## 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.

Crystal Report De	finition	(v.2017.0.5.0) [920130]					_			
Code Name	CR-	D001	Remarks	This Crystal Report Definition sales and purchase document	is a generic Its.	eric Crystal Report that can handle all				
Report	C:\	TEMP\Crystal Reports\Docume	ents.rpt			Edit	Refresh param	eters		
Parameters	#	Parameter		Value		Remarks				
	1	DocKey@		Dockey@				-		
	2	ObjectId@		ObjectId@						
								-		
Report options	🔷 This	Database Compatible Connec	tion 🔻		?					
ОК	Cancel	]				1	mport Ex	port		

## **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.

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.

Code	RA-	005	Remarks		
Name	First	t Mail Condition			
Туре	Con	ditional Action	Mark doc	cuments as printed	
			Cor	mmon SQL structures	
	SEI ENI ELS BEG	LECT 'FirstMail' F D SE GIN	OR BROWSE		
	SEI	LECT 'Existing' FC D	R BROWSE		
	SEI ENI	LECT 'Existing' FC	R BROWSE	tion to execute	
	\$EN	LECT 'Existing' FC D Conditional result FirstMail	Act	tion to execute RA-004	 ∆dd
	# 1 2	LECT 'Existing' FC D Conditional result FratMal Existing	R BROWSE	tion to execute RA-004 RA-004	 Add

	IF(Select Count (DocNum) FROM ORDR where CardCode ='\$[\$4.0.0]')<=1BEGIN
	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.

Code	RA-004 Remarks				
lame	Fir	stMailMuliiple			
ype	Mu	ltiple actions	<ul> <li>Mark documents as printe</li> </ul>	d	
ub-actions	#	Action			
	1	📫 RA-001		A	Add
	2	📫 RA-002			Remove
	3	📫 RA-003			

1<sup>st</sup> Action: Email report

Report Action (v.2017	.0.5.0) [920130]					
Code Name	RA-001 First Mail- New C	ustomer	Remarks			
Туре	Email report	•	Mark docume	ents as printed		
Subject	Welcome to a gr	eat Partnership				
Body Plain text ▼	Dear \$[\$7.0.0] We want to weld looking forward See attached you Kind regards,	ome you as a Pa working with yo ur first \$[OBJECT	rtner with Boyum -I u. NAME]-\$[\$8.0.NUM	T and want to k BER] and addite	et you know hoch r onal documents for	a great start.
Attachment template	\$[OBJECTNAME	]-\$[\$8.0.NUMBEF	Attachment t	ype PDF	▼ 2 A	dditional attachments
Recipients	# To/CC/	BCC Email to us Document:	e Selected contact p ▼	Direct Email	Email Category	Add Remove
	Client delivery m Outlook SMTP Exchange	ethod Save as draft Exchange: S	V V V ave as draft Exchange	erver delivery n ) SMTP ) Exchange	nethod Exchange: Sav	▼ ▼ e as draft
Group emails	Document level		▼ ?			
OK Cance	Tip: If M subject, I	ulti-language sup oody, and attachr	port is activate, it is p ment by pressing the	oossible to trans small globe in t	late the field	port 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 clickinng on "Additional Attachment".

#### 2<sup>nd</sup> 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.

Code	RA-002	Rema	irks			
Name	First Mail Activity	1				
Гуре	Create Activity	· · · ·	lark docume	nts as printed		
Activity	Note	•	Type	Ge	neral	4
Contact person	BP: Default conta	act person 🔻	Subject			
Remarks	First Mail					
Assigned to	User V	User that trigger the repo	ort action			
issigned to	User ▼	User that trigger the repo	ort action t Doc	umnet		PDF
issigned to	User  User Closed Inactive Descend	User that trigger the repo ✓ Attach document ✓ Link document Chart from	ort action t Doc	umnet	ter date @	PDF
Assigned to	User   User  Closed  Inactive Personal	User that trigger the repr ✓ Attach document Start time Duration	ort action t Doc	umnet days from trig	ger date @	PDF
ssigned to	User  Viser Viser Vised Vised Personal	User that trigger the report Attach document Unk document Start time Duration Gr Resinder	ort action t Doc 0	days from trig Minutes	ger date @	PDF

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

Code	RA-003	Remar	s	
Name	Rist Mail-Inter	nal message		
Туре	Create Interna	al message 🔻 🗌 Ma	rk documents as printed	
Users to send to	Include	User	Name	
		AlertSvc	AlertSvc	A
		B1i	Bli	
		B1i1	B1i1	
	~	manager	manager	
		Support	Support	
		USER1	USER1	
		USER2	USER2	
		USER3	USER3	
		USER4	USER4	
		Workflow	Workflow	
				~
Priority	Normal			
5ubject	New Custome	r		
Message	First Sales Or	der waas sent to this customer		^
Internal Link				~
	Attach do	cument Send docume	ot	PDF T

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 document 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.

Report Action (v.201	7.0.5.0) [920130]				_ ×		
Code Name	RA-D004 Email Document Report	Remarks [	Default Report Act	ion to Email a document			
Туре	Email report 🔻	Mark docume	nts as printed				
Subject	\$[OBJECTNAME_BP] - \$[\$8.0.0]						
Body Plain text *	r Dear \$[DOCUMENT_CONTACTPERSON] Attached are your \$[OBJECTNAME_BP] - \$[\$8.0.0] Kind Regards \$[COMPANYNAME]						
Attachment template	\$[OBJECTNAME_BP] - \$[\$8.0.0]	Attachment ty	/pe PDF	<ul> <li>0 Additional</li> </ul>	l attachments		
Recipients	# To / CC / BCC Email to use		Direct Email	Email Category			
	1 To Cocument: 9	Selected contact p ▼		• •	Add Remove		
	Client delivery method	Se	rver delivery met	hod			
	Outlook     Save as draft     SMTP     Exchange     VExchange: Sa	▼ ▼ ve as draft Exchange	) SMTP Exchange	▼ ▼ Exchange: Save as dra	ft		
Group emails OK Can	Document level Tip: If Multi-language supp subject, body, and attachm	▼ ? ort is activate, it is p ent by pressing the	ossible to translate small globe in the	field Import	Export		

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

Rep	Report configuration (v.2017.0.5.0) [920130]										
Desc	ription Sales	Order		Category	Sales		Туре	Sales Ord	er (139)		Number 2
#	Crystal Report	Print button	Print preview button	Add button	Email button	PDF button	Word button	Excel button	Fax button	D	
1	⇒ CR-D001	⇒ RA-D002	➡ RA-D002		📫 RA-005	📫 RA-D003					Add
											Remove
											-
	•			#	1					•	
	Active	Show on right	t-click 🗸 Defau	t			t an defendt	Depend			Sund Sund

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.

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