

# ***INTOGRATE NAV – Mail***

***Lotus Notes Integration Kit***

***For Dynamics NAV***

***Version 2.3.1***



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# ***1. Introduction***

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

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

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

This manual is based upon Dynamics NAV 2013/2015/2016 (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 NAV any changes to your NAV installation should be verified by the authority responsible for your NAV application (normally your NAV vendor). This includes hot fixes, patches, upgrades etc.

## ***1.3 Target audience***

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

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

## ***1.4 Terminology***

In the following sections, elements of NAV, 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.
'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>NAVElement</i>	NAV 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 NAV.
- COM component which handles the overall communication between NAV and the Integration Kit.
- Mail component used for sending e-mails and reports from NAV.

### **1.5.1 Integration Kit**

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

This file handles all communication between NAV 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 Dynamics AX.

### **1.5.2 COM component**

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

### **1.5.3 NAV Mail component**

NAV 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 NAV 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, NT, 2000, XP, Vista, Windows 7, Windows 8.
- Lotus Notes client version 5.02c or newer
- Microsoft NAV Attain DK 3.60, Microsoft Business Solutions-NAV DK 3.70, Microsoft Business Solutions-NAV DK 4.0, Microsoft Dynamics NAV 5.0, Microsoft Dynamics NAV 2009 or Microsoft Dynamics NAV 2013/2015/2016 (NAV 2016 in 32 bit client).

### ***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 your password if required. If any errors occur at this stage, make sure to solve them before you use the integration kit.
- Since NAV 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 NAV 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 NAV. (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 NAV and make sure that you have a valid user name and password for NAV. Do not forget to close NAV before you continue with the installation.

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

Insert the CD called "INTOGRATE NAV - 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 NAV.pdf".

## **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 NAV elements**

The following instructions are based on the English language layer (United States). If NAV 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 NAV 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 "NAV" (INTOGRATE is usually installed in "C:\Program Files\INTOGRATE NAV").
4. Select the file "INTOGRATE NAV - Mail - X.XX.fob" and click [Open].

X.XX is determined by your version of NAV:

- |      |   |
|------|---|
| 3.60 | Microsoft NAV Attain 3.60                   |
| 3.70 | Microsoft Business Solutions-NAV 3.70       |
| 4.00 | Microsoft Business Solutions-NAV 4.0        |
| 5.00 | Microsoft Dynamics NAV 5.0                  |
| 5.10 | Microsoft Dynamics NAV 5.0 Servicepack 1    |
| 6.00 | Microsoft Dynamics NAV 2009                 |
| 7.00 | Microsoft Dynamics NAV 2013                 |
| 8.00 | Microsoft Dynamics NAV 2015                 |
| 9.00 | Microsoft Dynamics NAV 2016 – 32 bit client |

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

## ***3. Setting up NAV and Lotus Notes***


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

## ***4. Getting started***

This section describes how to get started using the integration between Lotus Notes and NAV. 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 & Marketing/Order Processing/Customers'* in the *'Departments' menu* and select *'Edit'*). Open 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 mail in Lotus Notes with the customer's e-mail in the send-to field.




# ***5. Using the integration***


In this section the various fields of application will be described in detail.

## ***5.1 E-mail***

In NAV there are several ways to use the e-mail facilities. The following examples can be mentioned:

- You can use the e-mail icon () in NAV. This will start Lotus Notes, open a new e-mail and fill in the 'To' field.
- Automatic sending of notification when a service order has been marked complete. This can be set up through job scheduling.
- By modifying the existing NAV Code. The programming interface to Lotus Notes is the same as for Outlook, so no special knowledge on Lotus Notes is required.
- In NAV 2013/2015/2016 it is not possible to use the "Print & Send" functionality with Lotus Notes.

### ***5.1.1 Sending e-mails from contact card and customer card***

The Lotus Notes e-mail client can be activated from any location in NAV where the e-mail icon () appears. The 'To' field is automatically filled in with the contents of the e-mail field in NAV. The other fields must be filled in manually.

Examples of places from where e-mails can be sent through the e-mail icon are through the contact card under the communication tab and on the sales person/purchaser card in the 'General' tab:

# ***Appendix A Adjustments to NAV***

The below table describes all the elements in NAV 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 Start
```

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

```
// INTOGRATE 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.