

# ***INTOGRATE Navision – Mail***

***Lotus Notes Integration Kit***

***Version 1.7***



**INTO,INT**



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# ***1. Introduction***

## ***1.1 Integration of Navision Mail with Lotus Notes***

The standard version of Navision only supports Microsoft Outlook as mail client. Intoint's "INTOGRATE Navision - Mail" integration kit enables the use of the e-mail in Lotus Notes from Navision.

The integration kit for Navision is used in the same way as the Microsoft Outlook integration in Navision. Further information about the mail possibilities can be found in the Navision documentation from Microsoft Business Solutions.

This manual is based on Microsoft Business Solutions-Navision v3.70 (EN). This means that screen dumps and the menu items, etc. were taken from this version.

## ***1.2 Disclaimer***

To prevent any side effects in your existing Navision any changes to your Navision installation should be verified by the authority responsible for your Navision application (normally your Navision vendor). This includes hot fixes, patches, upgrades etc.

## ***1.3 Target audience***

This manual can be used by system administrators, developers as well as Navision users.

Navision developers can find additional information in Appendix A where adjustments to the standard Navision Mail module are described.

## ***1.4 Terminology***

In the following sections, elements of Navision, references to menus, etc. are referred to as described in the below table:

|   |   |
|---|---|
| <KEY>   | Refers to a key on the keyboard. For example, <ENTER> means that you must press the Enter key.              |
| Windows Start menu<br> | The Windows Start menu is typically located at the bottom left corner of the screen.                        |
| 'Menu\sub-menu\menu item'   | Refers to a menu selection. For example, 'File\Open' means that you must click 'Open' in the 'File' menu.   |
| "c:\Lotus\Notes"  | Refers to a path to either a file or a directory. Notice that the style resembles that of a menu selection. |
| <i>NavisionElement</i>  | Navision elements are referred to in italics, e.g. the code unit <i>Mail</i> .                              |
| [button]  | Refers to a button on the screen. For example, [OK] refers to a button with the text 'OK'.                  |

## **1.5 Components**

The Integration Kit consists of three overall components:

- The Integration Kit. This component handles the underlying communication between Lotus Notes and Navision.
- COM component which handles the overall communication between Navision and the Integration Kit.
- Mail component used for sending e-mails and reports from Navision.

### **1.5.1 Integration Kit**

The Integration Kit mainly consists of one file: erp2ln.dll.

This file handles all communication between Navision and Lotus Notes.

The Integration Kit can also be used for other types of integration. For example, it is also used for integration between Lotus Notes and CONCORDE XAL or Navision Axapta.

### **1.5.2 COM component**

The COM component enables use of the Integration Kit from Navision by means of COM technology. This component is the link between the Integration Kit and the rest of Navision.

### **1.5.3 Navision Mail component**

Navision uses this component to send e-mails. It replaces the part normally used for Microsoft Outlook. This means that no major adjustments are required in order to switch from Outlook to Lotus Notes.

## ***2. Program installation***

The Integration Kit should normally be installed from a workstation where Lotus Notes and Navision clients are installed. All descriptions and tasks are based on the assumption that they are carried out from a local workstation.

### ***2.1 Before you start***

#### ***2.1.1 System requirements***

The following software is necessary:

- Microsoft Windows Workstation/Server 98, NT, 2000, XP or VISTA.
- Lotus Notes client version 5.02c or newer<sup>1</sup>.
- Microsoft Navision Attain DK 3.60, Microsoft Business Solutions-Navision DK 3.70, Microsoft Business Solutions-Navision DK 4.0, Microsoft Dynamics NAV 5.0 or Microsoft Dynamics NAV 2009.

### ***2.2 Check list***

Before you begin the installation of the Integration Kit, it is recommended that you carry out the following points. They may prevent potential problems not related to the Integration Kit itself.

- Start your local Lotus Notes client and logon with you password if required. If any errors occur at this stage, make sure to solve them before you use the integration kit.
- Since Navision uses the local Lotus Notes client for e.g. sending e-mails, the user will be prompted for a password for Lotus Notes when starting Navision regardless of whether the Lotus Notes client has been started or not. This can be changed so that the entering of a password is not necessary if the Lotus Notes client has already been started. Start your Lotus Notes client and select the menu *'File\Tools\User ID'*. Mark *'Don't prompt for a password from other Notes-based programs..'*. Close the dialog box by clicking [OK]. After this, the user will not be prompted for a Lotus Notes password when starting Navision. (However, this requires Lotus Notes to be running in the background and the user to be logged in).
- It is recommended that you disable visible notification in Lotus Notes. This can be done from the menu *'File\Preferences\User preferences..'*. Select the *'Mail and News'* icon on the left side of the dialog box. Deselect *'Visible Notification'* in the *'Receiving'* section. This change is advantageous because Lotus Notes is locked when a message indicating that new mail has arrived is being displayed. The Integration Kit can thus not access Lotus Notes as long as the message is shown.
- Start Navision and make sure that you have a valid user name and password for Navision. Do not forget to close Navision before you continue with the installation.

### ***2.3 Installation of the integration Kit***

Insert the CD called "INTOGRATE Navision - Mail". If the installation program does not start automatically, double-click "setup.exe" in the root of the CD (Click 'Run' in the Windows Start menu and type "D:\setup.exe" if the CD-ROM drive is the D-drive).

Follow the installation guidelines on the screen. For a detailed description of the installation, see the section "Manual installation" in the whitepaper "Technical Guidance - INTOGRATE Navision.pdf".

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<sup>1</sup> Most features will work in older versions of Lotus Notes. However, the mail function of the CRM module will be limited.

## **2.4 License file**

To use INTOGRATE a license file must be installed.

This file can be obtained either by purchasing a license for INTOGRATE or by downloading a demo version from our website (<http://www.intograte.com>).

The license file must be copied to the directory where the product was installed (the directory where "erp2In.dll" is located).

## **2.5 Installation of Navision elements**

The following instructions are based on the English language layer (United States). If Navision is set to another language you can switch to English by selecting the menu item 'Language' in the 'Functions' menu and select English(United States).

1. Start Navision and select 'Object Designer' in the 'Tools' menu (short cut key: [SHIFT]+[F12])
2. Select 'Import' in the 'File' menu.
3. Find the directory where you installed INTOGRATE and open the sub-directory "Navision" (INTOGRATE is usually installed in "C:\Program Files\INTOGRATE Navision").
4. Select the file "INTOGRATE Navision - Mail - X.XX.fob" and click [Open].

X.XX is determined by your version of Navision:

- 3.60 Microsoft Navision Attain 3.60
- 3.70 Microsoft Business Solutions-Navision 3.70
- 4.00 Microsoft Business Solutions-Navision 4.0
- 5.00 Microsoft Dynamics NAV 5.0
- 5.10 Microsoft Dynamics NAV 5.0 Servicepack 1
- 6.00 Microsoft Dynamics NAV 2009

If Navision has modifications, these must be handled before the importing can continue.

5. Restart Navision in order for the changes to take effect.

## 3. Setting up Navision and Lotus Notes

As INTOGRATE for Navision fully replaces the corresponding Outlook functionality, there is no need for any special setup in Navision to be able to use the application.

### 3.1 Setting up Lotus Notes for reports by e-mail

If you plan to send reports from Navision a minor change must be made in Lotus Notes. Without this change, report attachments will have unreadable names.

**Instructions on how to make these changes will be delivered with the licensed version of INTOGRATE. These instructions can be found in the document "Manual - INTOGRATE Navision - Reports by e-mail" found in the root directory of the installation CD.**

In some cases it is not necessary to install the patch. To decide whether the patch should be applied try to generate a simple report from Navision. Install the patch if the result is similar to the following picture:



After the patch has been installed in Lotus Notes a report will look similar to this:



## 4. Getting started

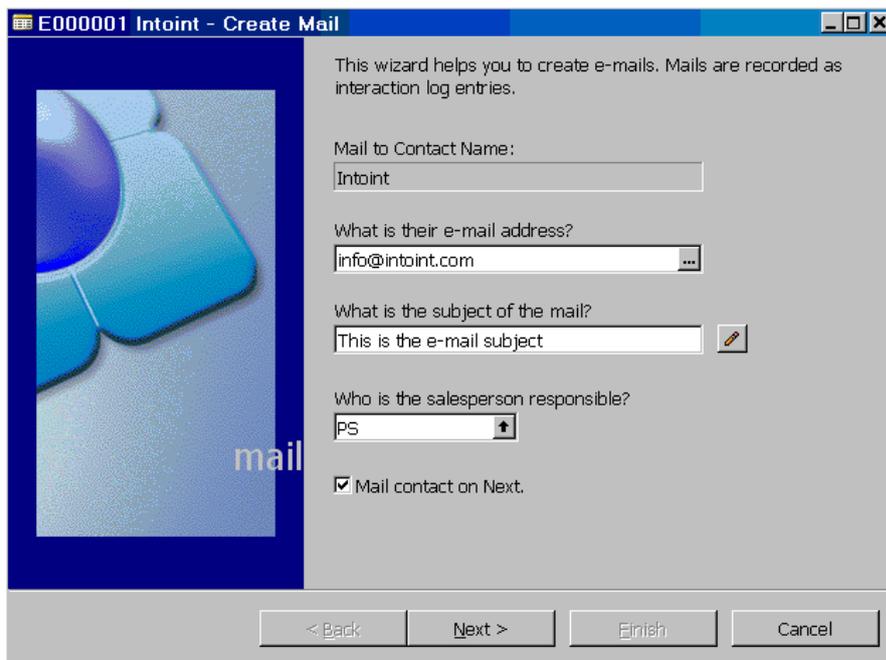
This section describes how to get started using the integration between Lotus Notes and Navision. For the next few sections, you are recommended to keep your Lotus Notes running in the background.

### 4.1 Sending e-mails

The following example describes how to send one e-mail to a customer in the customers table. Start by opening the customer card for a customer (select the menu item 'Sales & Receivables\Customers' in the 'Main Menu').

Switch to the 'Communication' tab and enter an e-mail address in the 'E-Mail' field if it is not already filled in.

To send an email, click the  icon. This will open the following 'Create Mail' dialog:



E000001 Intoint - Create Mail

This wizard helps you to create e-mails. Mails are recorded as interaction log entries.

Mail to Contact Name:  
Intoint

What is their e-mail address?  
info@intoint.com

What is the subject of the mail?  
This is the e-mail subject

Who is the salesperson responsible?  
PS

Mail contact on Next

< Back   Next >   Finish   Cancel

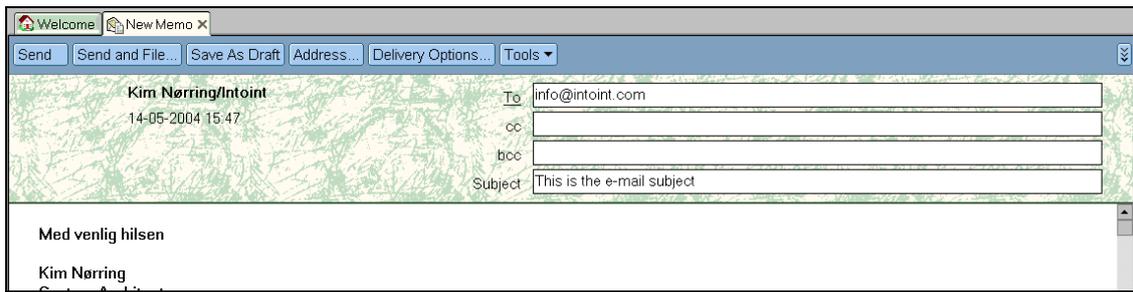
The field with the e-mail address is already filled in with information from the customer card. If the e-mail is to be sent to more people, separate the addresses by a comma (e.g. sales@intoint.com, info@intoint.com).

Enter the e-mail subject in the field called 'What is the subject for the mail?'. This will automatically be transferred to the 'Subject' line of the Lotus Notes e-mail.

If you deselect 'Mail contact on Next', the e-mail will not be created and shown in Lotus Notes. This feature can be used if the e-mail has already been sent from Lotus Notes and all that is needed is the creation of an Interaction Log Entry..

Click [Next] to create the e-mail in Lotus Notes.

An example of how the e-mail will look in Lotus Notes:





# ***Appendix A Adjustments to Navision***

The below table describes all the elements in Navision which are adjusted or added by the Integration Kit (adjustments are described in relation to the standard Mail module).

All code units added to existing code units are surrounded by the following:

```
// INTOGRATE Navision: START
```

```
.... code modifications
```

```
// INTOGRATE Navision: END
```

Modifications to local and global variables are not described in the code, but can be seen in the text versions of the import files. These can be found on the INTOGRATE CD or in the installation directory.

## ***New elements***

| Object type | Object                  | Id    | Comments      |
|-------------|-------------------------|-------|---------------|
| Code unit   | <i>Lotus Notes Mail</i> | 79540 | New code unit |

## ***Adjustments to existing elements***

| Object type | Object      | Id  | Comments  |
|-------------|-------------|-----|---|
| Code unit   | <i>Mail</i> | 397 | Most methods are modified by the Integration Kit. |