

Enhance your CRM activities using B1 Print and Delivery

Summary	
Module	Print & Delivery
Level	Moderate- Advanced

Description

In this sample, we will walk you through creating an automatic emailing system for handling First Time Customers using B1 Print and Delivery.

In this case, once a new customer placed his first sales order with the company, a few things will happen simultaneously:

- A different email template and additional attachments will be sent out them, vs. the regular email template used for already existing customer receive.
- An automatic activity will be added to remind the user to follow up with this customer
- An internal message will be sent out to inform relevant users that the first Sales Order was added for this new customer.

This is a very powerful system and you can use it, for example, to up sell products, by sending new customers the product catalog. Or you can provide them with a sales incentive or an attached coupon to be used in their next purchase and so on.

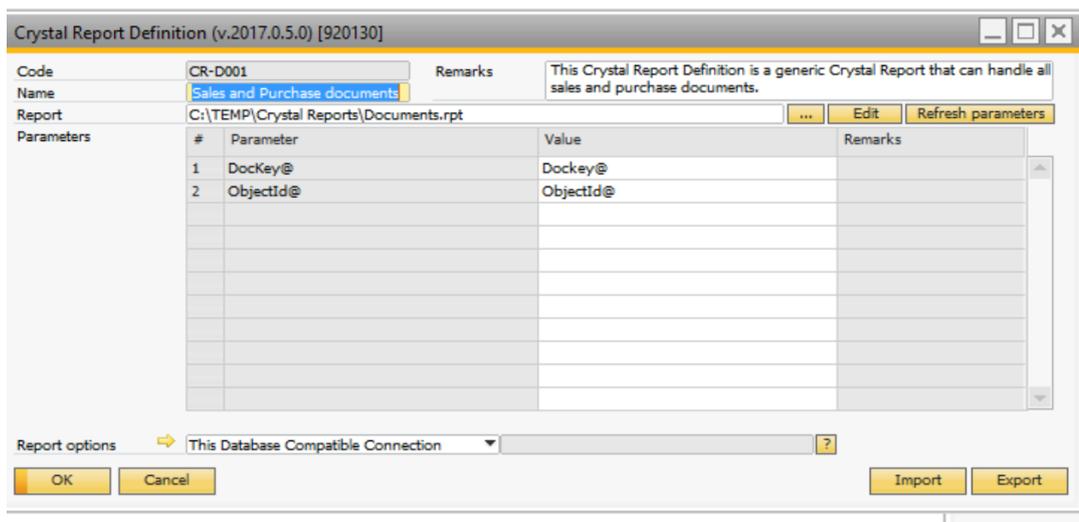
Step 1 – Create a Crystal Report Definition

Path: Administration > Add On > Add on > B1 Usability Package > Module Configuration > Print &Delivery > Crystal Report Definition

First, make sure you have your Crystal Reports set up under Crystal Report Definition.

Example, this print screen below shows you a crystal Report used for all Sales and Purchasing.

Print & Delivery already comes with pre-defined reports you can use, but of course you can use your own reports. Please refer to our Print and Delivery Manual.



Step 2 - Create a Conditional Report Action

Path: Administration > Add On > B1 Usability Package > Module Configuration > Print &Delivery > Report Action.

Here we create the Conditional Action as follows.

B1 Usability Package Print & Delivery Sample

This SQL statement checks if a particular BP has already any Sales Orders in the system. If NOT, it will take “FirstMail” condition. Otherwise, it will take “Existing” condition.

“FirstEmail” and “Existing” are other report actions as will be further seen.

#	Conditional result	Action to execute
1	FirstMail	RA-004
2	Existing	RA-004

```
IF (Select Count (DocNum) FROM ORDR where CardCode ='${4.0.0}')<=1
BEGIN
SELECT 'FirstMail' FOR BROWSE
END
ELSE
BEGIN
SELECT 'Existing' FOR BROWSE
END
```

Step 3 – Setting up “FirstMail” action report (the email to be sent to new customer)

Setup a multiple Action

In multiple actions we can tell the Print and Delivery to perform multiple tasks in paralel. In our case, if the first sales order was created to a new customer, 3 different reports actions will be executed in paralel. As seen in the next 3 sections.

#	Action
1	RA-001
2	RA-002
3	RA-003

1st Action: Email report

B1 Usability Package Print & Delivery Sample

Report Action (v.2017.0.5.0) [920130]

Code: RA-001
Name: First Mail- New Customer
Type: Email report
Remarks: [Empty]
 Mark documents as printed

Subject: Welcome to a great Partnership
Body: Plain text
Dear \$[7.0.0]
We want to welcome you as a Partner with Boyum -IT and want to let you know hoch much we are looking forward working with you.
See attached your first \$[OBJECTNAME]-\$[8.0.NUMBER] and additional documents for a great start.
Kind regards,

Attachment template: \$[OBJECTNAME]-\$[8.0.NUMBER] Attachment type: PDF 2 Additional attachments

#	To / CC / BCC	Email to use	Direct Email	Email Category
1	To	Document: Selected contact p		

Client delivery method:
 Outlook Save as draft
 SMTP
 Exchange
 Exchange: Save as draft
 Use Personal Exchange

Server delivery method:
 SMTP
 Exchange
 Exchange: Save as draft

Group emails
Document level: [?]
Tip: If Multi-language support is activate, it is possible to translate subject, body, and attachment by pressing the small globe in the field

Buttons: OK, Cancel, Import, Export

This is the email body for your new customer receiving an attachment for their first Sales Order. In our case we have created an additional attachment by clicking on “Additional Attachment”.

[2nd Action: Create Activity](#)

Next, we setup a “Create Activity” report action. Using this action, an automatic activity will be best our to the user who have added the Sales Order for the customer. This activity will remind that user to follow up to follow up with this new cusotme and make sure he is satisfied.

Report Action (v.2017.0.5.0) [920130]

Code: RA-002
Name: First Mail Activity
Type: Create Activity
Remarks: [Empty]
 Mark documents as printed

Activity: Note
Contact person: BP: Default contact person
Remarks: First Mail
Content: This is a new Customer and their first mail went out

Assigned to: User
 Closed
 Inactive
 Personal

User that trigger the report action: [Empty]
 Attach document
 Link document
Start time: 0 days from trigger date @ [Empty]
Duration: [Empty] Minutes
 Reminder: 3 Days

Buttons: OK, Cancel, Import, Export

As you can see on the above print screen, you can alter the content to your liking, attach the document or link the document to the activity. You can also set a reminder when to follow up with the customer.

[3rd Action: Create Internal message](#)

The last report action we can choose to add is an Internal Message.

B1 Usability Package Print & Delivery Sample

Include	User	Name
<input type="checkbox"/>	AlertSvc	AlertSvc
<input type="checkbox"/>	B1i	B1i
<input type="checkbox"/>	B1i1	B1i1
<input checked="" type="checkbox"/>	manager	manager
<input type="checkbox"/>	Support	Support
<input type="checkbox"/>	USER1	USER1
<input type="checkbox"/>	USER2	USER2
<input type="checkbox"/>	USER3	USER3
<input type="checkbox"/>	USER4	USER4
<input type="checkbox"/>	Workflow	Workflow

Here we created an internal message to the relevant user to inform them that the first Sales Order was add to a new customer. You can also attach the dcoument to the Internal message or create a link to the document.

Step 4 – Setting up “Existing” action report (the email to be sent to an existing customer)

Last, we setup the Email Action for Existing Customers, which will only be one Action.

#	To / CC / BCC	Email to use	Direct Email	Email Category
1	To	Document: Selected contact p		

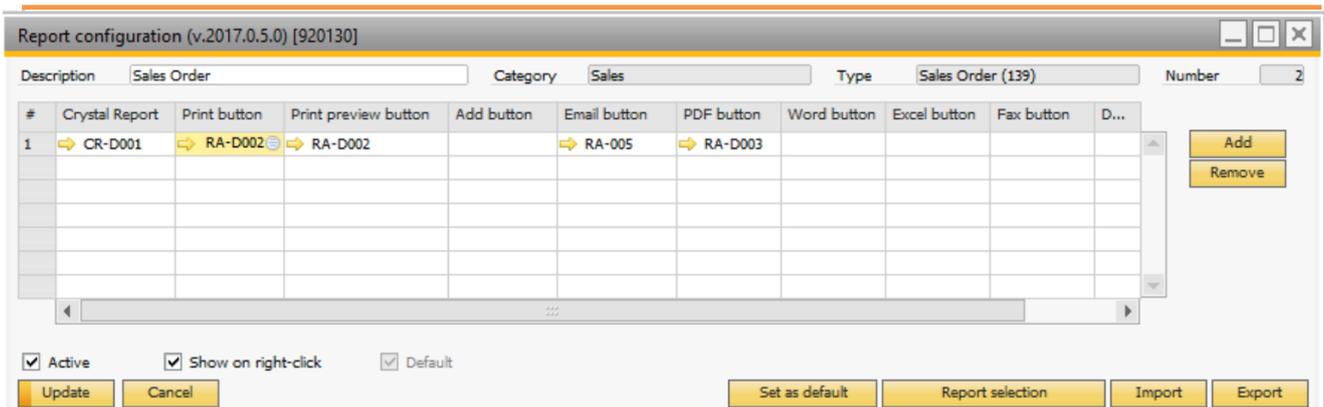
As you can see, in this case, the e-mail body is different and there are no additional attachments.

Step 5 – Link the Conditional Action to the Sales Order Report Configuration

The last step is to go to Report Configuration to link our Actions to the Document (in our case the Sales Order)

The report configuration can be found in: Administration > Add on > B1Usability Package > Module configuration > Print & Delivery > Report Configuration > Open the report configuration for the Sales Order

B1 Usability Package Print & Delivery Sample



In the first column, attached the Crystal Report created in Step 1 (above).

Last, attach the Conditional Action created in Step 2 (above) to the “Email button” column (In our case Action RA-005). Doing that, will make sure that every time a user clicks on the Add button in a Sales Order, Print and Delivery will check if this is the first order added for this customer or is he already has existing sales orders and will take the Actions specified in our Conditional Action.

- Follow us - www.youtube.com/boyumit
- Learn more - <http://www.boyum-solutions.com/learning/>