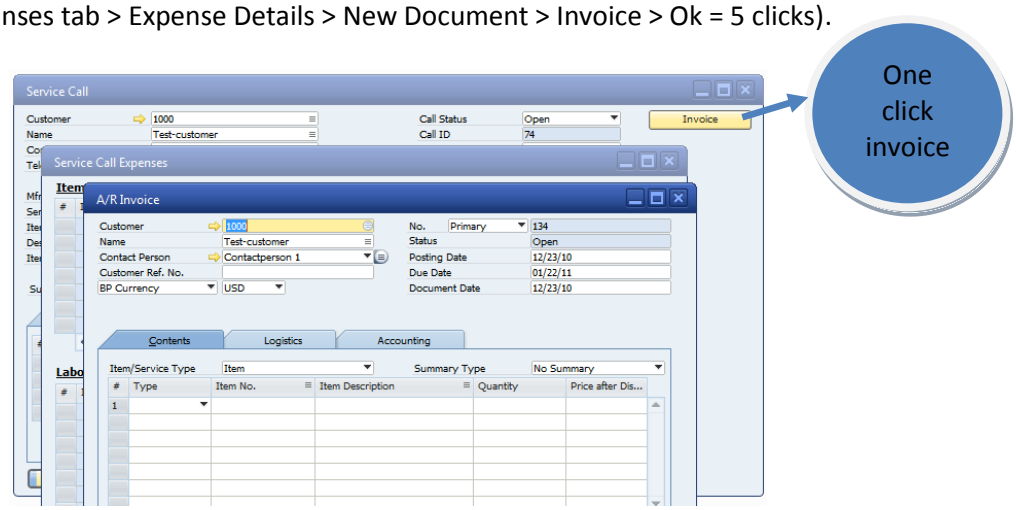
Create a button on service call that create a an invoice

Summary	
Module	Function Buttons + Universal Functions
Level	Advanced
Requirements	B1UP 2.7.4.0 or higher

Scenario

The customer uses service calls, and create invoices tied to the call, but is tired of the long process before invoice is ready (Expenses tab > Expense Details > New Document > Invoice > Ok = 5 clicks).



Needed configuration

You will need two things to do this:

1. The universal function that will provide the functionality
2. A function button configuration that set a button and link it to the universal function.

Step 1. Universal Function

To create universal functions please navigate to Administration > Add-Ons > B1 Usability Package > Module configuration > Universal Function configuration

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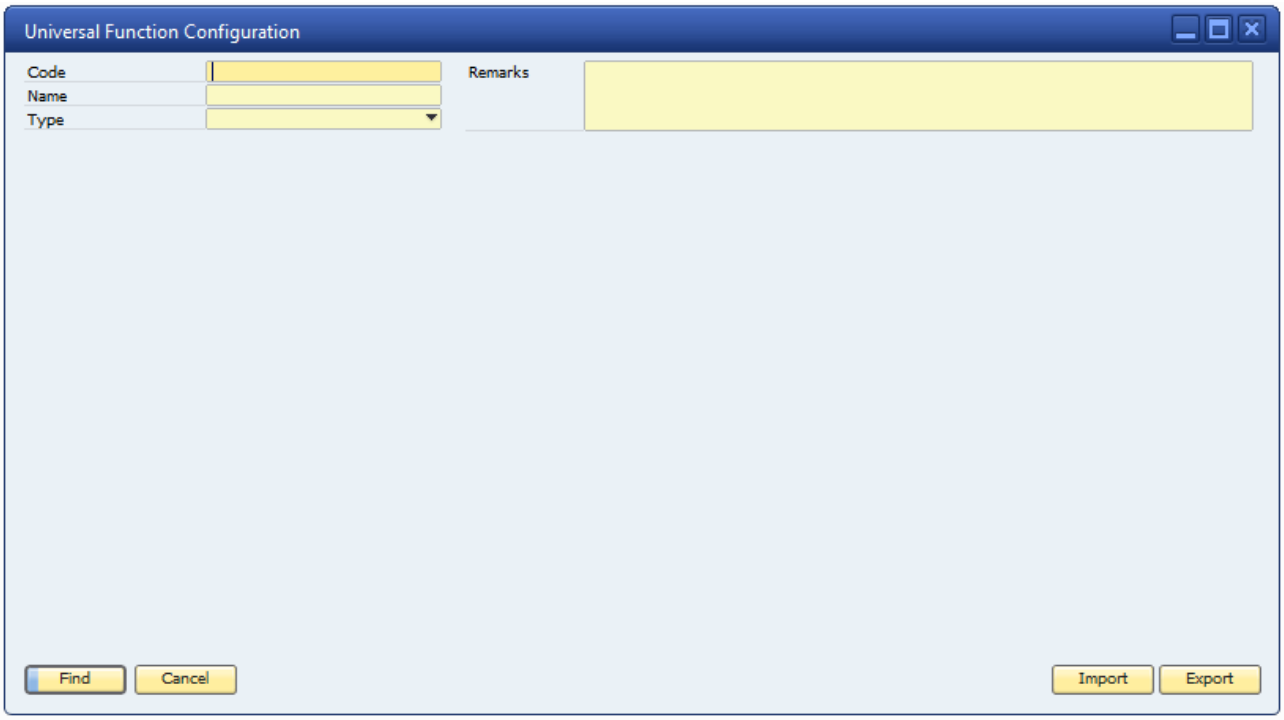
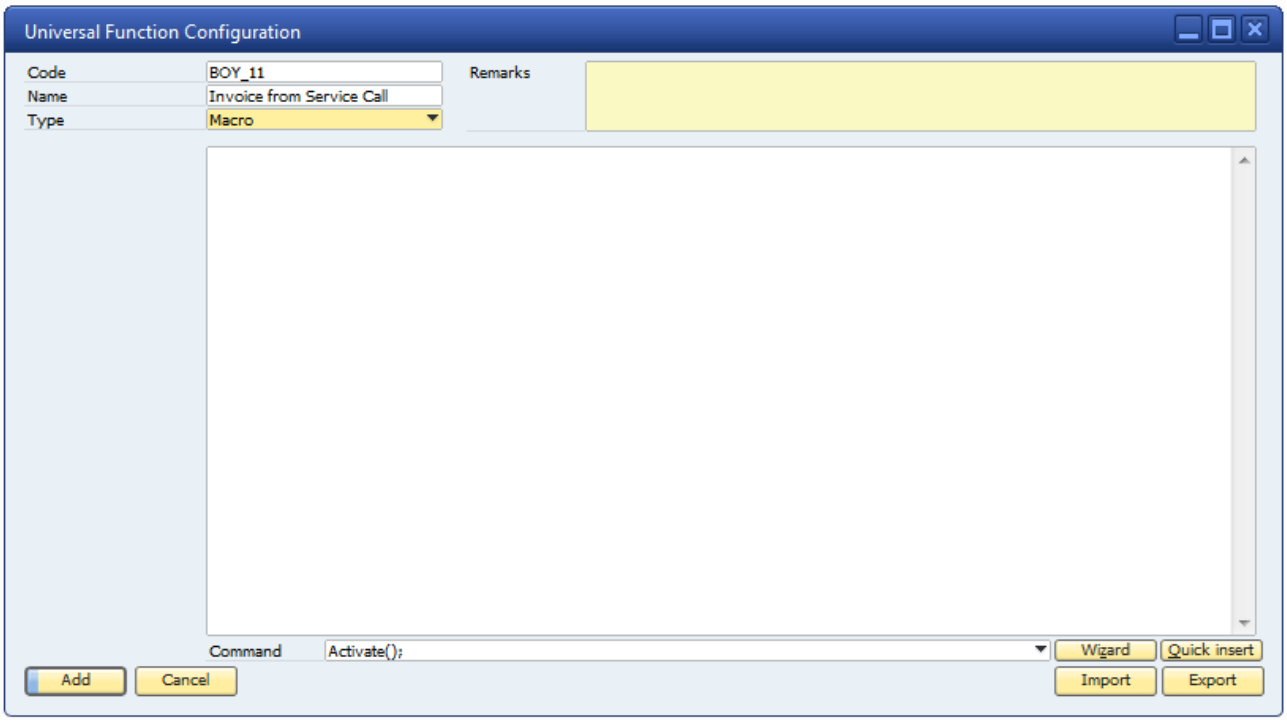


Start by switching to add-mode and choose the Universal Function type called Macro



First thing we need to do is to provide a code and a name for your configuration and optional some remarks to keep track of what the function does.

It is you that decide the code, name it just have to be unique and the code can max. be up to 8 characters long.

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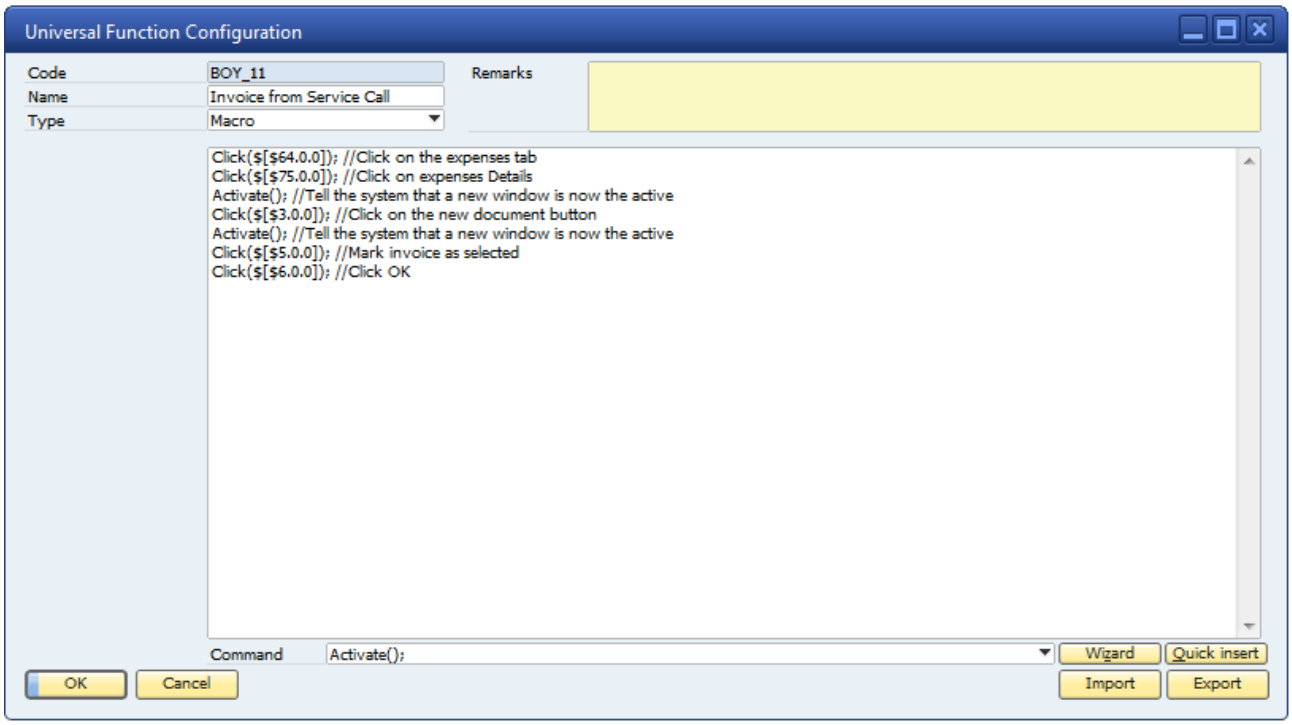
In this sample set the Code to BOY_11 and the name and add the remarks

Next we need to provide the data for the macro (scripting of the 5 steps). What we want to do is to

1. Click on the 'Expenses' tab
2. Click on the 'Expenses Details' button
3. On the new window that appear we wish to press the 'New document' button
4. On the new window that appear we wish to choose the Invoice option and press the OK button on order to get to our result which is an empty invoice ready to be added.

The steps above can be translated into the following macro



Macro for copy/paste:

```
Click($[$64.0.0]); //Click on expenses tab
Click($[$75.0.0]); //Click Expenses Details
Activate(); //Tell the system that a new window is now the active
Click($[$3.0.0]); //Click on the new document button
Activate(); //Tell the system that a new window is now the active
Click($[$5.0.0]); //Mark invoice as selected
Click($[$6.0.0]); //Click OK
```

Let's take a closer look at what happens:

Step	Macro
Click on the 'Expenses' tab	We activate system information and discover that the Expenses tab

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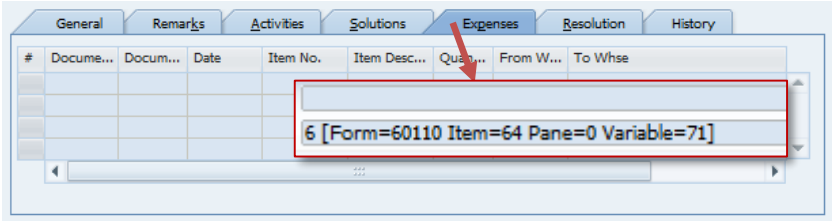
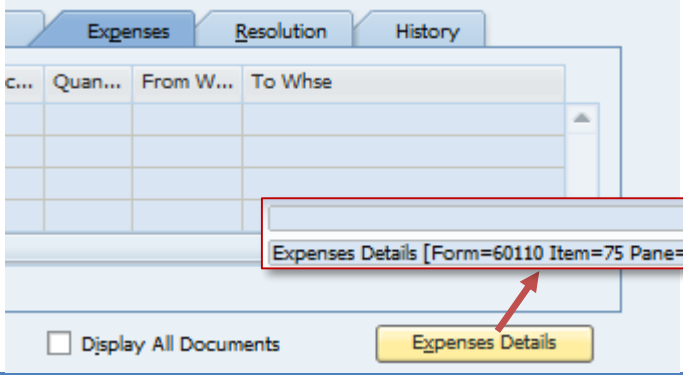
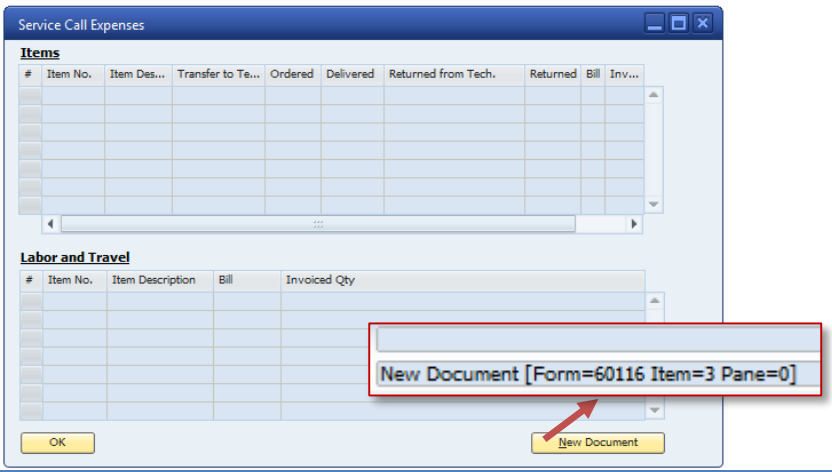
	have item id = 64 and using the macros click command simulate a click on it 
Click on the 'Expenses Details' button	Next we find the id of the Expenses Detail button which is 75. Again we use a click-command 
On the new window that appear we wish to press the 'New document' button	Before we are able to click the button on the new window we need to tell the macro that is should work on this new window. This is done by calling the Activate(); command Now all we need to do on the Expenses details window is to find the id of the new document button which is 3 
On the new window that appears we wish to choose the Invoice option and press the OK button on order to get to our result which is an empty invoice ready to be added.	Again a new window opens and we'll need to call the Activate(); command again so the macro knows that we are now working on this window. Last two things to do is identify the Invoice option (Id: 5) and the Ok-button (Id: 6) and click both in that order

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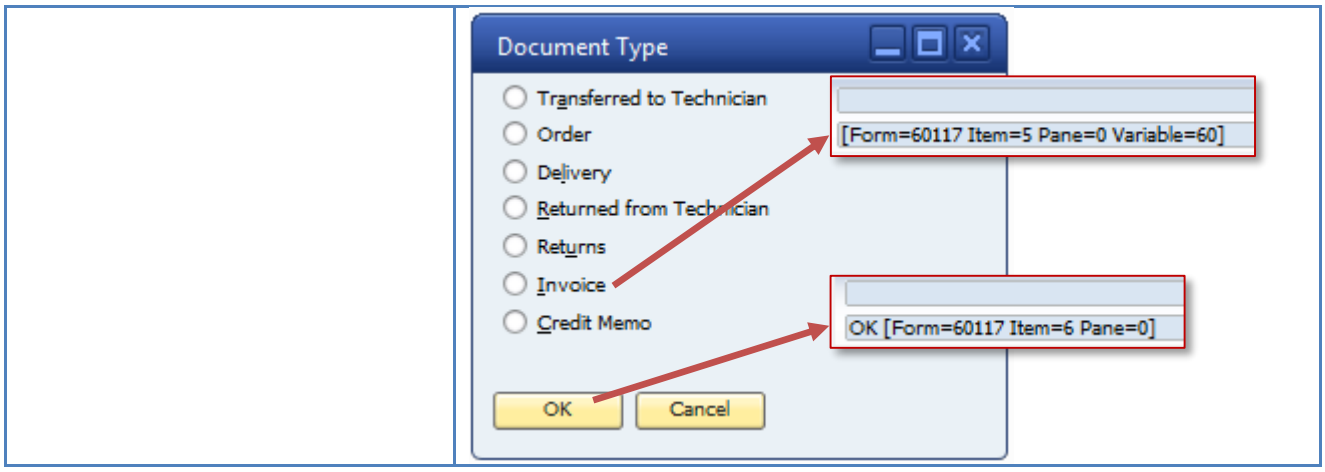
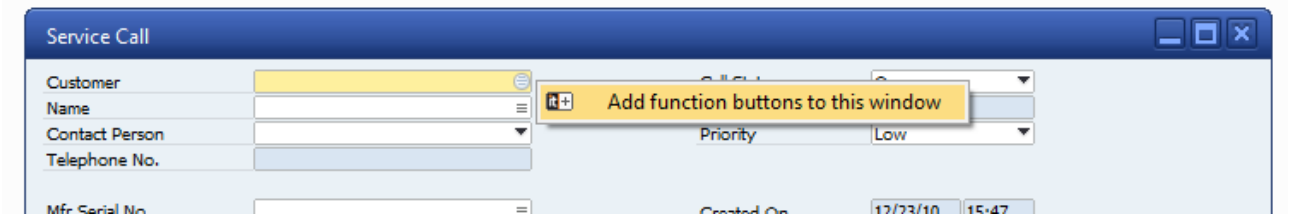
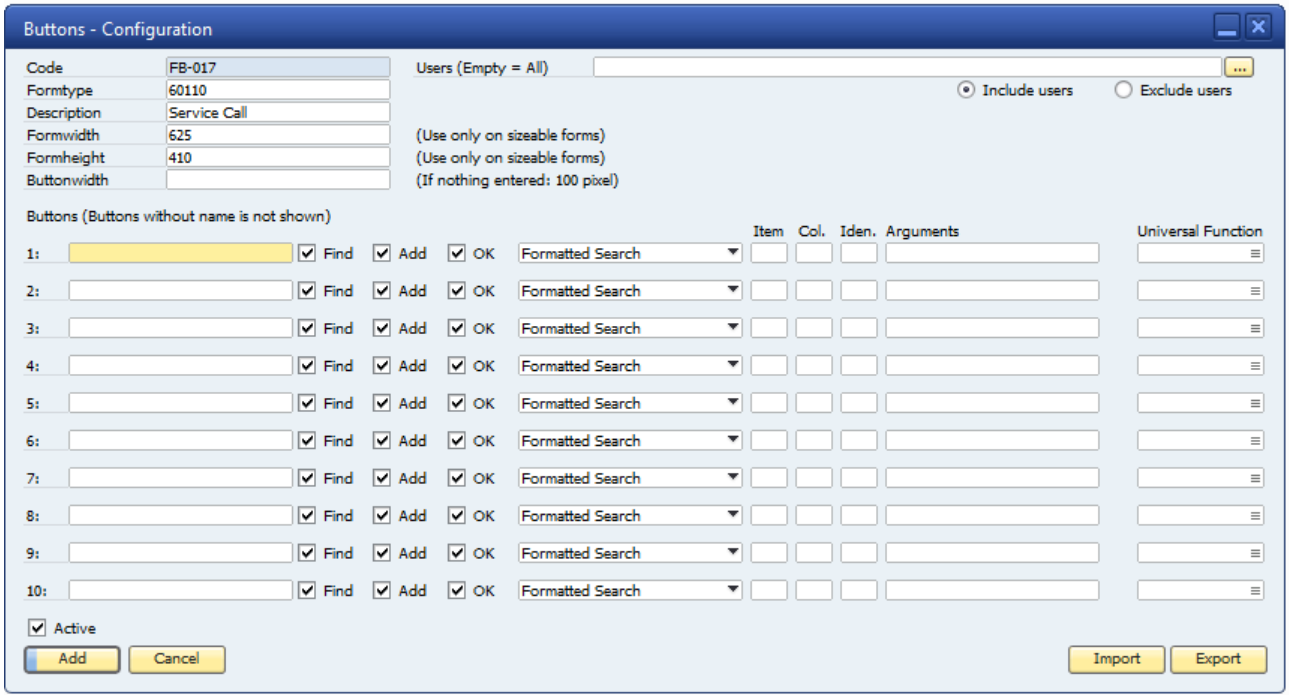


We are now ready to add the configuration and tie it the Function buttons

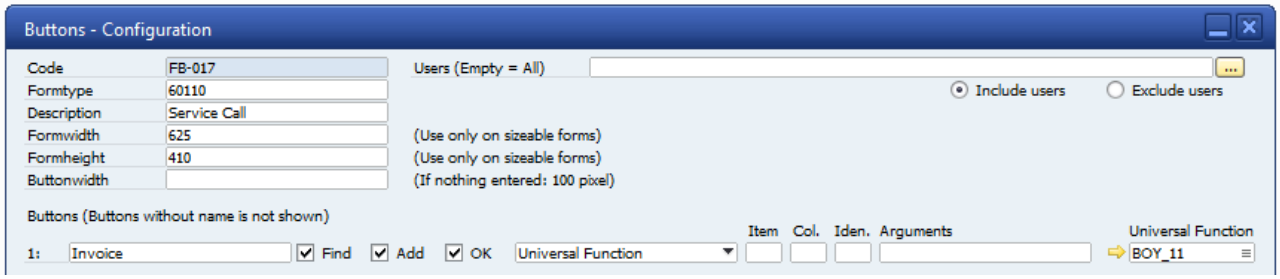
Step 2. Function Button Configuration

The function button we are planning for this should be located on the Service call window, so the first thing we need to do is to it, right click and choose “Add function Buttons on to this window”





Now we need to define the buttons we would like on the business partner window. This is done by simply adding the wanted name of the button and set the type to Universal Function.

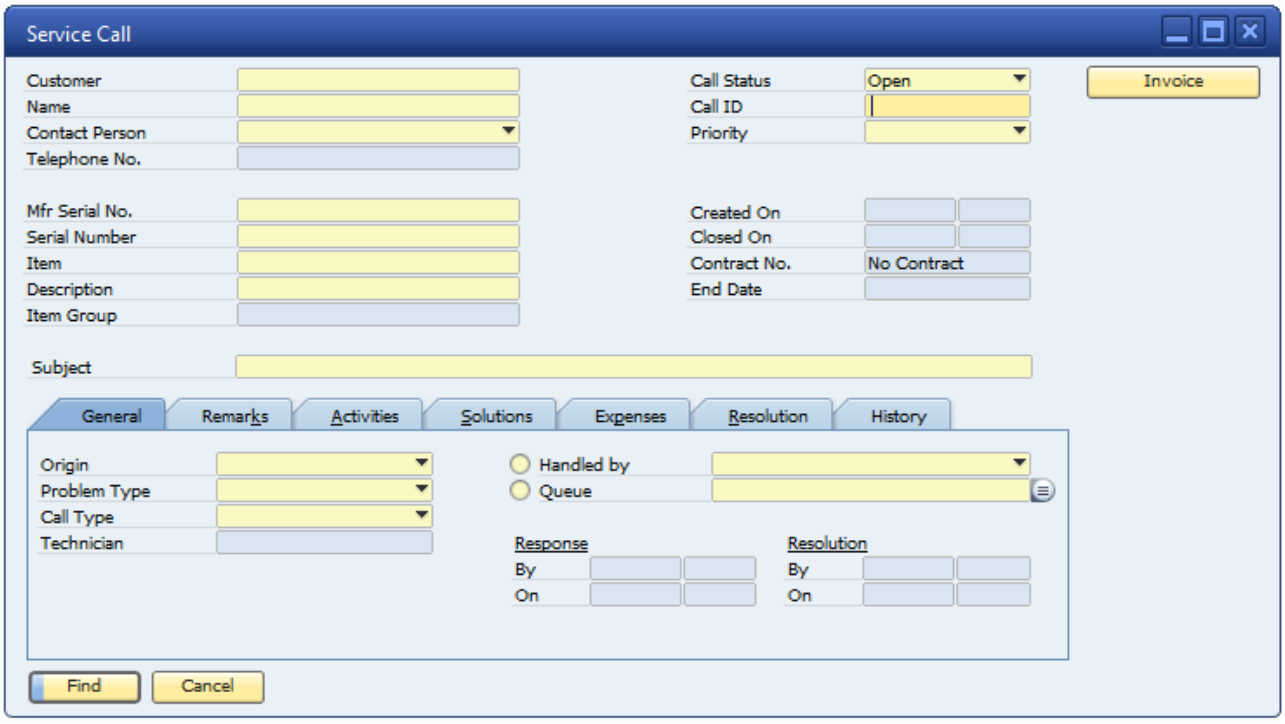


For the button go to the Universal function field, press tab and choose the BOY_11 universal function.

For this sample we do not need more configuration so simply press add to save the configuration.

Use of functionality

Now when we open a Service Call window we already see the button.



If we navigate to a service call and press our button, the macro will initiate and the normal 5 steps will feel as one.

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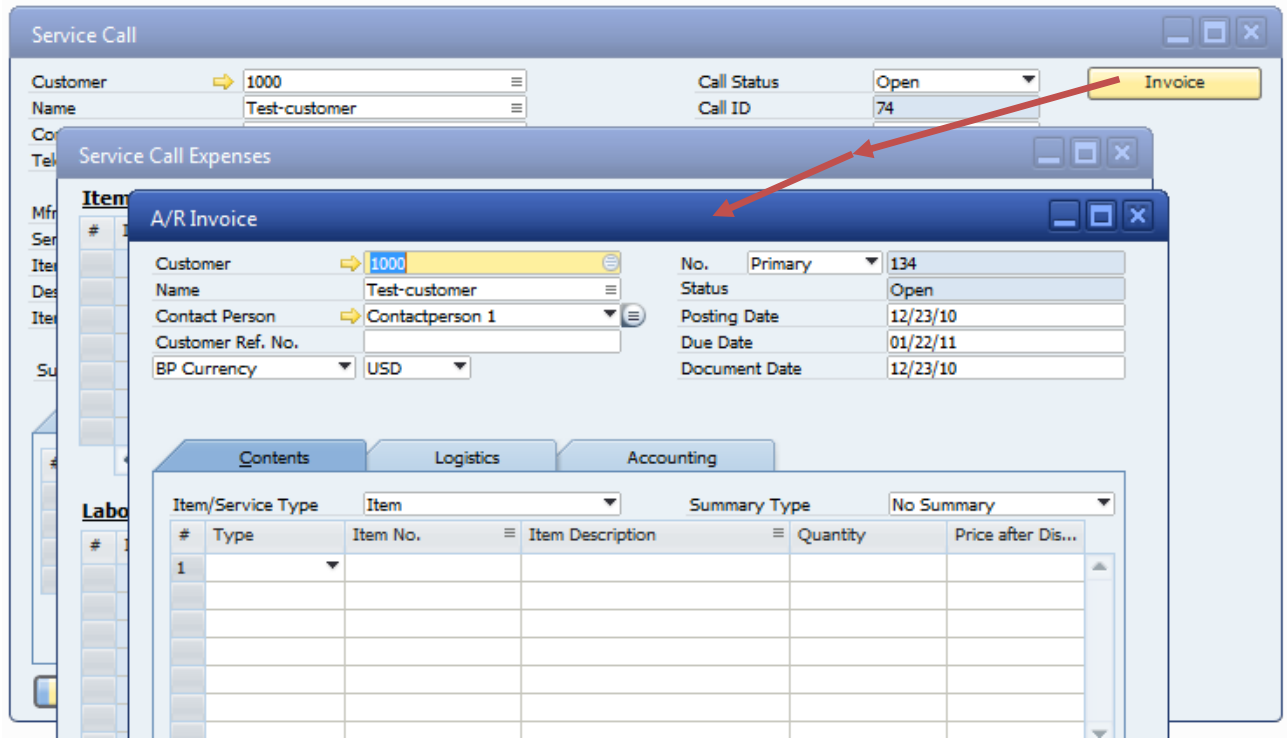

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