Applies to Keystone Core v. 24 onwards *Last updated: 11 March 2024*

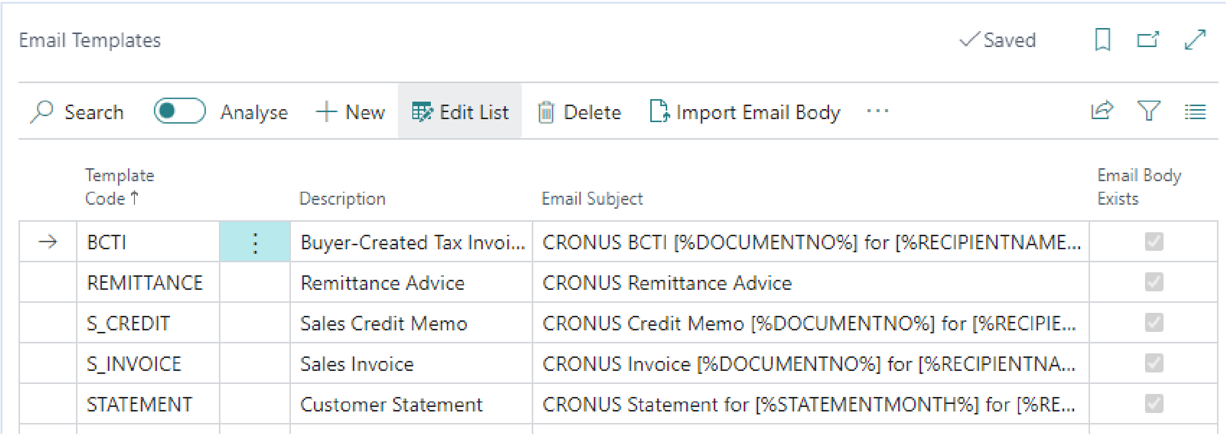
Deprecated Feature: Email Template

What does the existing feature do?

The Email Template feature in Keystone Core was built to address the following business requirements:

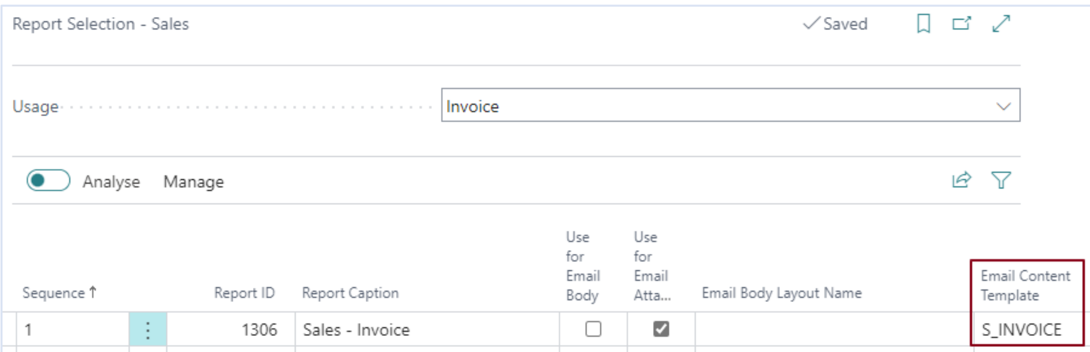
- Email body in HTML format – some clients may be using Business Central with an emailing system that is not Microsoft Outlook / Office 365. E.g. Google SMTP may have problems with deciphering Word Layouts and requires plain text for the email body.
- User-defined email subject – standard emailing feature in Business Central does not allow changing the email subject without customisation via AL development.

The feature allows setting up email subject and body via HTML file import for Sales Invoice, Sales Credit Memo, Customer Statement, Remittance Advice and Recipient/Buyer Created Tax Invoice.



Template Code ↑	Description	Email Subject	Email Body Exists
BCTI	Buyer-Created Tax Invoi...	CRONUS BCTI [%DOCUMENTNO%] for [%RECIPIENTNAME...	✓
REMITTANCE	Remittance Advice	CRONUS Remittance Advice	✓
S_CREDIT	Sales Credit Memo	CRONUS Credit Memo [%DOCUMENTNO%] for [%RECIPIE...	✓
S_INVOICE	Sales Invoice	CRONUS Invoice [%DOCUMENTNO%] for [%RECIPIENTNA...	✓
STATEMENT	Customer Statement	CRONUS Statement for [%STATEMENTMONTH%] for [%RE...	✓

The Email Template Code is assigned to the relevant Report Selection Usage if the email is to be sent using the subject and body defined in the Email Template instead of Word Layout.



Sequence ↑	Report ID	Report Caption	Use for Email Body	Use for Email Atta...	Email Body Layout Name	Email Content Template
1	1306	Sales - Invoice	☐	☑		S_INVOICE

Why is this feature being deprecated?

There are several known issues with the Email Template feature:

- It does not support defining different email subject/body for specific customer/vendor in Document Layouts;
- It only supports five document types and limited placeholders;
- There is limitation in HTML formatting and requires users to have knowledge of HTML tags; and
- There is a known bug when it is used in conjunction with the standard Send Remittance Advice function.

The above issues can be overcome by using the standard feature of Word Layout to define email body. It also removes the confusion of having two ways of defining email body in the system.

When will this feature be removed?

As part of Business Central 2024 Wave 1 release in April 2024, this feature will be completely removed from Klevr Keystone Core (v.24).

What is the impact of this feature deprecation?

For all clients who are using this feature, they will need to set up the Word Layout for email body and update the configurations before the wave release rollout. Failing to do so may mean the emails sent will not have an email body after v.24 update.

The main impacts of this deprecation are:

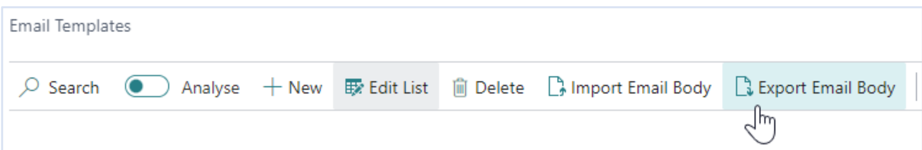
- The loss of user-defined email subject. The hard-coded email subject from Microsoft will be used. Any clients who want custom email subject will have to customise it in AL code.

- For clients who are not using Microsoft Outlook / Office 365 for emailing, thorough testing is required to ensure Word Layouts can be used. If the emailing system does not support Word Layouts, then this Email Template feature will need to be copied to the client's specific extension as their own customisation.

What needs to be done?

Follow the below steps to move Email Template to using Word Layout:

1. In Business Central, go to **Email Template** and click **Export Email Body** to download the existing email body in HTML file.

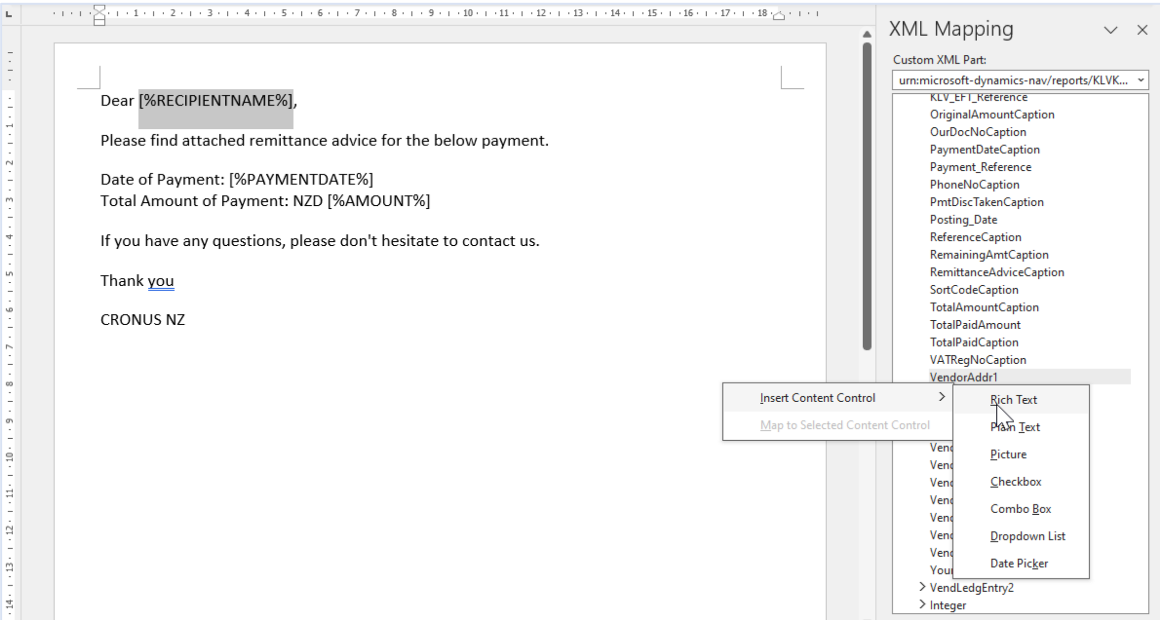


2. Go to **Report Layouts** and click **Export Layout** for the relevant Word report to download the Word Layout file.

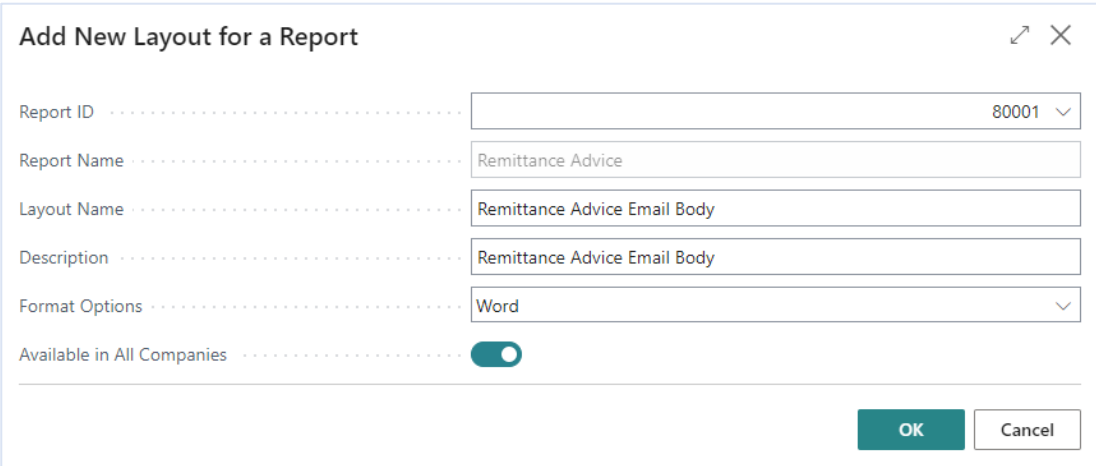
3. Open the Word Layout file downloaded from step 2 and delete all the content on the Word file, leaving you a blank Word file.

4. Open the downloaded HTML file from step 1 and copy all the HTML text to the Word file.

5. In the Word file, replace all the placeholders with the relevant XML field and format the layout as desired. Save the Word file once done.

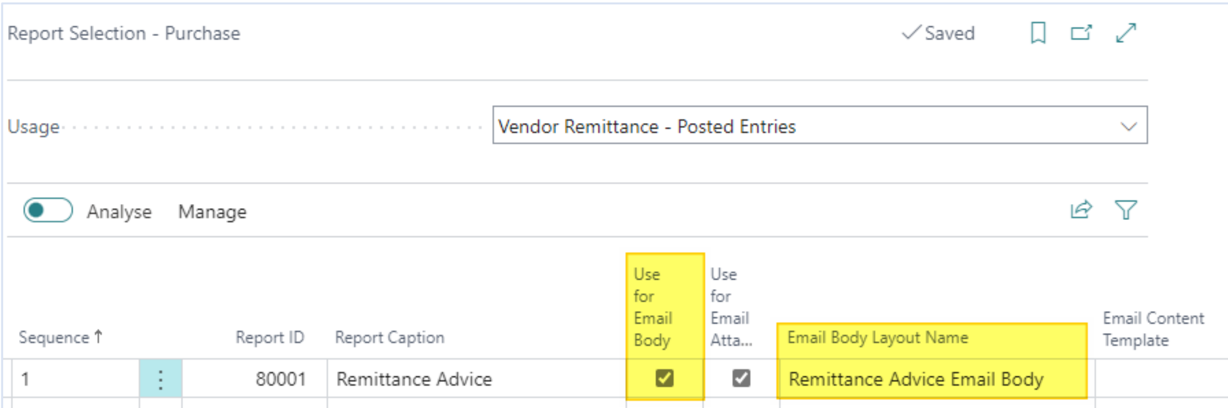


6. In Business Central, go to **Report Layouts** again and click **New** to add a new report layout for the relevant report. Make sure the Format Options is "Word" and import the Word Layout you created in step 5.



7. Go to the relevant Report Selection Usage and update the setup as follows:

   - Mark a tick in the *Use for Email Body* checkbox
   - Assign the email body Report Layout you created in step 6 to *Email Body Layout Name*
   - If you are updating this in v.23, blank off *Email Content Template* field
     Note: if this is done in v.24, the Email Content Template field will be removed from Report Selections



8. If you are updating the configurations in v.23, it is recommended to delete all records from the Email Template table after you have updated the configurations for all the document types. This is to prevent the Email Template being inadvertently used again before the wave update.

9. Test emailing of the document type that has been changed to confirm the email subject, email body and attachment in the received email are correct.