



Developer's Guide

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I. Introduction

Description:

The Outlook SendMail plug-in is a simple utility tool that allows FileMaker® to send plain text or HTML formatted emails with multiple attachments through Microsoft Outlook® while suppressing the Outlook security dialog. These operations are accomplished using FileMaker function calls from within FileMaker calculations. These calculations are generally determined from within FileMaker "SetField" or "If" script steps. For a list of available FileMaker functions and their functionality please see the accompanying "Function's Guide" document.

Intended Audience:

FileMaker developers or persons, who have knowledge of FileMaker scripting, calculations and relationships as proper use of the plug-in requires that FileMaker integration scripts be created in your FileMaker solution.

Successful Integration Practices:

- 1) Read the Developer's Guide
- 2) Read the Functions Guide
- 3) Look at our FileMaker Demo and video tutorials

Demo and video tutorials can be found here: <http://www.productivecomputing.com/plugins/outlook-sendmail-id-77/>

- 4) Familiarize yourself with Outlook

Error Handling:

Any of the plug-in functions may encounter an error during processing. A list of error codes and their meanings can be found at the end of this document. Since all errors have a value that is less than zero, trapping for return values that are less than zero will trap only the errors. If you call GetLastError immediately after the error, a detailed description of the last error will be returned. These error handling methods are designed to assist the user troubleshoot script or logic failures.

II. Integration Steps

Accessing and using the plug-in involve the following steps.

1) Install and Register the Plug-in

Installing the Plug-in:

The first step is to install the plug-in into FileMaker.

- 1) Quit FileMaker Pro completely.
- 2) Locate the plug-in in your download which will be located in a folder called "Plug-in". On Windows the plug-in will have a ".fmx" extension.
- 3) Copy the actual plug-in and paste it to the Extensions folder which is inside the FileMaker program folder. On Windows this is normally located here: C:\Program Files\FileMaker\FileMaker X\Extensions.
- 4) Start FileMaker. Confirm that the plug-in has been successfully installed by navigating to "Preferences" in FileMaker Pro, then click the "Plug-ins" Tab. There you should see the plug-in listed with a corresponding check box. This indicates that you have successfully installed the plug-in

Registration:

The next step is to register the plug-in which enables all plug-in functions.

- 5) Confirm that you have access to the internet and open our FileMaker demo file, which can be found in the "FileMaker Demo File" folder in your original download.
- 6) If you are registering the plug-in in Demo mode, then simply click the "Register the Plug-in" button and do not change any of the fields. Your plug-in should now be running in "DEMO" mode. The mode is noted in our FileMaker Demo file on the Setup tab.
- 7) If you are registering a licensed copy, then simply enter your license number in the "LicenseID" field and click the "Register the Plug-in" button. Make sure you remove the Demo License ID and enter your registration information exactly as it appears in your confirmation email. Your plug-in should now be running in "LIVE" mode. The mode is noted in our FileMaker Demo file on the Setup tab.

Congratulations! You have now successfully installed and registered the plug-in!

Why do I need to Register?

In an effort to reduce software piracy, Productive Computing, Inc. has implemented a registration process for all plug-ins. The registration process sends information over the internet to a server managed by Productive Computing, Inc. The server uses this information to confirm that there is a valid license available and identifies the machine. If there is a license available, then the plug-in receives an acknowledgment from the server and installs a certificate on the machine. This certificate never expires. If the certificate is ever moved, modified or deleted, then the client will be required to register again. On Windows this certificate is in the form of a "pci" file.

The registration process also offers developers the ability to automatically register each client machine behind the scenes by hard coding the license ID in the PCEM_Register function. This proves beneficial by eliminating the need to manually enter the registration number on each client machine. There are other various functions available such as PCEM_GetOperatingMode and PCEM_Version which can assist you when developing an installation and registration process in your FileMaker solution.

2) Authenticate to Outlook

When communicating with Outlook you must first specify what Outlook profile will be used. This is accomplished by authenticating to Outlook by calling the PCEM_Authenticate (ProfileName ; ProfilePassword) function. Authenticate must be called once per FileMaker session.

If Outlook is open when this function is called, then FileMaker will simply authenticate to the currently opened Outlook profile.

If Outlook is not open when this function is called, then FileMaker will open Outlook in the background and authenticate with the default Outlook profile or it will prompt the user to select one. This depends on your machine settings found in the Windows Control Panel under Mail. Most users do not have multiple Outlook profiles set up on their machine and will benefit from leaving the two parameters (ProfileName ; ProfilePassword) blank. If you do have multiple Outlook profiles set up on your machine, then you can pass the ProfileName and ProfilePassword to access the desired Outlook profile. Please note that not all profiles have passwords associated with them.

If you desire to authenticate with a different Outlook profile, then you must first close FileMaker AND Outlook. This is because FileMaker will hold onto the authenticated Outlook profile until both FileMaker and Outlook processes are terminated.

3) Sending Emails

Sending an email can be done in a single script step using the PCEM_SendMail function. Simply set the parameters in the PCEM_SendMail(To ; Cc ; Bcc ; Subject ; Body ; Attachments ; optUseHTML) function. Please note that all parameters except Subject, Body and OptUseHTML can contain multiple comma separated values.

In the examples below an email will be sent with three attachments using various methods. Please refer to the Functions Guide and our FileMaker demo file for further details and live examples.

Example of sending an email by hardcoding parameter values:

- PCEM_SendMail("joe@somecompany.com" ; "" ; "" ; "New Release" ; "A new product was just released allowing for please contact us" ; "C:\Pricing.pdf, C:\Overview.pdf, F:\SpecSheet.pdf" ; "N")

Example of sending an email by using field names:

- PCEM_SendMail(Main::gEmail To ; Main::gEmail Cc ; Main::gEmail Bcc ; Main::gEmail Subject ; Main::gBody ; FullPath1 & "," & FullPath2 & "," & FullPath3 ; Main::gUseHTML)

The FullPath1, FullPath2 and FullPath3 represent the field that stores the full file path.

III. Tips

We offer various Outlook and Exchange Manipulator plug-ins depending on your needs. The features of the different plug-ins are outlined in the screenshot below. This should assist you when trying to evaluate the correct plug-in to use in your environment.

FileMaker/Outlook Functions	Outlook SendMail	Outlook Manipulator	Exchange Manipulator
Send Mail (HTML & plain text)	▲	▲	▲
Send Mail with multiple attachments	▲	▲	▲
Extract Mail into FileMaker		▲	▲
Push or Pull Contact Items (Add, Edit, Delete)		▲	▲
Push or Pull Calendar Items (Add, Edit, Delete)		▲	▲
Push or Pull Task Items (Add, Edit, Delete)		▲	▲
Push or Pull Note Items (Add, Edit, Delete)		▲	▲
Push or Pull Post Items (Add, Edit, Delete)		▲	▲
Push or Pull Journal Items (Add, Edit, Delete)		▲	▲
Push or Pull Distribution Lists (Add, Edit)		▲	▲
Pull Reports, Meeting and Task Requests		▲	▲
Access User's Default Mailbox		▲	▲
Access Shared Folders		▲	▲
Access Public Folders		▲	▲
Send Email On Behalf Of Another User		▲	▲
Send Email As Another User			▲
Access All User Exchange Mailboxes via Outlook			▲

IV. Contact Us

Successful integration of a FileMaker plug-in requires the creation of integration scripts within your FileMaker solution. A working knowledge of FileMaker Pro, especially in the areas of scripting and calculations is necessary. If you need additional support for scripting, customization or setup (excluding registration) after reviewing the videos, documentation, FileMaker demo and sample scripts, then please contact us via the avenues listed below.

Phone: 760-510-1200

Email: support@productivecomputing.com

Forum: www.productivecomputing.com/forum

Please note assisting you with implementing this plug-in (excluding registration) is billable at our standard hourly rate. We bill on a time and materials basis billing only for the time in minutes it takes to assist you. We will be happy to create your integration scripts for you and can provide you with a free estimate if you fill out a Request For Quote (RFQ) at www.productivecomputing.com/rfq . We are ready to assist and look forward to hearing from you!