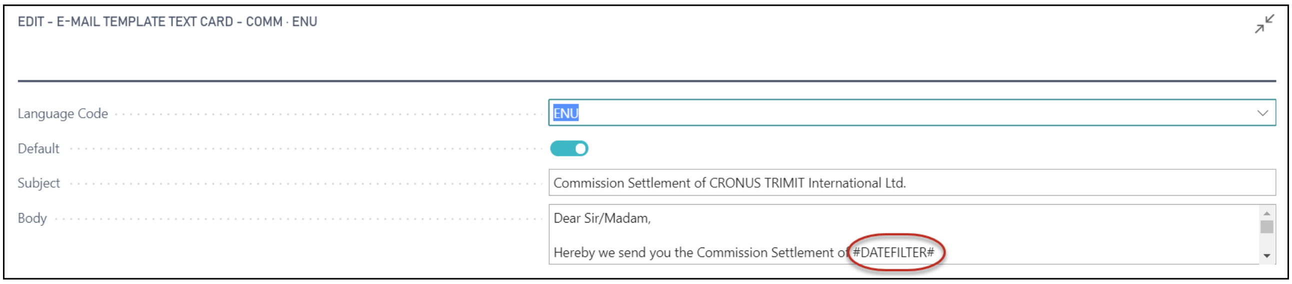
In the **Subject** and **Body** of the layout of the E-Mail, you can use references to Variables you define in the FastTab ***Variables*** with a percentage-sign (%) in front of the **Code** of your Variable.
If the **Code** only exist out of 1 digit, you can use the percentage sign (%).
If the **Code**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

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

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

```
// -> Mail
IF Mail.IsSlaveReport THEN BEGIN
  ValueEntryFilter.SETFILTER("Posting Date",Mail.ParamText_Get('DATEFILTER'));
  SpecificPerInv := Mail.ParamBoolean_Get('SPECIFICER');
  ShowCustomer := Mail.ParamBoolean_Get('SHOWCUST');
  CustPriceGrp.Code := Mail.ParamCode_Get('PRGRP');
  BasisOfCalculation := Mail.ParamInteger_Get('BASIS');
  CalculateOnly := Mail.ParamInteger_Get('CALCONLY');
END;
// <-
```

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



So the possibilities for creating your own layout for an E-Mail are endless – as long as you know how to develop in **C/AL Code** and you can use the standard HTML tags as well.

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

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

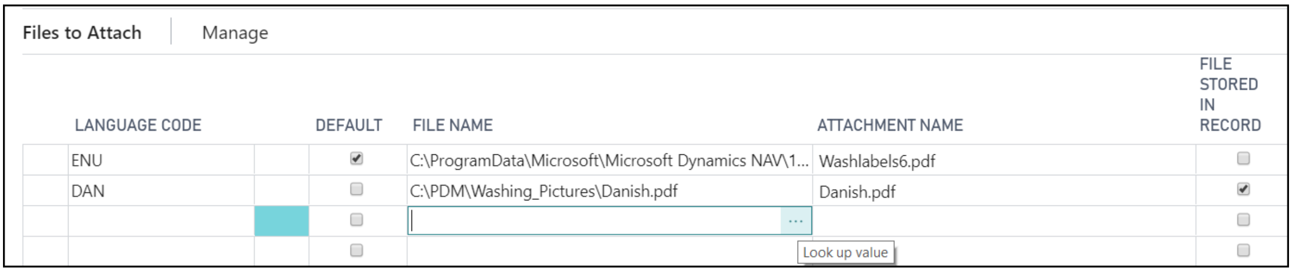
NOTE
You are able to add the usual tags for HTML-Files as well in the **Subject** and **Body** of your E-Mail.
I.e. if you want to add a link to a specific website:
LinkedIn
This will show the text **LinkedIn** with a link to the website https://www.trimit.com/link/linkedin
- Specify the **target** in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

HTML TAGS

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

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

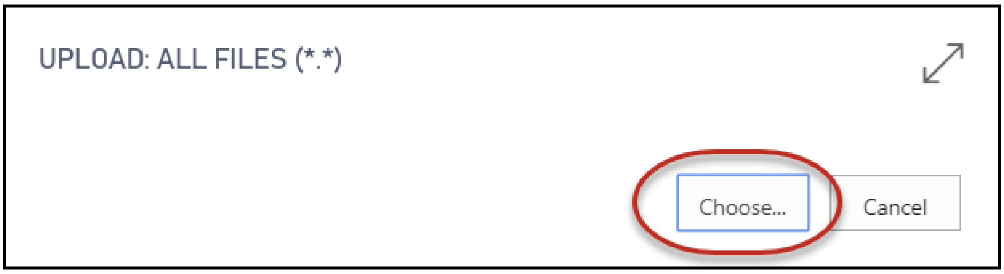
FASTTAB FILES TO ATTACH



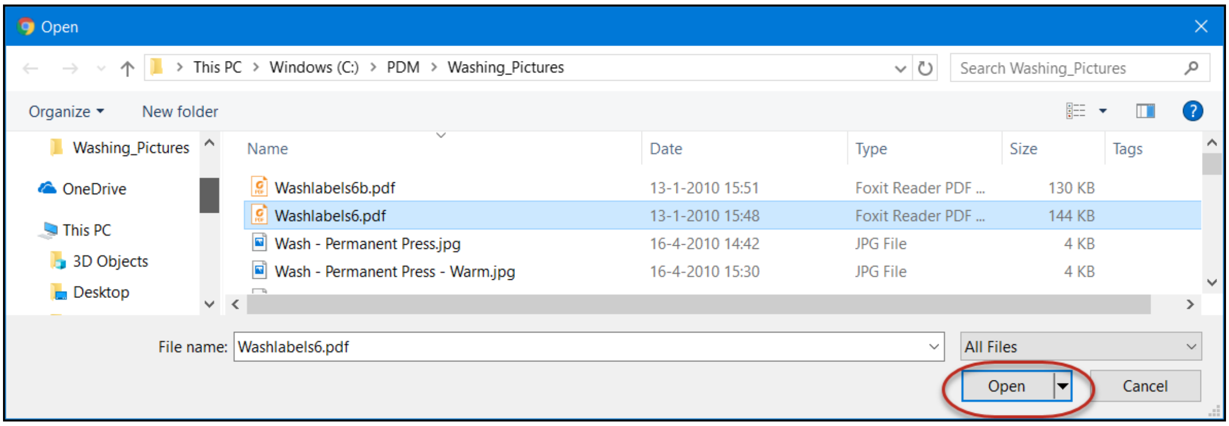
In the FastTab ***Files to Attach***, you can make a list of extra Files you want to attach to your E-Mail. You can attach as many Files as you want.

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

In the field **File Name,** you can press **Look up value** to select the specific File you want to attach by clicking **Open:**

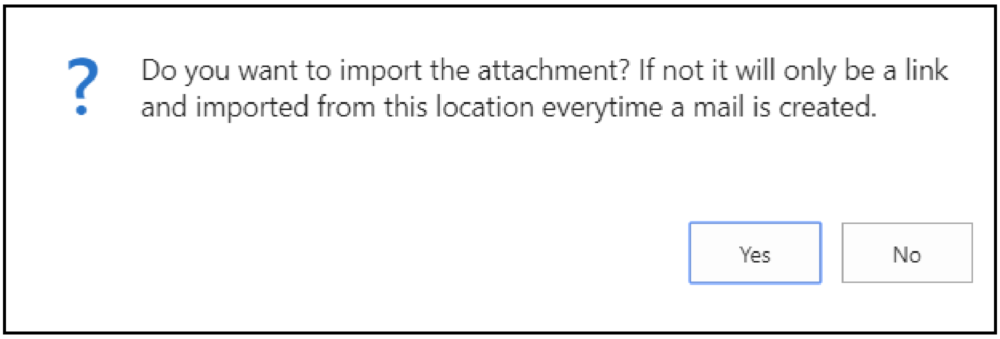


Click **Choose**

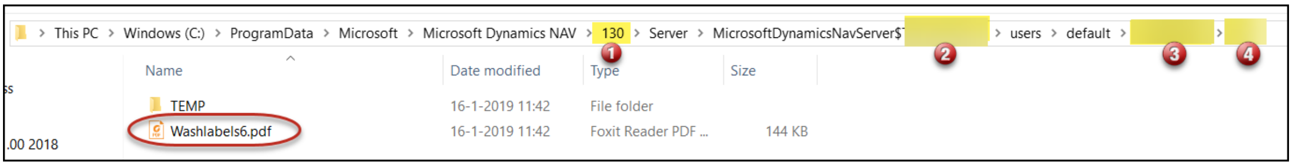


Select the file and click **Open**.

After selecting the File, you will get a question where you need to decide if you want to import the File immediately to your database (this is only possible when using the **Windows Client**), or if you want it saved as a Link (which needs to be selected when using the **Web Client).**
Therefore, every time an E-Mail is created based on the current Template, the system needs to upload the File:



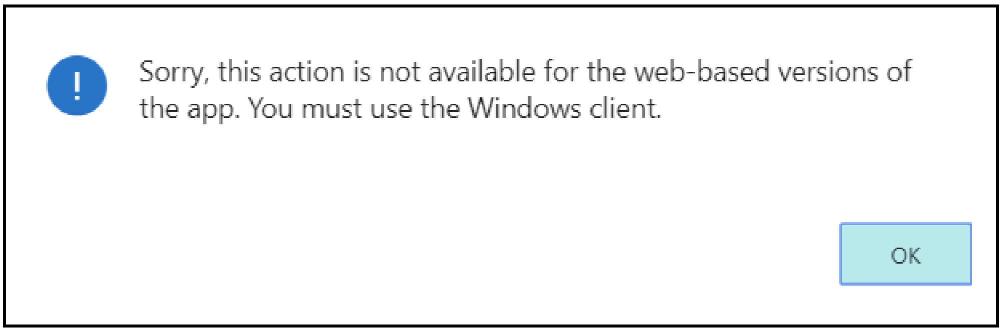
While working with the **Web Client** and clicking **No**, the file will be saved in a special directory.



In the above picture:

1	Release ID of Microsoft Dynamics 365 Business Central
2	Name of the running Instance
3	Name of the domain
4	Name of the user

When clicking **Yes,** while working with the **Web Client**, you will get an error message:



When clicking **Yes**, while working in the **Windows Client**, the file will be stored in the database itself.

NOTE

The answer to the question above (**Yes** or **No**) will be saved in field **File Stored in Record** of the Table ***6037702 E-Mail Template Files.***

Examples for Files to Attach could be extra Safety Restrictions, Work when sending PDM Reports, nice Christmas card picture or 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 Meet TRIMIT FASHION) will not work if it is in the picture! Therefore you need to use the special HTML Tags as mentioned earlier.

If a **File Name** (when working in the Windows Client) is referring to a directory on a general server: make sure you have the full name of the server and directory and do not use shortcut characters. This is especially important if you did not import the File. I.e.:
Not *N:\trimdata\KBI\E-Mail-Signature.png*
But *\\cornator.com\shares\trimdata\kbi\E-Mail-Signature.png*

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

FASTTAB EXTRA REPORT (RECIPIENT)

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

EXTRA REPORT ID

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

EXTRA REPORT FILE TYPE

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

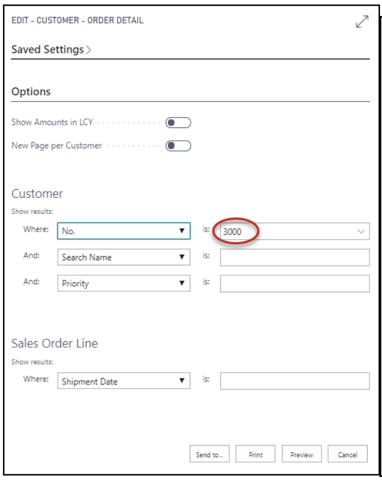
EXTRA REPORT FILE NAME

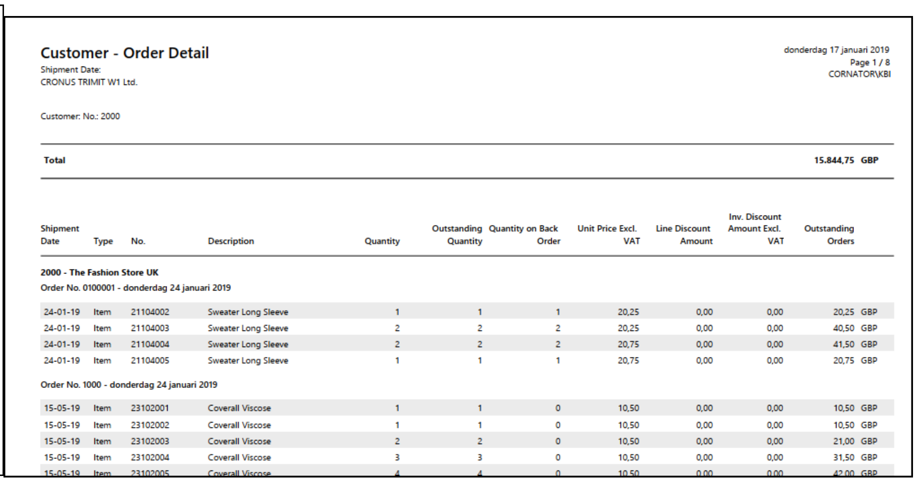
This is the name for the PDF-file (or other type of file based on **Extra Report File Type**) that will be created for the attachment of this specific **Extra Report ID**.
You can also use a **Variable** to fill this field.
The example in the above picture *Open_Sales_Orders_Detail_%2* is related to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

If this **Extra Report ID** has not been changed in the C/AL Code, this **Extra Report ID** will be executed with the last entered 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 C/AL Code in the **Extra Report ID**, so the Request Options might be set differently or based on fields of the Request Page of the **Report ID.**

I.e. If the Report *108 Customer – Order Details* was run with the following Request Options (see left picture), but the main record of the **Recipient Table ID** was of **Customer** *2000,* you will get the Report for Customer *2000* based on the Options of the last time you run the *108 Customer – Order Details* Report:





Customer - Order Detail
Shipment Date:
CRONUS TRIMIT W1 Ltd.

donderdag 17 januari 2019
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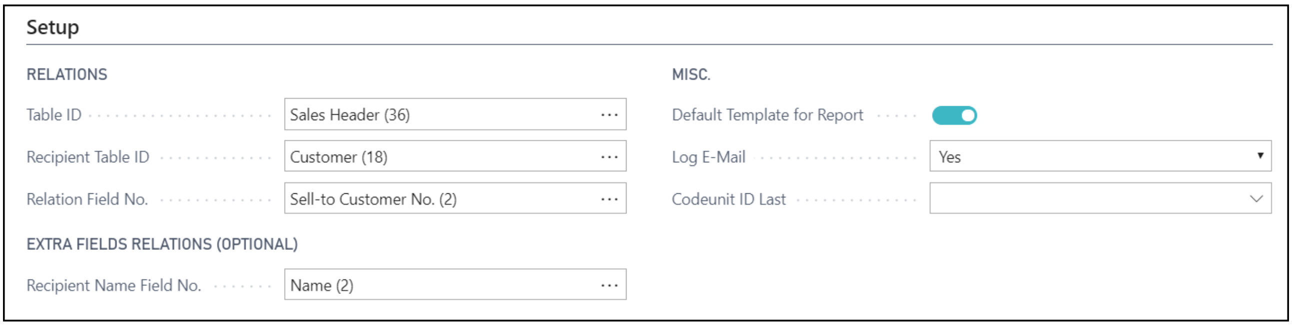
CORNATOR\KBI

Customer: No.: 2000

Total **15.844,75 GBP**

Shipment Date	Type	No.	Description	Quantity	Outstanding Quantity	Quantity on Back Order	Unit Price Excl. VAT	Line Discount Amount	Inv. Discount Amount Excl. VAT	Outstanding Orders
2000 - The Fashion Store UK										
Order No. 0100001 - donderdag 24 januari 2019										
24-01-19	Item	21104002	Sweater Long Sleeve	1	1	1	20,25	0,00	0,00	20,25 GBP
24-01-19	Item	21104003	Sweater Long Sleeve	2	2	2	20,25	0,00	0,00	40,50 GBP
24-01-19	Item	21104004	Sweater Long Sleeve	2	2	2	20,75	0,00	0,00	41,50 GBP
24-01-19	Item	21104005	Sweater Long Sleeve	1	1	1	20,75	0,00	0,00	20,75 GBP
Order No. 1000 - donderdag 24 januari 2019										
15-05-19	Item	23102001	Coverall Viscose	1	1	0	10,50	0,00	0,00	10,50 GBP
15-05-19	Item	23102002	Coverall Viscose	1	1	0	10,50	0,00	0,00	10,50 GBP
15-05-19	Item	23102003	Coverall Viscose	2	2	0	10,50	0,00	0,00	21,00 GBP
15-05-19	Item	23102004	Coverall Viscose	3	3	0	10,50	0,00	0,00	31,50 GBP
15-05-19	Item	23102005	Coverall Viscose	4	4	0	10,50	0,00	0,00	42,00 GBP

FASTTAB SETUP



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

	Report ID	Table ID	Recipient Table ID	Relation Field No	Recipient Name Field No.
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
Statement	116	18	18	1	2
Reminder	117	297	18	2	2
Finance Charge Memo	118	304	18	2	2
Sales Statistics	6036850	91	91	1	10

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 is 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 extra **C/AL Code** in the actual report in which you can easily set the **E-Mail Template** that needs to be used**.** I.e.:

```
Sales Header - OnAfterGetRecord()
IF SendMail AND
   NOT Mail.IsSlaveReport
THEN BEGIN
  MailRecRef.GETTABLE("Sales Header");
  Mail.CallClearAll;

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

```

LOG E-MAIL

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

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

CODEUNIT ID LAST

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

FASTTAB VARIABLES

Variables | Manage

CODE	TEXT REPLACE	TYPE	TABLE ID / VALUE	FIELD NO. / VALUE	RELATED TABLE ID	RELATED TABLE FIELD NO.	CODEUNIT ID LAST
1	%1 OR #1#	Table	Sales Header (36)	**No. (3)**			
2	%2 OR #2#	Table	Sales Header (36)	**Bill-to Customer No. (4)**			
3	%3 OR #3#	System	**WORKDATE**				
4	%4 OR #4#	Table	User (2000000120)	**Full Name (3)**			
5	%5 OR #5#	Table	User (2000000120)	**Contact Email (14)**			
6	%6 OR #6#	Table Relation	Sales Header (36)	Salesperson Code (43)	Salesperson/Purchaser (13)	**Name (2)**	
7	%7 OR #7#	Table	Customer (18)	**Email (102)**			
8	%8 OR #8#	Table	Company Information (79)	**Picture (29)**			

In this FastTab, you can define the Variables that you want to use in the **Subject** and **Body** of your E-Mail, but also in the **Sender Name, Sender E-Mail, 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#*.

Variables
New Find

Code	Text Replace	Type
1	%1 OR #1#	Table
2	%2 OR #2#	Table
3	%3 OR #3#	System
4	%4 OR #4#	Manual
50	#50#	Table Relation
A	%A OR #A#	Table
NAME	#NAME#	System
NO	#NO#	Table

TYPE

The **Type** determines which Type of Variable it is.
You can choose between four different options:

Table	You want to choose a Field from one of the following Tables: **Table ID, Recipients ID**, **Company Information** (79), **User Setup** (91), **E-Mail Template** (6037700), **E-Mail Recipient** (6037704) or **User** (20000000120)
Manual	You can enter a fixed value for this Variable in the field **Field ID / Value** that you want to add to your E-Mail. In that case the **Table ID / Value** needs to have an option <> *Blanc*.

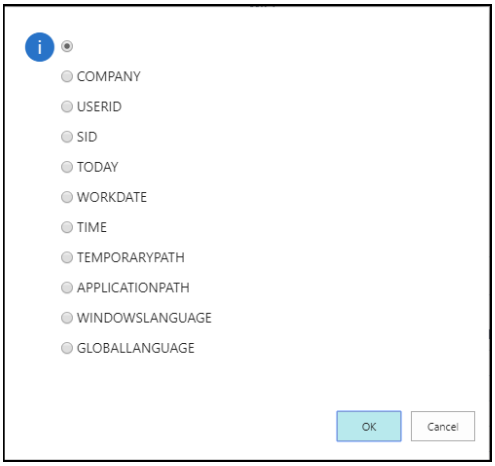
	If it is *Blanc, Manual* can be set by customized **C/AL Code** in the Report or by **Codeunit Call** and not in this FastTab. You do not need to create the Variable in this FastTab to address from in the C/AL Code. If not defined, it will still be set and can be used, but sometimes it's good to create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

TABLE ID/VALUE

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

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

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



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

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

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

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

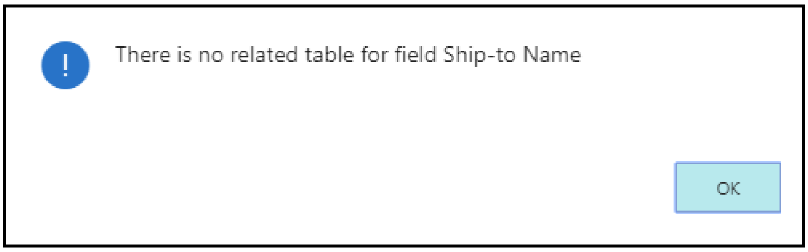
FIELD NO.

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

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

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

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



RELATED TABLE ID

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

RELATED TABLE FIELD NO.

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

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

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

CODEUNIT ID LAST

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

DESCRIPTION

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

NOTE

Description is not by default visible. You have to use **Choose Columns** to add it to the FastTab.

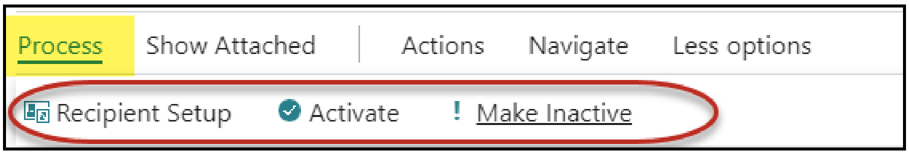
After you have entered all the necessary fields of the **Variables** the actual content that will be added to your text or field when using this **Variable** will be shown **bold**.

Variables | Manage

CODE	TEXT REPLACE	DESCRIPTION	TYPE	TABLE ID / VALUE	FIELD NO. / VALUE	RELATED TABLE ID	RELATED TABLE FIELD NO.	CODEUNIT ID LAST
1	%1 OR #1#	Number of the Sales Order	Table	Sales Header (36)	**No. (3)**			
2	%2 OR #2#	Number of the Bill-to Cust...	Table	Sales Header (36)	**Bill-to Customer No. (4)**			
3	%3 OR #3#	Work Date	System	**WORKDATE**				
4	%4 OR #4#	Name of the User that sen...	Table	User (2000000120)	**Full Name (3)**			
5	%5 OR #5#	E-Mail Address of the User	Table	User (2000000120)	**Contact Email (14)**			
6	%6 OR #6#	Name of the Salesperson ...	Table Relation	Sales Header (36)	Salesperson Code (43)	Salesperson/Purchaser (13)	**Name (2)**	
7	%7 OR #7#	E-Mail Address of the Cust...	Table	Customer (18)	**Email (102)**			
8	%8 OR #8#	Logo Picture of the Comp...	Table	Company Information (79)	**Picture (29)**			

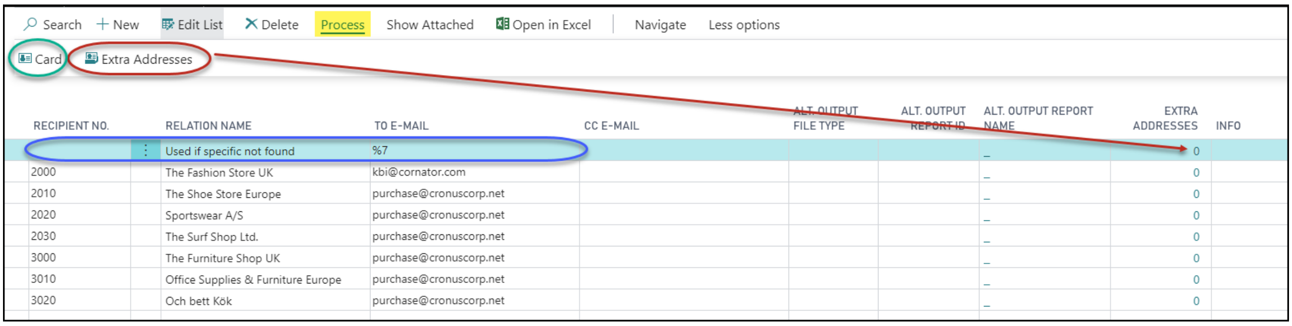
I.e.:
Variable *1* is showing the Number (**Field No.**) of the Sales Order.
Variable *6* is showing the Name (**Related Table Field No.**) of the Salesperson of the Sales Order.

PROCESS



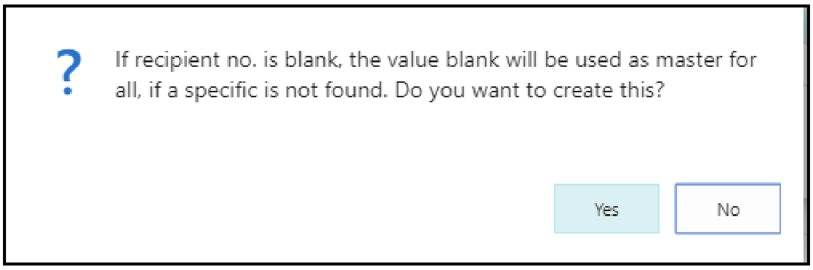
RECIPIENT SETUP

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



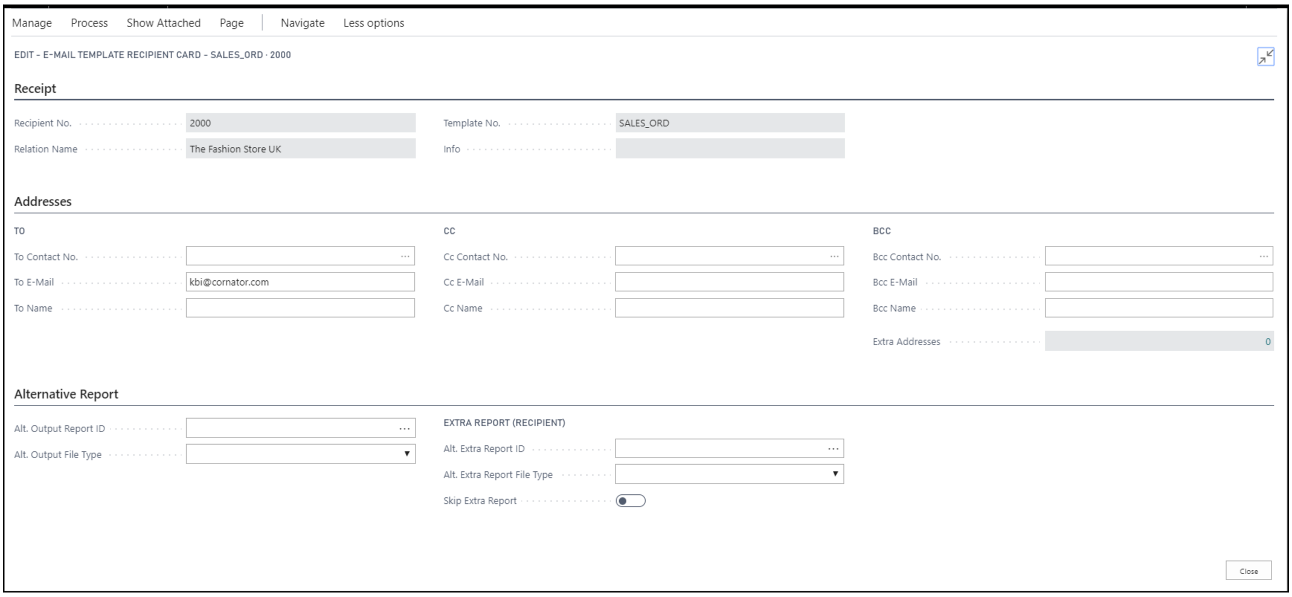
RECIPIENT NO.	RELATION NAME	TO E-MAIL	CC E-MAIL	ALT. OUTPUT FILE TYPE	ALT. OUTPUT REPORT ID	ALT. OUTPUT REPORT NAME	EXTRA ADDRESSES	INFO
	Used if specific not found	%7				_	0	
2000	The Fashion Store UK	kbi@cornator.com				_	0	
2010	The Shoe Store Europe	purchase@cronuscorp.net				_	0	
2020	Sportswear 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:



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



DESCRIPTION OF THE FIELDS

RECIPIENT NO.

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

RELATION NAME

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

TO / CC / BCC CONTACT NO.

The number of a Contact in the Contact List that should get the E-Mail on the *To, CC* or *BCC* of your E-Mail.
It doesn't have to be a Contact related to your **Recipient No.** You can choose any Contact.
If you press **F4** for the Lookup, you will get an option which Contacts you want to see in your Lookup:
Limited Recipient Company will only show the Contacts of the current **Recipient No.**
All will show you all the Contacts.

TO / CC / BCC E-MAIL

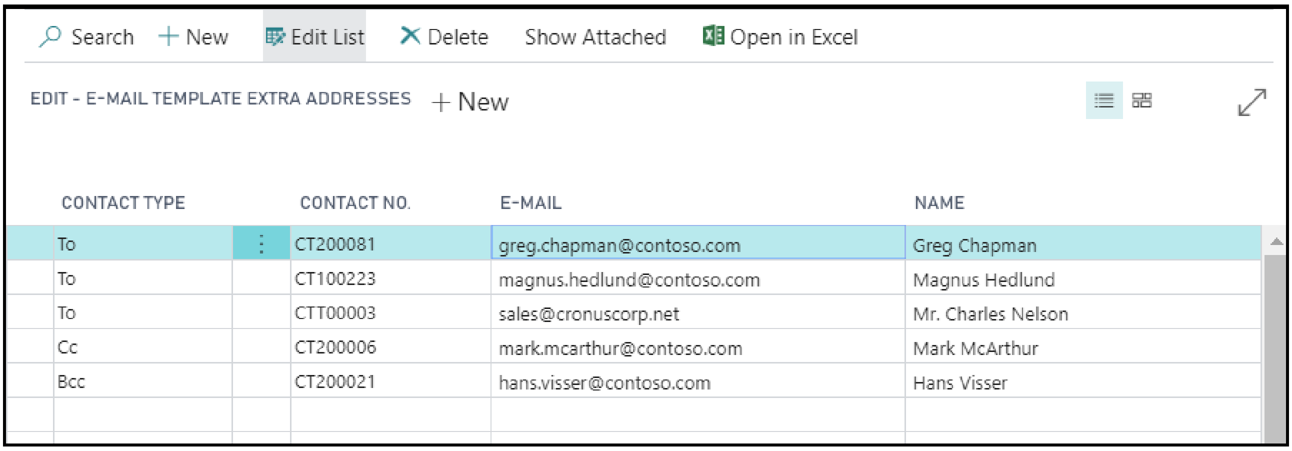
Will be filled with the E-Mail Address of the **Contact.**
Or you can enter the E-Mail Address manually of the person/department of your **Recipient No.** that should get the E-Mail on the *To, CC* or *BCC* of your E-Mail.
You are also able to enter two or more E-Mail Addresses just as you are able in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

TO / CC / BCC NAME

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

EXTRA ADDRESSES

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



CONTACT TYPE	CONTACT NO.	E-MAIL	NAME
To	CT200081	greg.chapman@contoso.com	Greg Chapman
To	CT100223	magnus.hedlund@contoso.com	Magnus Hedlund
To	CTT00003	sales@cronuscorp.net	Mr. Charles Nelson
Cc	CT200006	mark.mcarthur@contoso.com	Mark McArthur
Bcc	CT200021	hans.visser@contoso.com	Hans Visser

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

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.

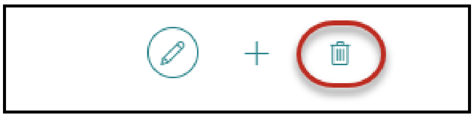
ACTIVATE

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*** on the ribbon *Home.*
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*.

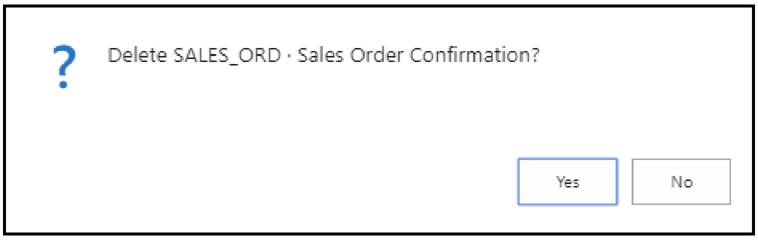
MAKE INACTIVE

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

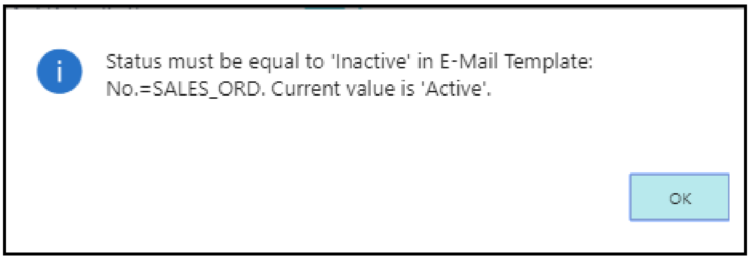
DELETE



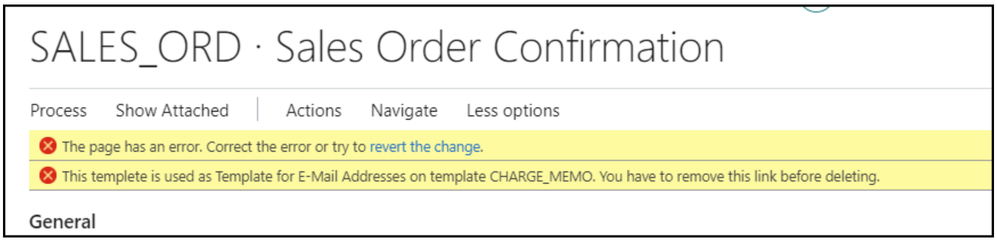
If you want to **Delete** a Template, you will get the following message that needs to be confirmed by clicking **Yes**:



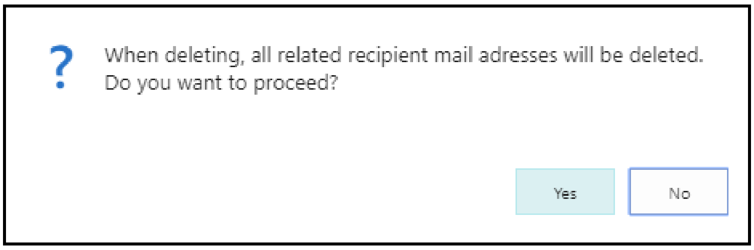
After clicking **Yes,** the system will check if the current **Template** is *Active* or *Inactive*. A Template needs to be *Inactive* to be able to delete it.



After clicking **Yes** in the first message (and clicking **OK** in the second message), 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 fourth message you can get before the Template is actually 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

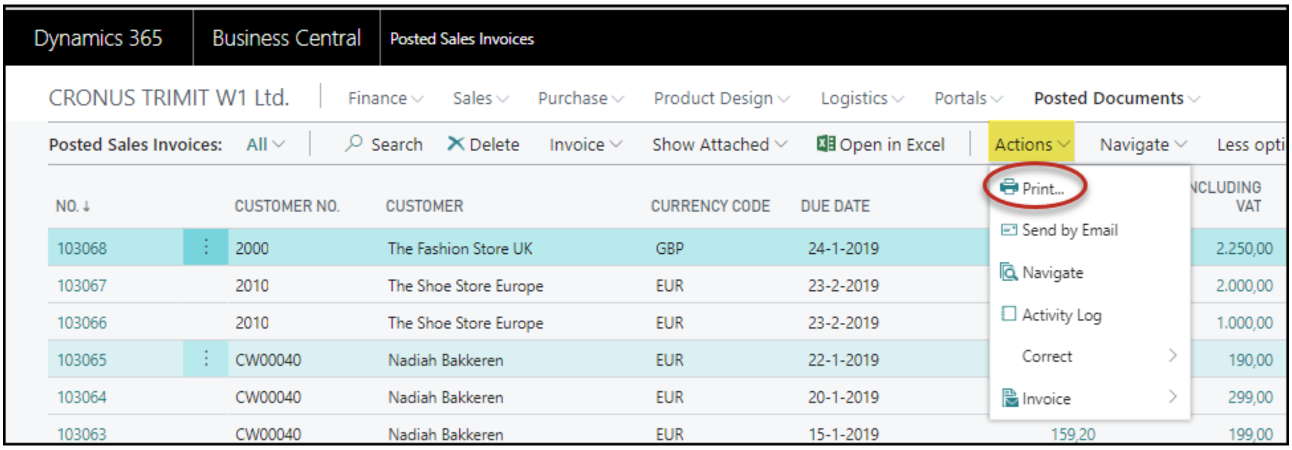
To use the specific **TRIMIT E-Mail Templates**, you can **PRINT** the Report, and the Number of the Report (based on the NAV Report Selections) must be the **Report ID** of an *Active* E-Mail Template.
The Report needs to be customized for the TRIMIT E-Mail functionality which has already been done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

This is applicable for:

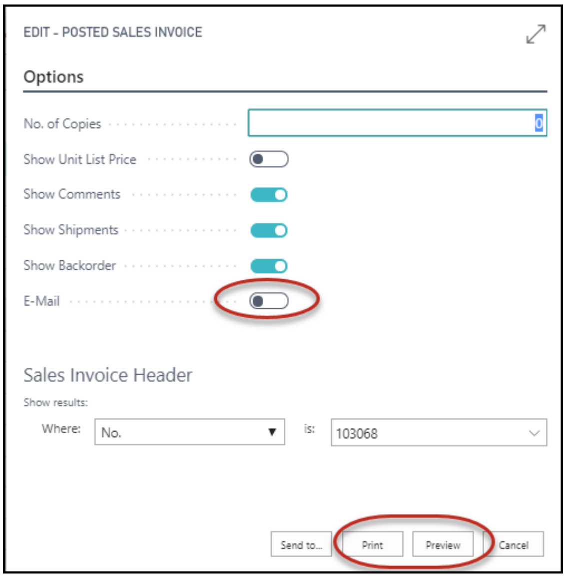
- Sales Quote List/Card: Click *Actions, Quote, **Print***
- Sales Order List/Card: Click *Process, **Print Confirmation***
- Posted Sales Shipment List/Card : Click *Process, **Print***
- Posted Sales Invoice List/Card: Click *Actions, **Print***
- Posted Credit Memo List/Card: Click *Actions, Send,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

PRINTING VIA PRINT

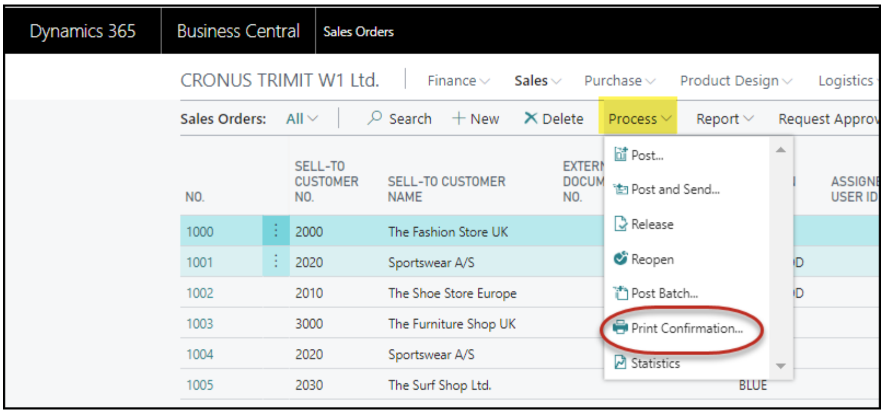
Alternatively, for the **Posted Sales Invoice,** you can click *Actions, **Print**:* you will get the normal Request Page for Printing, based on the **Report ID** (in our example ***6036702 Sales - Invoice TRIMIT***).



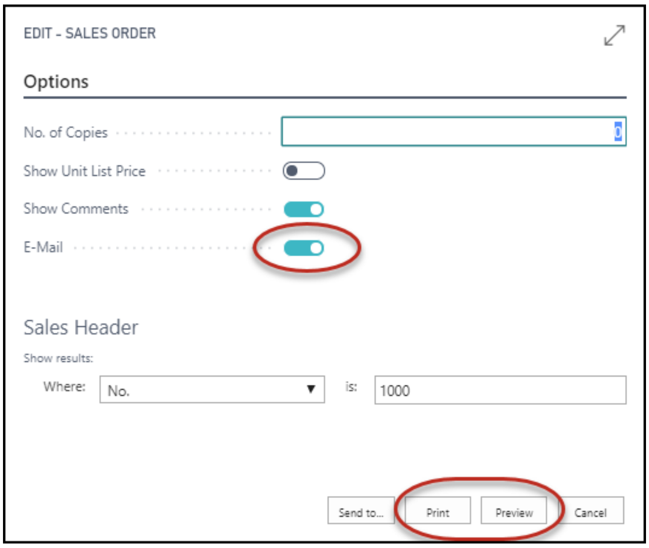
In this case, the option **E-Mail** will be set by default based on the field **E-Mail=Yes** in the E-Mail Template for this report, but the field **E-Mail** in the Request Page can be changed.



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



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



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

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

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

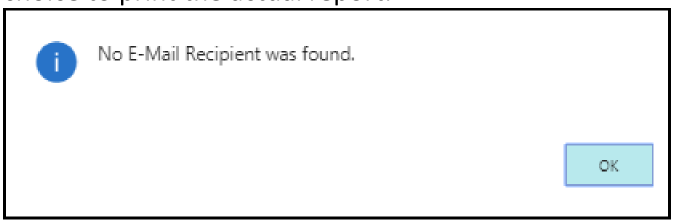
If you click **Preview**, only a Preview of the first selected Order will be shown – even if you have selected several Sales Orders.

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

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

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

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

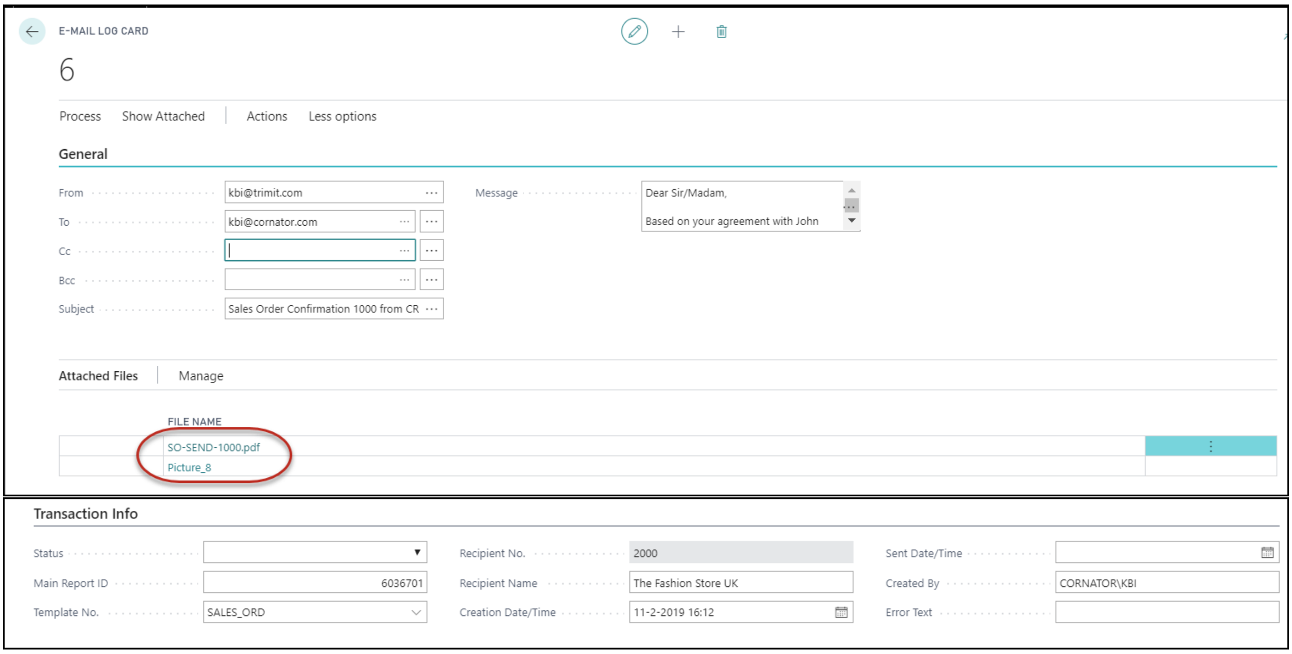


However, if you wanted to send the E-Mail from only 1 document, the generated E-Mail will be shown (see Preview of an E-Mail) and you have the opportunity to enter the Recipient directly in the E-Mail before sending it.

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

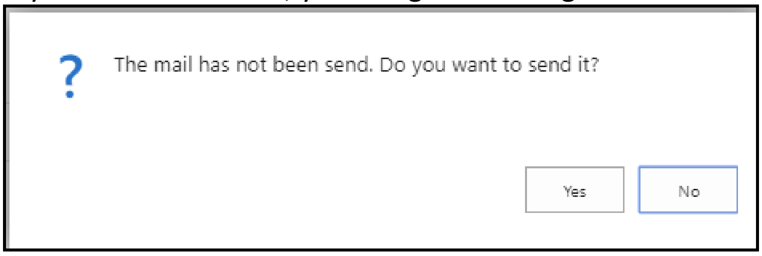
PREVIEW OF AN E-MAIL

This example is for an **Order Confirmation** of a **Sales Order** (*1002*).



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

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



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

NOTE

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

ACTUAL E-MAIL

The actual E-Mail might look as follows:

ma 11-2-2019 16:17

Kitty Bisseling <kbi@trimit.com>

Sales Order Confirmation 1000 from CRONUS TRIMIT International Ltd.

To Kitty Bisseling

SO-SEND-1000.pdf
38 KB

Dear Sir/Madam,

Based on your agreement with John Roberts, we hereby send you the Sales Order Confirmation of 1000.

Kind regards,
Kitty Bisseling
CRONUS TRIMIT International Ltd.
24-01-19

SEND E-MAIL → TRIMIT E-MAIL

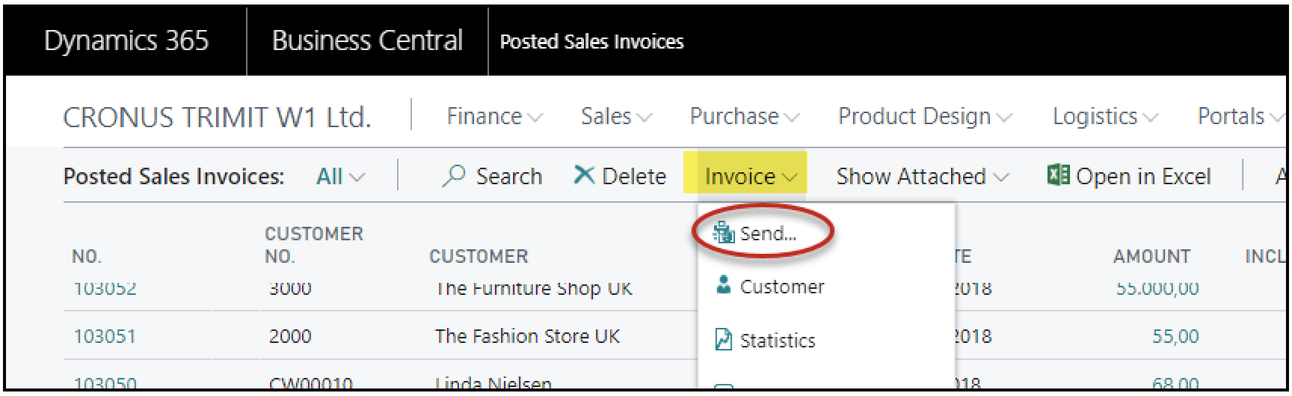
Besides printing Reports as described in Print Report -> TRIMIT E-Mail, you are also able to send an E-Mail directly via the mentioned documents that will make use of the TRIMIT E-Mail functionality if the Number of the Report (based on the BC13 Report Selections) will be a **Report ID** of an *Active* TRIMIT E-Mail Template. If there is no *Active* TRIMIT E-Mail Template, the standard BC13 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 *Process, **Send by Email***
- Sales Order List/Card: click *Actions, Order Confirmation, **Email Confirmation***
- Sales Order Card: click *Process, **Email Confirmation***
- Posted Sales Invoice List/Card: click *Invoice, **Send*** and choose **Email** *Yes*.
- Posted Credit Memo List/Card: click *Process, **Send*** and choose **Email** *Yes*.
- Purchase Order List/Card: click *Print, **Send*** and choose **Email** *Yes*.
- Customer List/Card: click *Print, **Statement*** and select **Output** *Email*.
- Issued Reminder List/Card: click *Process, **Send by Email***
- Issued Finance Charge Memo List/Card: click *Process, **Print***
- Extended Sales Statistics (Report) choose **Output** *E-Mail*
- Extended Sales Statistics Setup (Page): click *Report, **E-Mail***

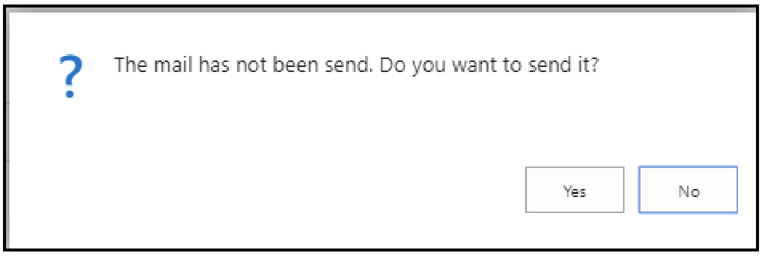
SENDING E-MAIL VIA SEND BY EMAIL (OR SIMPLY EMAIL)

Or for the **Posted Sales Invoice,** you can click ***Send by Email*** on the ribbon *Actions;* this will show the created TRIMIT E-Mail – if only one Invoice is selected – which can be changed before sending. If several Invoices are selected, the TRIMIT E-Mails will be created and send automatically.
Actual send TRIMIT E-Mails via the **TRIMIT E-Mail Template** will be saved in the **E-Mail Log Entries**.



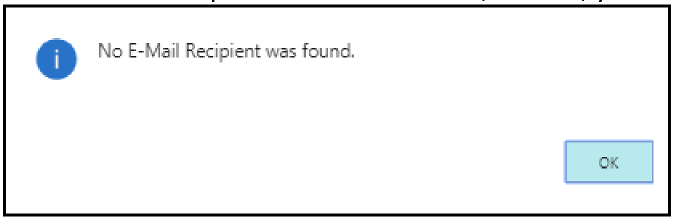
PREVIEW OF AN E-MAIL

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



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

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



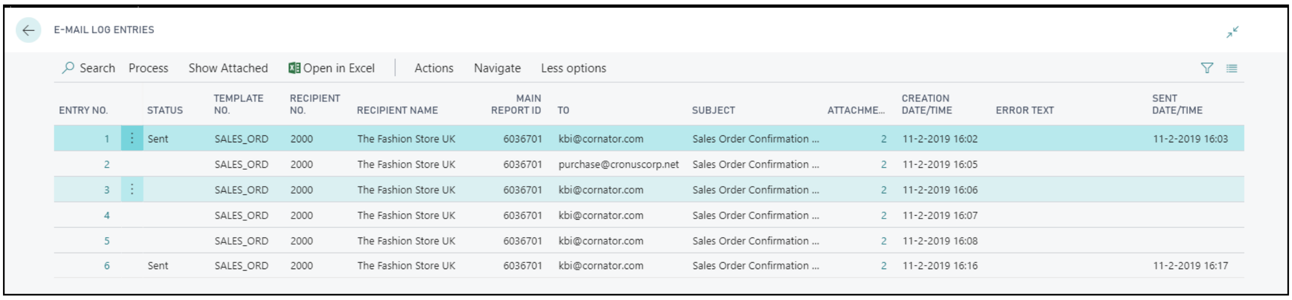
However, if you wanted to send the E-Mail from only 1 document, the generated E-Mail will be shown (see Preview of an E-Mail) and you have the opportunity to enter the Recipient directly in the E-Mail before sending it.
If you wanted to send several documents at the same time, only for the last selected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

PROCESS SUMMARY

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

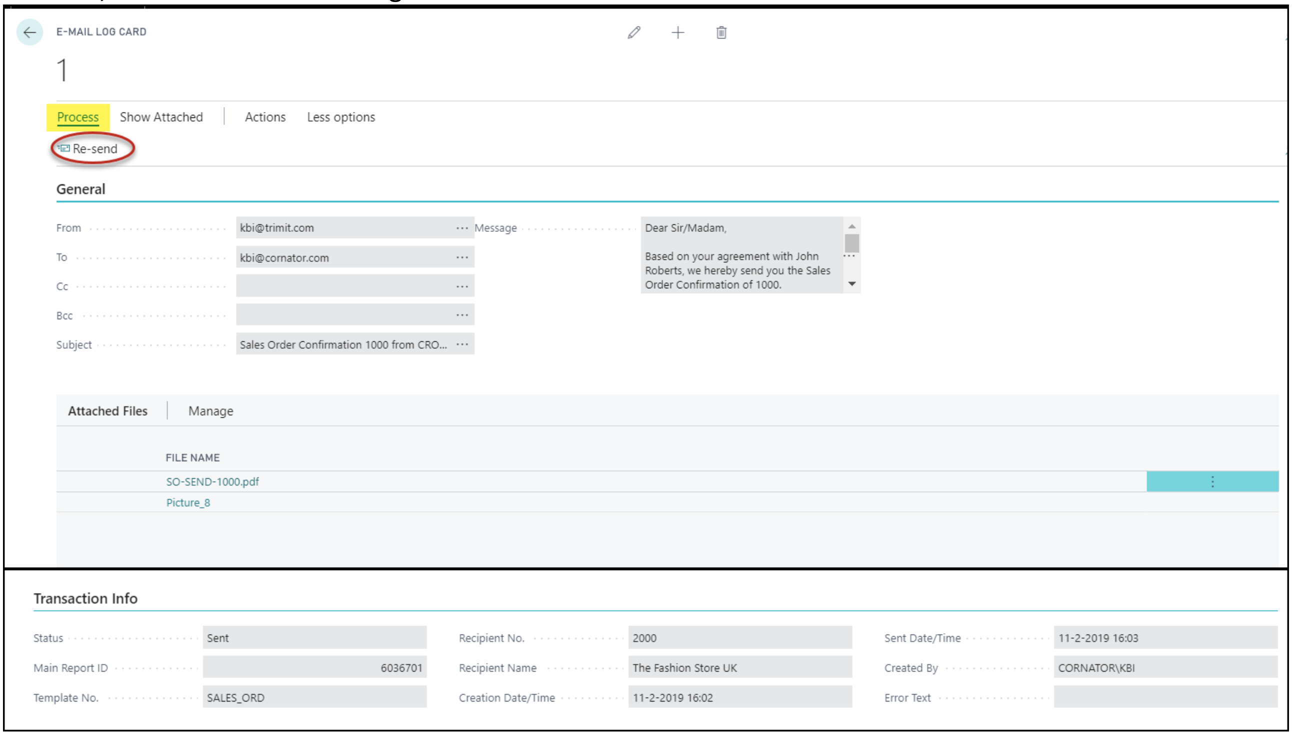
E-MAIL LOG ENTRIES

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



By clicking *Process, **Re-Send**,* you are able to re-send the E-Mail of a specific **Entry No.** (which is simply an automatic generated number). In that case a new **Entry No.** will be created in the log.

By clicking *Process, **Card*** you will see the preview of the E-Mail, and via the Card, you are also able to click ***Re-Send**,* to re-send the E-Mail again.

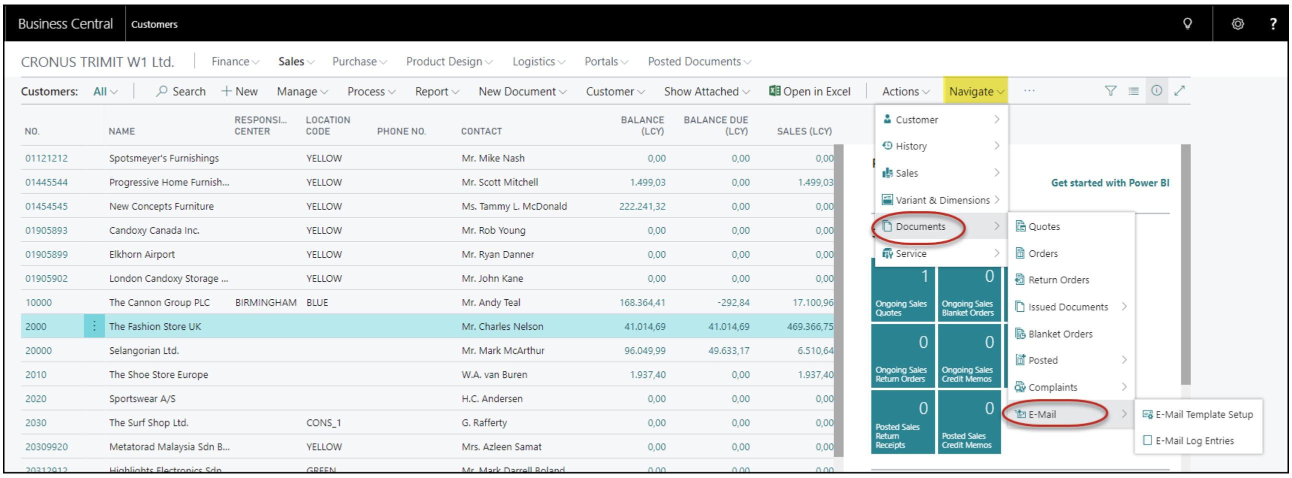


Every **Re-Send** will generate a new **Entry No.** in the E-Mail Log.

CUSTOMERS

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

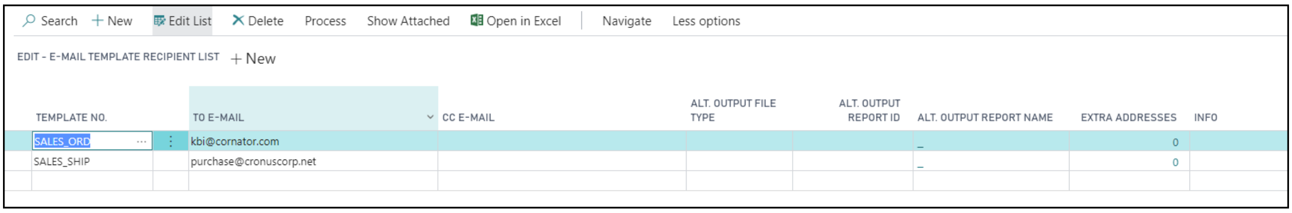
On the Customers List/Card by clicking *Navigate, **Documents, E-Mail***:



E-MAIL TEMPLATE SETUP

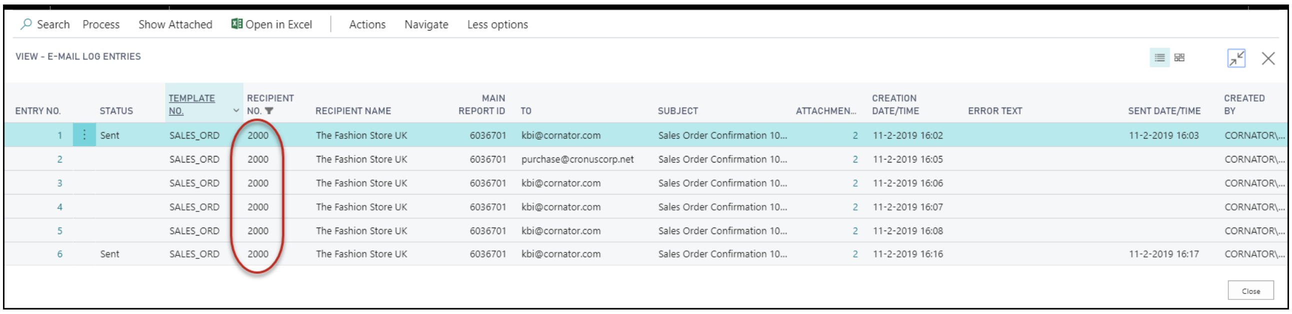
This will show you the **E-Mail Templates** to which the current **Customer** has been connected as a **Recipient** directly.

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



E-MAIL LOG ENTRIES

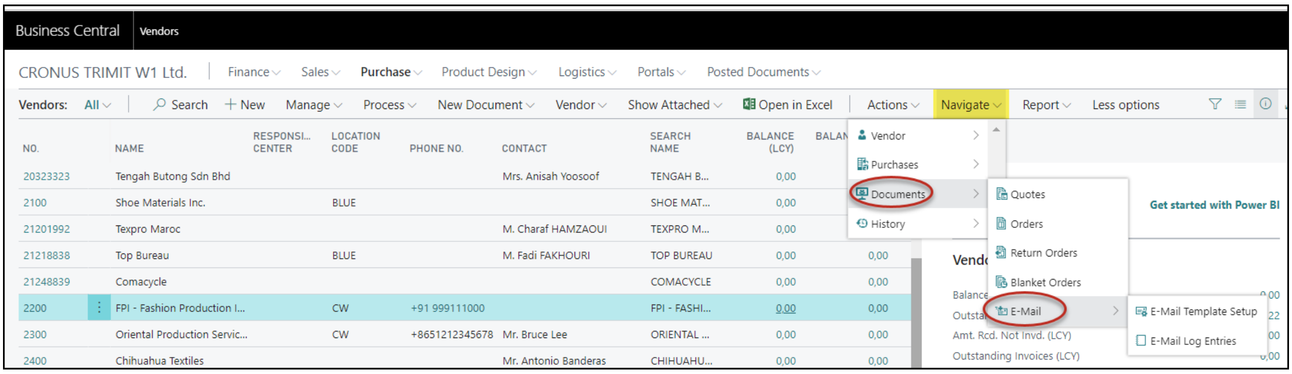
This will show all the **E-Mail Log Entries** for this specific Customer as **Recipient No**. I.e.:



VENDORS

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

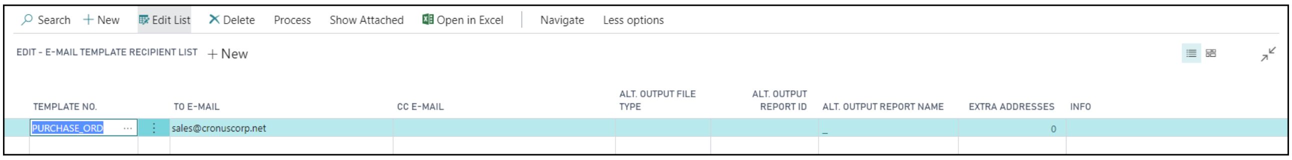
On the Vendors List/Card by clicking *Navigate, **Documents, E-Mail***:



E-MAIL TEMPLATE SETUP

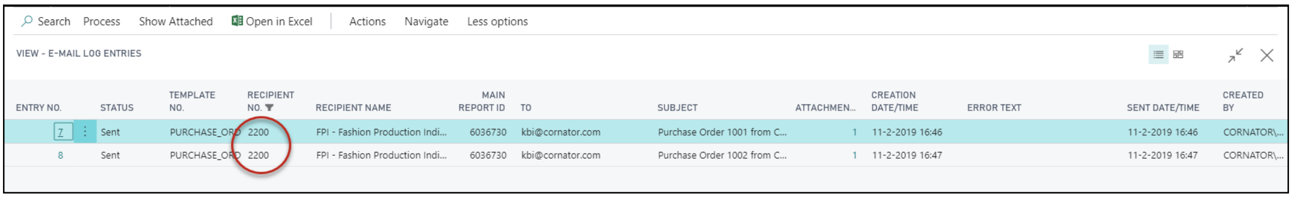
This will show you the **E-Mail Templates** to which the current **Vendor** has been connected as a **Recipient** directly.

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



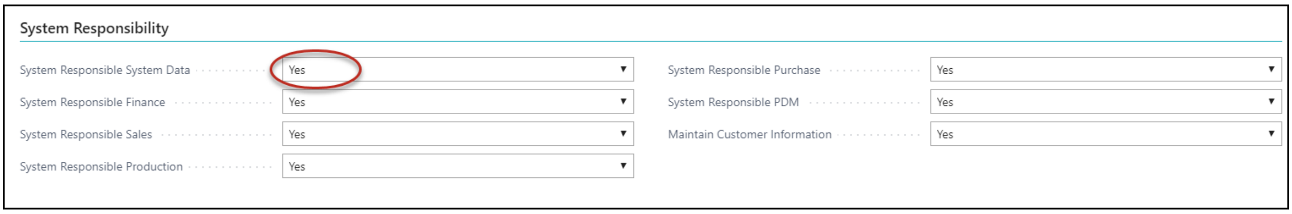
E-MAIL LOG ENTRIES

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

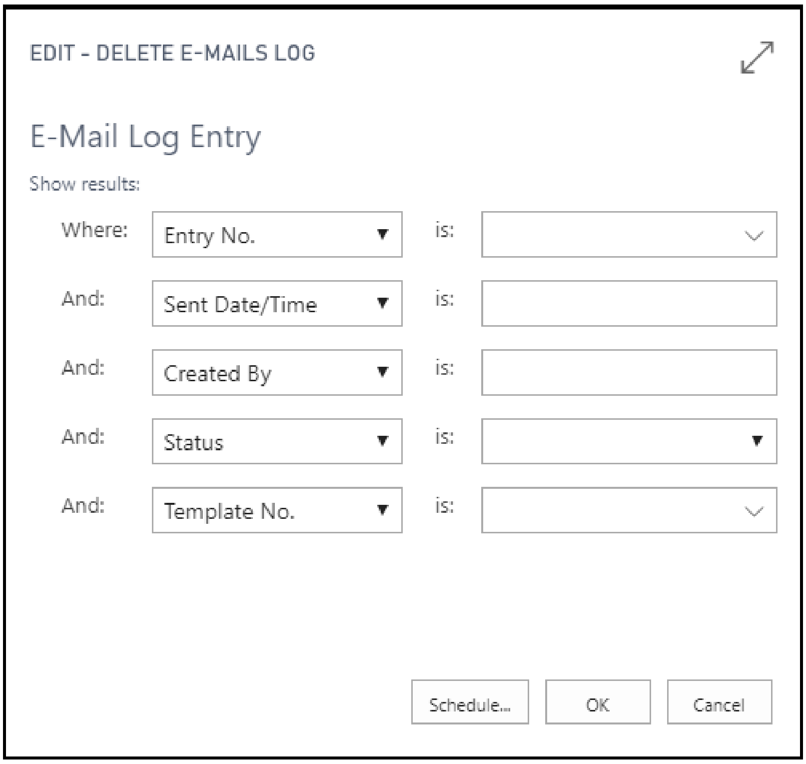


DELETE E-MAIL LOG ENTRIES

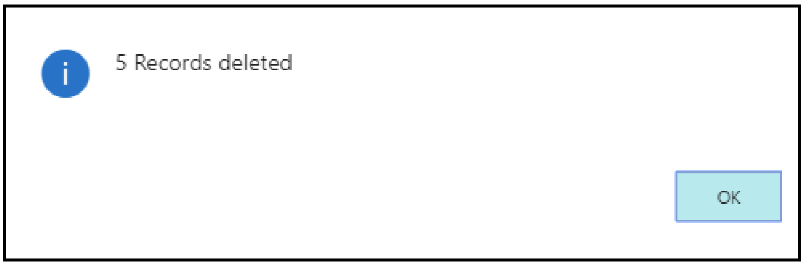
You are only able to delete the **E-Mail Log Entries** if you have the field **System Responsible System Data** set to *Yes* in the **User Setup** (**Tell me** *User Setup*)



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



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

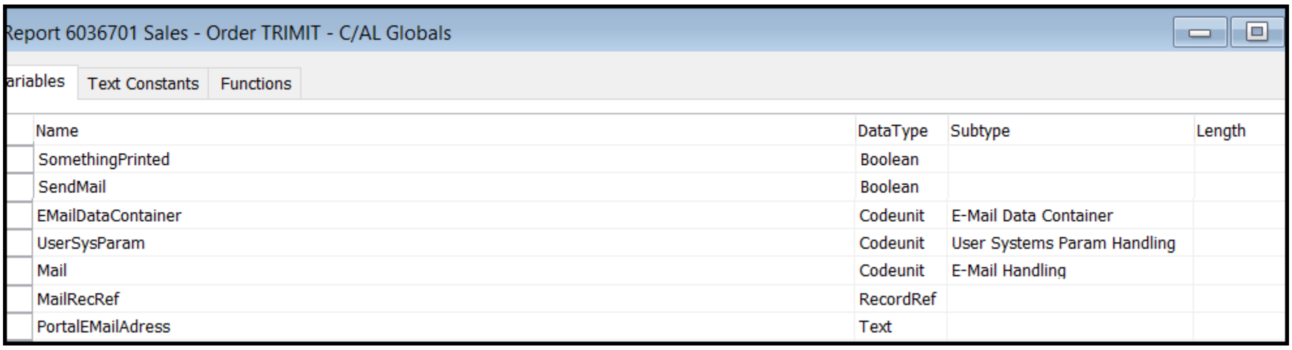


Press **OK**.

CUSTOMIZATION OF REPORTS

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

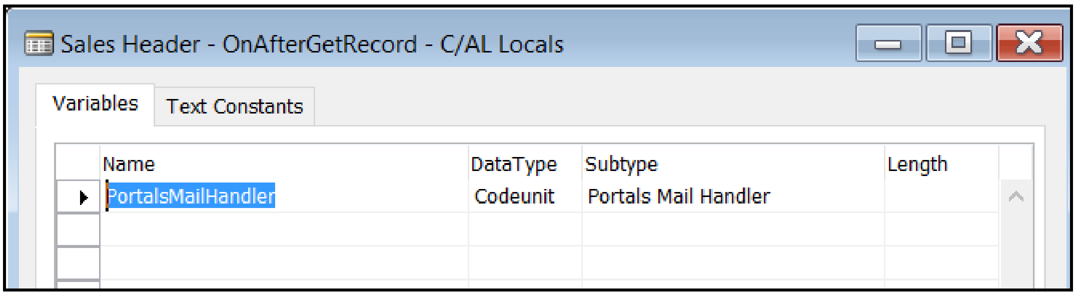
You need to create new **C/AL Globals**:


Report 6036701 Sales - Order TRIMIT - C/AL Globals

ariables | Text Constants | Functions

Name	DataType	Subtype	Length
SomethingPrinted	Boolean		
SendMail	Boolean		
EMailDataContainer	Codeunit	E-Mail Data Container	
UserSysParam	Codeunit	User Systems Param Handling	
Mail	Codeunit	E-Mail Handling	
MailRecRef	RecordRef		
PortalEMailAdress	Text		

In addition, **C/AL Locals**:


Sales Header - OnAfterGetRecord - C/AL Locals

Variables | Text Constants

Name	DataType	Subtype	Length
PortalsMailHandler	Codeunit	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:

```
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;
```

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

```
IF SendMail AND
   NOT Mail.IsSlaveReport
THEN BEGIN
  MailRecRef.GETTABLE("Sales Header");
  Mail.CallClearAll;
  IF UserSysParam.PortalInstalled THEN BEGIN
    PortalEMailAdress :=
PortalsMailHandler.GetPortalConfirmationRecipient("Sales Header");
    IF PortalEMailAdress <> '' THEN
      Mail.Add_Recipient(PortalEMailAdress,0,TRUE);
  END;
  Mail.CallCreateVariables(MailRecRef, "Language
Code",CurrReport.OBJECTID(FALSE),CurrReport.PREVIEW,(NOT GUIALLOWED));
  Mail.ParamBoolean_Set('COLORCODE',ShowColourCodeInMatrix);
  Mail.ParamBoolean_Set('SPLITASSOR',SplitAssortment);
  Mail.ParamBoolean_Set('TARIFF',ShowTariffNo);
  Mail.ParamInteger_Set('MAXCOLUMN',MaxNoOfColumns);
  Mail.ParamBoolean_Set('UNITPRICE',ShowUnitListPrice);
  Mail.ParamBoolean_Set('COMMENT',PrintComments);
  IF Mail.CallCreateMail(TRUE) THEN BEGIN
    SomethingPrinted := TRUE;
    IF CurrReport.PREVIEW OR
       UserSysParam.IsWebClient
    THEN
      CurrReport.QUIT
    ELSE
      CurrReport.SKIP;
  END;
END;
```

This C/AL Code is placed at the Main Record of the Report, and will split the standard BC13 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:

- ClearAll
- 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:

```
Sales Header - OnAfterGetRecord()
IF SendMail AND
   NOT Mail.IsSlaveReport
THEN BEGIN
  MailRecRef.GETTABLE("Sales Header");
  Mail.CallClearAll;
  IF UserSysParam.PortalInstalled THEN BEGIN
    PortalEMailAdress := PortalsMailHandler.GetPortalConfirmationRecipient("Sales Header");
    IF PortalEMailAdress <> '' THEN
      Mail.Add_Recipient(PortalEMailAdress,0,TRUE);
  END;

  //option to specify specific E-Mail Template
  Mail.Set_Template('S_ORDER');

  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 CurrReport.PREVIEW OR
       UserSysParam.IsWebClient
    THEN
      CurrReport.QUIT
    ELSE
      CurrReport.SKIP;
  END;
```

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

EXTRA REMARKS

BC13 E-MAIL

When using the **TRIMIT E-Mail** functionality you are not able to use the BC13 E-Mail functionality at the same time for the same report if there is an **E-Mail Template** with **Status** *Active* for that same report.

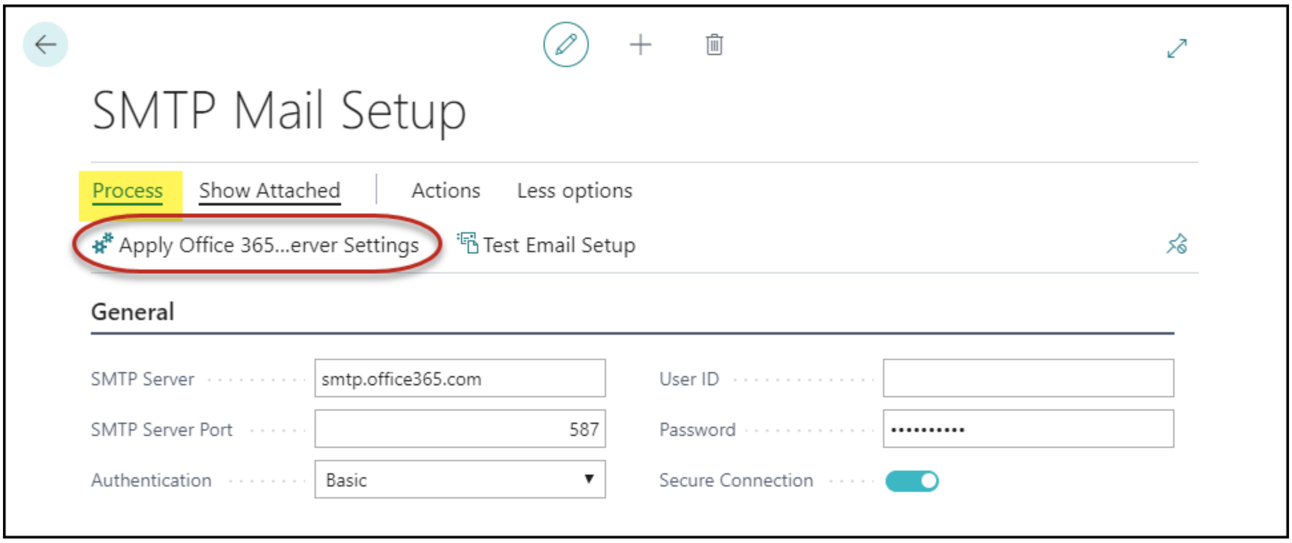
If no active **E-Mail Template** is available, and you would send the report by E-Mail, you would get the standard BC13 E-Mail functionality.
I.e. click *Invoice, **Send in*** the **Posted Sales Invoice** would result in:
The **To:** is simply the E-Mail Address in the Customer Card.

EXTRA SETUP INSTRUCTIONS

SMTP MAIL SETUP

To be able to send E-Mails of documents – regardless if you use the TRIMIT E-Mail functionality or the standard BC13 E-Mail functionality – you need to fill the right **SMTP Mail Setup** that can be found via **Tell me** *SMTP*.

The settings depend on your normal E-Mail Program and your security settings on the exchange server. I.e. as follows, if you use Office 365 (which can be filled via *Process, **Apply Office 365 Server Settings***), where you need to enter a **User ID** and **Password** related to your own domain.



TEST OF SMTP SERVER SETUP

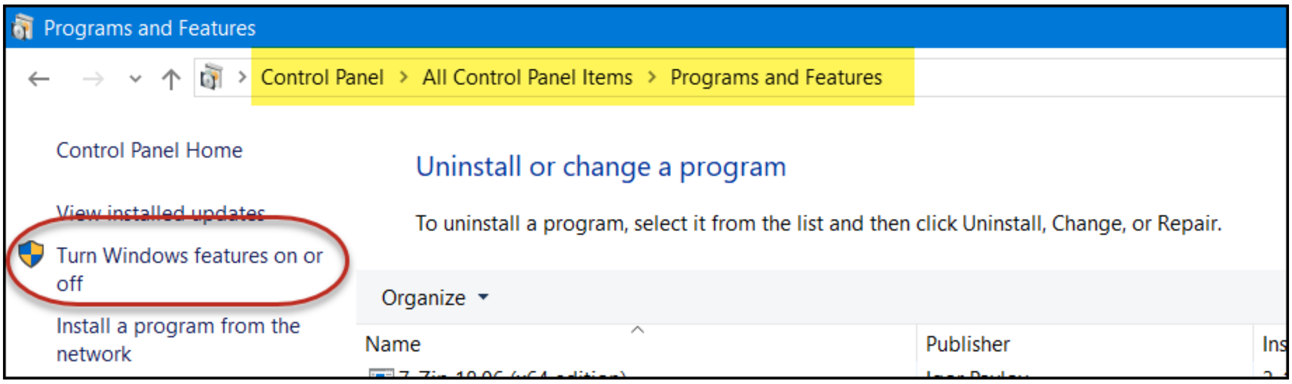
From Windows 7/Server 2008 R2 onward the telnet command needed for testing, is no longer installed by default. It can be installed by navigating to

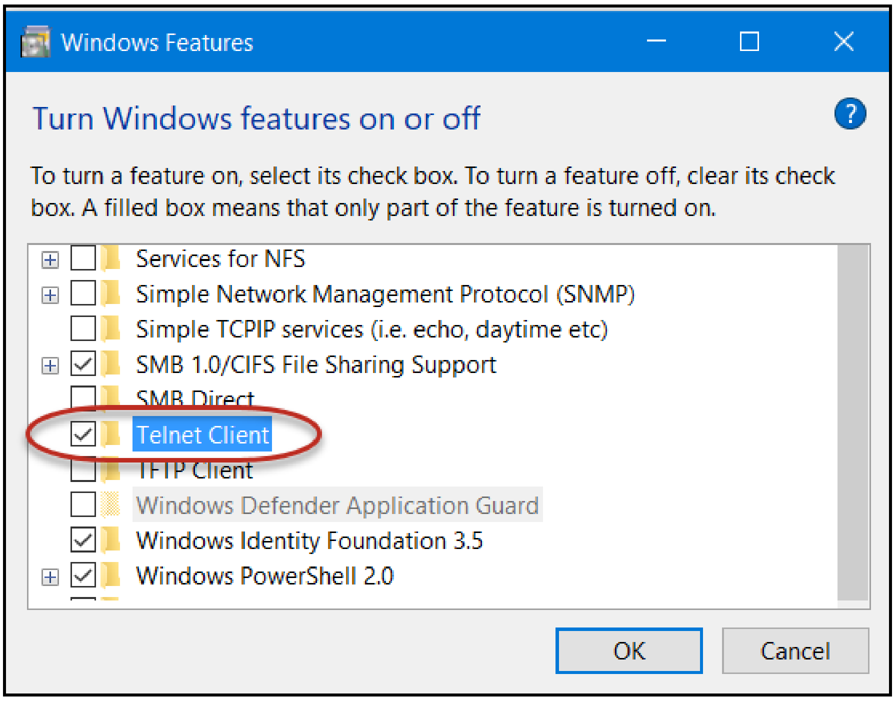
Control Panel

Programs and Features

Turn Windows features on or off

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





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

TEST WITH ANONYMOUS ACCESS

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

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

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

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

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

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

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

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

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

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

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

TEST WITH AUTHORIZATION

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

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

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

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

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