

Zetadocs Delivery Essentials Installation Guide



Version history

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1. Introduction

Thank you for choosing Zetadocs Delivery Essentials. Zetadocs Delivery Essentials enables users to send an array of different documents out to customers and suppliers from their NAV system. It helps accounts departments streamline business processes, reduce the costs of handling paper documents and enhances customer service. It enables NAV users to create and deliver statements, invoices, remittances and other financial documents instantly from their PC. Zetadocs also archives documents to Microsoft SharePoint so they can be retrieved promptly, enabling users to respond to queries instantly.

The aim of this document is to guide you through the installation of Zetadocs Delivery Essentials for your NAV system. The document contains a brief overview of Zetadocs and provides a step by step guide as to how to install Delivery Essentials. It is recommended that you read through the relevant installation materials before starting with an installation.

1.1 Installation Pack Contents

The software is supplied on a CD and contains the following:

Zetadocs SharePoint Extensions

Folder containing:

- SharePoint Extensions installer

Target OS: Windows Server 2008, Windows Server 2003, MOSS and WSS v3.0

Zetadocs Client

Installs everything that is needed on the end user desktop:

- Zetadocs Client

Target OS: Windows Server 2008, Windows Server 2003, XP, Vista

Documentation

- Documentation (installation, configuration and deployment instructions)

1.2 Technical Specifications

This section details the minimum system requirements for the software.

Client Operating systems supported

- Windows[®] Vista Business, Ultimate and Enterprise (x86 or running 32 bit on x64)
- Windows[®] XP SP2 (x86 or running 32 bit on x64)
- Windows[®] Server 2003 SP1 or later (x86 or running 32 bit on x64)
- Windows[®] Server 2008
- Requires Microsoft.NET Framework[®] version 2.0
- Integrates with Microsoft Office Outlook[®] 2003 SP2 and Microsoft Office Outlook 2007
- Integrates with Lotus[®] Notes[®] V6.5 and above
- Integrates with SMTP email systems
- Active Directory[®] integration for rapid and easy deployment to all network users

Client Hardware requirements

- It is recommended that systems have Pentium[®] class CPUs of 1 GHz or higher with 512 MB RAM or more

PDF capabilities

- Create PDF files which are readable using Adobe[®] Reader[®] software version 5 and later
- Supports PDF attachments created in PDF 1.2, 1.3, 1.4 and 1.5 standards
- Specify PDF security options such as allow printing, content extraction and password protection
- Password protection using 40-bit and 128-bit encryption

Other software requirements

- Integrates with NAV version 3.6 and 3.7 (x86 or running 32 bit on x64)
- Supports MOSS, WSS v3.0 (x86 or running 32 bit on x64)

2. How Zetadocs Interacts with NAV

The mechanism used to integrate Zetadocs with your NAV system is the NAV report itself, this is done by adjusting an NAV report to place an additional page at the front of every record output. This page contains a host of data relevant to the delivery and archiving of the documents in the form of embedded commands which are read and processed by Zetadocs.

Example Send Using Zetadocs

Currently in NAV if you printed a Sales Order report for a range of 3 records the report would have generated 3 pages of output. Following the modifications detailed in this guide would however result in this same report printing 6 pages. The embedded commands contained in these additional pages instruct Zetadocs on where and how to deliver the document, as well as providing other data to enhance document delivery and archiving. When received by Zetadocs the extra page is then removed from the final document and interpreted enabling the delivery and archiving of the final document, as shown in the diagram below.

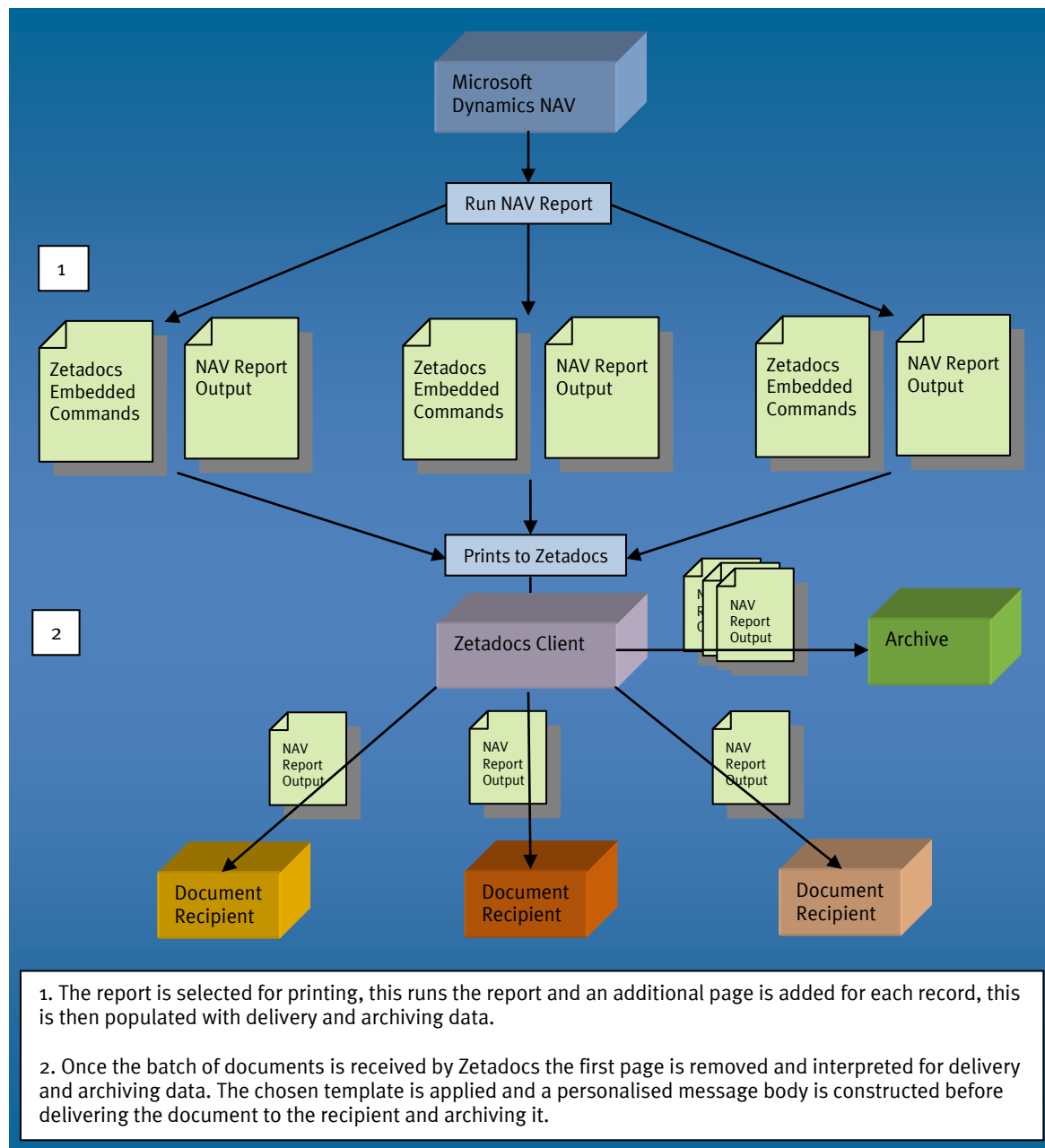


Figure 1 – How Zetadocs Interacts with NAV

3. Understanding your Requirements

Before beginning your install it is recommended that you identify your requirements in advance. Whilst most of the setup options available during the report modifications are straightforward some do require that you set criteria that you may not have previously worked with or considered.

3.1 Archiving your Documents

When configuring your archive you should be aware that your archive structure and other settings may impact any future system upgrades. Zetadocs can be more closely integrated with NAV versions 4, 5 and 6 offering additional functionality. Should you wish in future to upgrade your NAV system it will be a far simpler process if future upgrades were considered during the initial system setup. As such we have suggested default values we would recommend you utilise. If you do not wish to archive documents sent by Zetadocs then simply leave the archiving fields commented out in the code imported for each report.

Archiving to SharePoint

Zetadocs has the capacity to integrate with a SharePoint site for document archiving and retrieval. If you are intending archive to SharePoint from Zetadocs you need to install the Zetadocs SharePoint extensions. We would recommend carrying out that part of this installation first, before carrying on with the rest of the installation as you will need to specify the archiving address in the your report setup. If you are intending to use SharePoint proceed to the SharePoint Extensions Installation Guide on your product CD or download it from [here](#).

Structuring your SharePoint Archive

Zetadocs will automatically create the structure of your archive within the SharePoint Document Library using the structure specified when you modify your reports. The requirements of this structure should be determined by the volume of documents sent and how you wish to group your documents. The default strategy used in the report template takes its structure from the date in the format YYYY-MM-DD or 2009-08-06, thus grouping all document together based upon when they were sent to Zetadocs. A range of alternate strategies are available and to ensure upgradability of your system we would recommend you choose one of the strategies outlined in the [appendices](#).

Archiving to a Folder

Zetadocs is also capable of archiving to a folder location, it is important to ensure that all Zetadocs users have access to the specified folder location. The choices of structure shown above are again recommended. For details of archiving to a folder location please see the [appendices](#) for more details.

3.2 Document Delivery using Fax

If the system is to support delivery by fax, then the Zetafax Server and Client applications need to be installed. Zetafax is a separate product available from Equisys and as such comes with its own installation instructions for more details please contact sales@equisys.com.

3.3 Working with Zetadocs Document Templates

Document templates are combinations of attachments, stationery and a message body that can be created and stored within Zetadocs. These can then be used to ensure that documents that are sent out on a regular basis have all required information and can be created quickly and consistently throughout an organization. It is therefore important to identify how to use document templates to achieve the look and feel of your organizations existing documentation. The document templates provided are covered in greater detail in [Appendix A](#) of this guide but each of the templates is designed to support an individual report and comes with a piece of generic stationery, and a simple message body tailored to the specific report type. It is thus simple to use the provided templates adding only your own stationery and tuning the message body to reflect the organisations specific correspondence. If you do not wish to use document templates then simply skip section 5.

3.4 Identifying the Required Reports

Zetadocs supports the majority of the most commonly used reports, however due to the variety of reports and the customizable nature of reports it is difficult to provide a definitive list of compatible reports. The list below contains those reports for which we have provided an example modified report on the product CD. The main requirement for a report to be Zetadocs compatible is that it allows the Zetadocs Embedded Commands Data item to be located in front of every record output. This step detailed in section 6.6 places a

pair of text boxes into the first page of the report which contain our embedded commands. As explained earlier these are then interpreted by Zetadocs on printing so if this page can be successfully added to the report then it should be Zetadocs compatible. Identify those reports you wish to convert for sending using Zetadocs and make a note of them for reference later in the install as they should be backed up before modifications are performed.

Report Samples:

- Sales Order
- Sales Invoice
- Sales Quote
- Sales Credit Memo
- Statement
- Remittance Advice
- Purchase Order

4. Installing Zetadocs Delivery Essentials

4.1 Installation and Configuration Overview

This section aims to provide a brief overview of the installation and configuration process for Zetadocs Delivery Essentials.

- [Installing the Zetadocs Client](#)
 - [Zetadocs Client licensing and registration](#)
- [Installing the Zetadocs for NAV Document Templates \(Optional\)](#)
- [Modifying a NAV Report](#)
 - [Backing up the existing reports](#)
 - [Adding Zetadocs code to your reports](#)
- [Configuring Report Settings](#)
- [Validating your modified reports](#)
- [Configuring Report Selection and Printing](#)
 - [NAV report selection](#)
 - [NAV printer selection](#)
- [Testing your Solution](#)
 - [Testing Document Delivery](#)

4.2 Installing the Zetadocs Client

This section describes the installation of the Zetadocs Client, this should be performed on every client machine which is part of your system install.

- Ensure the currently logged in user has local administration rights on the machine that is being installed upon.
 - This is required to install pre-requisite components used in Zetadocs. These permissions can be elevated temporarily for the installation.
- Insert the Zetadocs Delivery Essentials CD.
- When the CD Browser runs, follow the menu options and select the ERP system relevant to your system.
- Select the option to begin installing the Zetadocs Client in either 32 or 64 bit as appropriate.

The Zetadocs Client installer is a combination of installers. When you begin installing the Zetadocs Client you will be prompted with the installation options for Zetadocs. There are also a number of pre-requisites

for the Zetadocs Client which must be installed first. Please follow the installation dialogs with this ordered check list.

- Zetadocs Client
 - Install pre-requisites of Zetadocs Client (If the Zetadocs Client has previously been installed on the machine this dialog may not appear as pre-requisites will already be installed)
 - Choose language
 - Choose Installation Directory
 - Choose Installation Type
 - Evaluation
 - Administration
 - Typically only installed by an administrator on the server machine. Installs the Zetadocs Client and the Zetadocs Admin Configuration application for licensing and network configurations of Zetadocs.
 - Standard
 - Typically the most used installation on regular client machines.

Once you select Finish, the Zetadocs PDF Configuration program will launch.

4.3 Configuring Zetadocs Client Licensing

Before you can start using Zetadocs you must license and register it, enable users and setup file sharing folders for storage of company accessories (templates, stationery and attachments). The Zetadocs PDF configuration program is automatically installed as part of your Zetadocs system when you select the Administration install option during installation.

This program allows you to manage your Zetadocs PDF program across your network, allowing licensing, registration, shared folders and user accounts to be modified.

Zetadocs Client Licensing and Setup

Actions:

- Launch the Zetadocs PDF Configuration.
- Choose the license location (General Tab).
 - Active Directory (requires that user has access rights to write to AD)
 - Shared Network Folder
- Enter your Zetadocs license number and company name and register online.
- Enter your registration key on receiving the registration success email.
- Add the required users.
- Leave Network Archiving off if you are using SharePoint as an archive.

Zetadocs Client

Actions:

- Start the client.
- If using Active Directory licensing, Zetadocs should locate the license automatically, otherwise, go to Tools→ Options\Licensing and enter the path to the network folder containing the Zetadocs license.
- Restart client if necessary.
- You can confirm that you are successful if the splash screen shows the Automation tag beside the number of users.

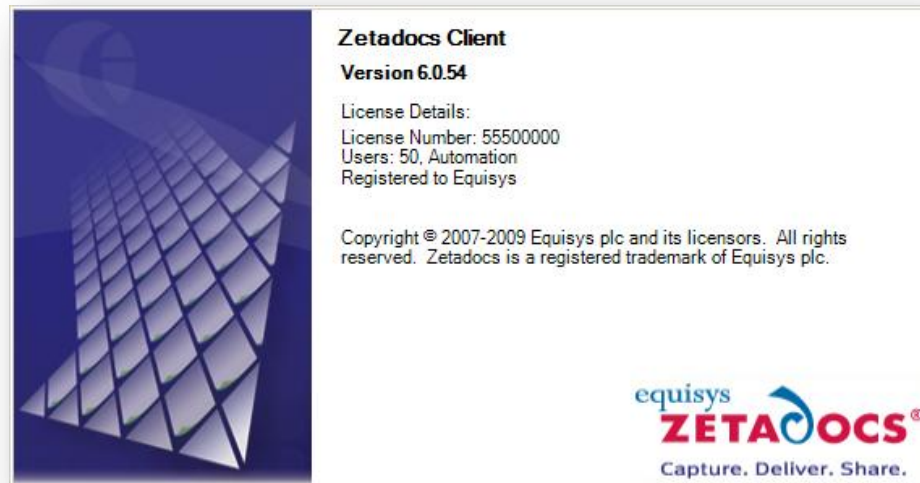


Figure 2 - Zetadocs Client Splash Screen

Please refer to the Zetadocs Client Help for further information on configuring the Zetadocs Client.

5. Zetadocs for NAV Document Templates

To enable other system users to access the Zetadocs for NAV Document Templates it is necessary to create and share the Templates folder. Should you have decided not to use document templates skip this section and continue from chapter 6.

5.1 Creating the Document Templates Folder

Find a suitable location within your network for the central storage of your templates. This should be accessible by all intended users of the system.

- Create a folder named **Templates** in a suitable location.
- Right click on the folder and select **Properties**.
- Choose the **Sharing** tab.
- Check the **Share this Folder** radio button.
- Select the **Permissions** button.
- Assign the Permissions necessary to enable your system users to be able to **read and/or write** to these locations depending on the level of control you wish to grant them.

5.2 Adding the Standard Document Templates

To populate the templates folder simply:

- Open the **Templates** folder on the Zetadocs for NAV product CD folder by going to:
<CD Drive>:\NAV3.6-3.7\Templates
- Copy the contents of this folder into the Templates folder created and shared earlier.
- Select all of the files in this folder, right click on them and select Properties. Ensure that the read-only flag is deselected.
- Details on how to view and modify these document templates are contained in [appendices A](#).

6. Modifying a NAV Report

This section details the changes required to enable a typical NAV report to be sent using Zetadocs. To make the process simpler and faster there is a template report in the Zetadocs for NAV installation pack which contains only the elements that are to be added to an existing report to enable it for sending. Please follow each of the steps listed in the section below in the order they appear for each of the reports you intend to modify to work with Zetadocs.

Note: This method works for most reports; however, due to the customizable nature of reports it may not fit all reports exactly. Therefore, the location of where to insert the code below may need to vary but the code will remain the same.

6.1 Glossary of Terms

Term	Description
Document	Any printable document that can be printed to the Zetadocs printer. Typically refers to a NAV Report output in this context.
Report	A NAV Report.
Template	The report template provided.
Document Template	A collection of stationery, attachments and message body Zetadocs can apply to documents prior to delivery

6.2 Backup Reports

In order to be able to uninstall the Zetadocs for NAV software it is recommended that you backup the Navision reports you are editing before modifying them to work with Zetadocs. Alternatively, reports can be duplicated and saved with new report ID's before adding the Zetadocs for NAV changes. Either way it is recommended that you add the Version List **EQ2.1DE** after saving the completed report.

- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tools→Object Designer).
- Click on **Report** button in the designer menu.
- Select all the reports that you identified earlier and are going to edit for Zetadocs for NAV.
- Select **Export** objects in file menu (File→Export).
- Export objects to a **Backup of Reports before Zetadocs for NAV2.1.fob** file.
- Keep the **Backup of Objects before Zetadocs for NAV2.1.fob** in a safe place.

6.3 Import the Zetadocs for NAV Report Template

- Open the Navision client and connect to/open the Navision database.
- Open the **Object Designer** (Tools→Object Designer).
- Select **File → Import** from the NAV menu and import the file below into NAV.

<CD Drive>:\NAV3.6-3.7\ZD-Report Template.txt

Note: The template is based on the “Sales Header” table as it is based upon a Sales Order report. We have also included at the same location sample modified reports for Sales Order, Sales Invoice, Sales Quote, Sales Credit Memo, Statement, Purchase Order and Remittance Advice to aid in developing your understanding of how the reports operate. The Remittance Advice report is significantly different from the other reports and has a dedicated section in the [appendices](#) detailing its specific setup process.

6.4 Creating your Modified Report

Now that you have imported the template you need to open the template in the Object Designer to enable you to copy various items from it into your report. We will proceed by setting up the Sales Invoice report as an example.

- Locate the template in the Object Designer and select **Design**.
- The report will open in the **Report Designer**.
- Return to the Object Designer and locate the report you wish to modify, click **Design**.
- You will need to keep the original report ID for the Remittance and Statement Reports for these proceed to section 6.5 below.
- For the other reports you can set your own id's if you wish, to do this Select **File→ Save As** from the NAV menu.
- Enter a new ID and name for the report based upon what is available in your system e.g. ID:10075 Sales Order becomes 50075 ZD-Sales Order.
- Click **OK** to create the modified report.

6.5 Global, Local and Text Constants

- Return to the template in the **Report Designer** and select View→CA/L Globals.
- Select all global variables (Ctrl + A), right-click and select **Copy**.
- Switch to your report and select **View→CA/L Globals**.
- Scroll to the bottom of any existing Globals in your report and select the blank global variable row, right-click and select **Paste** to paste the additional Zetadocs Globals into the report.
- The Variables are by default set for Sales reports, should you be creating a Purchase report select the Customer variable and replace it with Vendor. The Datatype should remain Record with Subtype Vendor.
- If upon compilation the report indicates that there are duplicate values as can occur with Customer for example. In these instances compare the two, they would usually have the same values by default, and remove one of the instances as appropriate.
- Return to the template and select the **Text Constants tab**, select all and then copy.
- Paste these at the bottom of any existing text constants in your report.

6.6 CA/L Code Segments

Next you need to add code to your report.

Create Zetadocs Embedded Commands Data Item

- In the report designer select an empty row in your report and create a new data item of type **Integer** called **Zetadocs Embedded Commands**.
- Move the data item up to just below your main data item and indent once so that it will be the first page of output in your report.
- In the template in the Report Designer select **View→Sections**.
- Select and copy the two textboxes located in the **Zetadocs Embedded Commands, Body(1)** section.
- Paste these textboxes into the same section in your report.

Zetadocs Embedded Commands Data Item Code

Next you need to add the Code that enables your report to print the embedded commands Zetadocs uses to send your document to the desired recipients. We have code which needs to be pasted from the template into the corresponding OnPreDataItem(), OnAfterGetRecord() and OnPostDataItem() sections.

- Select the Zetadocs Embedded Commands DataItem in the template.
- Click **View→C/AL Code** or press F9 to open the C/AL Editor.
- Select and copy all of the content from the OnPreDataItem() section.
- Go to your report and select the Zetadocs Embedded Commands DataItem.
- Click **View→C/AL Code** or press F9 to open the C/AL Editor.
- Paste the code copied earlier into the OnPreDataItem() section.
- Repeat this procedure copying the contents from the OnAfterGetRecord() and OnPostDataItem() sections.

OnInitReport Code

There is also some additional code required in the OnInitReport() section.

- Go to the Report Designer for the Template and select an empty row.
- Click **View→C/AL Code** or press F9 to open the C/AL Editor.
- Select and copy all of the content from the Report – OnInitReport() section.
- Go to your report and open in the Report Designer, select an empty row.
- Click **View→C/AL Code** or press F9 to open the C/AL Editor.
- Paste the code copied earlier into the Report – OnInitReport() section.

7. Configuring Report Settings

Having successfully copied the various elements from the template into a copy of your existing report we now need to configure these elements to match your requirements. An example Sales Order report is available in the [appendix](#) for reference of how this should look when complete.

7.1 Zetadocs Embedded Commands – OnPreDataItem

The OnPreDataItem contents control the number of iterations the report goes through and ensures that each document created by the report has a corresponding set of embedded commands to ensure it is delivered correctly.

```
SETRANGE(Number,1,1);
```

7.2 Zetadocs Embedded Commands – OnAfterGetRecord

The code that you imported into your report will not operate properly until it has been adjusted for each individual report. What follows is a breakdown of the code which should allow you to understand enough to enter suitable values or adjust them as required. Sections which should potentially be modified are highlighted using **red text**, with fields requiring static values to be entered are denoted by <> either side.

Default Fields

```
Separator := '\';  
Customer.GET("Sales Header"."Sell-to Customer No.");
```

This string identifies the table in NAV from which we are sourcing the various fields, the values above are from the Sales Order report. Replace these with the appropriate values for your report e.g. for Sales Invoices. "Sales Invoice Header"."Sell-to Customer No.". If you were to be working on a Purchase report you would replace Customer with Vendor and then Sell-to Customer No. with Buy-from Vendor No. This would give you Vendor.GET("Purchase Header"."Buy-from Vendor No.");

```
IF NOT (BatchCommandAdded) THEN  
    BEGIN  
        EmbComms := STRSUBSTNO(Batch , '<Batch Name>' ) + Separator;  
        EmbComms := EmbComms + STRSUBSTNO(BatchPreview , '<YES/NO>' ) + Separator;  
        EmbComms := EmbComms + STRSUBSTNO(StartDocument) + Separator;  
        BatchCommandAdded := TRUE;  
    END  
ELSE  
    BEGIN  
        EmbComms := STRSUBSTNO(StartDocument) + Separator;  
    END;
```

This code identifies whether the print is a Batch or a single document and applies embedded commands accordingly. The areas where you should add values are outlined below.

```
EmbComms := EmbComms + STRSUBSTNO(Batch , '<Batch Name>' ) + Separator;
```

This string determines the name of the batch being sent, this is often representative of their purpose e.g. Sales Invoice. A suitable string could read EmbComms := EmbComms + STRSUBSTNO(Batch , 'Sales Invoices') + Separator;

```
EmbComms := EmbComms + STRSUBSTNO(BatchPreview , '<YES/NO>' ) + Separator;
```

This string determines whether batches are previewed before sending, replace with either YES or NO. We would recommend you initially use YES until you are satisfied the system is configured as expected.

```
EmbComms := EmbComms + STRSUBSTNO(StartDocument) + Separator;  
EmbComms := EmbComms + STRSUBSTNO(DeliveryOption , '<Email, Print, Fax>' ) + Separator;
```

This string determines the delivery method Zetadocs will employ. These can be placed in sequence separated by a comma to act as a failover e.g. Email, Fax, Print will result in Zetadocs attempting to send via Email. Should this fail due to insufficient addressing information Zetadocs will then try Fax and then finally Print to deliver the document.

Value	Description
Email	Document will be sent via email.
Fax	Document will be sent via fax.
Print	Document will be printed.
EmailandPrint	Email your document and print a copy.
EmailandFax	Email and Fax your document.
FaxandPrint	Fax your document and print a copy.

EmbComms := EmbComms + STRSUBSTNO(ExcludePage) + Separator;

*EmbComms := EmbComms + STRSUBSTNO(Email, **Customer."E-Mail"**) + Separator;*

*EmbComms := EmbComms + STRSUBSTNO(Fax, **Customer."Fax No."**) + Separator;*

These strings pull the email address and fax number for the specific record being processed, if you are creating a purchase report then change Customer to Vendor and check to ensure that the fields E-Mail and Fax No. are available.

*EmbComms := EmbComms + STRSUBSTNO(Printer, '**<PrinterName>**') + Separator;*

This string determines the printer to be used when DeliveryOption is set to Print.

EmbComms := EmbComms + STRSUBSTNO(Template, TemplatePath) + Separator;

*TemplatePath := STRSUBSTNO('%1%2', NetPathStart, '**<Templates location on Network\\ZD-Order Confirmation Template.zdt>**');*

This string identifies the folder from which Zetadocs is to source the templates applied to documents when sending. Add the network location where you have chosen to store your templates and the name of the template you wish applied. You may need to create additional templates if no existing template is suitable see [Appendix A](#) for details. If you do not wish to use templates then simply comment out these two strings.

Note: Due to the way NAV processes the reports you should ensure that you use double back slashes “\\” instead of single “\” in this instance. If you wish to use a local folder instead of a network one see section [12.3 in the appendices](#).

*EmbComms := EmbComms + STRSUBSTNO(Name, **Customer.Contact**) + Separator;*

*EmbComms := EmbComms + STRSUBSTNO(Organization, **Customer.Name**) + Separator;*

These strings pull the organization name and contact name for the specific record being processed, if you are creating a purchase report then change Customer to Vendor. Then check to ensure that the fields Contact and Name are available in the relevant table.

Optional Fields

Zetadocs is capable of processing a number of other commands that whilst not essential do have the capacity to greatly expand your system functionality should you require it. The fields below have been “commented out” using the // command, this effectively means NAV ignores all lines which begin //. The benefit of this is that if you require an optional field adding you just need to remove the // from the start of the line and configure it accordingly.

//Optional Fields

//Optional File Naming

*//FileName := STRSUBSTNO('<Sales Order> %1', **"Sales Header". "No."**);*

The file naming works by taking the name in <> and adding the record number from NAV to create a descriptive filename e.g. Sales Order 158811. Remember that the following characters are unsuitable for use in file names \/:*?"<>|. After adding a suitable name, ensure that NAV is looking in the correct table to source the ID.

//EmbComms2 := EmbComms2 + STRSUBSTNO(OutputFileName, FileName) + Separator;

Is required to process and display the FileName value created by the previous command.

//Optional Addressing

*//EmbComms2 := EmbComms2 + STRSUBSTNO(EmailBCC, '**<bccaddress@email.com>**') + Separator;*

*//EmbComms2 := EmbComms2 + STRSUBSTNO(EmailCC, '**<ccaddress@email.com>**') + Separator;*

*//EmbComms2 := EmbComms2 + STRSUBSTNO(EmailFrom, '**<fromaddress@email.com>**') + Separator;*

The bcc and cc fields operate as you would expect, the email from field allows you to set an alternate address from which all these documents will appear to have originated e.g. Sales@equisys.com. You can use values sourced from the NAV database for these values in much the same way as we did above with the Customer.Contact and Customer.Name values.

```
//Optional Archiving
```

```
//EmbComms2 := EmbComms2 + STRSUBSTNO(ZDArchiveDocument, '<YES/NO>') + Separator;
```

This string determines whether documents are archived or not on sending, replace with either YES or NO.

```
//Need to format the date to be 01 not just 1 for days and months under 10
```

```
//
```

```
day := DATE2DMY(TODAY,1);
```

```
IF day < 10 THEN
```

```
DD := STRSUBSTNO('0%1', day)
```

```
ELSE
```

```
DD := STRSUBSTNO('%1', day);
```

```
month := DATE2DMY(TODAY,2);
```

```
IF month < 10 THEN
```

```
MM := STRSUBSTNO('0%1', month)
```

```
ELSE
```

```
MM := STRSUBSTNO('%1', month);
```

```
YYYY := STRSUBSTNO('%1', DATE2DMY(TODAY,3));
```

```
Datefolder := STRSUBSTNO('%1-%2-%3',YYYY,MM,DD);
```

This section of code is responsible for generating the date so it can be used to give the archive structure. The only area where you need to modify it could be the Datefolder string which you can adjust to give you the year, month and day elements in a different order.

Output YYYY-MM-DD or 2009-07-09

```
Datefolder := STRSUBSTNO('%1-%2-%3',YYYY,MM,DD);
```

Output DD-MM-YYYY or 09-07-2009

```
Datefolder := STRSUBSTNO('%1-%2-%3',DD,MM,YYYY);
```

```
ArchiveFolder := STRSUBSTNO('sharepoint: http://%1,%2/%3/', 'ds-srv-01', 'archive', Datefolder);
```

The archive folder string facilitates archiving to your SharePoint sites document library, it then utilizes a year, month and then day folder structure e.g. 2009-09-03. It is possible to replace these date values with organization name for example which would file documents according to the recipient organization. Alternate archiving sample code is provided in the [appendix](#).

```
//EmbComms2 := EmbComms2 + STRSUBSTNO(ZDArchiveFolder, ArchiveFolder ) + Separator;
```

```
//EmbComms2 := EmbComms2 + STRSUBSTNO(ArchiveDocumentType, '<Sales Order>') + Separator;
```

The archive document type string adds meta data to the archived file, for effective storage these should reflect the content types used in your SharePoint archive. For suitable values please see the [appendices](#).

```
//EmbComms2 := EmbComms2 + STRSUBSTNO(FieldRecNum, "Sales Header"."No." ) + Separator;
```

```
//EmbComms2 := EmbComms2 + STRSUBSTNO(FieldCompNum, Customer."No." ) + Separator;
```

These strings pull the record number and customer number for the specific record being processed, if you are creating a purchase report then change Customer to Vendor. Then check to ensure that the fields are available in the relevant tables. These fields are used by the preconfigured templates, should you decide not to include them simply remove the relevant embedded commands from the templates in question.

```
//End Optional
```

Once you have added all of the values necessary close the C/AL Editor and the Report Designer windows, you will be asked to save the report changes. Ensure the Compiled checkbox is ticked and select Yes to save your changes and compile.

7.3 Zetadocs Embedded Commands - OnPostDataItem()

The OnPostDataItem contents shown below ensure that the NAV report content is contained on a new page. The exclude page embedded command causes that page to be removed and analyzed on printing to Zetadocs. Thus the code below ensures that any NAV report content is on a fresh page on printing to Zetadocs.

```
CurrReport.NEWPAGE();
```

8. Validating your Modified Reports

To ensure that the report is operating as expected it is recommended that you run the report and validate that it generates suitable values. The most effective way to do this is to preview the report as this displays the first page of the report, which is automatically used by Zetadocs to provide information on the document for delivery. This is not displayed in items printed to Zetadocs as it is instead this first page is interpreted and then skipped.

Previewing the Report

To preview the report:

- Go to the **Object Designer** and select the modified report.
- Select the **Run** button and enter appropriate filter details.
- Click **Preview** and the Print Preview window should open containing the embedded commands Zetadocs uses on the first page.

Interpreting the Embedded Commands

Understanding the embedded commands used is relatively straightforward as they are largely self explanatory.

Below is the list of standard embedded commands that are by default not commented out, review each of these to ensure that they contain the expected values.

```
%%[Batch: Sales Orders]
%%[BatchPreview: YES]
%%[StartDocument]
%%[DeliveryOption: Email,Print]
%%[ExcludePage]
%%[Email: the.cannon.group.plc@cronuscorp.net]
%%[Fax: 456465464]
%%[Printer: PrinterName]
%%[Template: C:\Templates\ZD-Order Confirmation Template.zdt]
%%[Name: Mr. Andy Teal]
%%[Organization: The Cannon Group PLC]
```

Below this initial group of embedded commands will appear any optional commands you have included. If all values are as expected run the report again this time printing to the Zetadocs PDF printer ensuring you have the BatchPreview option set to Yes. This will enable you to check that it sends all of the necessary details across as expected.


```
%%[OutputFileName: Sales Order: 2005]
%%[EmailBCC: bccaddress@email.com]
%%[EmailCC: ccaddress@email.com]
%%[EmailFrom: from@email.com]
%%[ArchiveDocument: YES]
%%[ArchiveFolder: sharepoint: http://ds-srv-01.archive/2009-07-24/]
%%[ArchiveDocumentType: Sales Order]
%%[Field: ZetadocsRecordNo, 2005, ARCHIVE]
%%[Field: ZetadocsCompanyNo, 60000, ARCHIVE]
```

Once you are satisfied that the report outputs are as expected repeat the report setup process for each of the remaining reports you require for your system.

8.1 Troubleshooting your Modified Reports

In most circumstances the report should compile and run without any problems, however due to the sensitive nature of the report designer to even small errors, you may have some issues getting the report to compile. Below is a list of the most frequent problems that may arise, a sample modified Sales Order report is also available in the appendices as a reference.

Duplicate Variables

Some reports may already make use of a variable imported with our Zetadocs variables e.g. Customer. By importing our variables you may be creating a duplicate value which needs to be resolved before the report will compile. To do this simply select View → C/AL Globals and delete the additional duplicate Customer variable.

Double Backslashes (\\)

The report tool adds additional significance to the backslash symbol, the result of this is that to output a single backslash you need to have a double backslash in the report. This is particularly relevant to the Template path field.

Missing Single Quotes

Single Quotes (") are required around some values to ensure they are correctly interpreted. These are all in place within the template but can easily be deleted or typed over accidentally. If you are unsure simply check the template or the sample modified report located within the appendices.

Leaving <> Characters in Strings

In the report template we have used <> brackets to denote where you should replace the content with appropriate values. These should not be left on place either side of the new value but removed entirely.

Insufficient Margins

The NAV reports can come with no left hand margin included which can result in reports printing with a poor layout. To resolve this simply open the report in question with the Report Designer and select an empty Dataltem, next select View → Properties. This will open the Report-Properties window, select the LeftMargin field and add a suitable value such as 250 and save and compile the report. Run the report and preview it to ensure that it now displays as desired.

9. Configuring Report Selection and Printing

9.1 NAV Report Selection

Next you need to ensure that NAV will utilise the new reports modified to work with Zetadocs. This is only applicable if you have created new versions of reports for Zetadocs with different ID's to the normal versions.

Actions:

- Go to **Sales & Receivables** within NAV and select **Setup→Report Selection Sales**.
- The **Report Selection – Sales** window will open, select the relevant document type from the **Usage** drop down box e.g. Order.
- The existing NAV report currently used is displayed, select the Report ID field and the click on the up arrow displayed in the field.
- This will open the **Objects** window, search through this list and select your Modified report.
- NAV will now use the modified report when creating the relevant sales document.

Repeat this for each modified Sales and Receivables report that you want to enable for sending via Zetadocs. Once complete for the Sales reports repeat the above process for any modified reports managed from the Purchases and Payables section within NAV.

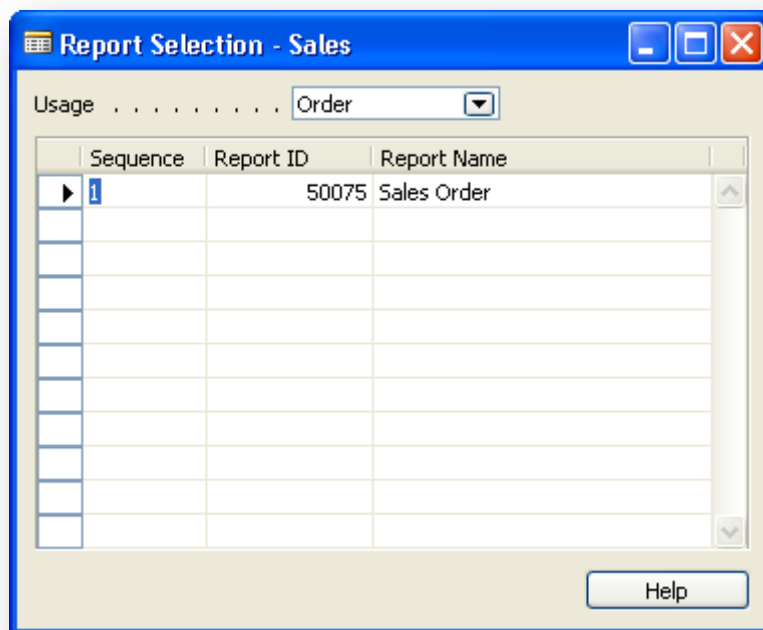


Figure 3 – Report Selection

9.2 NAV Printer Setup

Any report that has been Zetadocs enabled must have the Zetadocs printer selected in the printer selections to ensure that it is the default printer when sending a print job using Zetadocs.

Actions:

- In the NAV Navigation Pane, select the **General Ledger** option.
- Click **Setup → Printer Selections**.
- Click on the **Report ID** field and select the arrow to open the **Objects** window.
- Select a Zetadocs enabled report, you will be returned to the Printer Selections window.
- Select the **Printer Name** field and open the **Printers** window.
- Choose the **Zetadocs PDF** printer from the list and click **OK**.
- Repeat this process for all reports you have modified for use with Zetadocs.

10. Testing your Solution

Now that you have completed the installation and setup of your reports it is time to test each to ensure that it is operating as expected.

10.1 Testing Document Delivery

Having set up the report and printer selections you now need to ensure that your newly modified reports are delivered and archived as expected. We recommend verifying the following for each report.

Delivery Validation

Select the report and print it as usual from NAV, ensure that the delivery preferences for this report are applied as expected. These could include bcc, cc and from fields.

Archiving Validation (if implemented)

Ensure that the selected archiving policy is successfully implemented for the report and that archived documents appear in your archive as expected.

Document Templates (if implemented)

Print the report and ensure the correct template and stationery have been applied. You should further ensure that the message body has been populated with the correct NAV data.

Delivery Method Failover (if implemented)

If you set up delivery method failover then you should test this by printing a report which is missing the primary delivery information. For example if your delivery method was set to E-mail, Hard Copy then the primary delivery method is email, if no email address is provided for a customer the system should then instead print the document using the printer specified.

11. Appendix A: Document Templates

You should have already specified the shared folder where these templates are to be stored during the install process as this is required to make them available to other network users. We have provided you with a wide range of some dozen preconfigured templates and you should already have configured your reports to point towards them or stated alternate templates you now wish to create.

11.1 Using Preconfigured Document Templates

Zetadocs for NAV has a number of preconfigured document templates included within it to make setting up a system quicker and easier. These templates contain Zetadocs stationery and a message body which have been deliberately constructed to provide a starting point from which to build and customize your system. Should you wish to construct your own templates instructions on manually creating them are available in the Advanced Configuration guide or by accessing the help installed with the Zetadocs Client. You should though find it easier to follow the instructions here to modify the standard templates to your needs.

11.2 Preconfigured Document Template Features

The document templates contain Zetadocs stationery and a suitably generic message body reflective of each templates purpose.

Attachments

The document templates come without an attachment included to allow you to include your own company specific documents like terms and conditions that you may wish to distribute.

Stationery

A single stationery file has been provided which by default is applied to all ZD Templates included with your installation. This means you would only be required to update this stationery once for it to apply to all document templates.

Message Body Text

The message body text contains a default message which would form the email message body and subject when the document is sent using Zetadocs for NAV. This allows for the use of dynamics fields to populate information from NAV automatically into the email reducing the time required to process business documents. In the message in [section 11.5](#) you can clearly see several examples of these fields.

Viewing the Template details

To view the Zetadocs for NAV template details simply:

- Open the Zetadocs Client.
- Select the Shared network folder setup earlier containing your templates in the **accessories pane** on the right hand side using the **folder** drop down box shown below. If the accessories pane is not displayed select the **Accessories** button from the toolbar to display it.
- Ensure the Type drop down box is set to **Templates**.
- Double click on the Template you wish to adjust to open the Document Template Wizard.
- The pages of the wizard cover contain:
 - An Introduction to templates
 - Assignment of attachments
 - Assignment of Stationery
 - Email properties
 - Template Review and Save

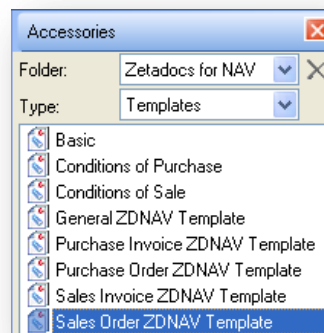


Figure 4 – Opening the Document Template Wizard

11.3 Template Wizard - Adding an attachment to a template

The preconfigured templates supplied do not come with an attachment included as this would make them unusable 'out of the box' as such if you require attachments to be sent along with your business documents then please follow the steps below.

Any file that you use on a regular basis can be stored as an attachment file for ease of use. These files can be attached to any spooled document prior to sending quickly and easily using the Accessories tool. By specifying an attachment in a template you ensure it is always included when a document is sent using that template with Zetadocs for NAV.

To add an attachment simply:

- Copy your desired attachment (e.g. terms and conditions) in pdf format into the shared folder location, likely to be in the form \\ServerName\Zetadocs Templates\
- Open the **Zetadocs Client** and select the template you wish to modify by double clicking on it in the Accessories pane, see figure 4.
- The template wizard will open, Select **Next** to reach the attachments step of the wizard.
- Select the Shared Network Folder by selecting the **Folder** drop down box.
- Your attachment should appear as one of the attachment options.
- Select the attachment and click the **Add** button.
- Select **Next** to be taken to the stationery template wizard page. If you are happy with the existing settings in the remaining wizard steps skip past them using next and select **Finish** to save your changes.

11.4 Replacing the stationery

The templates comes with stationery included, this single piece of stationery is applied to all of the templates provided. As such by simply replacing this one file you can ensure your stationery is applied to all of the provided templates.

Adding company stationery to the Zetadocs client

To add your stationery to the Zetadocs Client simply open your existing company stationery and print it selecting the Zetadocs PDF printer using the steps below.

- Open your stationery in Word or another suitable application. The standard stationery has been provided to you in Word format in the templates folders as well, so you can adjust and print that if desired.
- Select **print** and select **Zetadocs PDF** as your printer.
- This will open the Zetadocs client with your stationery within it.
- Select the **File** menu and then **Save As Stationery**.
- You will then be prompted to provide the name and save location of the stationery, you should select the shared network folder mentioned earlier this is likely to be in the form \\ServerName\Zetadocs Templates\.
- If you wish to apply this stationery to the existing preconfigured templates this file should be named **ZD - Stationery.zds** this will overwrite the existing standard stationery and will now be used by all of the templates provided.
- Should you wish to apply this stationery to a single template, name the file as you see fit then open the Zetadocs client.
- Next open the template wizard by double clicking on the template you wish to modify.
- Go to the third page of the wizard using the next button the screen shown below will appear.
- Select your stationery by selecting the Folder drop down box and selecting the Shared Network folder.
- Selecting the existing stationery from the selected stationery window as shown.

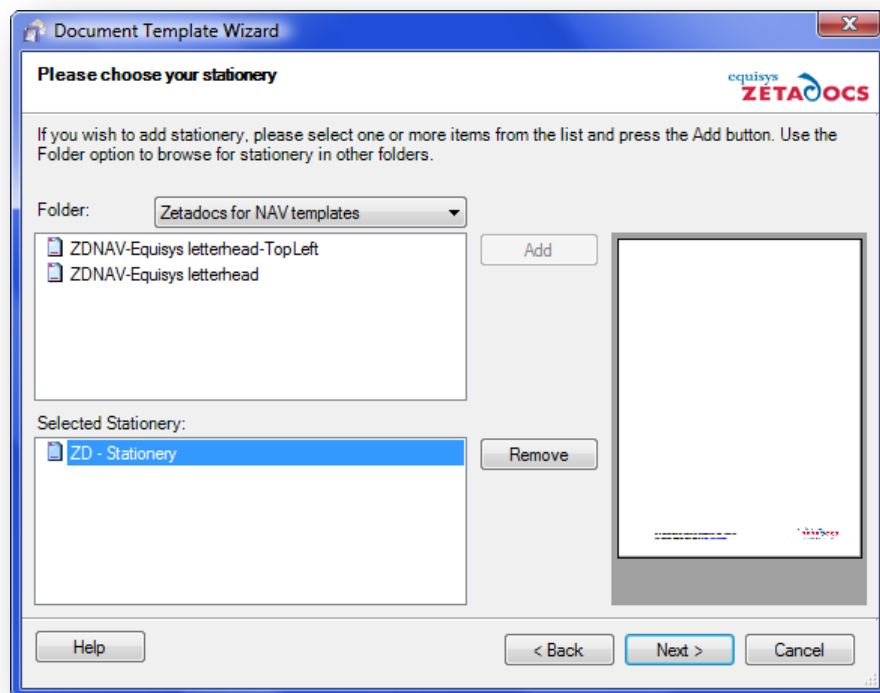


Figure 5 – The Document Template Wizard

- Click the **Remove** button.
- Select your new stationery file and press **Add**.
- Select **Next** to be taken to the email message template wizard page. If you are happy with the existing message select next again and then select **Finish** to save your changes.

11.5 Adjusting the Email message

The preconfigured templates contain an email message populated with dynamics field data from NAV and static text generically phrased to allow them to be applicable in a number of situations. The messages, like the one shown below, work with NAV to automatically create a personalised message that contains contact details, names, order numbers and organization names.

Note: If you have chosen not to use the optional commands to generate the Record No. you will need to remove the %%[ZetadocsRecordNo] embedded command from the message body as the value will not have been extracted from NAV and passed to Zetadocs.

Messages using Dynamics Fields

Subject: Order Confirmation for order number: %%[ZetadocsRecordNo] for %%[Organization]

Message Body:

FAO: %%[Name]

Dear Customer,

I'm pleased to attach your order confirmation, reference number %%[ZetadocsRecordNo].

Kind regards,

Sales Team

When sent using the Zetadocs for NAV Client these fields are replaced with the corresponding fields from NAV, and would appear thus:

Message with Dynamic Fields Populated

Subject: Order Confirmation for order number: 300381 for Equisys plc

Message Body:

FAO: John Smith

Dear Customer,

I'm pleased to attach your order confirmation, reference number 300381.

Kind regards,

Sales Team

By amending the document template you will be able change the content of every email message sent using that template. It is possible to include a variety of other dynamically populated fields within your email.

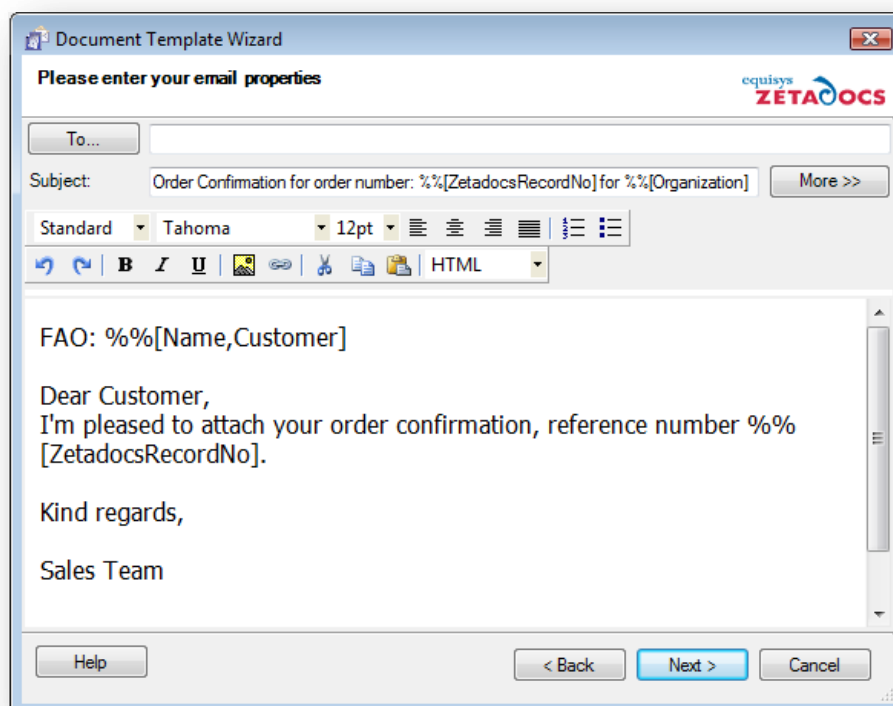


Figure 6 - Document Template Wizard – Email Message Body

To adjust the email message you need to view the template in the Zetadocs Client using the document template wizard. To open the document template wizard for a particular template follow the steps in [section 11.2](#).

- The first three pages of the wizard contain:
- An introduction to templates
- The assignment of attachments
- The selection of stationery
- Click **Next** on each page to move past these wizard stages until you reach the email properties page (see figure 6 above).
- Adjust this content to match your needs remembering that the dynamic fields use the format %[%Name] and will be replaced in the message by the corresponding NAV value.
- Click **Next** to review the templates contents and select **Finish** to save your changes.

12. Appendix B – Report Modification

12.1 Remittance Advice Report

The major difference between setting up the remittance reports and the other reports in this guide is that we are unable to use the additional Dataltem mechanism to place our code in the report. Instead we need to add the code to an existing Dataltem as described below.

Adding Global, Local and Text Constants

- Return to the template in the **Report Designer** and select View→CA/L Globals.
- Select all global variables (Ctrl + A), right-click and select **Copy**.
- Switch to your report and select **View→CA/L Globals**.
- Scroll to the bottom of any existing Globals in your report and select the blank global variable row, right-click and select **Paste** to paste the additional Zetadocs Globals into the report.

- The Variables are by default set for Sales reports, should you be creating a Purchase report select the Customer variable and replace it with Vendor. The Datatype should remain Record with Subtype Vendor.
- If upon compilation the report indicates that there are duplicate values as can occur with Customer for example. In these instances compare the two, they would usually have the same values by default, and remove one of the instances as appropriate.
- Return to the template and select the **Text Constants tab**, select all and then copy.
- Paste these at the bottom of any existing text constants in your report.

Modifying the Top Dataltem

- In the report designer select the top Dataltem.
- In the template in the Report Designer select **View→Sections**.
- Select and copy the two textboxes located in the **Zetadocs Embedded Commands, Body(1)** section.
- Go to the top Dataltem and select **View→Sections**.
- Select the top section and select **Edit→Insert New**, choose Group Header for Section type and ensure the Insert Section value is set to Before Current selection then click **OK**.
- Paste the textboxes from the template into this new Group Header in your report.

Adding Dataltem Code

Next you need to add the Code that enables your report to print the embedded commands Zetadocs uses to send your document to the desired recipients. We have code which needs to be pasted from the template into the corresponding OnAfterGetRecord() section. Note: this is in contrast to other reports whereby we copy code into the OnPreDataltem() and OnPostDataltem() sections as well.

- Select the Zetadocs Embedded Commands Dataltem in the template.
- Click **View→C/AL Code** or press F9 to open the C/AL Editor.
- Select and copy all of the content from the OnAfterGetRecord() section.
- Go to your report and select the Top Dataltem.
- Click **View→C/AL Code** or press F9 to open the C/AL Editor.
- Paste the code copied earlier into the OnAfterGetRecord() section below any existing content.

Configuring the Modified Report Settings

You should follow the standard report configuration settings in [section 7.2](#) and implement the specific step below in addition.

Remove the code line in red below from the top of the OnAfterGetRecord() section:

```
Separator := '\';  
Customer.GET("Sales Header"."Sell-to Customer No.");
```

This is because the report already contains the GET at the top of the report so when sourcing data from NAV you can use commands like Vend."No." or Vend."E-mail" instead.

12.2 Alternate Archiving Strategies

We have provided below some sample archiving strategies and the code required to implement them. We recommend that you use one the structures detailed below as they are those available in later versions of Zetadocs for NAV and will ensure upgrade compatibility.

Breaking Down the Archive Folder String

Existing string in template:

```
ArchiveFolder := STRSUBSTNO('sharepoint: http://%1,%2/%3/', 'ds-srv-01', 'archive', Datefolder);
```

String Breakdown

This section of the string identifies that we are archiving to SharePoint

sharepoint:

`http://%1,%2/%3/`

This section of the string identifies how many parts the string is going to have e.g.

`%1<SharePoint site>`

`%2<doclib>`

`%3 Datefolder`

Therefore when constructed it becomes: `http://<SharePoint site>, <doclib>/YYYY-MM-DD`

Or once completed for example: `http://zdnv-serv, archive/2009-03-30.`

Non SharePoint Based Archiving

Whilst SharePoint archiving offers a number of benefits in circumstances where it is not available it is possible to archive to other folder locations instead. In the example we are working through below we are going to set the archive to the local hard drive although a network location would be equally valid.

Target Archive location:

`C:\Archive`

Archive folder structure: Company/Date

Date structure: YYYY-MM-DD

Modifications required

To get items to archive to a folder location we first need to review our target location and structure and how this affects the string. The slashes also need replacing as a non web based address will need to use backslashes in its folder address.

Modified String:

`ArchiveFolder := STRSUBSTNO('%1\\%2\\%3\\','C:\Archive', Customer.Name, Datefolder);`

`%1'C:\Archive'`

`%2 Customer.Name`

`%3 Datefolder`

Once run this would give an output folder address in the form `C:\Archive\Sample Company\2009-07-20.`

SharePoint Archive Structure

When using Zetadocs with NAV versions 4, 5 and 6 users are provided with options within NAV which allows them to structure their archive using a combination of the Company, DOCTYPE and Date. This means items can be stored using any of these individually or in combination and it is recommended that you follow this model as well as possible to ensure future upgrade compatibility.

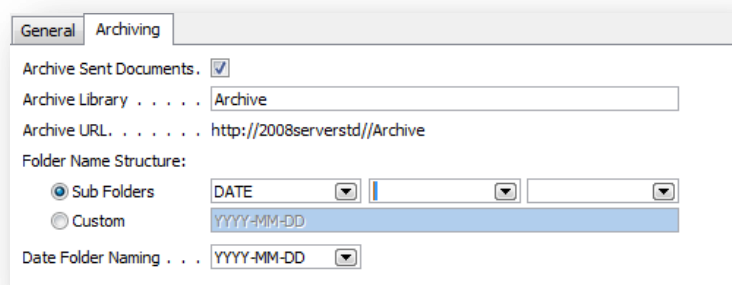


Figure 7 – Archiving Options Tab available to NAV version 4 and later customers

Choosing your folder Structure

Folder Name Structure: Subdivides archived documents into subfolders of the SharePoint document library based on information from the sent record.

- **COMPANY** – The recipient NAV *Customer* name.
- **DATE** – The Date the document was processed.
- **DOCTYPE** – The Archive Document Type as specified for the current Zetadocs Report.

Date Folder Naming– Allows you to specify the format of the date folder structure in the SharePoint archive. E.g. YYYY-MM-DD, DD-MM-YYYY, MM-DD-YYYY etc.

From these options construct a suitable archiving structure, in our worked example below use the structure Company/Date/DOCTYPE for the Sales Order report. For date we will use the format YYYY-MM-DD. Compared to the default contained within the template we are adding some additional structure, as such we need to use more than the 5 components which currently make up the string. This example also requires us to source the recipient's organization name and the type of document being sent. The recipient organization is sourced in the Sales Order report using Customer.Name and the Document Type is Sales Order.

Elements of the Archive folder string

%1 <SharePoint site>

%2 <doclib>

%3 Customer.Name

%4 Datefolder

%5 'Sales Order'

Assembling the Archiving String

The existing string only uses 3 components and needs expanding:

`http://%1,%2/%3/`

`http://%1,%2/%3/%4/%5'`

`('sharepoint: http://%1,%2/%3/%4/%5/', '<SharePoint site>', '<doclib>', Customer.Name, Datefolder, 'Sales Order');`

Therefore when constructed it becomes: `http://<SharePoint site>, <doclib>/Sample Company/YYYY-MM-DD/'Sales Order'/`

Or once completed: `http://ds-srv-01, archive/Sample Company/2009-03-30/Sales Order/`

Changing the Date Structure

The existing example uses a YYYY-MM-DD structure, this can be adjusted by moving the elements around in the Datefolder string shown below.

Output YYYY-MM-DD or 2009-07-09

`Datefolder := STRSUBSTNO('%1-%2-%3',YYYY,MM,DD);`

Output DD-MM-YYYY or 09-07-2009

`Datefolder := STRSUBSTNO('%1-%2-%3',DD,MM,YYYY);`

12.3 Local Template Folder

If you wish to use templates that are stored locally on the machine then this is possible, however it does mean that any updates would have to be repeated in each local area. To get Zetadocs to search for templates in a local folder simply change the template path field as shown below with the text in red needing to be replaced with the folder location you have copied your templates too. Note that due to the way NAV processes reports you are required to use double backslashes “\\” instead of simple ones which would normally be used.

`TemplatePath := STRSUBSTNO('C:\\Templates\\ZD-Sales Credit Memo Template.zdt', NetPathStart);`

12.4 SharePoint Content Types

During the SharePoint Extensions install you will have created a number Zetadocs Content Types in your SharePoint site which are displayed below. This table should form the reference when selecting Archive Document Types to ensure items are archived correctly. A Content Type is a concept that allows you to 'mark' documents as being of a particular type. For example, you might have a content type of 'Sales

Invoice' or 'Purchase Order' for those specific report types. By using Content types you can create a SharePoint archive which is more effective at locating and retrieving documents when searched.

Content Type Name
Purchase Finance Charge
Purchase Order
Purchase Return Order
Sales Credit Memo
Sales Finance Charges
Sales Invoice
Sales Quote
Sales Service-Repairs
Statement
Remittance Advice Journal
Purchase Credit Memo
Purchase Invoice
Purchase Misc Charge
Sales Back Order
Sales Debit Memo
Sales Fulfillment Order
Sales Order
Sales Return Order
Sales Warranty

12.5 Sales Order Report Example

Below is an example of a modified Sales Order report with the appropriate values throughout for our example system.

Zetadocs Embedded Commands – OnPreDataItem()

```
SETRANGE(Number1,1);
```

Zetadocs Embedded Commands – OnAfterGetRecord()

```
Separator := '\';
Customer.GET("Sales Header"."Sell-to Customer No.");

IF NOT (BatchCommandAdded) THEN
BEGIN
    EmbComms := STRSUBSTNO(Batch,'Sales Orders') + Separator;
    EmbComms := EmbComms + STRSUBSTNO(BatchPreview,'YES') + Separator;
    EmbComms := EmbComms + STRSUBSTNO(StartDocument) + Separator;
    BatchCommandAdded := TRUE;
END
ELSE
BEGIN
    EmbComms := STRSUBSTNO(StartDocument) + Separator;
END;

EmbComms := EmbComms + STRSUBSTNO(Batch,'Sales Orders') + Separator;
EmbComms := EmbComms + STRSUBSTNO(BatchPreview,'YES') + Separator;
EmbComms := EmbComms + STRSUBSTNO(StartDocument) + Separator;
EmbComms := EmbComms + STRSUBSTNO(DeliveryOption,'Email, Print') + Separator;
EmbComms := EmbComms + STRSUBSTNO(ExcludePage) + Separator;
EmbComms := EmbComms + STRSUBSTNO(Email,Customer."E-Mail") + Separator;
EmbComms := EmbComms + STRSUBSTNO(Fax,Customer."Fax No.") + Separator;
EmbComms := EmbComms + STRSUBSTNO(Printer,'PrinterName') + Separator;
```

```

TemplatePath := STRSUBSTNO('%1%2', NetPathStart, 'ds-srv-01\\Templates\\ZD-Order Confirmation
Template.zdt');
EmbComms := EmbComms + STRSUBSTNO(Template, TemplatePath ) + Separator;
EmbComms := EmbComms + STRSUBSTNO(Name, Customer.Contact ) + Separator;
EmbComms := EmbComms + STRSUBSTNO(Organization, Customer.Name ) + Separator;

//Optional Fields

//Optional File Naming
FileName := STRSUBSTNO('Sales Order %1', "Sales Header"."No.");
EmbComms2 := EmbComms2 + STRSUBSTNO(OutputFileName, FileName ) + Separator;

//Optional Addressing
EmbComms2 := EmbComms2 + STRSUBSTNO(EmailBCC, 'bccaddress@email.com' ) + Separator;
EmbComms2 := EmbComms2 + STRSUBSTNO(EmailCC, 'ccaddress@email.com' ) + Separator;
EmbComms2 := EmbComms2 + STRSUBSTNO(EmailFrom, 'from@email.com' ) + Separator;

//Optional Archiving
EmbComms2 := EmbComms2 + STRSUBSTNO(ZDArchiveDocument, 'YES' ) + Separator;

//
//Need to format the date to be 01 not just 1 for days and months under 10
//
day := DATE2DMY(TODAY,1);
IF day < 10 THEN
DD := STRSUBSTNO('0%1', day)
ELSE
DD := STRSUBSTNO('%1', day);

month := DATE2DMY(TODAY,2);
IF month < 10 THEN
MM := STRSUBSTNO('0%1', month)
ELSE
MM := STRSUBSTNO('%1', month);

YYYY := STRSUBSTNO('%1', DATE2DMY(TODAY,3));
Datefolder := STRSUBSTNO('%1-%2-%3',YYYY,MM,DD);
ArchiveFolder := STRSUBSTNO('sharepoint: http://%1,%2/%3/', 'ds-srv-01', 'archive', Datefolder);
EmbComms2 := EmbComms2 + STRSUBSTNO(ZDArchiveFolder, ArchiveFolder ) + Separator;
EmbComms2 := EmbComms2 + STRSUBSTNO(ArchiveDocumentType, 'Sales Order' ) + Separator;

EmbComms2 := EmbComms2 + STRSUBSTNO(FieldRecNum, "Sales Header"."No." ) + Separator;
EmbComms2 := EmbComms2 + STRSUBSTNO(FieldCompNum, Customer."No." ) + Separator;
//End Optional

```

Zetadocs Embedded Commands – OnPostDataItem()

```

CurrReport.NEWPAGE();

```

12.6 Dynamic Fields

Zetadocs allows you to define fields that can be included within the delivery information in the recipients, subject and body text of the email. You will need to create a corresponding text constant in the C/AL Globals section for each using the existing FieldRecNum and FieldCompNum text constants as patterns for how to proceed.

To create a field use the command:

- %%[field: «fieldname», «fieldvalue»]

Where:

«fieldname» is any descriptive word for your field, but with no spaces e.g. firstname
«fieldvalue» is the value of the field.

For example:

- %%[field: firstname, Harry]

To use the field within the email, simply include it using the command:

- %%[«field name»]

For example:

- %%[firstname]

In this example, the field firstname would be replaced with the value Harry. It is also possible to give a default value to be used for the field if it has not been defined, using the command:

- %%[«fieldname», «default value»]

For example:

- %%[firstname, Customer]

In this example, if the value of firstname has not been set it would be replaced with Customer instead.

Dynamic fields can be combined with the other embedded commands. You can use these fields to put merge values in any set embedded command for example:

- %%[Field, name, Harry]
- %%[Field, company, Widgets Inc.]
- %%[OutputFilename: %%[company] - %%[name]]

The output filename of the document that includes the above embedded commands will be “Widgets Inc. – Harry”. As before, you can also add a default value.

For example:

- %%[OutputFilename: %%[company] - %%[firstname, Customer]]

So the output filename of the document this time will be “Widget Inc. - Customer”, since the dynamic field *firstname* was not defined in the document.

When field commands are used in conjunction with the archiving commands for SharePoint, a third parameter denotes that the field value should be passed as metadata for the document. This is done by specifying the following:

- %%[Field: «fieldname», «fieldvalue», ARCHIVE]