without a doubt

Email templates

How to configure advanced email templates with Partners & WMS Parties.

Boltrics

Introduction

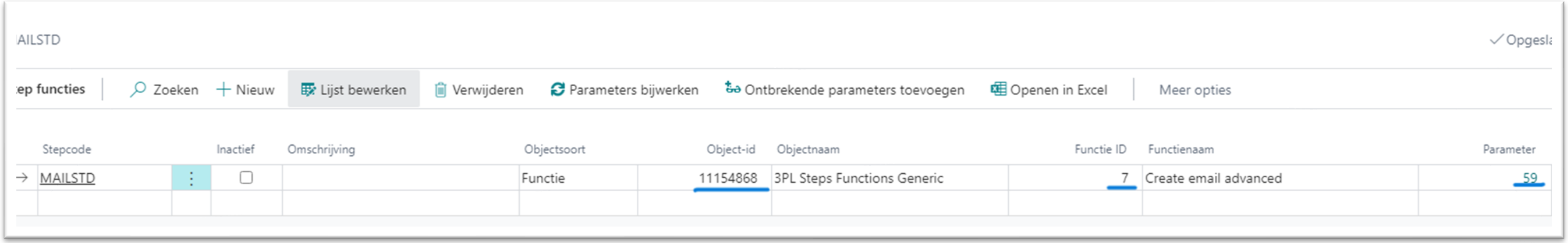
This guide will provide you with all necessary information to configure an advanced automated email message (step), which is triggered through the status template of a document. Please note although the manual is quite straight forward, some basic knowledge concerning Business Central is required in order to successfully implement it as a solution.

If you have any concerns regarding a lack of skills or knowledge, please do not proceed any further with this guide. No additional support is provided for configurations which are not implemented by our consultants.

Before configuring / implementing anything in PROD please test it in RAPP first!

1. Creating the step

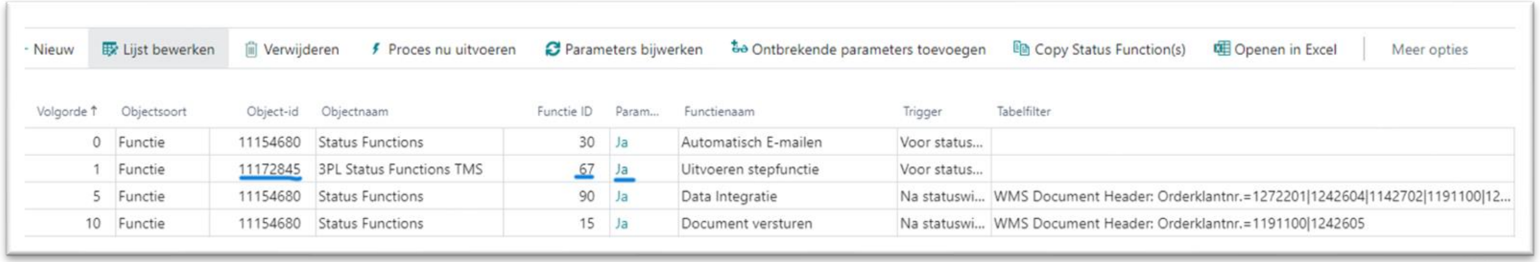
1. Go to “Steps” (“Alt+Q”).
2. Create a new step and give it a proper name e.g., “MAILSTD” (Function + Order type), and write it down for later reference.
3. Click functions from the ribbon.
4. Select “Function” as the Object Type combined with Object-Id “11154868 “and Function-ID “7”, and leave the line to save.
5. Click on the hyperlinked Parameter number.



6. Please fill in the necessary parameters. Please note that the correct PARTNERCODE is selected. This code should contain the recipient address for the email. (See chapter “Creating the Partner codes”) or return to this chapter once you have created those (I’ll remind you).
7. Please leave the parameter “SMTP_BACKGROUND” empty for now, just until we finished testing.

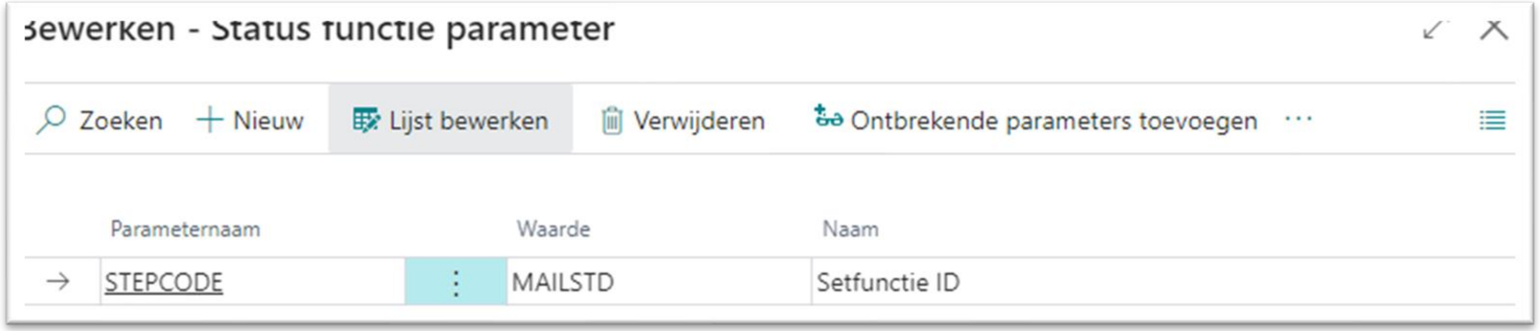
2. Preparing the status template

1. Go to “Status Templates” (“Alt+Q”).
2. Select the designated order type.
3. Select the status in which you want the email to be triggered e.g., “65-Transport Docs” and add a new parameter.
4. Please select Object-ID “11172845” and Function-ID “67 “and leave the line to save.
5. Click on the blue hyperlinked “yes”, under the column parameters.



Volgorde ↑	Objectsoort	Object-id	Objectnaam	Functie ID	Param...	Functienaam	Trigger	Tabelfilter
0	Functie	11154680	Status Functions	30	Ja	Automatisch E-mailen	Voor status...	
1	Functie	11172845	3PL Status Functions TMS	67	Ja	Uitvoeren stepfunctie	Voor status...	
5	Functie	11154680	Status Functions	90	Ja	Data Integratie	Na statuswi...	WMS Document Header: Orderklantnr.=1272201|1242604|1142702|1191100|12...
10	Functie	11154680	Status Functions	15	Ja	Document versturen	Na statuswi...	WMS Document Header: Orderklantnr.=1191100|1242605

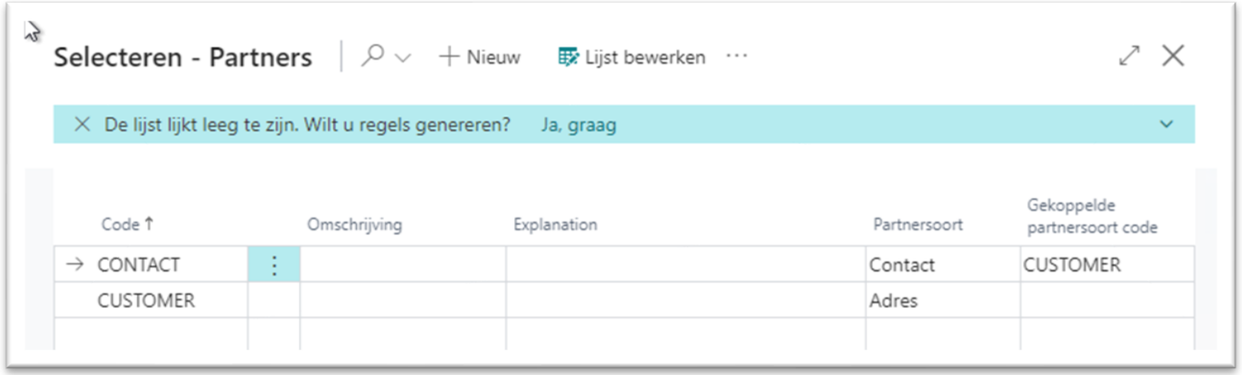
6. Enter the value of the step code which we created under 1.2 (MAILSTD).



Parameternaam	Waarde	Naam
STEPCODE	MAILSTD	Setfunctie ID

3. Creating the Partner codes

1. Please note that the to-be-created partner codes are free to be named, however, please ensure that they make sense to you, your colleagues and quite possibly our support department for future reference. Examples might be customers, vendors, supplies, shippers, etc.
2. Go to “Partners” (“Alt+Q”).
3. Add new partner codes.
4. For each new partner code, please select the proper source table under “partner type” (mandatory) and coupled partner type (if required) .



5. Coupled partner type codes create a filter on the first table (contact) with information on the second (customer).
6. Please fill the partner code from chapter one in the step parameters, if you haven’t done so yet.

4. Configuring the WMS Party Template

1. Go to "WMS Party Template" ("Alt+Q").
2. Create a new code through the ribbon, once again it's free to be named. Please check 3.1 for advice.
3. On the WMS Party subpage, select the template you just created, I used the order type as a reference:

Code ↑	Omschrijving
STD	

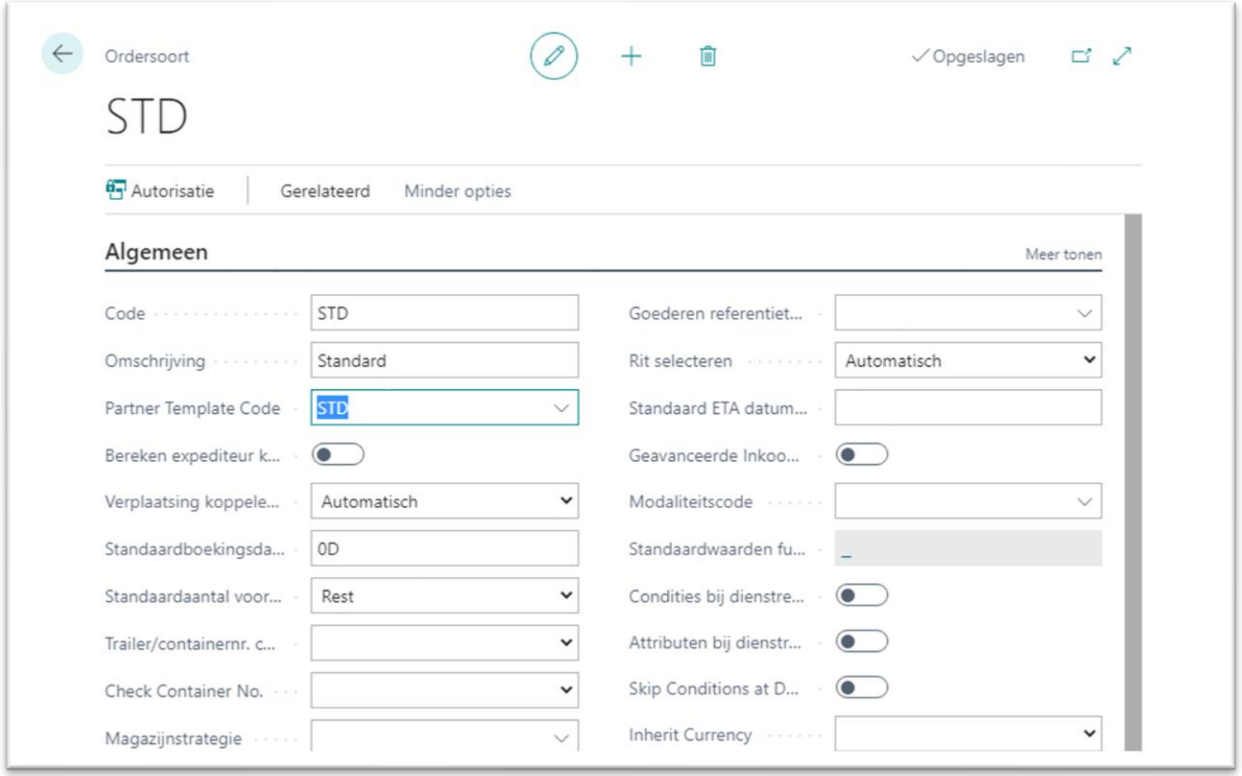
4. Now connect the partner codes to their respected fields:

WMS Party Template Subpage | Beheren

Code ↑	Regelnr. ↑	Omschrijving	Klant	Orderleveran...	Geadresseerde code	Verladerscode	Agentcode	Carrier adrescode	Verkoper	Shipping Agent Code	Sell-to Contact No.	Klant (MAWB)	Ship-To Address No.
STD	10000		CONTACT										CUSTOMER

5. Initializing on order type

1. Go to “Order type” (“Alt+Q”).
2. Select the order type in question and click on “edit” in the ribbon.
3. Select the created “WMS Party Template” created in chapter 4 under the Partner Template Code.



6. Testing current operations

Congratulations! Most of the configurations have been completed by now, all you have remaining is to test its functionality and update your database. This to provide this new functionality with the necessary information and enable it to function.

1. Create a new order of the type we have used throughout this exercise e.g., “STD”
2. When enabled, the fact box “Partner“ should now indicate all created partner codes along with the general information of each partner.
3. Now trigger the status in which we configured the step to be triggered.

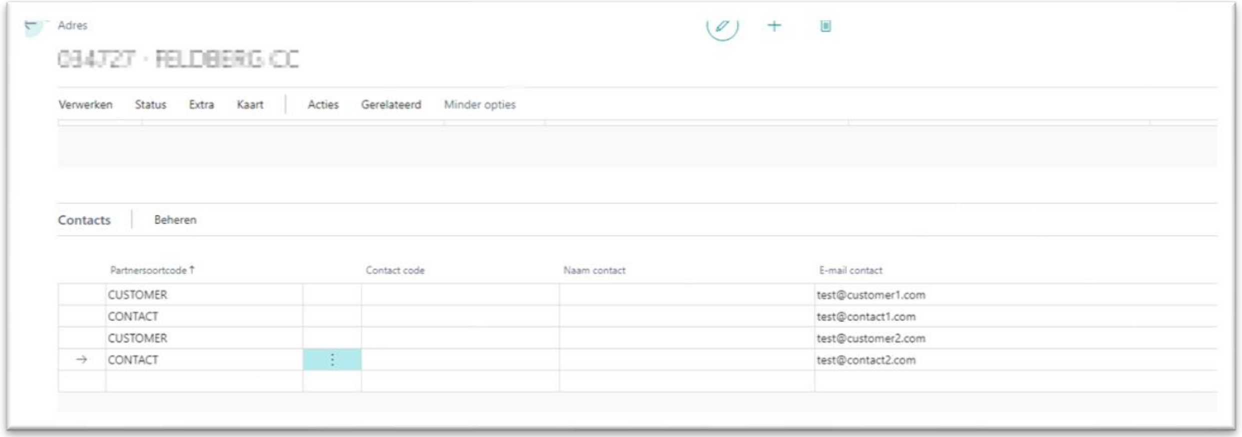
If all went well, you should now see an email form created based on your email template (selected in chapter one) which “recipient address” should be filled with the email address(-es) of the partner code you selected in chapter 1.

7. Final note

Once you have been able to fully test all functions, please do not forget to enable the parameter "SMTP_BACKGROUND", mentioned in chapter one if you desire such functionality.

Furthermore, one last detail has been missed. When filling email addresses on your master data you should know that often multiple addresses can be added through a "; "(please note the space) as a separator between email addresses. The addresses have another special trick that one could take advantage off:

Here you can set up each individual partner code with its designated contact based on that address:



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Boltrics

Galileïlaan 23B
6716 BP Ede
+31 (0)318 742 550
www.boltrics.com
info@boltrics.nl