



ebs-plus

Installation and Configuration

File/Version:

0.1

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1 Introduction

This guide describe the process of installing and configuring **ebs-plus**.

1.1 Pre-Requisites:

Before installing the solution, make sure that the following pre-requisites are met:

1. The solution requires **Microsoft Dynamics NAV R2, Cumulative Update 8** for **Australia**. It is not designed to work with the older versions of NAV.
2. The solution is targeted for the **Australian Market** and is not suitable for using in other countries and regions.
3. The solution requires **Microsoft Dynamics NAV 2013 Starter Pack** license for installation.
4. Microsoft Dynamics 2013 R2 **Help Server** should be installed for the installation of the help files for the ebs-plus package.

2 Installation

ebs-plus package provides the standard NAV .fob file for the installation of the features. To install the solution find the file **ebs-plus-1.0.0-nav-2013-r2-cu8.fob** in the **Objects** folder of the ebs-plus package.

Use the Microsoft Dynamics NAV Development Environment to install these objects to the Object Designer. Make sure you hit the **Replace All** button before importing the objects so that NAV does not try to merge any of the objects which can lead to unexpected results.

To install end user help, copy the files from the Help folder of the package to the to the **help/en** and **help/en-AU** folder of the NAV Help web application installation folder.

3 Rapidstart Package

ebs-plus comes with a rapid start package that configures the setup tables with default data. This would create email templates for both customer statement and vendor remittances and select them as active templates for the email as well. Note that after running the package you should go replace default values for fields like From Address and From Name to more appropriate values for your organization.

When you install the package. It also creates a configuration questionnaire. Use this questionnaire to select any new templates that you have created for the emails.



4 Uninstall

NOTE: To uninstall the solution you will need a developer license with permissions to remove the installed fields and objects.

Following is the list of objects that are created/modified by ebs-plus installation:

Object Type	Object ID	Object Name
Table	18	Customer
Table	23	Vendor
Table	16014930	EBS Plus Setup
Table	16014931	EBS E-Mail Setup
Table	16014932	EBS E-Mail Log
Report	16014969	EBS Purge E-Mail Log
Report	16014970	EBS Send Remittance by Email
Report	16014971	EBS Send Statement by Email
Codeunit	16014950	EBS Email Management
Page	21	Customer Card
Page	26	Vendor Card
Page	16014950	EBS Plus Setup
Page	16014951	EBS E-Mail Setup Card
Page	16014952	EBS E-Mail Setup List
Page	16014953	EBS Plus Communicator Log
Page	16014954	About EBS Plus
Menusuite	1051	Dept - EBS

To uninstall the solution, follow the following steps.

1. Delete all data from the following fields of Vendor (Table: 23) table and then delete the fields:
 - a. Account Correspondence Type (Field: 16014950)
 - b. Accounts Email (Field: 16014951)
2. Delete all data from the following fields of Customer (Table: 18) table and then delete the fields:
 - a. Account Correspondence Type (Field: 16014950)



- b. Accounts Email (Field: 16014951)
3. Delete all data from the following tables and then delete the table objects:
 - a. EBS E-Mail Log (Table: 16014932)
 - b. EBS E-Mail Setup (Table: 16014931)
 - c. EBS Plus Setup (Table: 16014930)
4. Remove the following objects using Object Designer
 - a. Reports:
 - i. EBS Purge E-Mail Log (16014969)
 - ii. EBS Send Remittance by Email (16014970)
 - iii. EBS Send Statement by Email (16014971)
 - b. Codeunits:
 - i. EBS Email Management (16014950)
 - c. Pages:
 - i. EBS Plus Setup (16014950)
 - ii. EBS E-Mail Setup Card (16014951)
 - iii. EBS E-Mail Setup List (16014952)
 - iv. EBS Plus Communicator Log (16014953)
 - v. About EBS Plus (16014954)
 - d. MenuSuite:
 - i. Dept – Partner (1080)
5. Remove the records created in the Standard Text (Table: 7) for the email setups.
6. Remove the ebs-plus help files from **help/en** and **help/en-AU** folder of the NAV Help web application installation folder.

5 ebs-plus Setup

5.1 Customer Card

There are two new fields added to the customer card under communication.



1. **Accounts Correspondence Type:** Whether the customer prefers to receive the statement by email or hard copy.
2. **Accounts Email:** Email address to which the statement will be sent.

The e-mail will only be sent to those customers with an Accounts Correspondence Type of “E-mail”. If the field is set to “Hard Copy”, the statement will be printed to the default printer. No statements will be printed if the E-Mail Only flag is ticked in the report options.

5.2 Vendor Card

Similar to Customer, there are two new fields added to the vendor card under communication.

1. **Accounts Correspondence Type:** Weather the vendor prefers to receive the payment receipt by email or hard copy.
2. **Accounts Email:** Email address to which the payment receipt will be sent.

The behavior of these settings is identical to that of the customer settings.

5.3 SMTP Setup

In order to send batch e-mails, the SMTP Mail Setup must be configured. This is a standard NAV setup and can be found under:

[Departments / Administration / IT Administration / General / SMTP Mail Setup](#)

For more details on this setup refer to the NAV manuals.

5.4 EBS Plus Setup

The EBS Plus Setup screen is available in the NAV menu via:

[Departments / Administration / IT Administration / General / EBS Plus Setup](#)

On this screen you need to specify the **Email Setup** codes for customer statement and vendor remittances. The following section describes how to create email setup codes.

5.5 EBS Plus Email Setup

The EBS Email Setup screen is available in the NAV menu via:

[Departments / Administration / IT Administration / General / E-Mail Setup List](#)

On the email setup card, the user needs to provide basic setups for sending an email, the following table describe each field and its purpose.

Field	Description
Code	A unique identifier for this template



Description	The description of the template
From E-Mail Address	The From E-mail Address that will be used when sending e-mails with this template
From Sender Name	The name of the sender that is used on e-mails sent using this template; if this is left blank the From E-Mail Address is used
CC From Address on E-Mails	Include the From E-Mail Address on all e-mails sent using this template. Since the bulk e-mail feature uses SMTP, the e-mail does not go into a Sent Items folder; this therefore assures that a copy of the e-mail sent to each recipient is kept
Standard Text Code	The Standard Text Code that is used to generate the Subject and Body text of the e-mail for this template
Standard Text Name	Shows the name of the Standard Text record relating to the code selected above.

5.6 Standard Text Code

The Standard Text Code and the Extended Text Lines related to the standard text are used to format the subject and body of the e-mails in selected areas.

The **Description** on the Standard Text Code is used to create the subject of the e-mail. There are two placeholders for the e-mail subject:

%1 = Document No.

%2 = From the Company Information screen, the **Name** (and **Name 2** if specified) fields

If a Standard Text Code is not supplied for a particular e-mail type, the subject on the e-mail will be set as the name of the PDF file attached to the e-mail.

The e-mail body is generated based on the Extended Text Lines specified against the Standard Text Code. These are entered in the Standard Text Codes screen, via the Extended Texts button on the Navigate tab. The General section can be left blank.

The Lines section is where the Body text of the e-mail is entered. Each line can only take a limited number of characters, but each line is appended to the last and added to the body of the e-mail. The
 placeholder indicates a line break, as the Body of the e-mail uses HTML. Other HTML code can also be used in this area to format the font and other aesthetic elements of the e-mail text.