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Overview

The B1 Print and Delivery Add-on are a replacement of SAP Business One's print via the PLD and a powerful extension of SAP's usage of Crystal reports. B1 Print and Delivery allow you to create your documents in Crystal Report and let you show, print, save and email all your communication with your customers and vendors.

Online E-Learning is also available for this module. Click here to watch it

Configuration

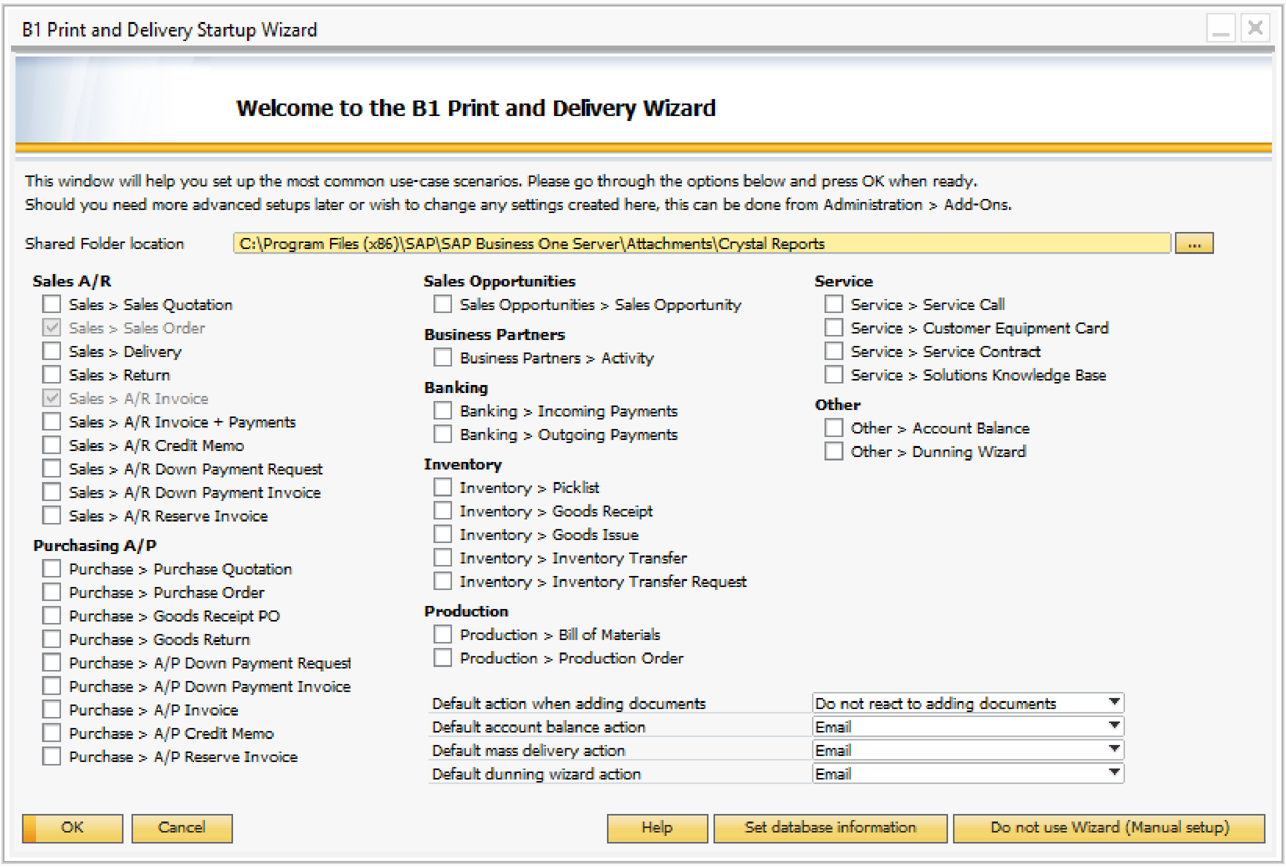
Initial setup

In order to use B1 Print and Delivery you will need to do a few initial configurations. Summed up you need to:

- Tell the system how to reach the SQL-server behind the SAP Business One database (see: Database Setup)
- Tell the system where your crystal report files are stored and what parameters are needed to send to them (see: Report definitions)
- Tell the system what you want to happen during show, print, save and/or email of reports (see: Report actions)
- Tell the system what windows in SAP should use B1 Print and Delivery and optionally if there are any special cases for certain business partners (One BP might need a report to be printed while another wish the report via an email) (see: Main configuration)

Startup Wizard

If this is a new installation you will be presented with the B1 Print and Delivery Wizard



The Wizard will help you set up the most common scenario, including where you wish to store your crystal reports, what type of documents you use and a few default actions.

Field / Button	Description
Shared Folder location	Here you define where the default Crystal Report documents provided with B1 Print and Delivery should be placed. In a multi-user scenario this need to be a Shared folder
Work with the following documents	Here you can check and uncheck which documents you normally work with and the add-on should setup up automatically (You can later add/remove documents in the Report Configuration)
Default action when adding document	Here you can define what the default action should be when you add a sales/purchase document. As default nothing is defined, but you can choose between Show, Email, Save and Print. NB: IF SAP'S DEFAULT PRINT DURING ADD-FEATURE IS ACTIVATED IN THE DATABASE BE SURE TO DISABLE IT (ELSE IT WILL DO BOTH THE SAP DEFAULT AND THE B1PRINT AND DELIVERY ACTION).
Default action when running account Balance	Here you can define your default delivery method of the Account Balance feature. Default is Email.
Default mass delivery action	Here you can define your default delivery method of the Mass delivery feature. Default is Email.
Default dunning wizard action	Here you can define your default delivery method of the Dunning feature. Default is Email.
Help	Click here to see this help-file

Set database information	Clicking this button will open the database information setup-window. You need to define how the Crystal Reports connects to the SAP Database.
Do not use this Wizard	If you do not wish to use the Wizard and set everything up manually you can click this button to get rid of the Wizard

When everything in the Wizard is as you want it to be, you can press OK and confirm to apply the Wizards data. On confirmation the Wizard will do the following:

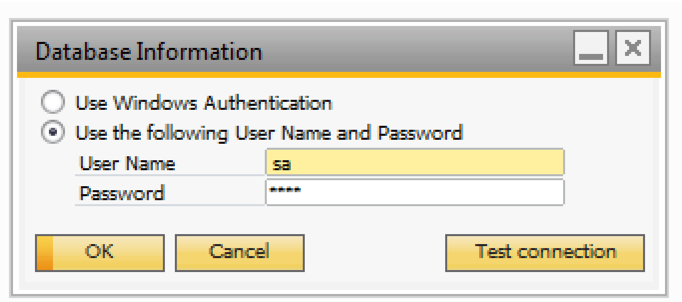
- Create the Shared Folder if it does not exist
- Moved the default reports to the shared folder location
- Create Crystal Report Definitions
- Create the following Report Actions required for your selections
- Save the defaults for adding documents, Account balance and dunning reminders
- Create a configuration for each checked document type with the following
    - Print preview button use a Show-action
    - Print button use a print-action
    - PDF button use a save-action
    - Email-button use an email-action
    - Document printing use a print-action
    - If configured Add-button use the selected Add-action.

After completion of the Wizard you can now modify or add various additional crystal definitions, actions (texts) and configurations as needed.

The following sections explain each type of configuration in details.

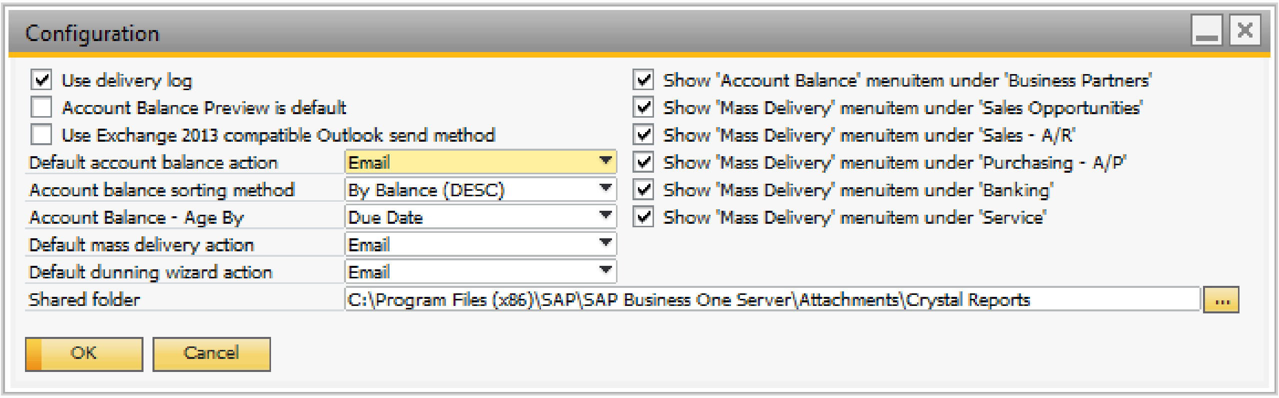
Database setup

Before you can use the system you will need to define how it should create a connection to the database if your Crystal Reports have database connections. This is done via Administration > Add-ons >B1 Usability Package > Module configuration >B1 Print and Delivery> Set database Password



Configuration

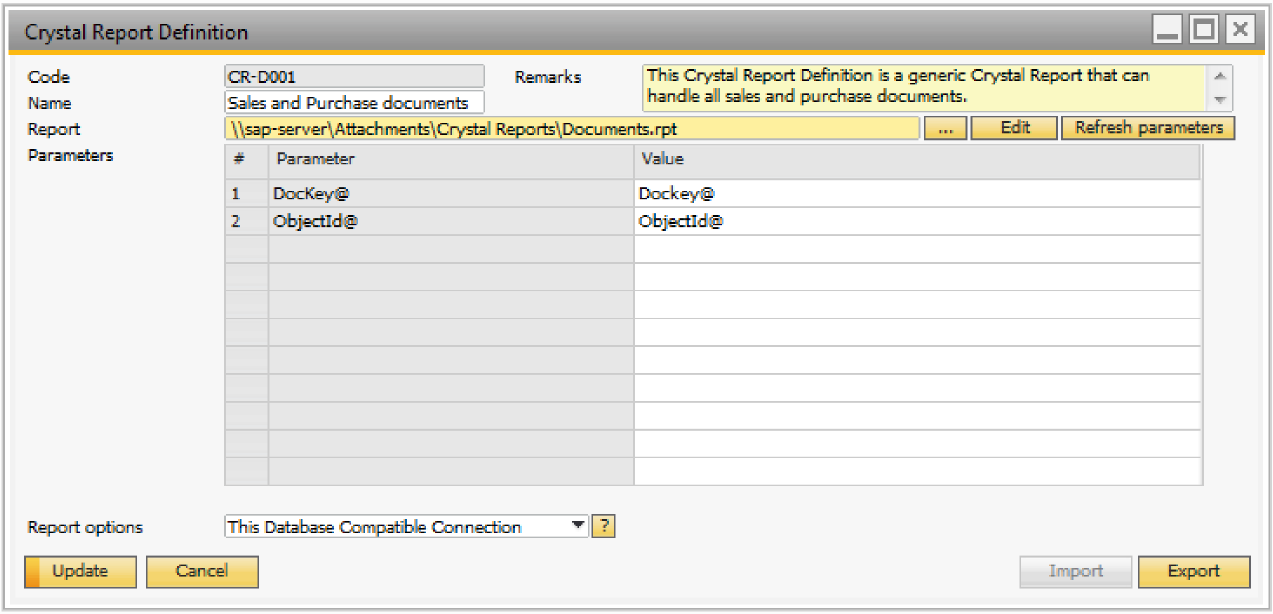
Here you can set general configurations for B1 Print and Delivery. This is done via Administration->Add-ons->B1 Usability Package->Module configuration->B1 Print and Delivery->Configuration



Field	Description
Use delivery log	Is the delivery log system to be used
Account Balance Preview is default	Is this option is enabled the Account Balance Preview will be checked by default
Use Exchange 2013 compatible Outlook send method	If this option is enabled B1Print & Delivery will use a new Exchange 2013 compatible way of interacting with the Outlook client. Enable this option if you have problem with Outlook and Exchange 2013.
Default account balance action	Default account balance action for the account balance functionality
Account balance sorting method	Determines in what order B1 Print and Delivery will send out account balances.
Default mass delivery action	Default mass delivery action for the mass delivery functionality
Default dunning wizard action	Default dunning wizard action for the dunning wizard functionality
Shared folder	The shared folder to be used HINT: YOU CAN SELECT A FOLDER BY CLICKING THE "…" BUTTON
Show 'x' menuitem under 'y'	These options allow you to control where B1P&D add menuitems om the main menu in other places that administration. This is handy if you use the form-settings to have a more minimal Main menu without certain of the main menu-headers.

Report Definitions

Report definitions are where you tell the system where each of your crystal report files is located on the network and what parameters are needed to show the report. These are used in the main configuration.



<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Code</td><td>The unique code of the report-definition (Can be up to 8 chars)</td></tr>
<tr><td>Name</td><td>The name of the report-definition</td></tr>
<tr><td>Report</td><td>Here you choose your crystal report layout you wish to launch. You can type in the path to the file or press the "..." button to choose the file. Once you choose the file it will be scanned for parameters and shown below.

NB: Please be aware that if multiple users need to run the report, the path to the file should be a shared path (Example: \\sap-server\Crystal\Document Master.rpt)</td></tr>
<tr><td>Edit-button</td><td>If you are on a machine with the Crystal Report designer installed you can press the Edit-button to edit the selected report.</td></tr>
<tr><td>Refresh parameter-button</td><td>If you have already chosen a Crystal Report file, but after selection, you update the layout to include more parameters, you can click this button to update the list of parameters below.

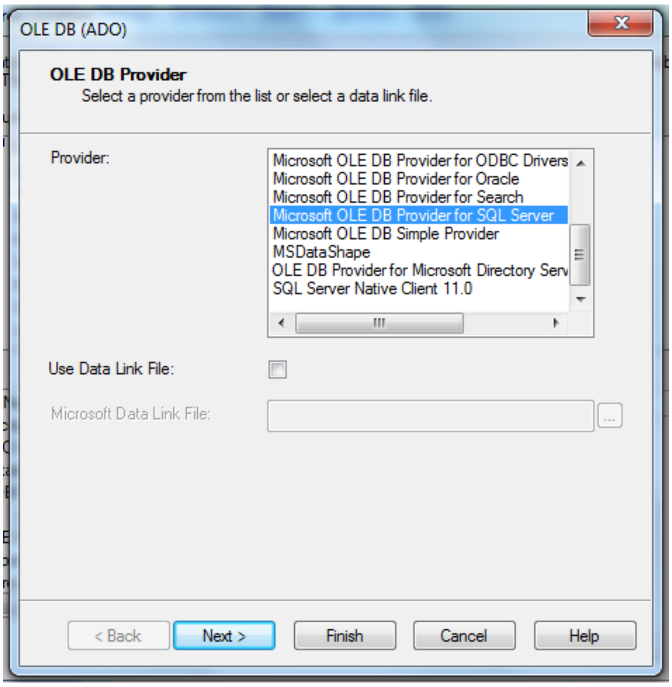
Tip: If you alreadyentered values for the parameters and press update the system will try to preserve existing value as long as the parameter name is the same.</td></tr>
<tr><td>Parameters</td><td>In Crystal Reports, you have the option pass along parameters to the report (example: a specific customer code or a specific document number).
<table>
<tr><th>Colum</th><th>Description</th></tr>
<tr><td>Parameter</td><td>Here the names of the parameters in the report is automatically drawn and shown</td></tr>
<tr><td>Value</td><td>Here you enter the value that you wish to send along to the report. You have several options on how to pass along</td></tr>
</table></td></tr>
</table>

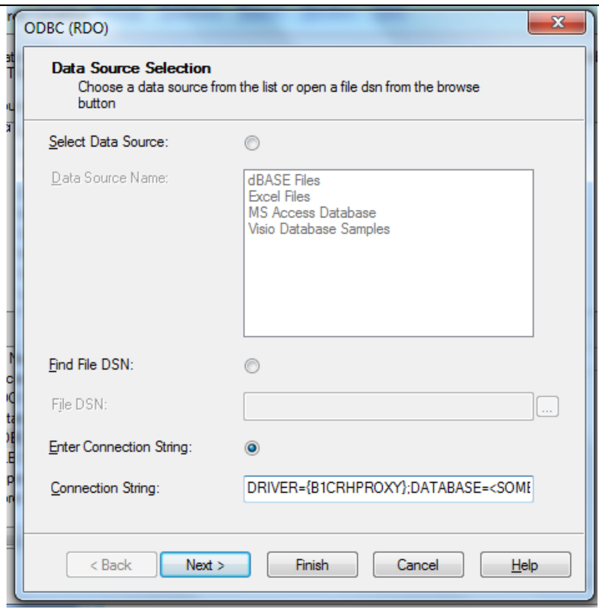
parameters

- No value
  - If you leave the value empty the report at launch ask you for a value before showing the report
- Fixed value
  - You can enter any fixed value (123, abcetc. all depending on your report parameters value)
- DocKey@ keyword
  - This special keyword defined by SBO8.8 will give you the DocEntry-field of all sales and purchase documents
- ObjectId@ keyword
  - This special keyword defined by SBO8.8 will give you the object-type of the document.
    - 23 = A/R Quotation
    - 17 = A/R Order
    - 15 = A/R Delivery Note
    - 16 = A/R Return
    - 203 = A/R Down Payment
    - 13 = A/R Invoice
    - 14 = A/R Credit Note
    - 22 = A/P Order
    - 20 = A/P Goods Receipt PO
    - 21 = A/P Goods Return
    - 204 = A/P Down Payment
    - 18 = A/P Invoice
    - 19 = A/P Credit Note
    - 33 = Activity
    - 24 = Incoming Payment
    - 46 = Outgoing Payment
    - 97 = Sales Opportunity
    - 156 = Pick List
    - *[Other can be found in the "SDK Help Center" under BoLinkedObject Enum]*
- Null value
  - Enter the special keyword $[NULL] to pass along a NULL value
- Dynamic Syntax Value (Header level data only)
  - Use the common dynamic syntax ($[$<item>.<col>.<type>] or $[<table>.<field>.<type>]) to pass along data from the active window in SAP Business One. For more information on the dynamic syntax, see the dynamic syntax guide
    - **Sample:** $[$8.0.NUMBER] to pass the document number on a Sales Order.
- SQL value
  - Use the SQL:<your sql> syntax to execute your SQL where the result of the SQL will be passed

	along as the value. In <your sql> you can use the dynamic syntax ▪ **Sample:** SQL:SELECT DocEntry FROM OINV WHERE DocNum = $[$8.0.0]
Report options	Here you can define what data source the crystal report is using when launching. A Crystal Report as default have a data source attached to it within the report-files, and choosing the option "As in report" will let the report know that it should use the source as it was designed. In scenarios where you use the report in multiple database or if it is not designed on location you can choose the "This database". Doing this will cause B1 Print and Delivery, to on the fly, tell the report that it should use the currently logged in database instead of the data source embedded into the report. If you have problem with “This database” you can try the “This database Compatible Connection”. This will force the Crystal Report to use predefined value that should work on every system.
Import-button	You have the option to import exported Report-definitions from XML
Export-button	In OK-Mode you have the option to export the current or multiple Report-definitions to XML. In add-mode you have the option to export multiple Report-definitions from XML

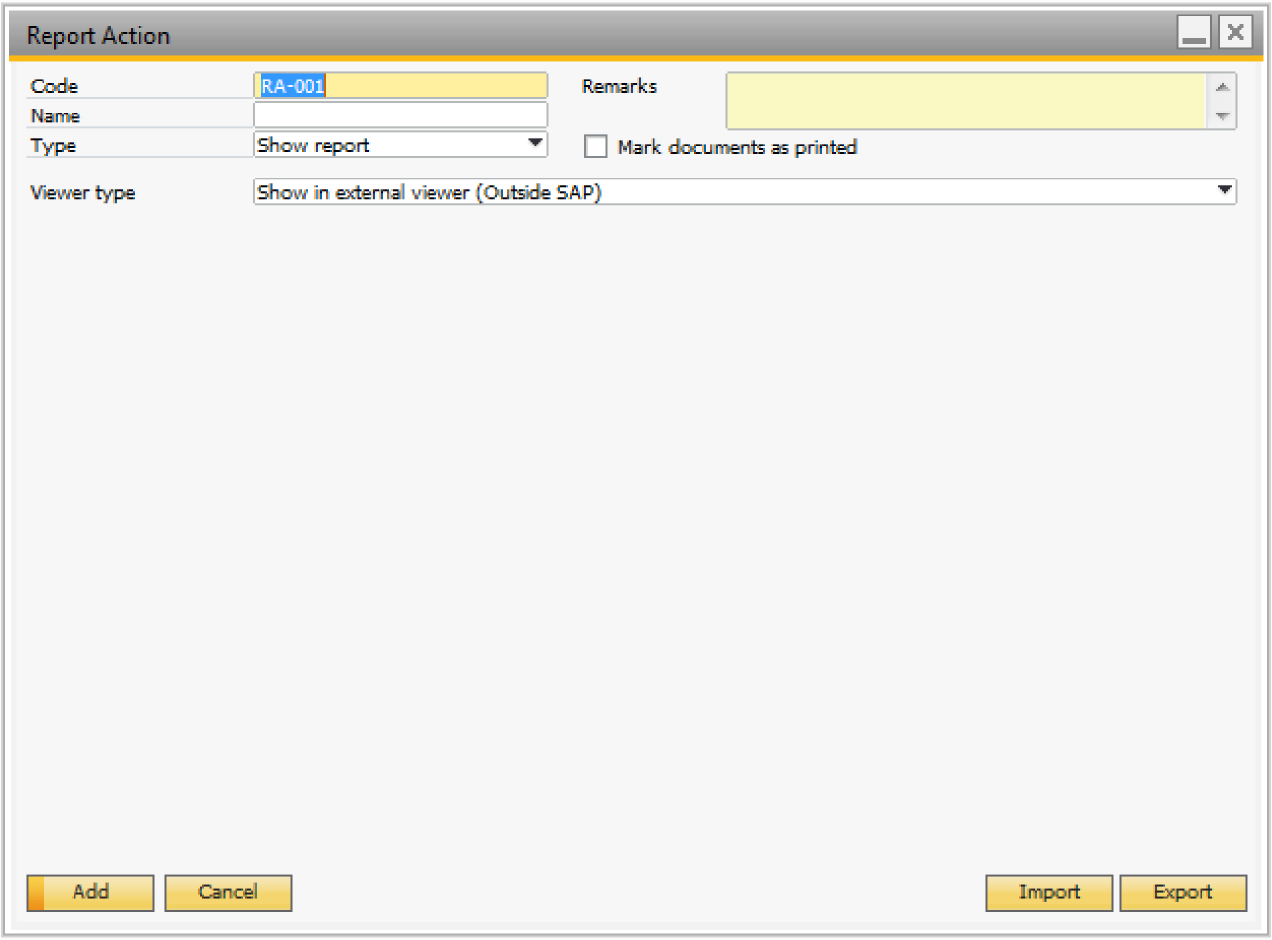
Note on Recommenced Crystal Report Datasources:

Datasource on MSSQL	**Datasource on SAP HANA**
We recommend using OLE DB (ADO) datasource with provider Microsoft OLE DB Provider for SQL Server 	We recommend using ODBC (RDO) datasource with following HANA connection string: DRIVER={B1CRHPROXY};DATABASE=<SOME_DATABASE>;PWD=<SOME_PASSWORD>;SERVERNODE=<SOME_IP_ADDRESS>



Report Actions

The report action window is where you define the different type of action you wish to apply to a report (print, save, email etc.).

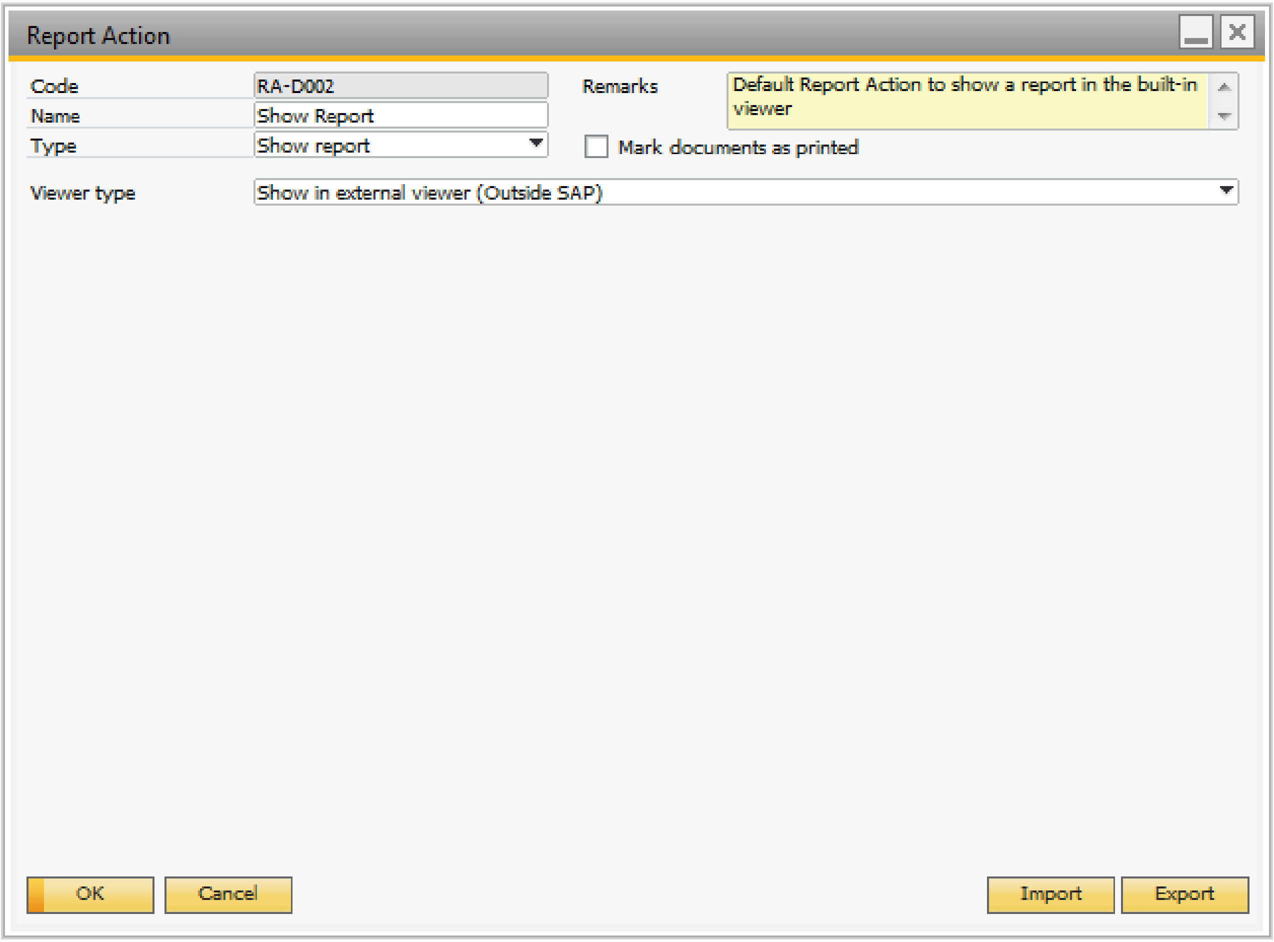


Common for all report actions are the following

Field	Description
Code	The unique code of the action (Can be up to 8 chars)
Name	The name of the report action
Type	The type of the report action. The different types are described below
Remarks	Any remarks or description you might have for the action
Mark documents as printed	Should the action mark the document as printed (Sales and purchase documents only) when the action is performed
Import	In add-mode you have the option to Import exported Report Actions from XML
Export	In OK-Mode you have the option to Export Report Actions to XML

Show Action

The show-action allows you to show a crystal report in a built in report viewer



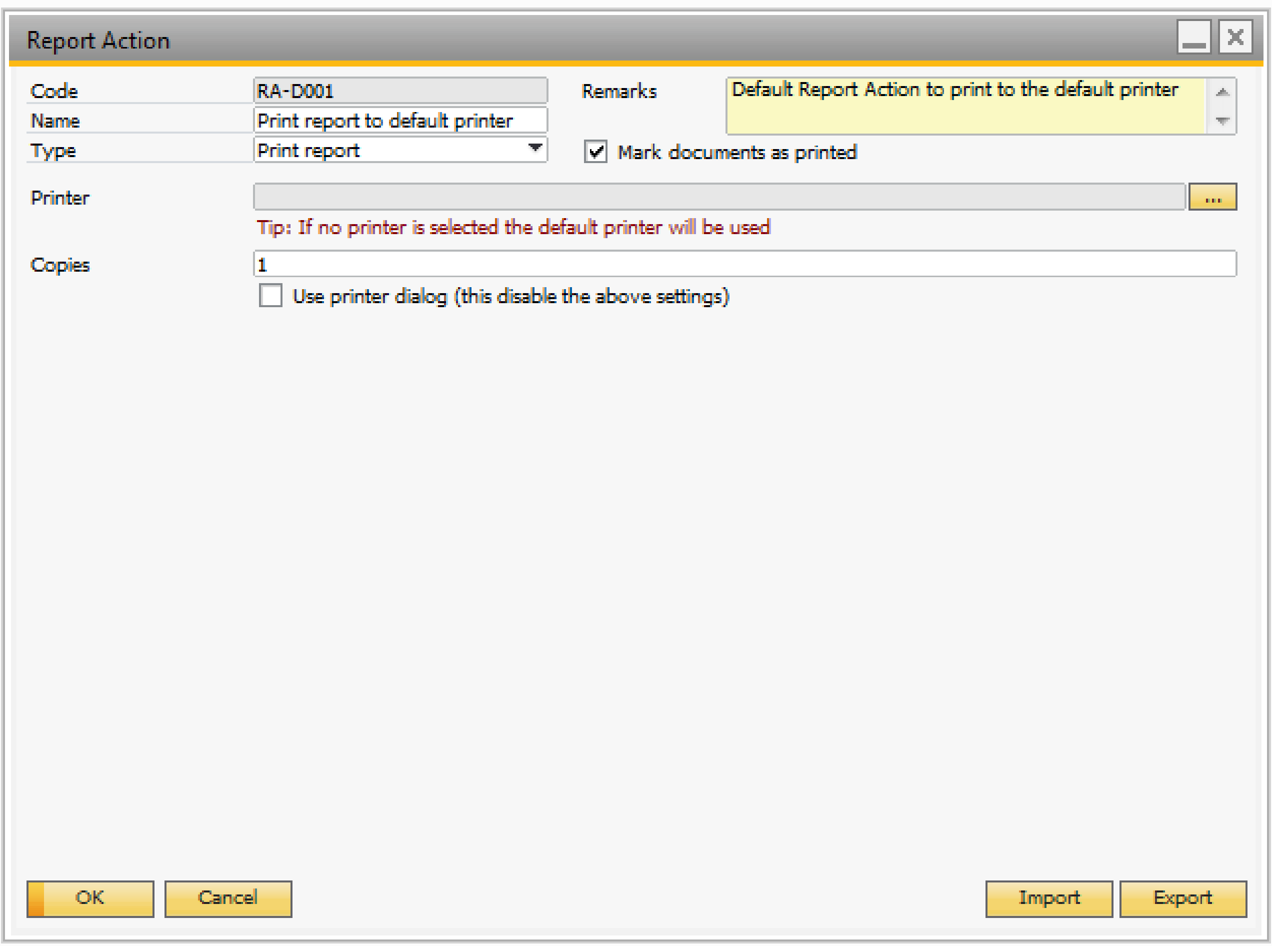
Field	Description
Viewer type	Here you have the option to show the viewer as an external viewer (window that is separate from SAP B1 Client (Great if you have multiple screens)) or an internal viewer.

TIP: FROM THE BUILT IN CRYSTAL REPORT VIEWER, YOU HAVE THE OPTION TO PRINT AND/OR EXPORT THE REPORT FOR FURTURE USAGE.

Print Action

The print action will as the name says print a Crystal Report. You have the option to choose which printer you wish to print to (if none is selected the default printer will be used) and how many copies you wish to print.

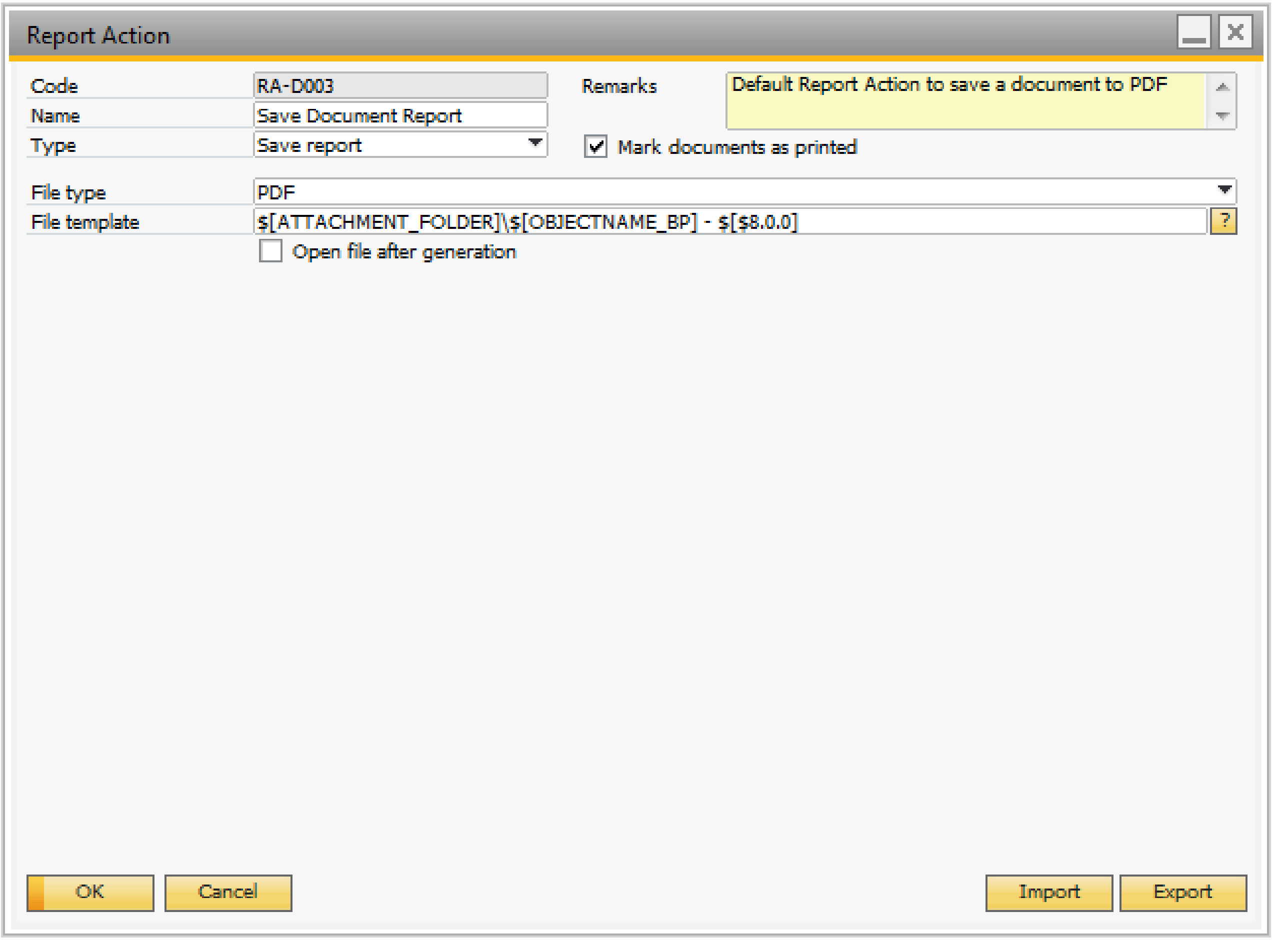
Alternative you can choose to force to have a Printer dialog up each time. If you choose this option the above data is the default of the dialog.



TIP: IT IS POSSIBLE TO USE DYNAMIC SYNTAX AND SQL: SYNTAX IN THE NUMBER OF COPIES FIELD.

Save Action

The save action allows you to save a Crystal Report as a file.

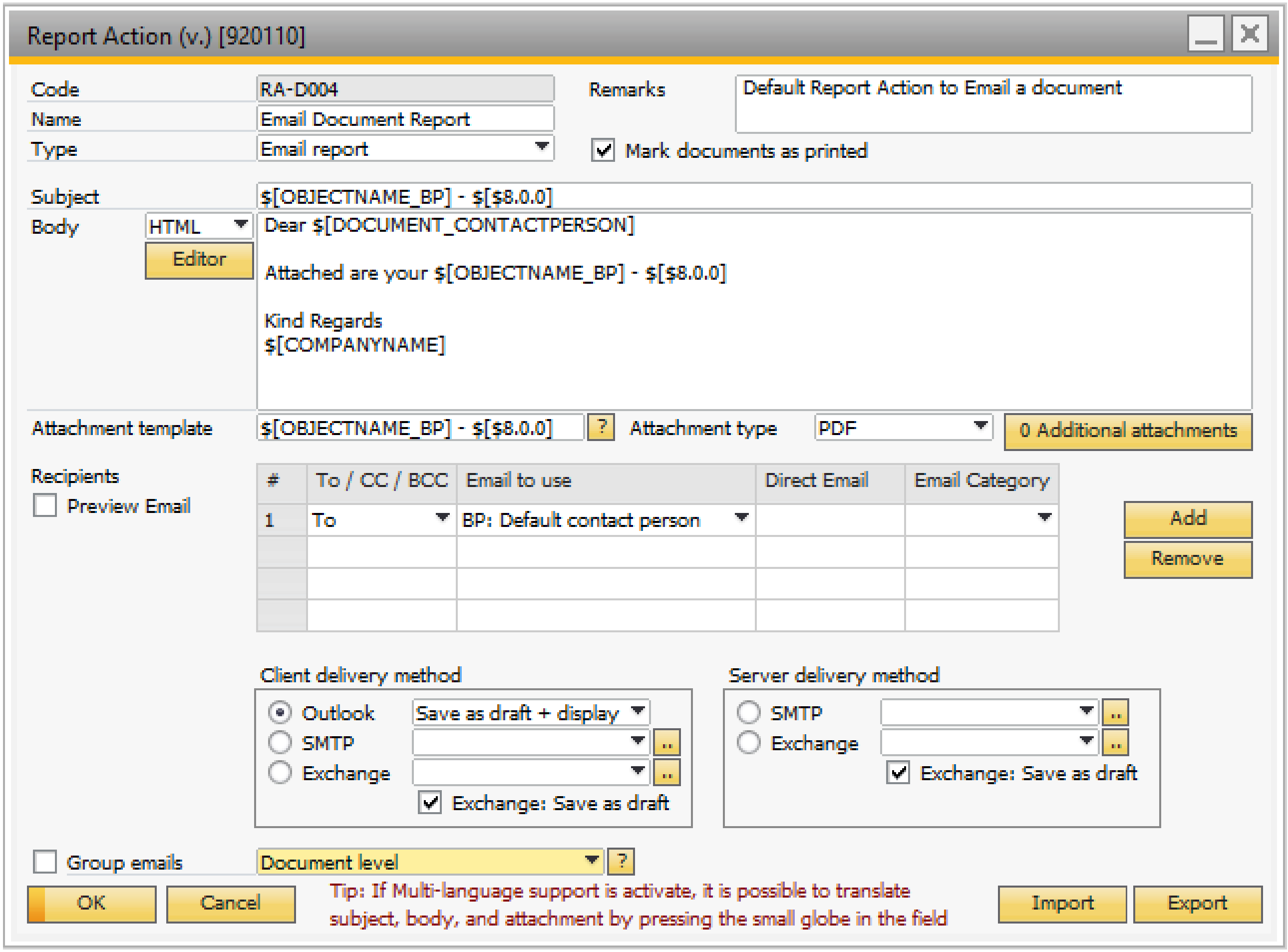


Field	Description
File type	Here you choose the file type. Supported file types are: - PDF - Excel - RTF (Rich Text Format) - Word - CSV - RTF (Editable) - Excel (Records) - Tab Seperate Text (TTX) - Text (TXT) - HTML - XML - Word For Windows (RTF)
File template	Here you choose the location of the file. As you can see in the screenshot you have the option to use the SAP dynamic syntax (Example: $[$8.0.0] on a Sales order will give you the order number). You can furthermore use the special keyword $[OBJECTNAME] which will be replaced with name of the window from which you saved (Example: in the case of printing from a sales order the keyword would be replaces the “Sales order”). The full sample would result in a file being saved in C:\Sales order – 23.pdf (if the sales order had number 23)

	TIP: FOR FULL LIST OF SPECIAL KEYWORDS, PLEASE SEE APPENDIX 1
Open file after generation	Check this option if you wish to open the file after it has been generated.

Email Action

The email action is a powerful action that allows you to send a Crystal Report via email (SMTP or MS Outlook) to one or multiple recipients.



Field	Description
Subject	Here you type the subject of the email you want to send. You can use a fixed text or combine it with the dynamic syntax and/or one or more of the special keywords. TIP: FOR FULL LIST OF SPECIAL KEYWORDS, PLEASE SEE APPENDIX 1
Preview email	Here you can choose to preview before you choose the send it NB: DOES NOT WORK WITH MASS DELIVERY
Body	Here you type the body of the email. Again, this can be a fixed text or combined with the dynamic syntax and/or one or more of the special keywords. TIP: FOR FULL LIST OF SPECIAL KEYWORDS, PLEASE SEE APPENDIX 1 **KEYWORDS** ***DateFormat(DynamicSyntax|FORMAT)*** can be used to format dates using a format. Example:

DateFormat($[$10.0.DATE]|dd-MM-yyyy)
Will give:
31-01-2012
Please note: You need to use .date in the dynamic syntax
Please note: You can use the keyword today DateFormat(Today|format) to get today's date

Formats available:

Format	Description	Example
d	Day without leading zero	5
dd	Day with leading zero	05
ddd	Day as text (shot)	Mo
dddd	Day as text (long)	Monday
M	Month without leading zero	9
MM	Month with leading zero	09
MMM	Month as text (short)	Sep
MMMM	Month as text (long)	September
yy	2-digit year	08
yyyy	4 digit year	2008

You can use the TimeFormat keyword to format a time:
TimeFormat(Time|Format).
Example:
TimeFormat($[SERVERTIME]|h:mm).

Formats available: http://msdn.microsoft.com/en-us/library/8kb3ddd4.aspx (Or google Custom Date and Time Format Strings)

SQLHtmlTable(<sql>) this will if given a SQL create a HTML table with a header containing the name of the columns and create rows containing the values.
Example: SQLHtmlTable(SELECT CardCode, CardName FROM OCRD)
Tip: You can style the table using normal CSS. The class for table is: defaultTable.
Please note: It will make a HTML table so you should switch the body type to HTML

SQL(<sql>) this will if given a SQL insert the first value returned by the SQL into the email body.
Example: SQL(SELECT Balance FROM OCRD WHERE CardCode = '$[$4.0.0]')

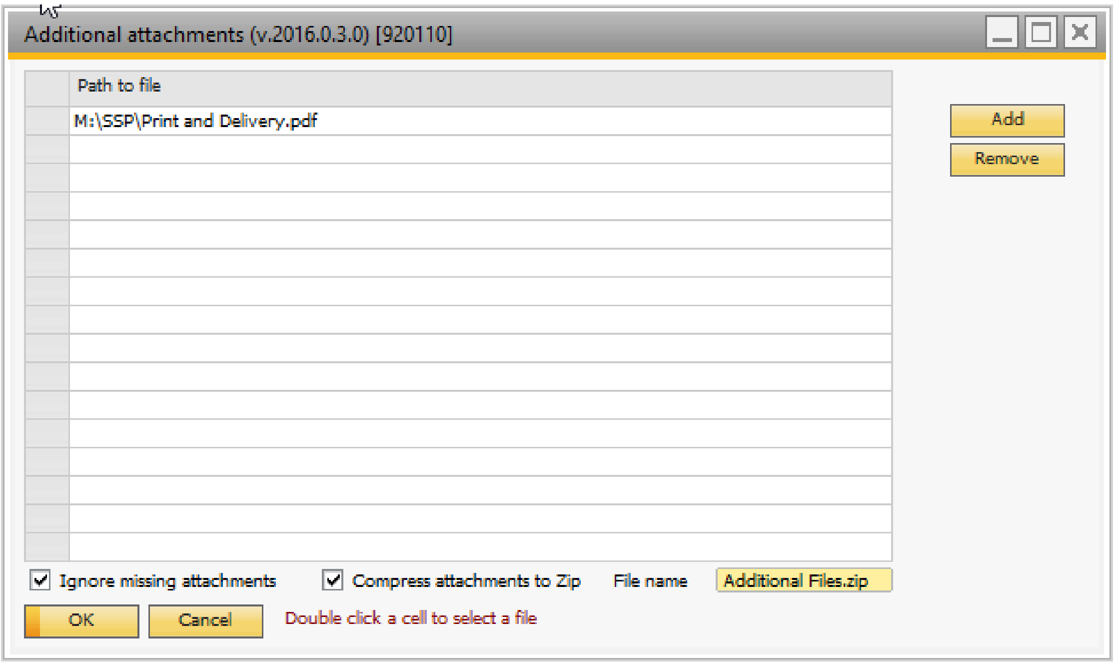
Attachment template

Here you choose the name of the report attachment. As you can see in the screenshot you have the option to use the SAP dynamic syntax (Example: $[$8.0.0] on a Sales order will give you the ordernumber).
Tip: For full list of special keywords, please see appendix 1

Attachment type

Here you choose the attachment type. Supported attachment types are:

- PDF
- Excel
- RTF (Rich Text Format)
- Word

<table>
<tr>
<td></td>
<td>
- CSV
- RTF (Editable)
- Excel (Records)
- Tab Separate Text (TTX)
- Text (TXT)
- HTML
- XML
- Word For Windows (RTF)
- No Attachment (Will result in there being no attachment attached to the mail)
</td>
</tr>
<tr>
<td>Additional attachments</td>
<td>
You have the option to attach additional files to the emails.
To add additional attachments click the button and a new window will show:


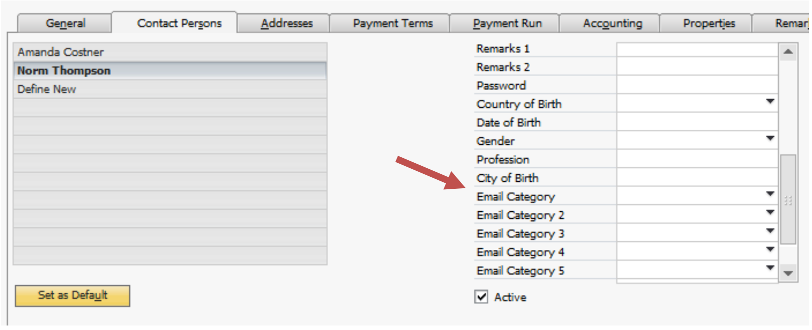
You can double click a cell to select a file and you have the option to use the SAP dynamic syntax. You can add a folder path and it will take all the files in the folder.
You have the option to ignore missing attachments. If an attachment is missing and this option is not set you will get an error and the mail will not be send.
The additional attachments also supports “SQL:” and “SQLMulti:” where SQLMulti: can be used to get multiple rows from a table.

You also have the option to compress the attachments to a zip file and give the file a name. The name field supports dynamic syntax.

Example: “SQLMulti:SELECT CAST(T1.trgtPath AS nvarchar(4000)) + '\' + T1.FileName + '.' + T1.FileExt FROM ORDR T0 JOIN ATC1 T1 ON T0.AtcEntry = T1.AbsEntry WHERE T0.DocNum = $[$8.0.0]” will attach all attachments on a Sales order to the email.
</td>
</tr>
<tr>
<td>Recipients</td>
<td>
In order to send an email you need to specify one or more recipients for the email. You can have as many recipients as you like by adding lines.
<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>To / CC / BCC</td><td>Here you decide how the recipient will get the email. You can choose To, CC or BCC.</td></tr>
<tr><td>Email to use</td><td>Here you choose among predefined BP emails or direct emails (see below)</td></tr>
</table>
</td>
</tr>
</table>

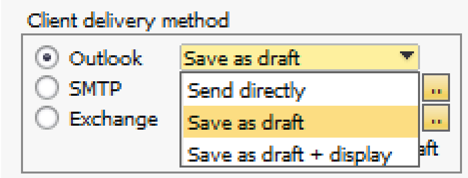
<table>
<tr><td></td><td></td><td>
<table>
<tr><th colspan="2">Type</th></tr>
<tr><td>BP: Default contact person</td><td>Use the email of the default contact person defined for the Business partner.</td></tr>
<tr><td>BP: Header</td><td>Use the email defined on the Business partner’s general tab.</td></tr>
<tr><td>Document: Selected contact person</td><td>Use the email of the selected document’s selected contact person.
(Can only be used when printing documents)
Does not work on the dunning wizard.</td></tr>
<tr><td>Email Category</td><td>Use all BP Contact persons that have the specified Email-category (see below)</td></tr>
<tr><td>BP Consolidation: Header</td><td>Use the Header email of the BP’s consolidation business partner.</td></tr>
<tr><td>BP Consolidation: Default Contact Person</td><td>Use the Default contactperson email of the BP’s consolidation business partner.</td></tr>
<tr><td>BP Consolidation: Email Category</td><td>Use all BP Contact persons that have the specified Email-category (see below) of the BP’s consolidation business partner.</td></tr>
<tr><td>BP Consolidation: Header (with fallback)</td><td>As “BP Consolidation: Header” but if no consolidation then it revert to “BP: Header”</td></tr>
<tr><td>BP Consolidation: Default Contact Person (with fallback)</td><td>As “BP Consolidation: Default Contact Person“ but if no consolidation then it revert to “BP: Default Contact Person”</td></tr>
<tr><td>BP Consolidation: Email Category (with fallback)</td><td>As “BP Consolidation: Email Category” but if no consolidation then it revert to “BP: Email Category”</td></tr>
</table>
</td></tr>
<tr><td></td><td>Direct email</td><td>The direct email field can be used to send the report to a fixed email specified in the configuration. Also it can be used to send to custom emails using dynamic syntax if needed. The direct email supports “SQL:” and “SQLMulti:” where SQLMulti: can be used to get multiple rows from a table.

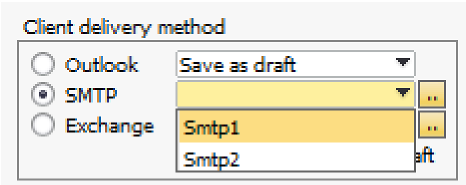
Sample: if you on a sales order have defined a user-defined field (called U_MAIL) to hold an email, you could set up a direct email to $[ORDR.U_MAIL.0] in order to send the sales order to the email specified in the UDF.</td></tr>
</table>

<table>
<tr>
<td></td>
<td>
<table>
<tr>
<td>Email Category</td>
<td>Here you can choose the type of Email Category you wish to send to if you have set the “Email to use” to type “Email Category”. Email Category is defined on the Business Partner, Contact persons.


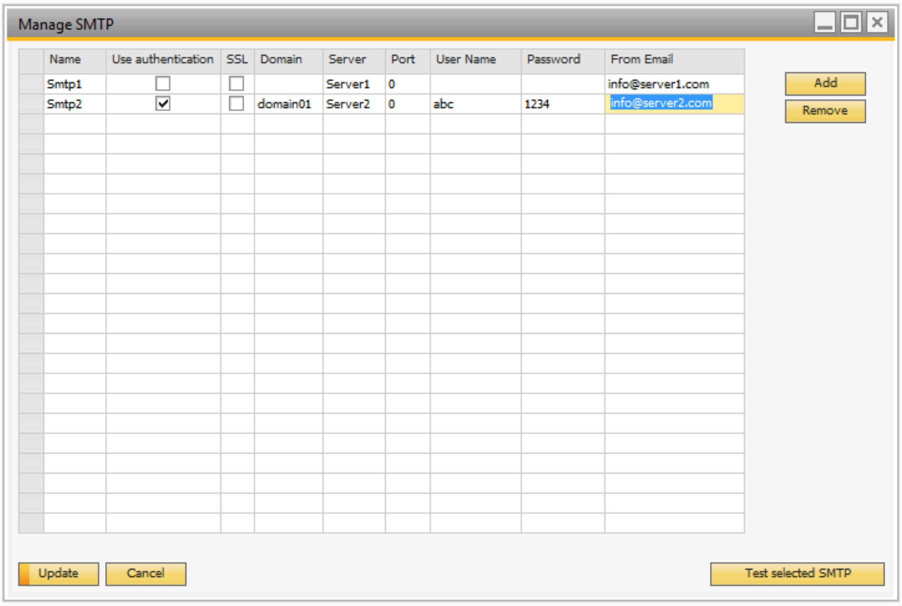
As default there are no categories but from the contact persons you can define as many categories as you want.

Each contact person can be associated with up to 5 different e-mail categories for more complex e-mail configurations (Example: a contact person has primary category “Accounting” but is also “COO” as secondary category. All invoices should be sent to the accounting category while all COO’s need to be CC’ed on service calls. This would not have been possible with a single category and for that reason there are multiple).</td>
</tr>
</table>
</td>
</tr>
<tr>
<td>Client delivery method</td>
<td>Here you decide if you wish to use Outlook, SMTP or Exchange to send the report from the client.

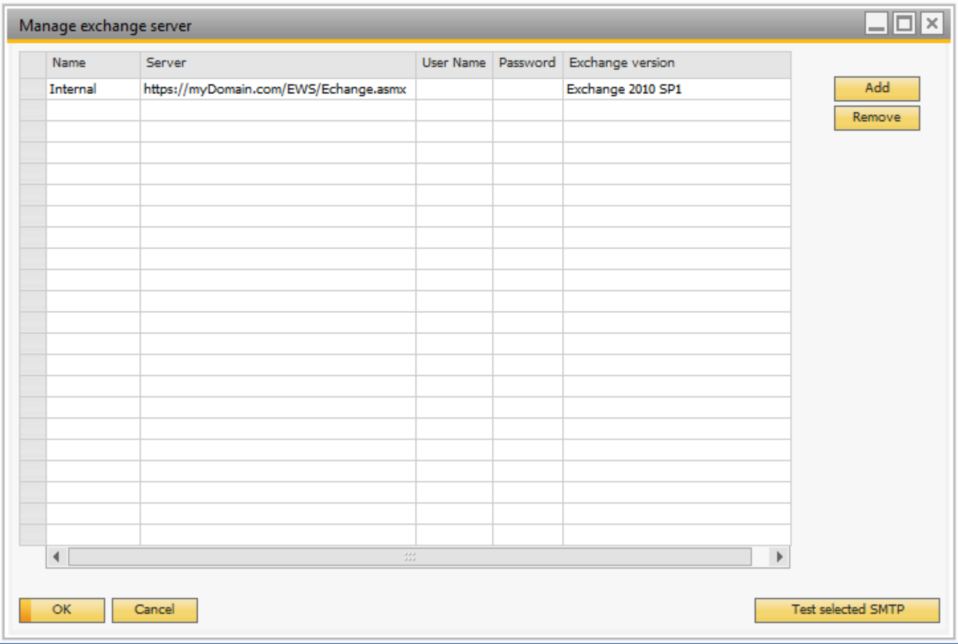
If you choose Outlook, you have the option to decide if the email should be generated as a outlook draft, darft + display of this draft or directly sent.


If you choose SMTP you need to choose one of the defined SMTP configurations. You can setup SMTP configurations by clicking the .. Button.


</td>
</tr>
</table>



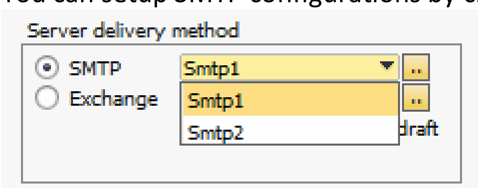
- If you choose Exchange you need to choose one of the defined Exchange configurations. You can setup Exchange configurations by clicking the … Button. The server field needs to point to the ASMX URL of your exchange server and you need to select the correct exchange version.

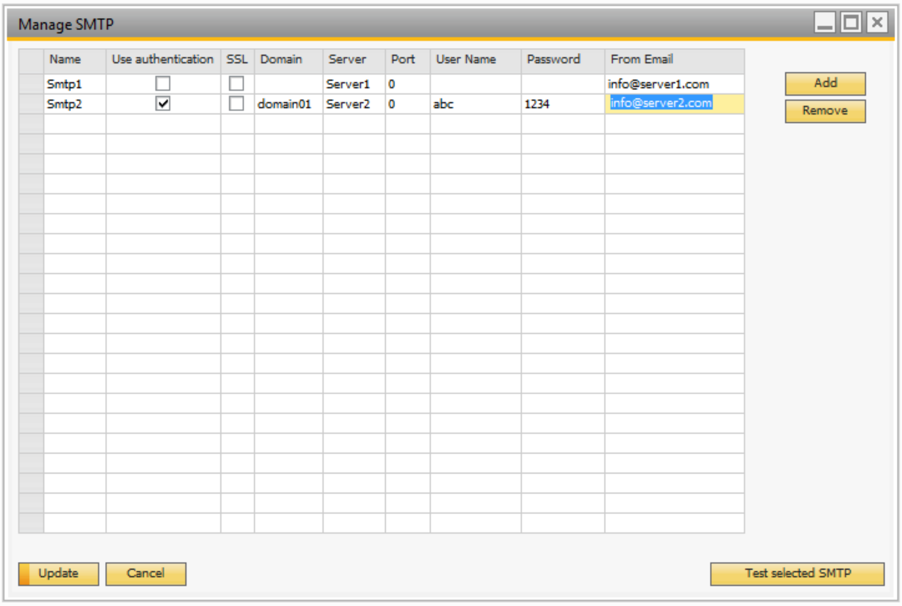


Server delivery method

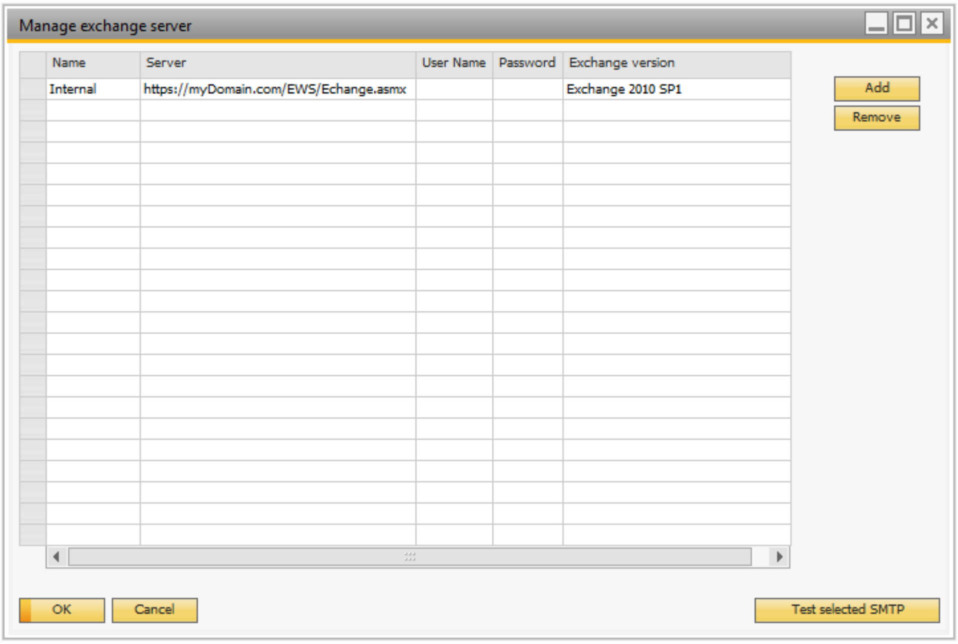
Here you decide if you wish to use SMTP or Exchange to send the report from the client.

- If you choose SMTP you need to choose one of the defined SMTP configurations. You can setup SMTP configurations by clicking the … Button.



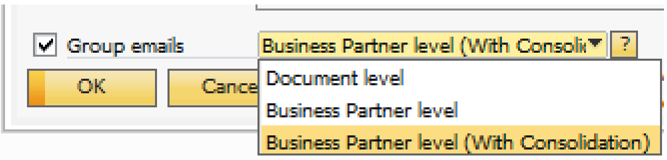


- If you choose Exchange you need to choose one of the defined Exchange configurations. You can setup Exchange configurations by clicking the … Button. The server field needs to point to the ASMX URL of your exchange server and you need to select the correct exchange version.



Group emails

Check this option to allow the system to group emails to the same recipient.
In B1 Print & delivery you can choose to group by "Document level" or "Business Partner level".

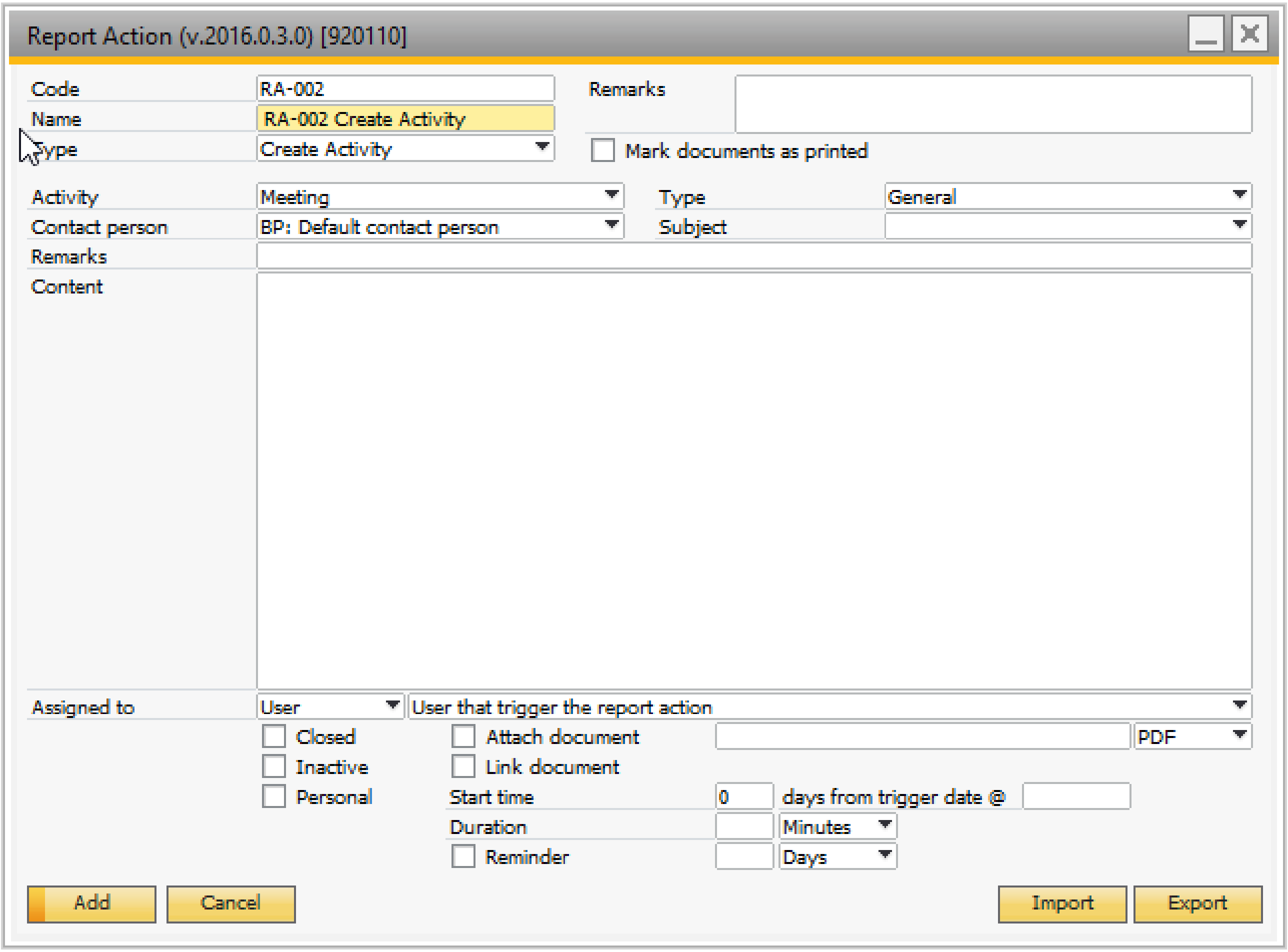


Document level: Example of this is that if you have a sales document report and a specification report that are set up to be printed on a user-action, the system would be able

	to send both reports in one email instead of two. If grouping is possible the subject and body will always be used from the first configured email-action. **Business Partner level:** Example of this is that if you have multiple document for example invoices that should be emailed to the same business partner, they will get grouped into one email instead of multiple. If grouping is possible the subject and body will always be used from the first configured email-action. **Business Partner level (With consolidation)** As above but the BP Matching will happen on the consolidating BP (or itself if no consolidation)

Create Activity Action

The Create Activity Action allows you to create a SAP activity (Business Partners > Activity) and link or/and attach the report to the activity created.

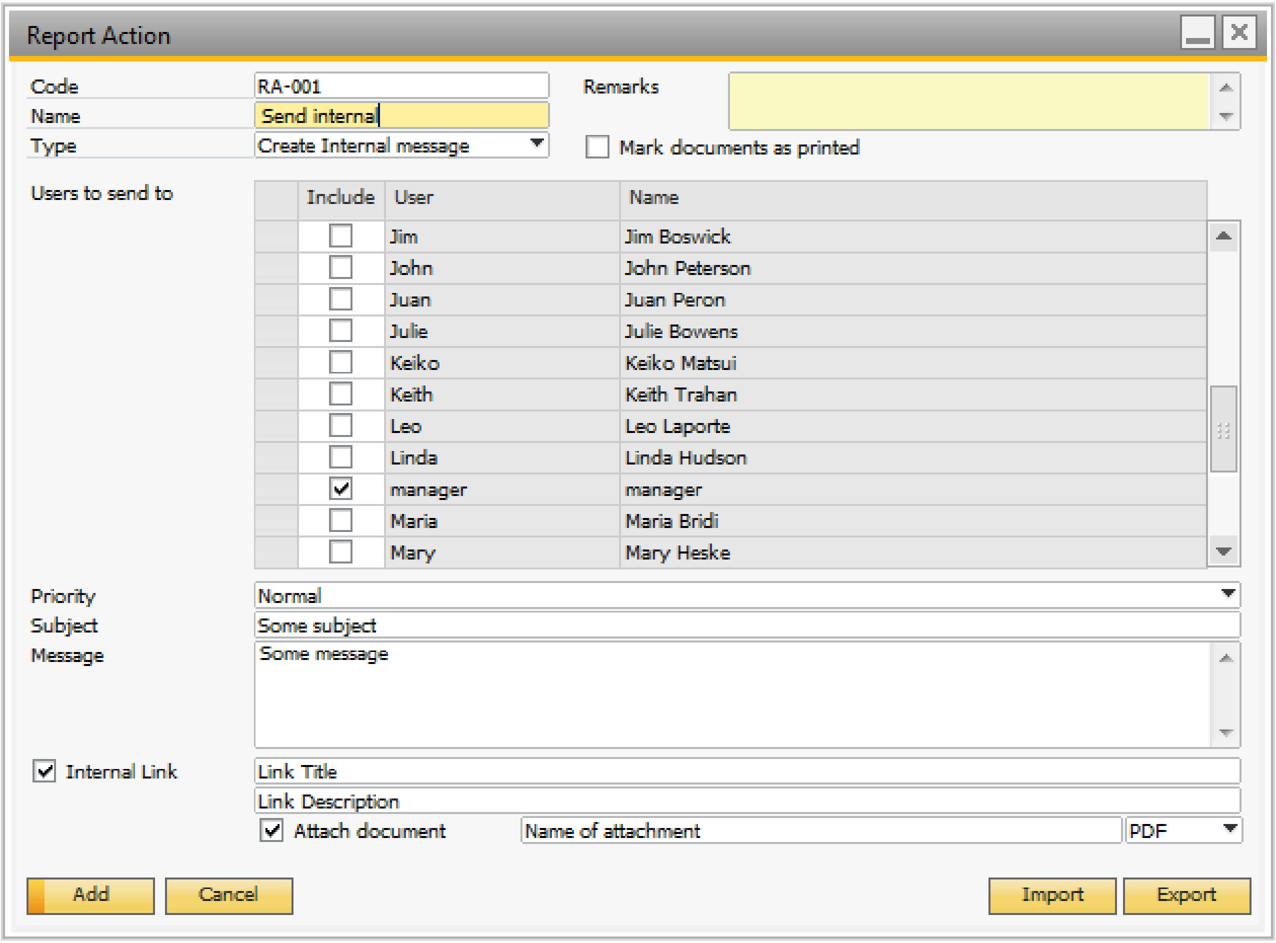


Field	Description
Activity	This determine what type of activity you are creating.
Contact Person	Determines what contact person is used on the activity. The contact person can be either the default contact person, the contact person on the document from where you create the activity or none.

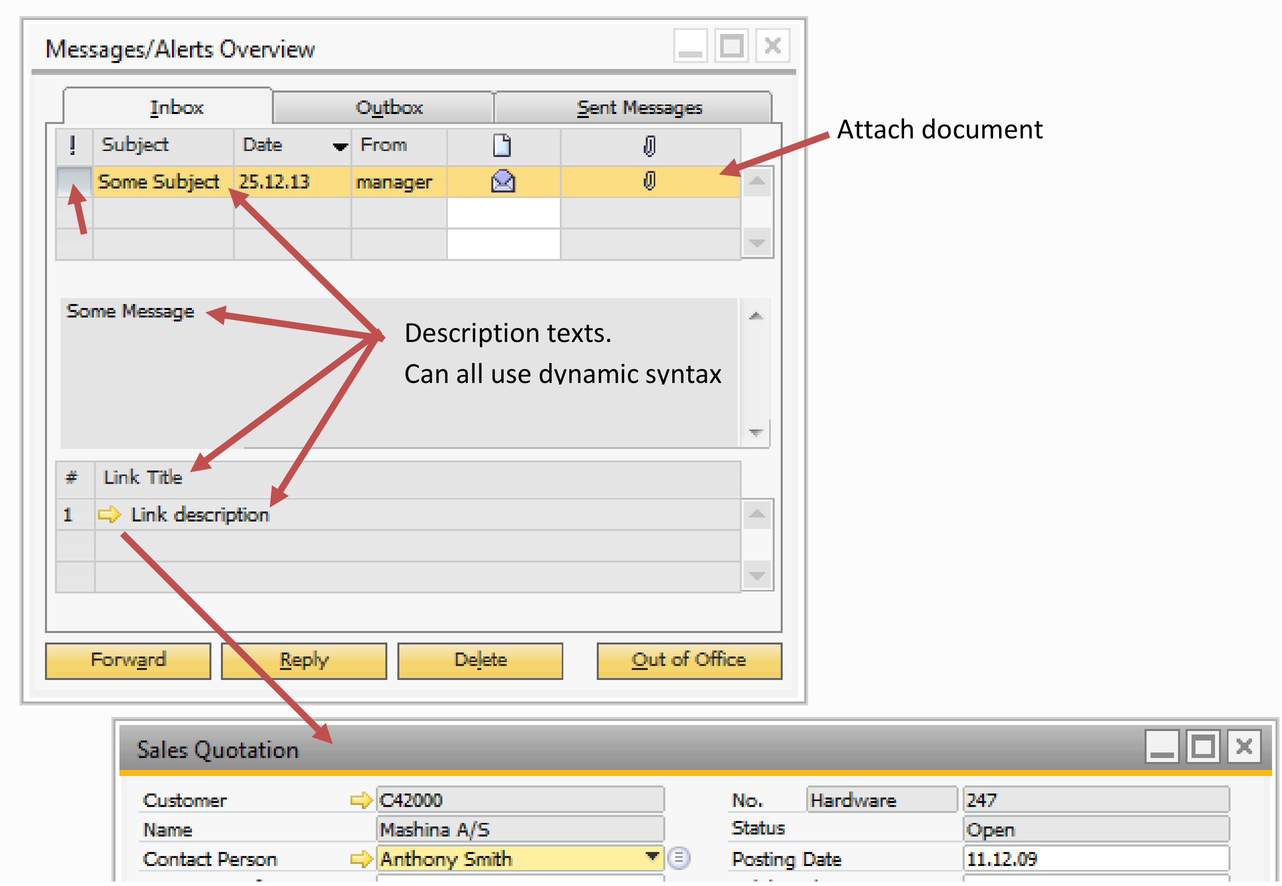
	NB: if you are on a document that does not have a contact person and use the document contract person option it will instead use the default contact person.
Type + Subject	Here you choose the type and the underlying subject of the activity
Remarks	This is the remarks of the activity. You can use the dynamic $[$item.col.type] syntax if you wish to make the remark dynamic
Content	The you can write the more detailed description of the activity. You can use dynamic syntax in this field as well.
Assigned To	Here you choose what user type either user or employee that you assign the activity to. It can be dynamically to the user that triggers the action or a specified user you choose
Closed	Indicate if the activity should be created with the closed-flag checked or not
Inactive	Indicate if the activity should be created with the inactive-flag checked or not
Personal	Indicate if the activity should be created with the personal-flag checked or not
Attach Document	If you check this the system will attach produced version of your Crystal report from used Report Action to your activity. In the field you need to indicate the filename you want for the attachment (Tip: you can use the dynamic syntax to build the file-name) and choose the type of attachment. NB: In order for this to work you need to have set up a valid Attachment Folder path in the system administration of SAP Business One
Reminder	Here you can indicate if the activity should be created with a reminder + the time before you are reminded.
Link document	Activities have the option to link data to them on the “Linked document” tab. If you check this option the report action will create a link to the source document provided it is a type supported by the activity window.
Start time	Here you can set the number of days in the future you want to start the activity and at what time the activity should start. **Example**: to create an activity there begins the next days at 12.00 Start time 1 days from trigger date @ 12:00
Duration	Here you can set the duration for the activity. The duration can be in minutes, hours or days

Create Internal Message Action

Create Internal Message Action allow you to create internal message to other users within the SAP Business One notifying them of actions being taken.



The definition of the Create Internal Message first allow you to define what other users should receive the message and afterward how the message should be build up. Example when run from Sales Quotation 250



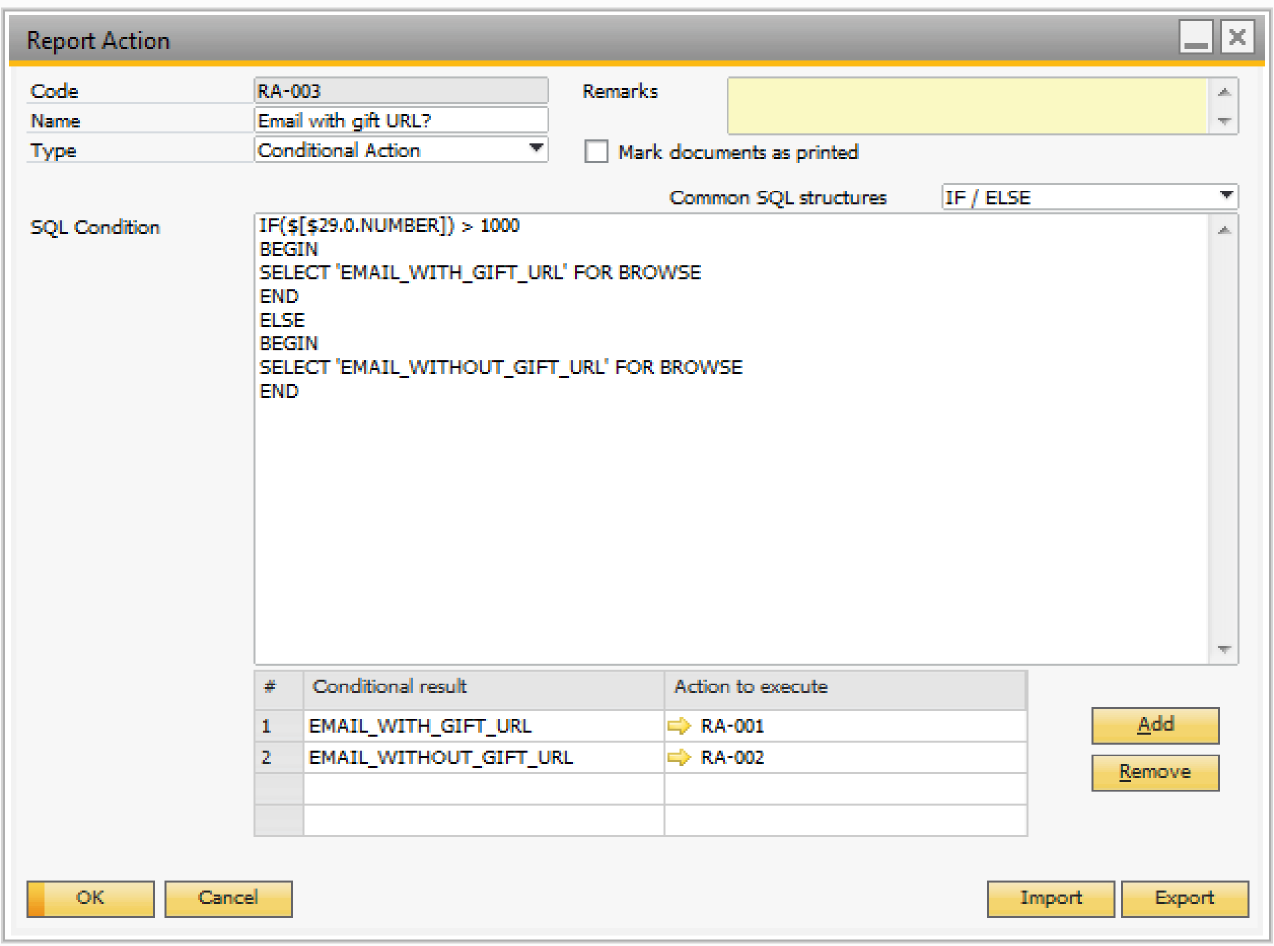
Conditional Action

Conditional Action does not by itself do anything when triggered. It instead have the option much like B1UP's Validation System to check values on the screen (via dynamic syntax) to determine what other report actions to take:

Examples:

- Use different Print Actions linked to different printer based on the $[USERNAME] keyword
- Use a UDF of standard value on the screen to specify the action to take
    - Example: Have a checkbox directly on an Invoice that decide if document should be printed or emailed.
- Use another layout/email text with other wording/promotions based on the Invoice amount
    - Example: Include a promotion URL in a mail to claim a free gift if amount is over 10.000$

In general it is only your imagination that set the limit on what combinations you can use.

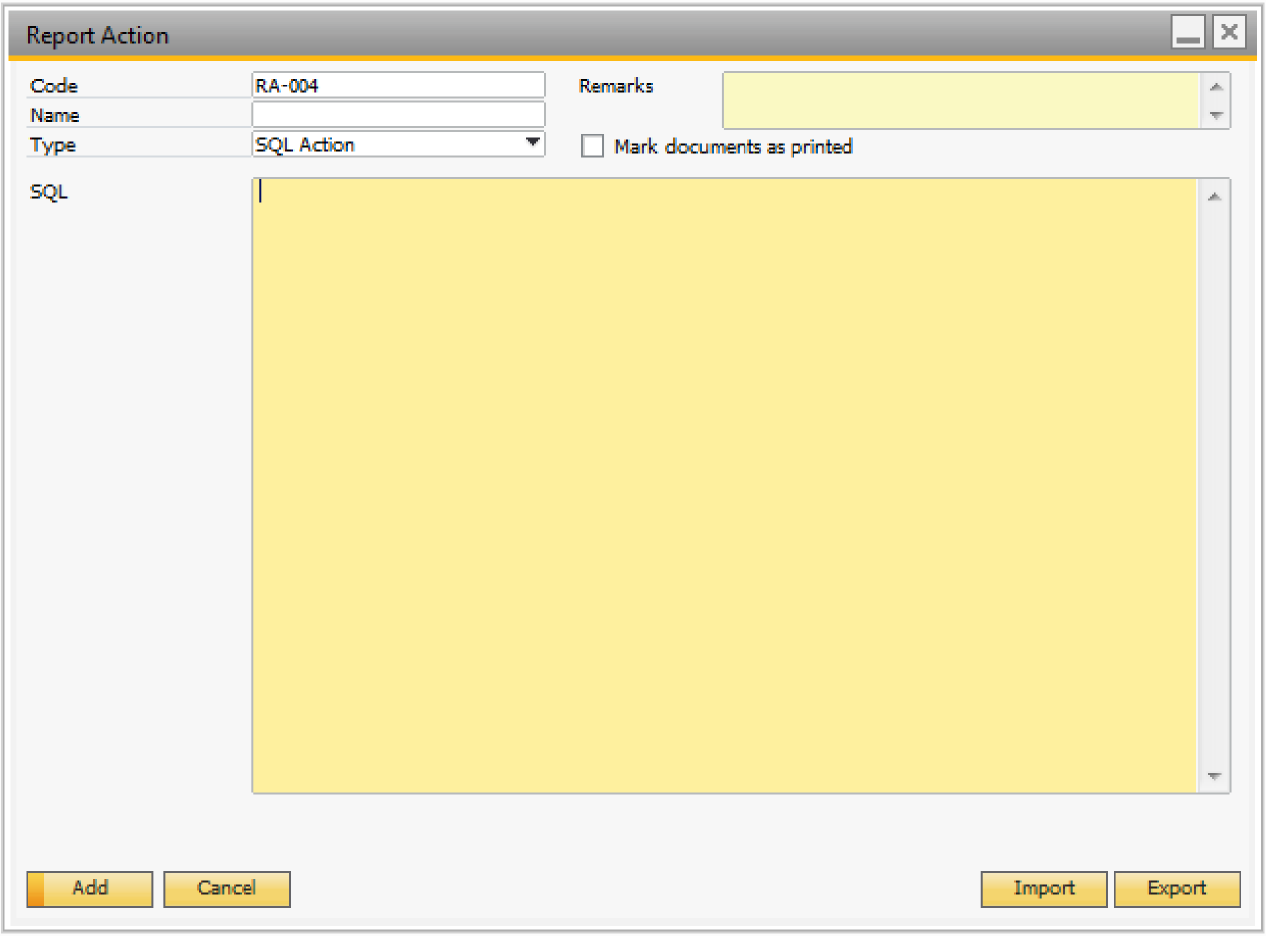


Field	Description
SQL Condition	First you need to create you SQL, which in most cases will have an IF/ELSE or a CASE/WHEN Structure (You can select such from the Common SQL combobox). In the SQL you can use the syntax $[$<ITEM>.<COLUMN>.<TYPE>] for dynamic values from items and $[<TABLE>.<FIELD>.<TYPE>] for data sources (Both work very similar to formatted searches). Once the Report action triggers the SQL is executed and the first column of the first row of the result is used as the “condition result”
Condition Result	In example above you have two values that your condition can output (The string “EMAIL_WITH_GIFT_URL” or “EMAIL_WITHOUT_GIFT_URL”). These can now be entered into the Condition Result Matrix where you decide what should happen for each result by assigning another Report Action code

SQL Action

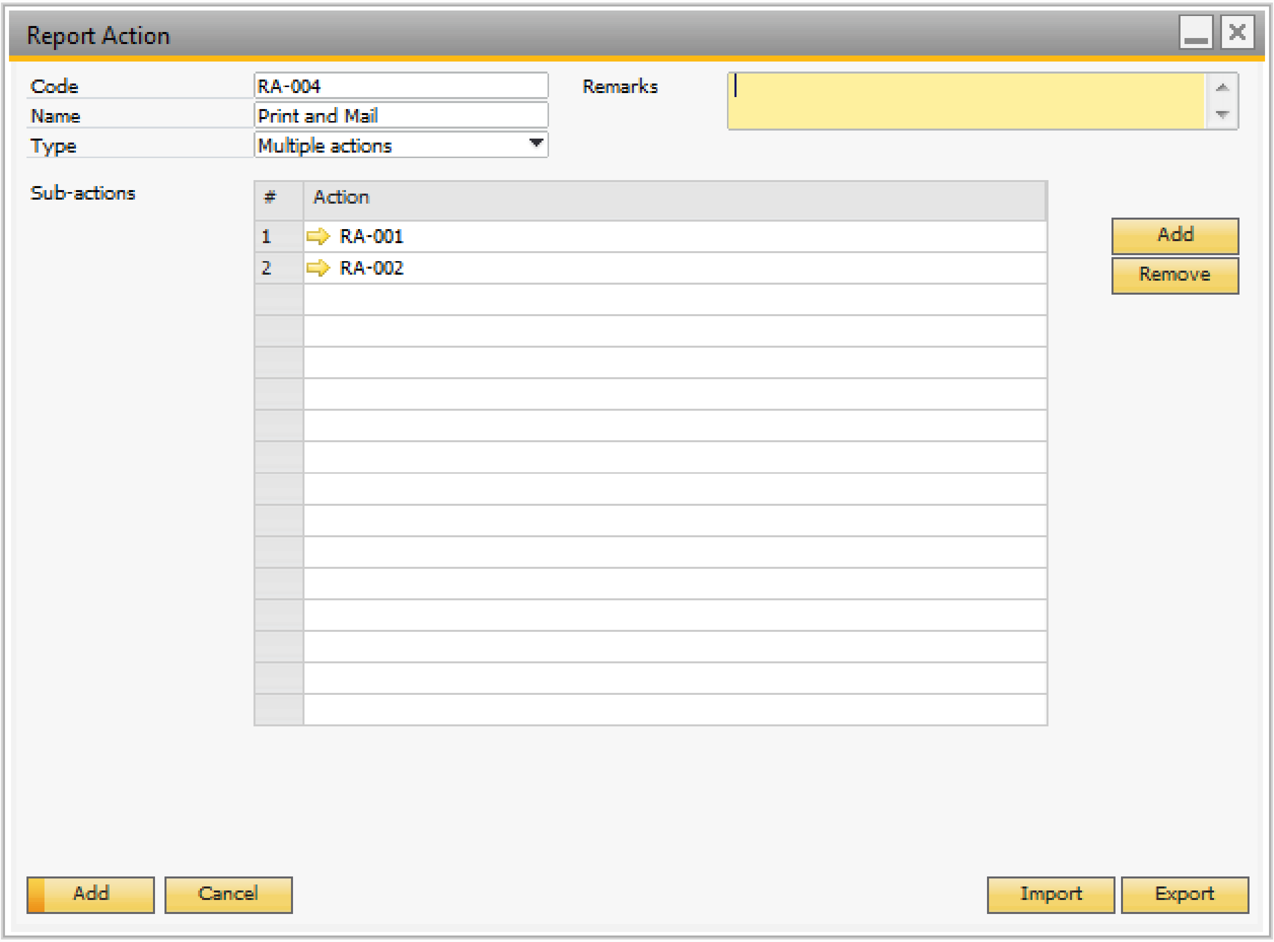
WARNING: This type will only be visible if you have activated the "Advanced development option" in the main configuration.

The SQL action allows you to execute SQL when the action is run.
You have access to use the dynamic syntax and special keywords including DOCKEY@.



Multiple Action

In addition to the above types, you can also have the option to perform multiple actions (Example: both print and email in one action).



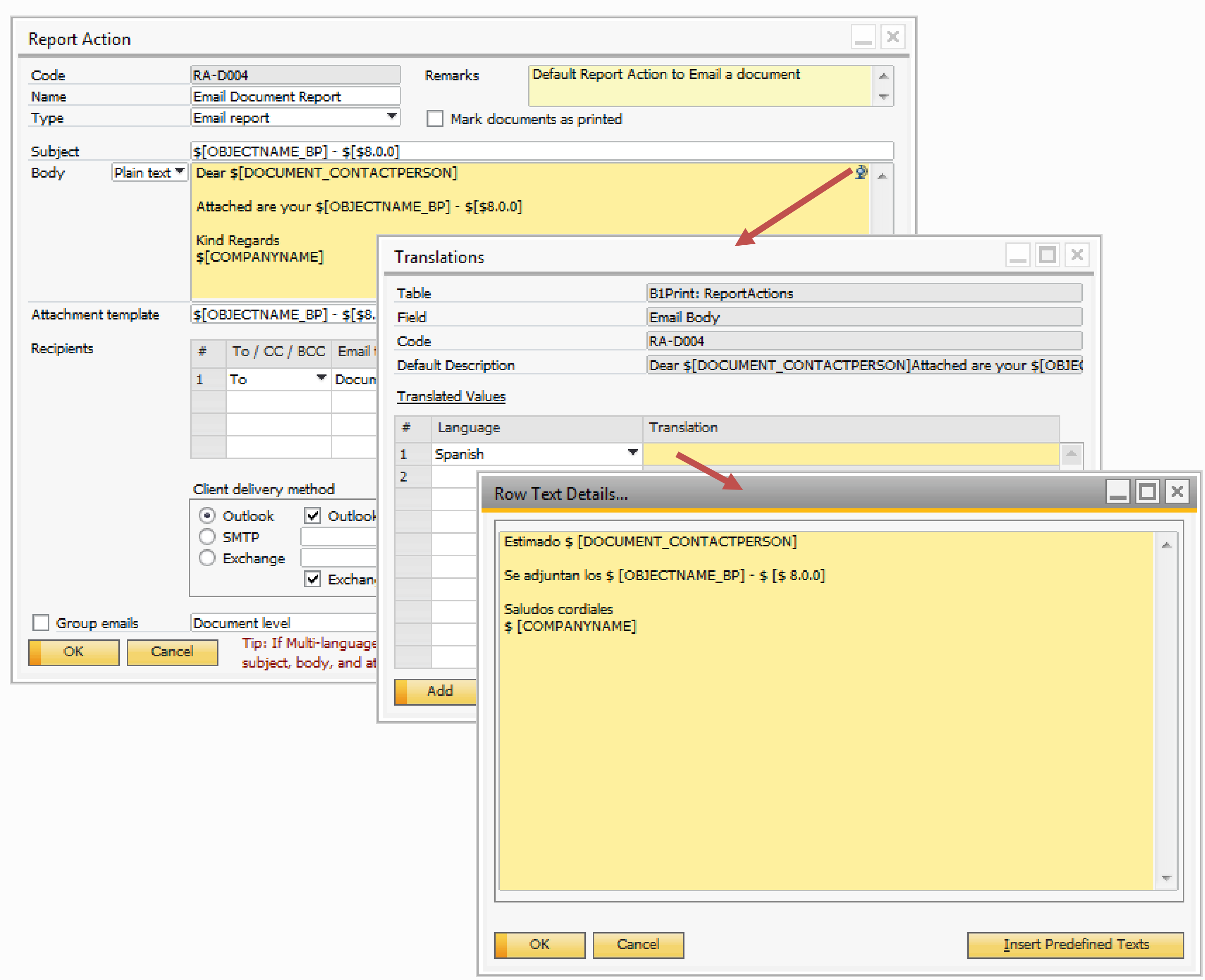
In order to choose a multiple actions sequence you simply add as many as needed sub-actions.

Multilanguage

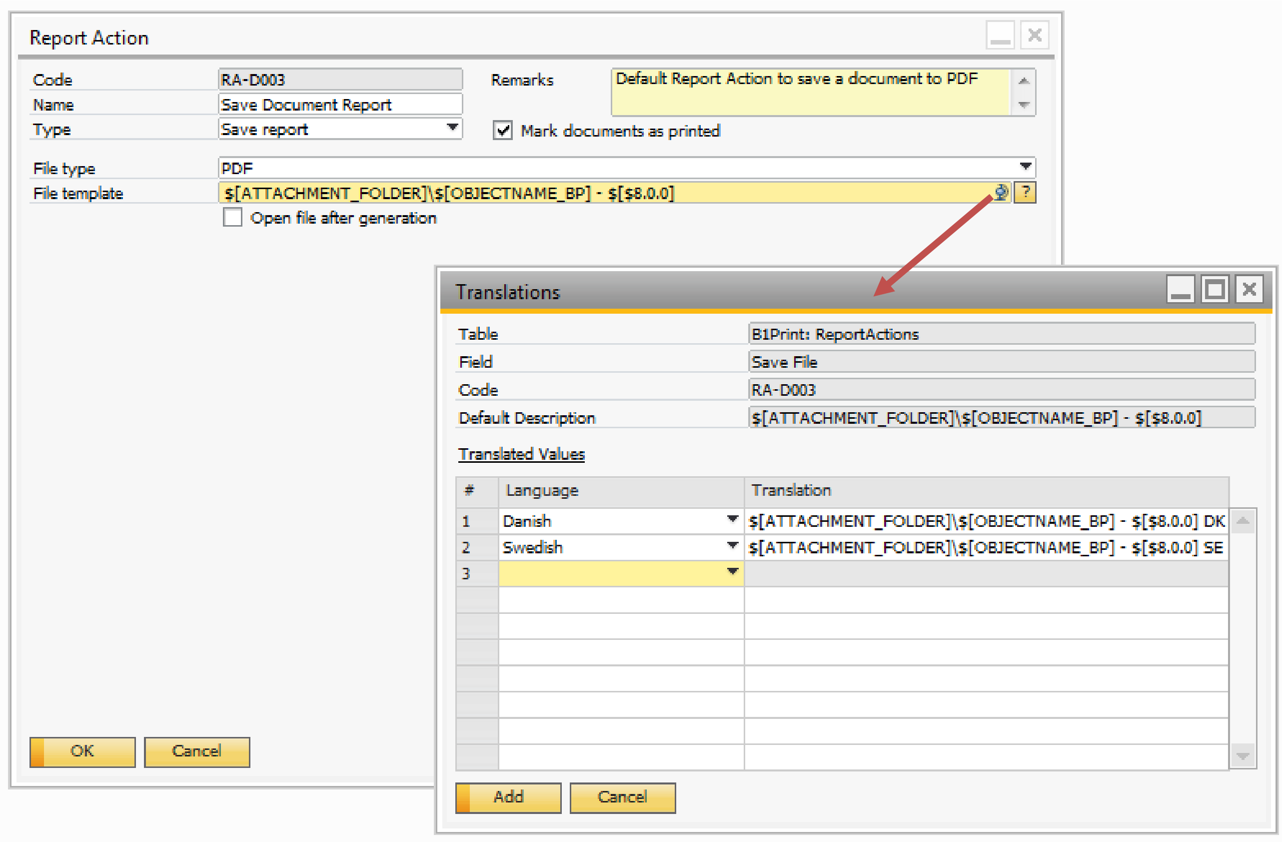
The Email and Save report actions supports translatable fields (you need to have Multilanguage and translatable fields enabled in SAP).

The translation used when executing Email and Save report actions is either based on the language selected in the Business Partner Master data or if used on a Sales Order it is based on the language selected in the Logistics tab.

On Email report actions you can translate Subject, Body and Attachment template.



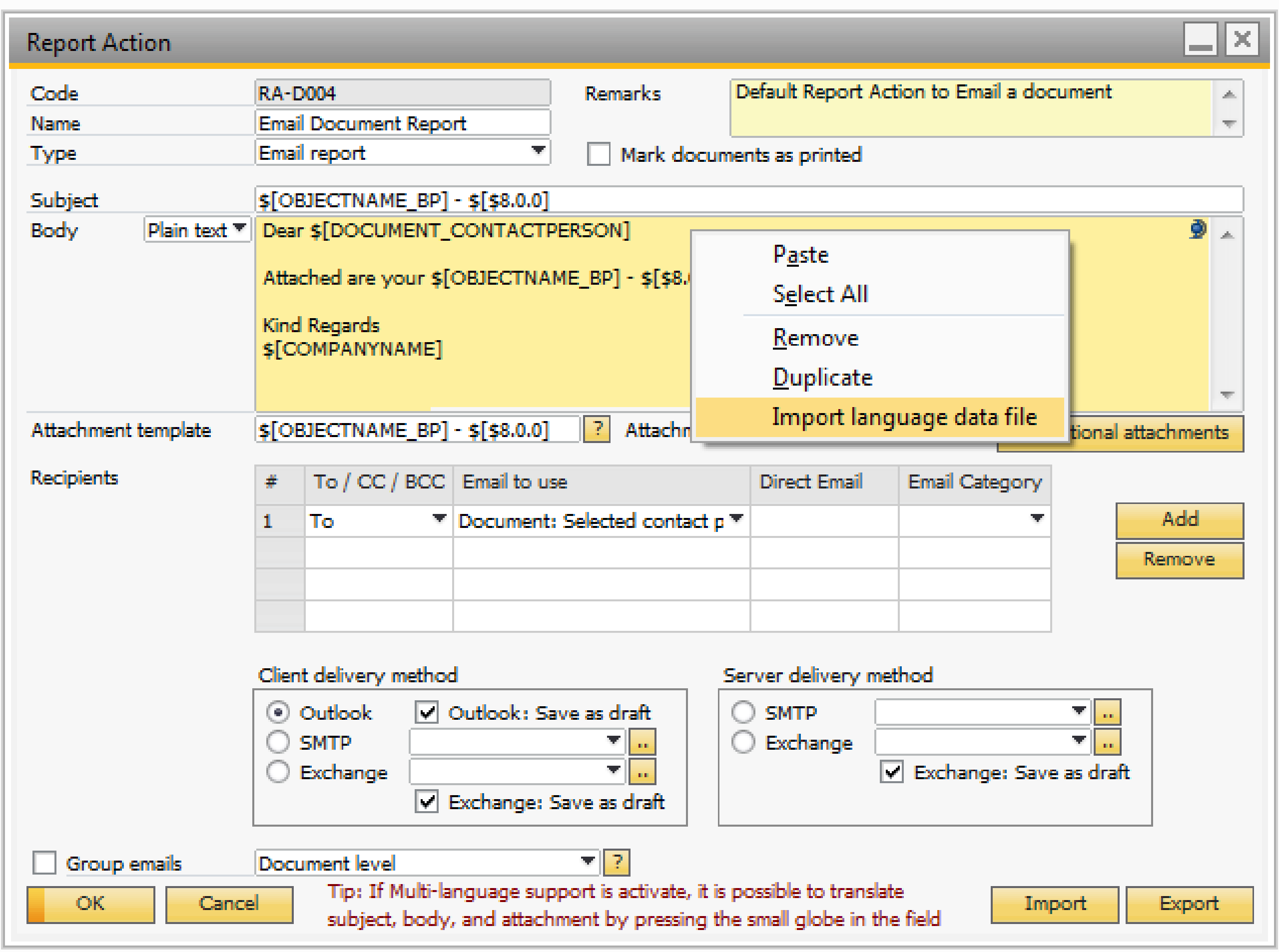
On Save report actions you can translate File template.



Import of Report Actions

For general use of the import functionality please see the B1UP manual.

NOTE: YOU CAN IMPORT SINGLE LANGUAGE DATA FILES TO "SAVE" AND "EMAIL" REPORT ACTIONS USING THE RIGHT CLICK OPTION "IMPORT LANGUAGE DATA FILE" (ONLY IN UPDATE AND OK MODE).



TIP: B1 PRINT AND DELIVERY AUTOMATICALLY IMPORTS LANGUAGE DATA FOR "SAVE" AND "EMAIL" REPORT ACTIONS WHEN DOING MULTIPLE IMPORTS.

Export of Report Actions

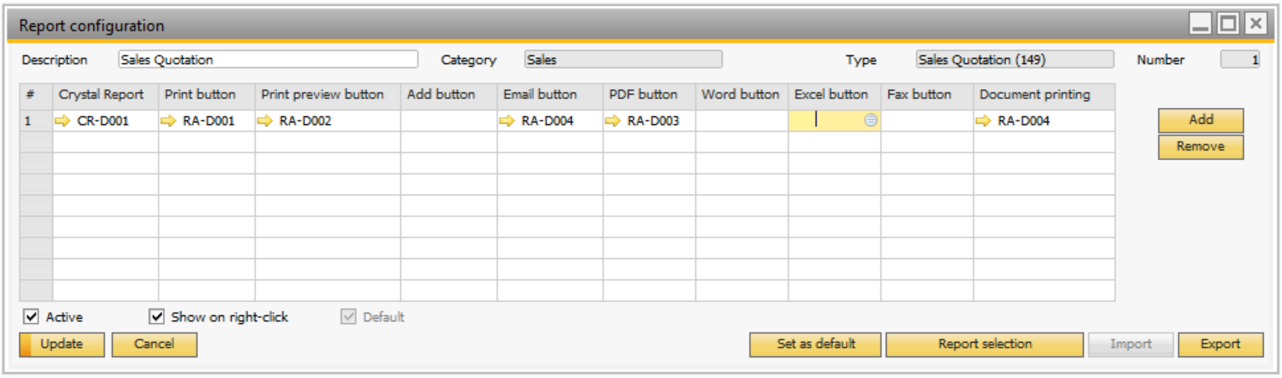
For general use of the export functionality, please see the B1UP manual.

TIP: BOTH TYPES OF EXPORT (SINGLE OR MULTIPLE) AUTOMATICALLY EXPORTS LANGUAGE FILES FOR "SAVE" AND "EMAIL" REPORT ACTIONS.

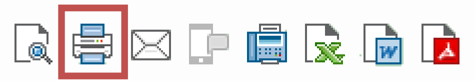
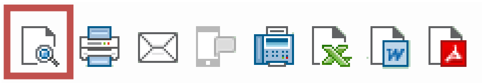
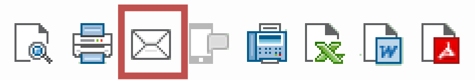
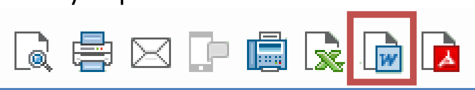
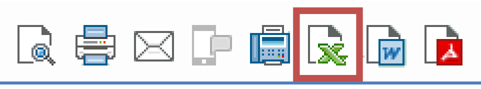
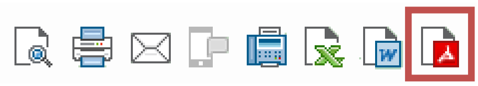
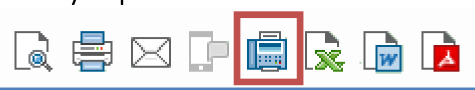
WARNING: DO NOT CHANGE THE NAME OF THE FILES WHEN DOING MULTIPLE EXPORTS OR THE LANGUAGE MAY NOT BE IMPORTED AND YOU WILL HAVE TO DO IT MANUALLY.

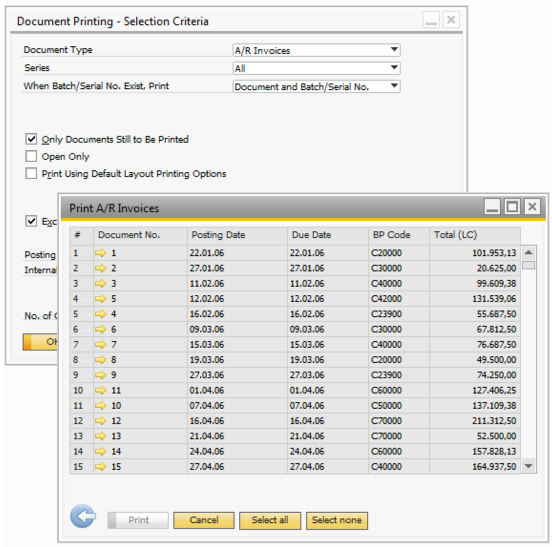
Report Configuration

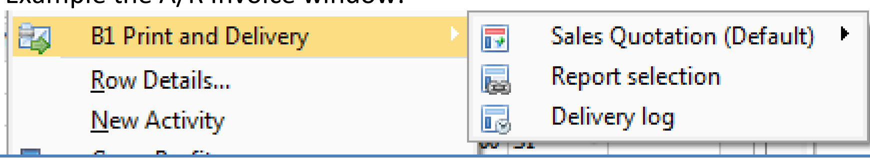
The main configuration is what binds the report-definitions and the report-actions together and where you specify what windows should use B1 Print and Delivery.



<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Description</td><td>Here you can describe the configuration. Example “Default A/R Invoice“ or “Sales orders for VIP customers”</td></tr>
<tr><td>Category</td><td>Here you choose the category in where the different types of windows are located. As default the following categories exist:
<table>
<tr><th>Category</th><th>Description</th></tr>
<tr><td>Business Partner</td><td>- Activity window
NB: Business Partner Master Data is covered by ‘Other’ > ‘Account Balance’</td></tr>
<tr><td>Sales</td><td>All A/R documents</td></tr>
<tr><td>Purchase</td><td>All A/P documents</td></tr>
<tr><td>Service</td><td>- Service Call
- Customer Equipment Card
- Service Contract
- Solution Knowledge base.</td></tr>
<tr><td>Sales Opportunities</td><td>- Sales Opportunity</td></tr>
<tr><td>Banking</td><td>- Incoming Payment
- Outgoing Payment</td></tr>
<tr><td>Inventory</td><td>- Pick Lists</td></tr>
<tr><td>Custom</td><td>Allow you to run custom defined Mass Deliveries (the type will be the Mass Deliveries of type Custom)</td></tr>
<tr><td>Other</td><td>General category with windows that does not belong to a specific type</td></tr>
</table></td></tr>
<tr><td>Type</td><td>Once you have chosen a category all types of windows under the selected category is shown here and you need to choose the type that suits your configuration.</td></tr>
<tr><td>Configuration lines</td><td>The configurations are where you choose the Crystal report definition to use and the actions to apply to it. Most of the time you will only have one line (one report) but you have the option to have more than one report being used (Example: if you have an A/R Invoice + a specification to the invoice)
<table>
<tr><th>Column</th><th>Description</th></tr>
<tr><td>Crystal Report</td><td>Here you choose the report definition (Crystal report file) to use.</td></tr>
<tr><td>Print button</td><td>Here you define the action you wish to happen when you press the SAP Print button.</td></tr>
</table></td></tr>
</table>

	 The default action here is a print-action, but you can choose any action you wish.
Print preview button	Here you define the action you wish to happen when you press the SAP Print preview button.  The default action here is a show-report action, but you can choose any action you wish.
Add button	Here you define the action you wish to happen when you press the Add button (Sales and purchase documents only) The default action here is either not to do anything or print action, but you can choose any action you wish NB: If you use this action you should disable SAP's default Print on Add in the general Print-settings. NB: Types in the Service category and Other Category does not use this configuration
Email button	Here you define the action you wish to happen when you press the SAP Email button  The default action here is an email action, but you can choose any action you wish.
Word button	Here you define the action you wish to happen when you press the SAP Word button 
Excel button	Here you define the action you wish to happen when you press the SAP Excel button 
PDF button	Here you define the action you wish to happen when you press the SAP PDF button  The default action here is a Save PDF action, but you can choose any action you wish.
Fax Button	Here you define the action you wish to happen when you press the SAP Fax button 

<table>
<tr><td></td><td>
<table>
<tr><td>SMS Buttons</td><td>Here you define the action you wish to happen when you press the SAP SMS button (Only available in IL and PA localizations)
</td></tr>
<tr><td>Document printing</td><td>Here you define the action you wish to happen when you press the Print button in the document printing.


The default action here is a Print action, but you can choose any action you wish.</td></tr>
</table>
</td></tr>
<tr><td>Active</td><td>The checkbox here indicate if the configuration is active or not. As long as a layout is inactive it will not be used at runtime.</td></tr>
<tr><td>Show on right-click</td><td>The checkbox indicate if the configuration should be shown as an option when right-click is used on windows.
Example the A/R Invoice window:

</td></tr>
<tr><td>Default / Set as default</td><td>Each combination of category/type can have a default configuration if you create multiple configurations for the same type. At runtime, the system will if having multiple configurations to choose from and the business partners is not specifically set to one configuration, choose the default layout.</td></tr>
<tr><td>Select Business partners</td><td>From this button you can make selection of multiple configuration Business partner specific (see more below).</td></tr>
<tr><td>Import</td><td>You have the option to Import exported Report configurations from XML</td></tr>
<tr><td>Export</td><td>In OK-Mode you have the option to export the current or multiple Report-definitions to XML.
In add-mode you have the option to export multiple Report-definitions from XML</td></tr>
</table>

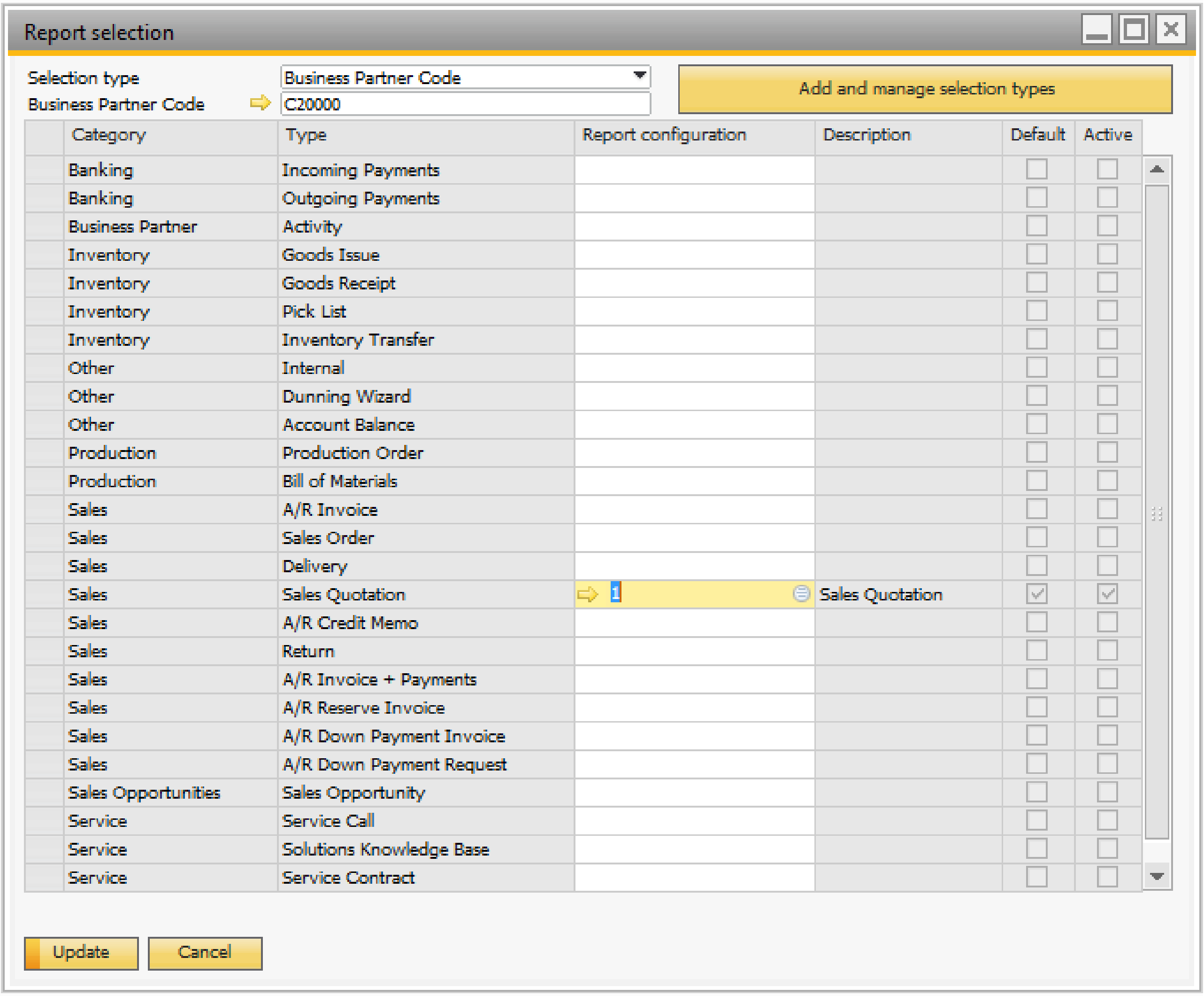
BP Selection options

Sometimes it is not enough to have only one layout per type of document. In such cases you will need to make a layout Business Partner specific (One set of BP's using one layout while another use a different set).

Making BP selections

BP Selections can be activated from the following places:

- From the main configuration
- Via the "Select business partners" button on the Report configuration window
- Right click from any Sales or purchase document
- Right click from Business Partner master data screen



Category	Type	Report configuration	Description	Default	Active
Banking	Incoming Payments				
Banking	Outgoing Payments				
Business Partner	Activity				
Inventory	Goods Issue				
Inventory	Goods Receipt				
Inventory	Pick List				
Inventory	Inventory Transfer				
Other	Internal				
Other	Dunning Wizard				
Other	Account Balance				
Production	Production Order				
Production	Bill of Materials				
Sales	A/R Invoice				
Sales	Sales Order				
Sales	Delivery				
Sales	Sales Quotation	1	Sales Quotation	✓	✓
Sales	A/R Credit Memo				
Sales	Return				
Sales	A/R Invoice + Payments				
Sales	A/R Reserve Invoice				
Sales	A/R Down Payment Invoice				
Sales	A/R Down Payment Request				
Sales Opportunities	Sales Opportunity				
Service	Service Call				
Service	Solutions Knowledge Base				
Service	Service Contract				

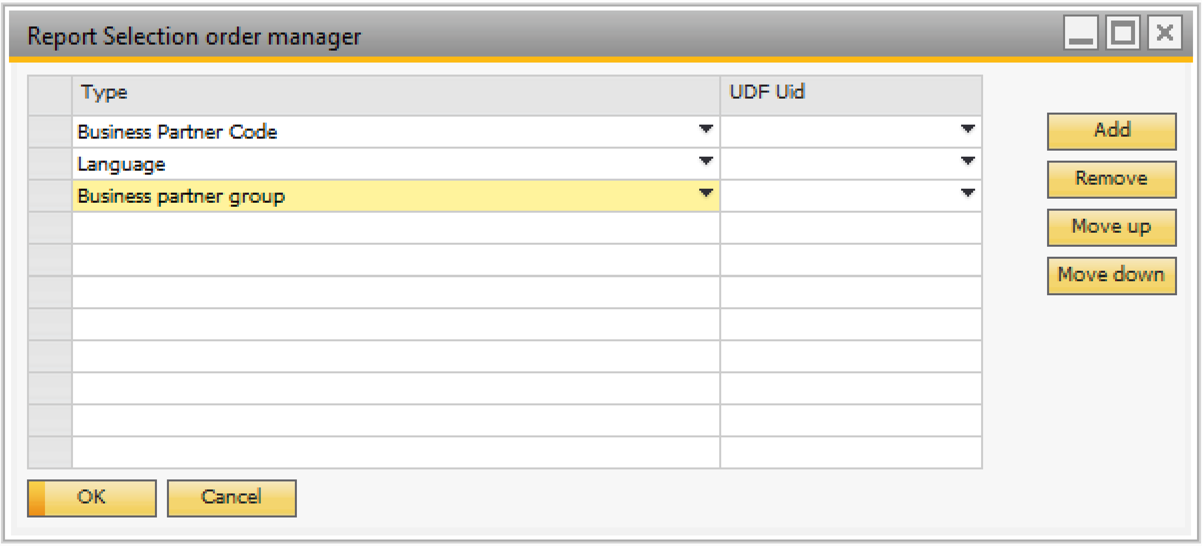
In the report selection window you can choose your selection type and control which specific layout a given business selection type should use. If you do not select anything it will automatically use the default layout.

Report selection can be done on multiple levels/selection types. Default rules for layout selection are:

1. What layout (if any) is selected for the BP-Code

2. What layout (if any) is selected for the BP-Language
3. What layout (if any) is selected for the BP-Group
4. What layout (if any) is the default layout
5. If we still do not have a specific layout, use the first found.

The default layout selection order can however be changed via the “Add and manage selection types”.



Here you can change the order of the selection type order (Example: If you wish to have BP Group to be the selection factor before language you simply select it and press the move up button).

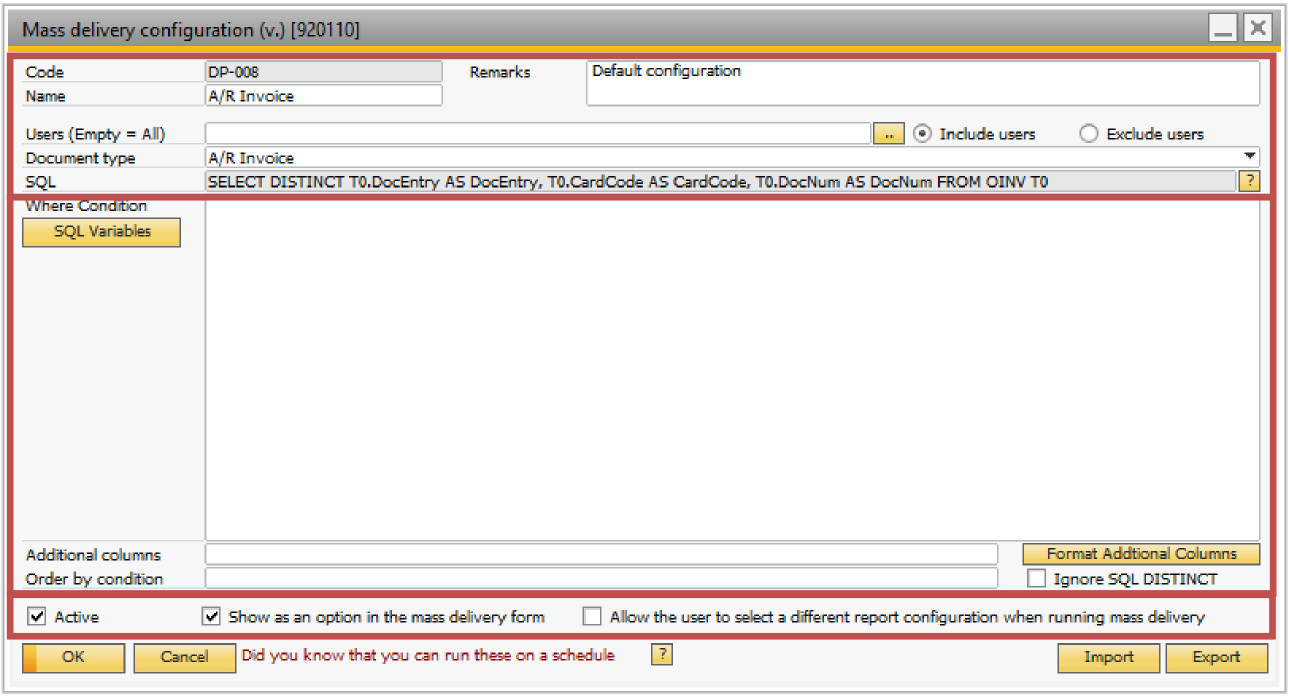
You can also add or remove new selection types. The following table lists the types you can use as selection types:

Selection Type option	Description
Business Partner Code	The code of the business partner
Business Partner Group	The customer/supplier group of the business partner
Language	The language of the business partner
UDF1 to UDF10	Up to 10 different User-defined fields on the business partner
Property 1 to Property 64	The 64 properties of the business partner

Mass delivery configuration

You can use B1 Print and Delivery for mass delivery of different documents.

The mass delivery configuration window can be found by navigation to *Administration->Add-ons->B1 Usability Package->Module configuration->B1 Print and Delivery->Mass delivery configuration.*
B1 Print and Delivery comes with predefined configurations for all the documents supported.
B1 Print and Delivery will auto create the Select SQL needed for the system to work correctly but you have the option to write your own SQL WHERE condition to filter what should be selected for delivery. You can also write your won Order By condition for ordering the result.



The configuration window can be divided into three parts.

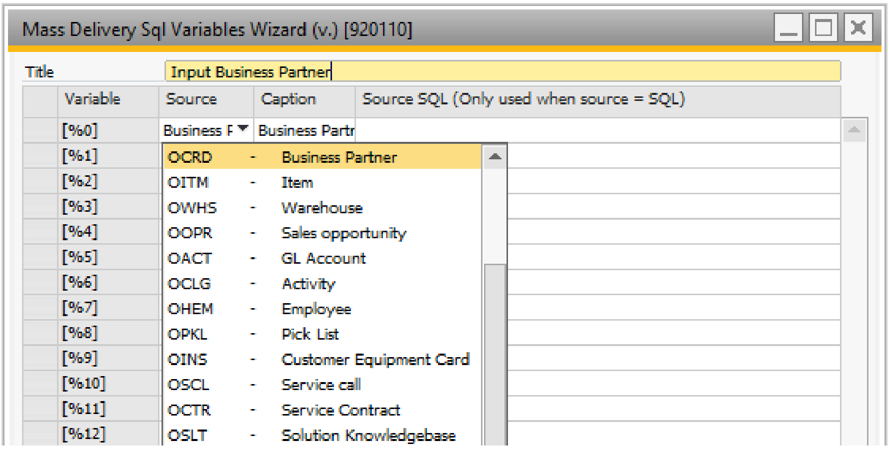
Part	Description	
Header data	**Field**	**Description**
	Code	Code this is the auto generated number of the configuration
	Name	This is your name for the configuration for reference, this is also the name that will be shown in the Mass delivery window combobox
	Users (Empty = All)	Here you have the option to make the Configuration user-specific. All you need to do is to enter the wanted users (their usercodes) separated by ";" (Depending on the user-setting: • Include users = All users entered will use the configuration • Exclude users = All users entered will not use the configuration If you do not enter anything, all users will use the configuration **Samples:** 1. Entered: <u>manager;user1;user2</u> (Include users option) o The 3 users with usercode "manager", "user1" and "user2" will use the configuration. 2. Entered: <u>user3</u> (Exclude users option) o All users except user with usercode "user3" will use the configuration.
	Document type	Here you can select what document type this configuration should handle. NB: For type "Custom " please see the special section on that
	SQL	This is the auto-generated SQL that will be used for fetching the

data needed for the system to function correctly. This cannot be edited.

Where condition

Field	Description
Where condition	This is your Where condition to be used for filtering the data. An example (Invoice document type) could be *WHERE T0.CardCode = 'C20000'* this would when Mass delivery is run only return the Invoices with CardCode = C20000.
SQL Variables	Here you have the option to define up to 20 Variables ([%0], [%1], [%2], [%3] … [%19]) there can be used in the where condition.

NB: SQL VARIABLES CANNOT BE USED IN CONFIGURATIONS THERE IS USED BY THE SCHEDULER/SERVER COMPONENT.

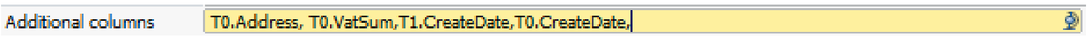


Column	Description
Variable	The variable you are defining the source for
Source	The Source. It can a custom value or a list of common values like Business partners etc. If can find the list of value you wish you also have the option to define a SQL sentence that should retrieve the values as a combobox.
Caption	The caption of the variable (The text shown when prompting the user for the value)
Source SQL	If you in the Source select SQL as source, you define the SQL here (else it is not used). The SQL sentence should be a SELECT statement with two selected columns. first value will be seen as the value of the selection and second will be seen as the description.

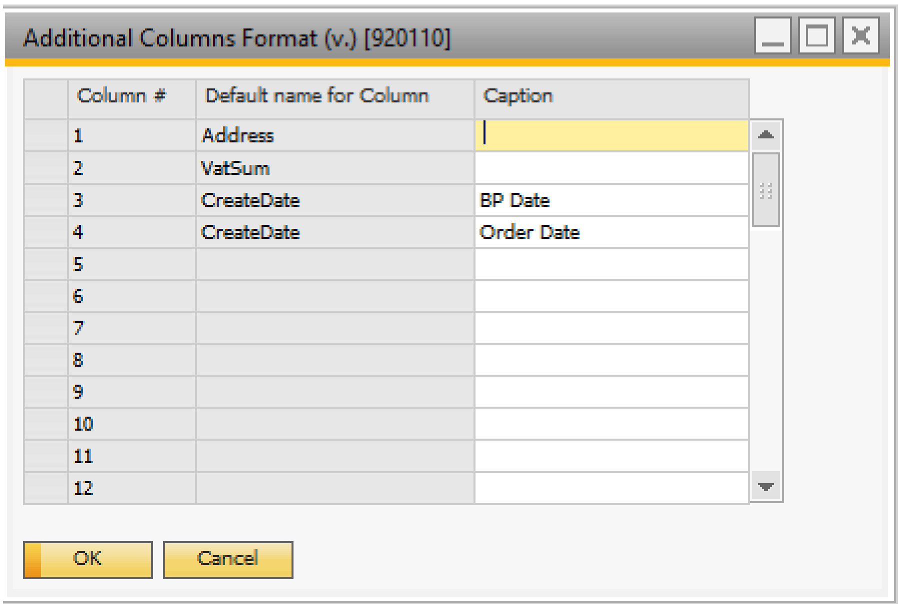
<table>
<tr><td></td><td>
<table>
<tr><td></td><td></td><td>SELECT <VALUE>,<DESCRIPTION> FROM <TABLE>

Sample: SELECT CardCode, CardName FROM OCRD would result in a list of all Business Partners. CardCode will be the value for the customer select and CardName will be the description that help them choose the value.</td></tr>
<tr><td></td><td>**Title**</td><td>The title of the window shown when prompting the user for the values

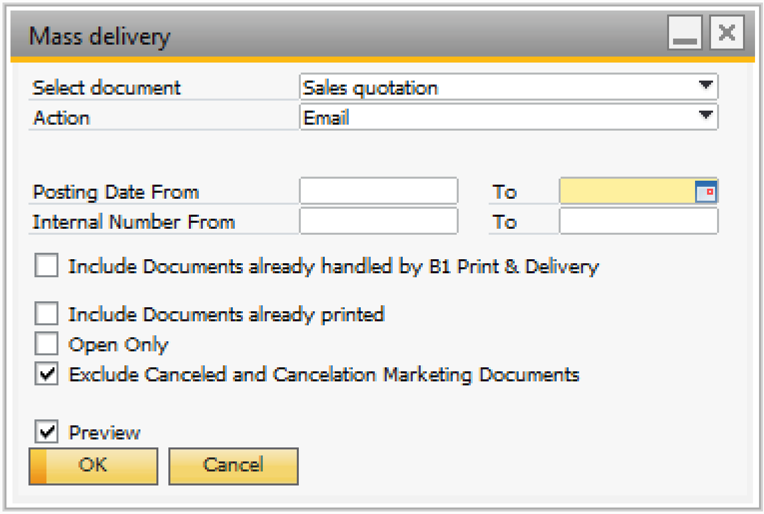
NB: the default title Is 'Define survey variables' if no title is given.</td></tr>
</table>
</td></tr>
<tr><td>**Order by condition**</td><td>
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>**Order by condition**</td><td>Here you can write an Order By condition that will decide how the ordering of the result should be. Example *DocEntry DESC*</td></tr>
</table>
</td></tr>
<tr><td>**Additional Columns**</td><td>Here you can write a "," separated list of additional columns in the database you want to be shown on the mass delivery preview window.



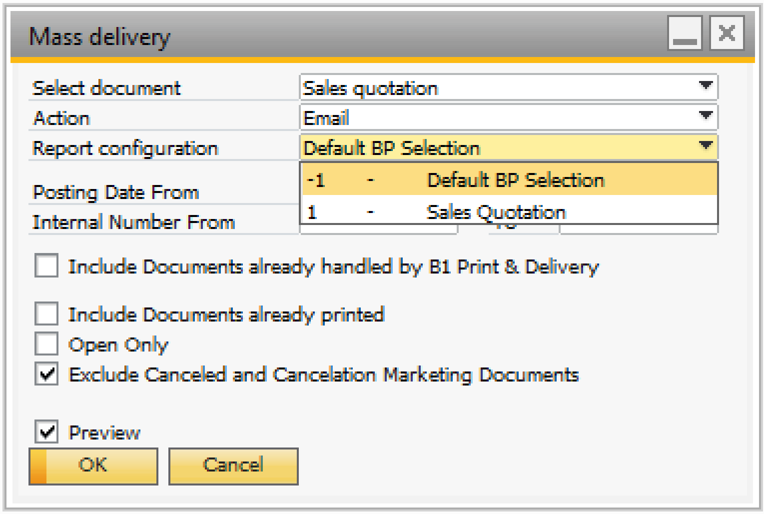
NB: if you use joins in the where condition you need to use prefixes on the column names to ensure the correct column is shown</td></tr>
<tr><td>**Additional Columns Format**</td><td>Here it is possible to format the additional columns by giving them a new caption there will be shown as the column header on the mass delivery preview form.

</td></tr>
<tr><td>**Extra**</td><td>
<table>
<tr><th>Field</th><th>Description</th></tr>
</table>
</td></tr>
</table>

<table>
<tr><td>Active</td><td>Is the configuration active</td></tr>
<tr><td>Show in the mass delivery from</td><td>Is the configuration to be shown in the mass delivery form</td></tr>
<tr><td>Show report selection</td><td>Should the mass delivery from let the user optionally select a different report configuration:
Example without:



Example with:



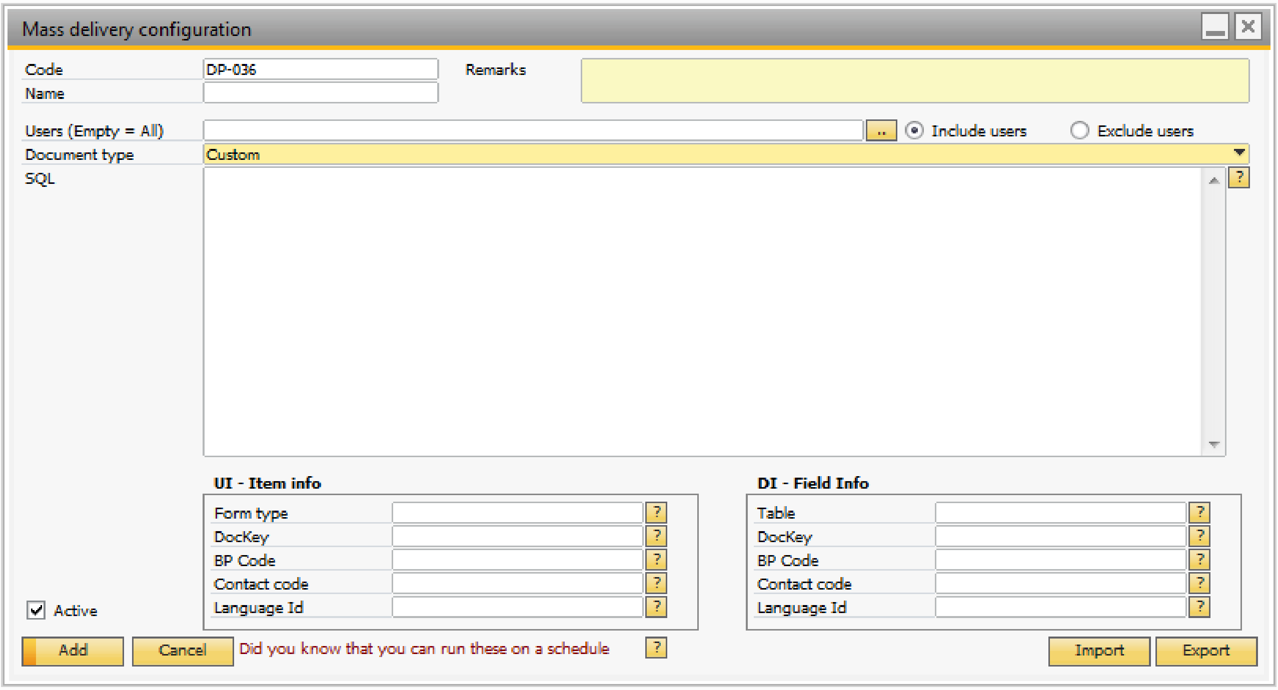
</td></tr>
</table>

Mass Delivery – Special Custom Document type

In a custom mass delivery you can make deliveries on any data stored in the SAP Business One database.

See the online E-Learning on Custom Reporting

Compared to a normal mass deliveries where the system can, based on the selected type, deduce the table, keys, formtypes etc. In mass delivery custom due to its open ended nature we do not have that option so you need to provide the system with the SQL and the data below in order for the delivery to collect and send the correct data.

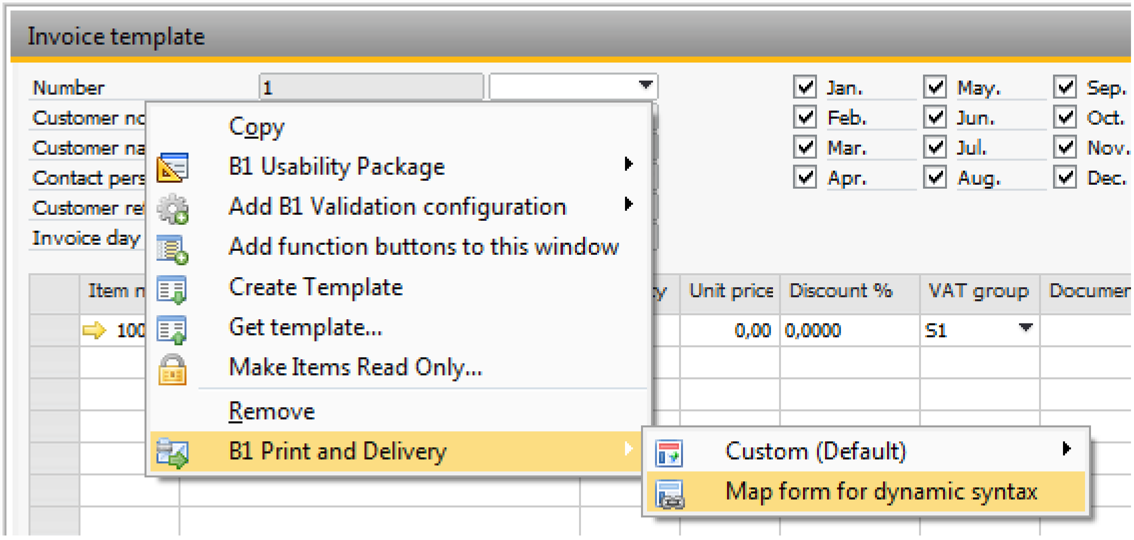


Field	Description
SQL	First thing we need is the SQL that should executed in the Mass delivery run. In normal scenarios you only need to provide the WHERE condition but in Custom you need to provide the full SQL. The selected columns should the be paired the fields with the DI - Field Info below
UI – FormType	In this field you can write the formtype the this mass configuration. This is optional but if you provide the information you will be able to go to the window and interact with the window as it was any and of the out of the box supported delivery types
UI – DocKey	In this field you need to provide the dynamic syntax of where on the provided form above the primary key to report against is. Example: If you on a screen have an item with uid = BOY_123 and that item holds the primary key of what you are reporting against you would need to write $[$BOY_123.0.0] in this field
UI – BP code	In this field you need to provide the dynamic syntax of where on the provided form above the BP code (if any) is located. This is optional but needed if you need you Report Action - Email configurations to pick up the emails. Example: If you on a screen have an item with uid = BOY_456 and that item holds the BP Code you are reporting against you would need to write $[$BOY_456.0.0] in this field
UI – Contact Code	In this field you need to provide the dynamic syntax of where on the provided form above the BP Contact Person Code (if any) is located. This is optional but needed if you need you Report Action - Email configurations to pick up the emails of type 'Selected Document Contact person'.

	Example: If you on a screen have an item with uid = BOY_789 and that item holds the BP Contact person id (The internal number) you are reporting against you would need to write $[$BOY_789.0.0] in this field
UI – Language Id	In this field you need to provide the dynamic syntax of where on the provided form above the wished language id (if any) of emails sent. This is optional or can be statically typed but needed if you need you Report Action - Email to be able to translate you emails automatically Example: If you on a screen have an item with uid = BOY_111 and that item holds the Language Id (The internal number) you are reporting against you would need to write $[$BOY_111.0.0] in this field List of valid language ids: - 1 = Hebrew - 3 = English - 5 = Polish - 8 = English (UK) - 9 = German - 11 = Danish - 12 = Norwegian - 13 = Italian - 14 = Hungarian - 16 = Dutch - 17 = Finnish - 18 = Greek - 19 = Portuguese - 20 = Swedish - 22 = French - 23 = Spanish - 24 = Russian - 25 = Spanish (LA) - 26 = Czech - 27 = Slovak
DI - Table	In this field you can write the table of this mass configuration (The main table you used in above SQL). This is required unless you are not using the mass delivery
DI - DocKey	In this field you need to provide the field from the above SQL that represent primary key to report against is. Example: If you on a SQL where column U_KEY holds the primary key of what you are reporting against you would need to write U_KEY in this field
DI – BP code	In this field you need to provide the field from the above SQL that represent the BP code (if any). This is optional but needed if you need you Report Action - Email configurations to pick up the emails.

	<u>Example:</u> If you on a SQL where column U_BP holds the BP Code of what you are reporting against you would need to write U_BP in this field
DI – Contact code	In this field you need to provide the field from the above SQL that represent the BP Contact Person Code (if any). This is optional but needed if you need you Report Action - Email configurations to pick up the emails of type 'Selected Document Contact person'. <u>Example:</u> If you on a SQL where column U_CNCTC holds the Contact code (Internal number) you are reporting against you would need to write U_CNTCT in this field
DI – Language Id	In this field you need to provide the field from the above SQL that represent the wished language id (if any) of emails sent. This is optional or can be statically typed but needed if you need you Report Action - Email to be able to translate you emails automatically <u>Example:</u> If you on a SQL where column U_LANG holds the Language id (Internal number) you are reporting against you would need to write U_LANG in this field List of valid language ids: - 1 = Hebrew - 3 = English - 5 = Polish - 8 = English (UK) - 9 = German - 11 = Danish - 12 = Norwegian - 13 = Italian - 14 = Hungarian - 16 = Dutch - 17 = Finnish - 18 = Greek - 19 = Portuguese - 20 = Swedish - 22 = French - 23 = Spanish - 24 = Russian - 25 = Spanish (LA) - 26 = Czech - 27 = Slovak

Additional In order to allow mass delivery configuration of type Custom to know the dynamic syntax (for the server component) you need to go to the window of the configured configuration and choose “Map form for dynamic syntax”. Here is a sample of mapping the Recurring Invoice screen from B1UP.

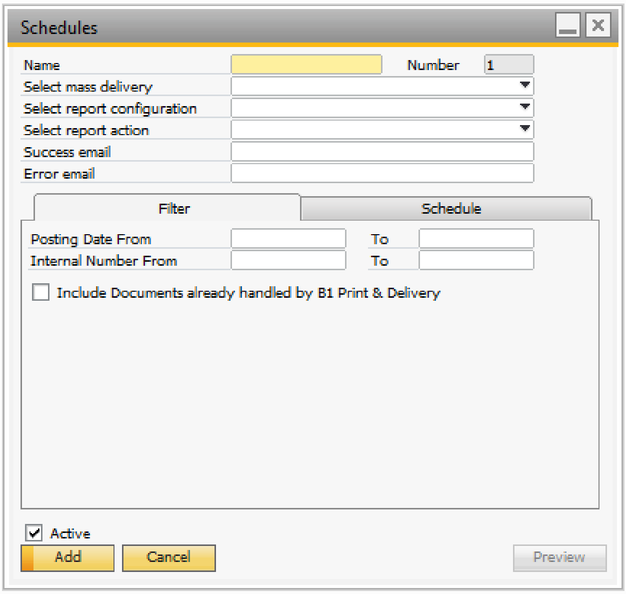


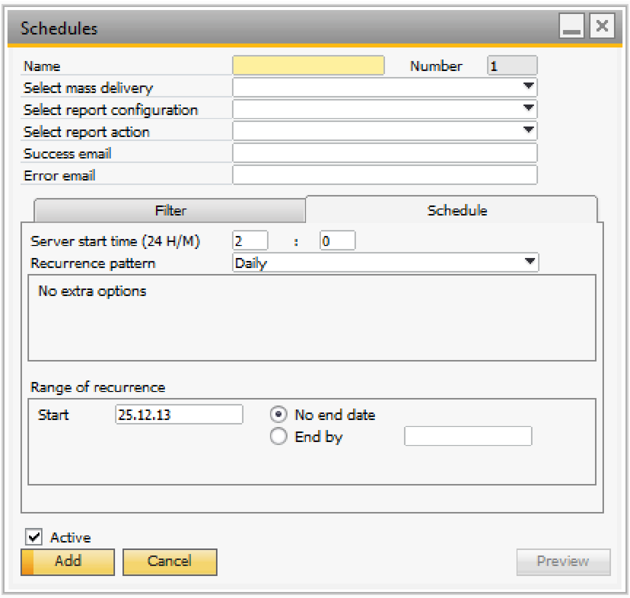
Schedule configuration

Schedules are a powerful type of configurations that together with our server component allows you to execute mass delivery configurations on a minutely, hourly, daily, weekly or monthly schedule.

NOTE: YOU CANNOT SETUP SCHEDULES BEFORE THE SERVER COMPONENT HAS BEEN INSTALLED AND ACTIVATED.

When the server component has been successfully setup you can access the schedules configuration from *Administration->Add-ons->B1 Usability Package->Module configuration->B1 Print and Delivery->Schedules.*





To automate running mass delivery configurations you can use schedules.

Part	Description	
Header data	**Field**	**Description**
	Name	This is your name for the configuration for reference, this is also

<table>
<tr><td></td><td>
<table>
<tr><td></td><td>the name that will be shown in success and error emails from the scheduler.</td></tr>
<tr><td>Select mass delivery</td><td>Here you select the mass delivery to be executed.</td></tr>
<tr><td>Select report configuration</td><td>Here you may overwrite the report configuration.</td></tr>
<tr><td>Select report action</td><td>Here you select the report action to be executed.</td></tr>
<tr><td>Success email</td><td>If set you will receive an email confirming that the schedule where run correctly.</td></tr>
<tr><td>Error email</td><td>The email that will receive an error report if the schedule encounters and error.</td></tr>
</table>
</td></tr>
<tr><td>Filter</td><td>The filter is used together with the mass delivery where condition to determine if there is anything to be handled.
PLEASE NOTE: DIFFERENT FILTERS MAY BE SHOWN DEPENDING ON WHAT CONFIGURATION IS SELECTED</td></tr>
<tr><td>Schedule</td><td>
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Server start time (24 H/M)</td><td>When the schedule should be executed the first time.</td></tr>
<tr><td>Recurrence pattern</td><td>There are currently five supported types:
Minutely: Run the schedule every X minutes.
Hourly: Run the schedule every X hours.
Daily: Run the schedule once each day on the server start time.
Weekly: Run the schedule on specific days of the week on the server time.
Monthly: Run the schedule every X day of the month on the server time.</td></tr>
<tr><td>Range of recurrence</td><td>Start: Start date of the recurrence.
No end date: The schedule should never end.
End by: The schedule should end by the specific date.</td></tr>
</table>
</td></tr>
</table>

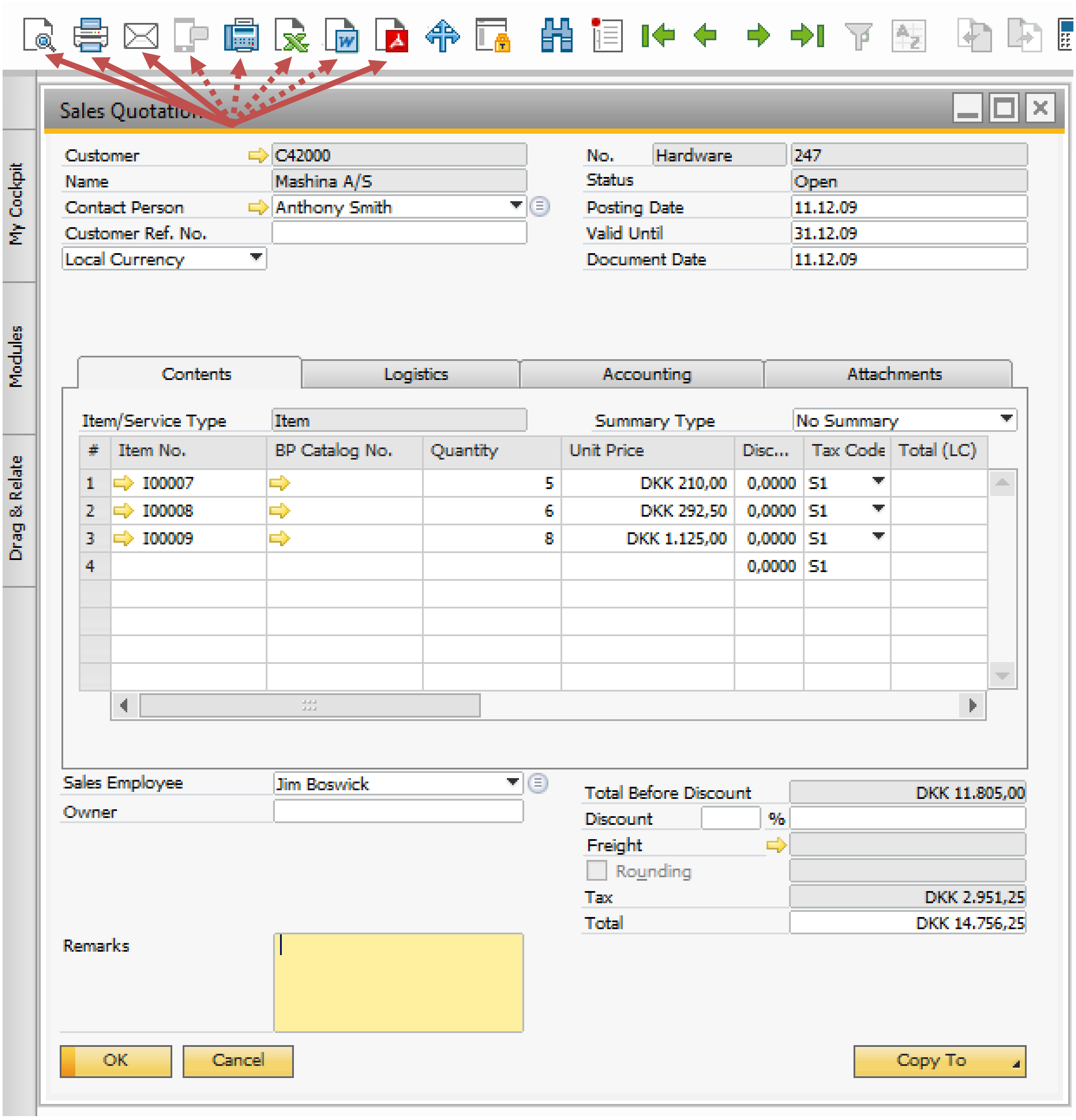
Refresh cache

This menu-item will allow you to refresh the cached data on a machine (As default if another user change something in the configuration on his/her machine then you will not get this change until you either restart the add-on or press this refresh cache menu-item).

Usage

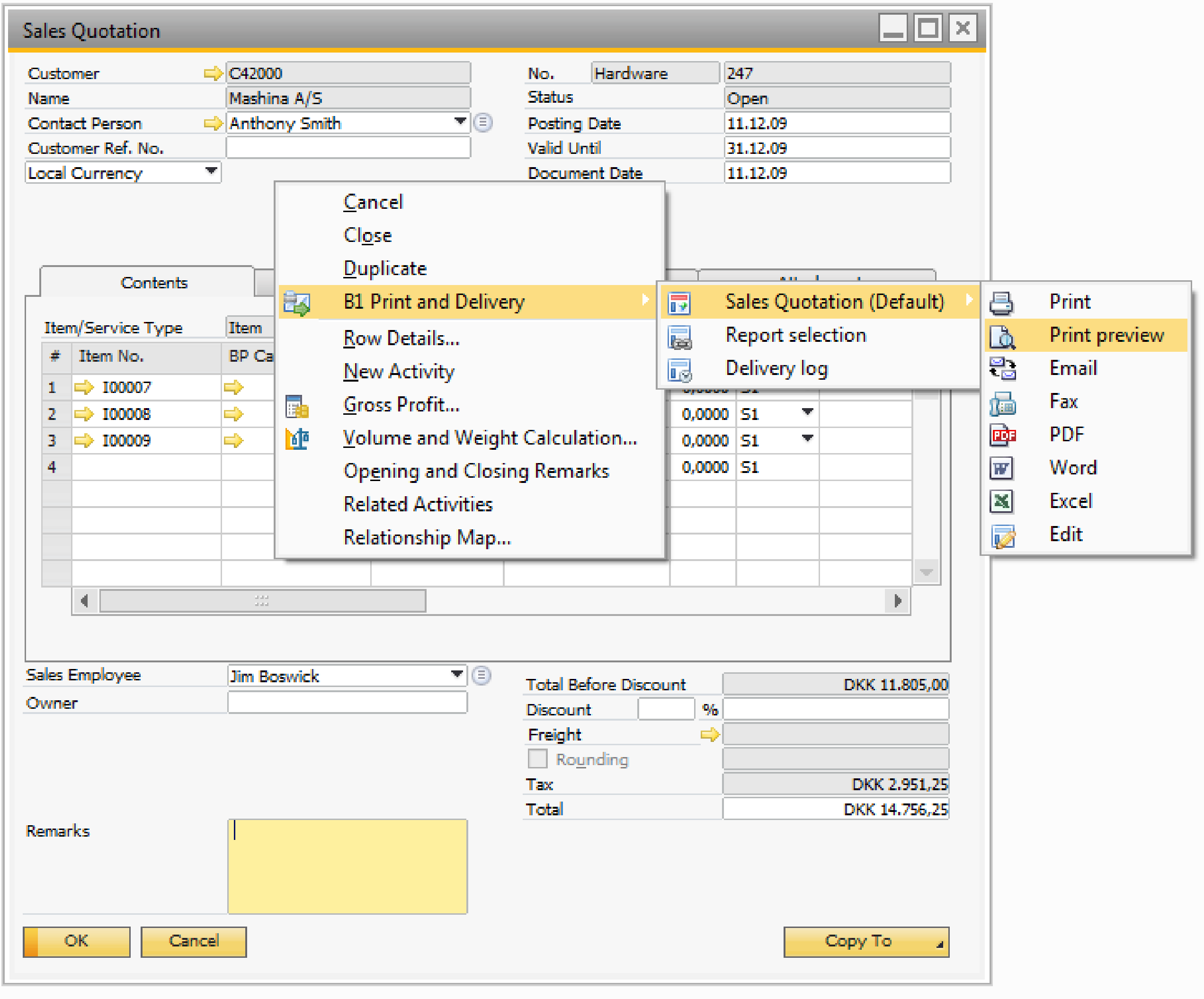
On standard windows

Using B1 print is just like the normal SAP PLD, except that the reports set up are created in Crystal Reports.



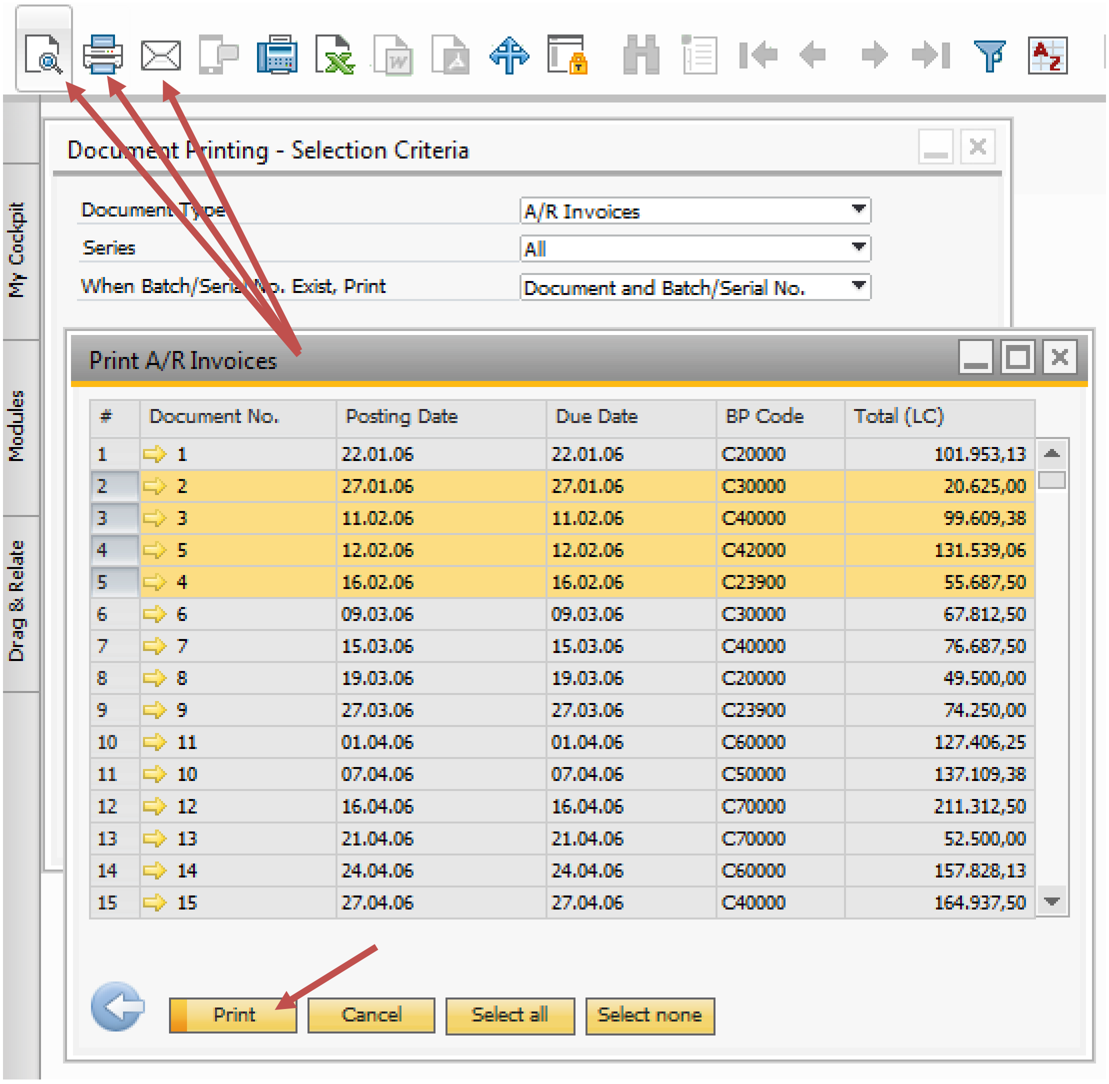
Pressing the print-preview, print, email or PDF button will do the respected set up report action(s) and adding a document will perform the Add button report action.

You also have the option to on the fly choose another action (Example: a special layout used for special occasions). Simply right-click to choose between the possible layouts.



In Document Printing

You can also use B1Print and Delivery in document printing



Pressing the print-preview, print, email button will do the respected set up report action(s) for all selected documents in the list, while the print button on the window will do the set up document printing action.

NB: B1 Print and Delivery only support print of sales and purchase documents + Incoming and Outgoing Payments from document printing. The rest of the document prints will work as normally.

NB: It is not possible to mix and Match Business partners to use crystal Reports and Print Layout Designer (Technical limitation). Business partners in the list that does not have a Report action will be ignored.

Mass delivery

You can access the “Mass delivery” from multiple places:

Sales Opportunities->Mass delivery

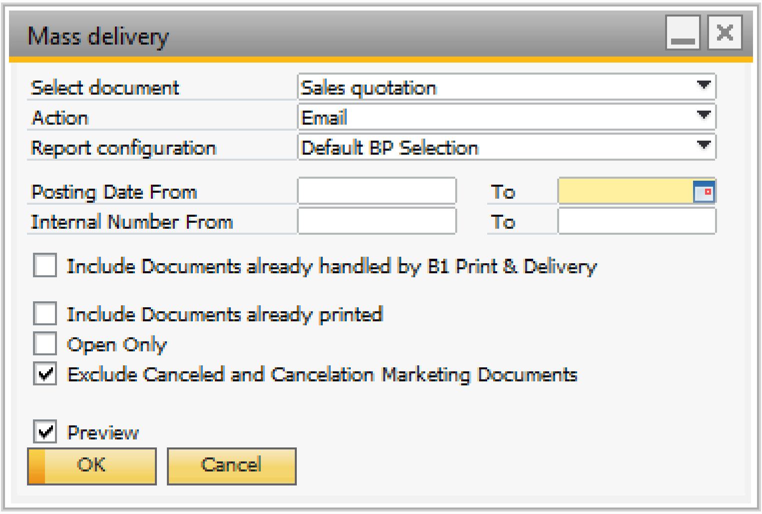
Sales A/R->Mass delivery

Purchasing A/P->Mass delivery

Banking->Mass delivery

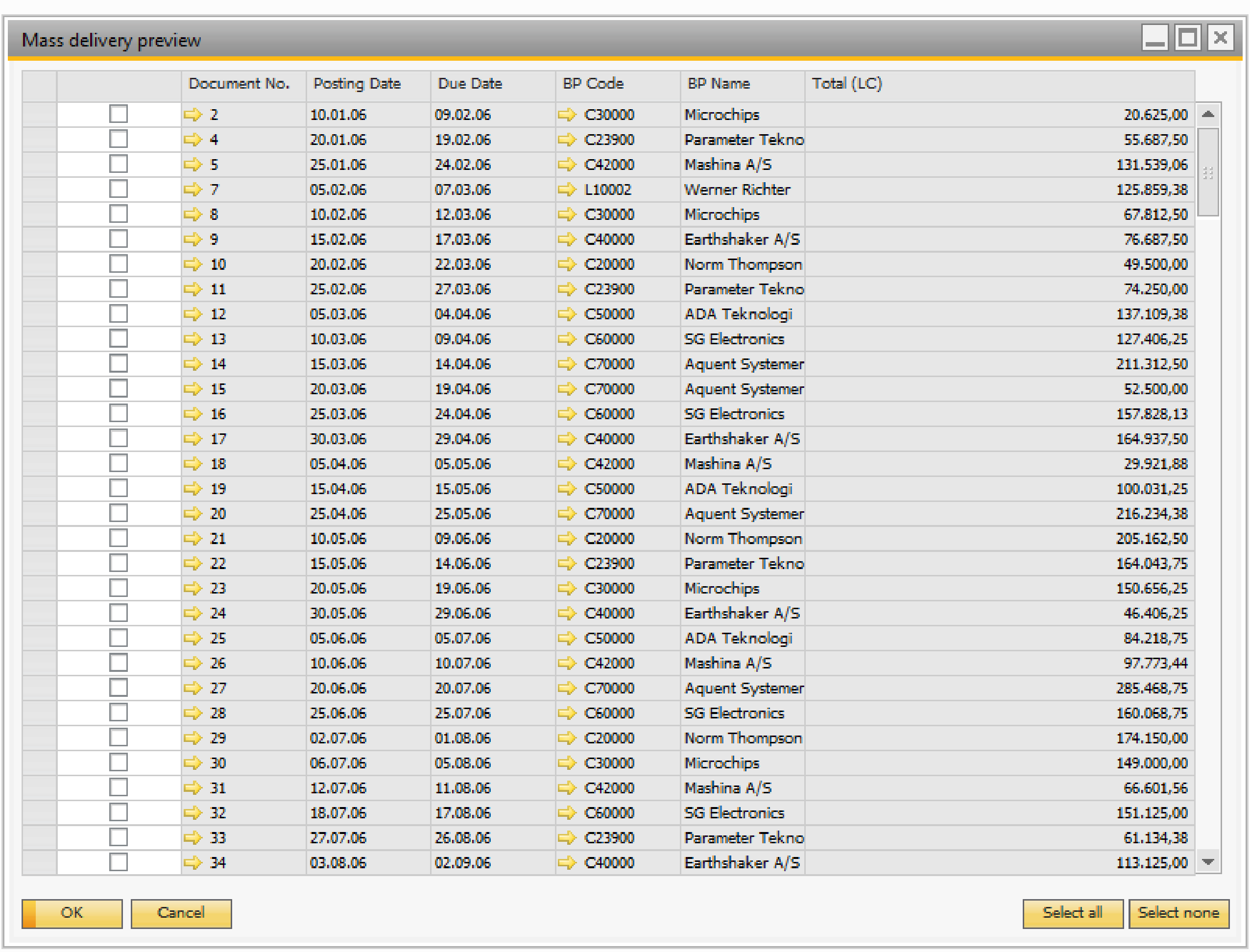
Service->Mass delivery

Accessing any of the menu items will open a window:



Here you can select the Mass delivery configuration to be used, the action and some filters.
PLEASE NOTE: DIFFERENT FILTERS MAY BE SHOWN DEPENDING ON WHAT CONFIGURATION IS SELECTED

If you select “Preview” you will be presented with a window where you can select what you would like to execute the action for:

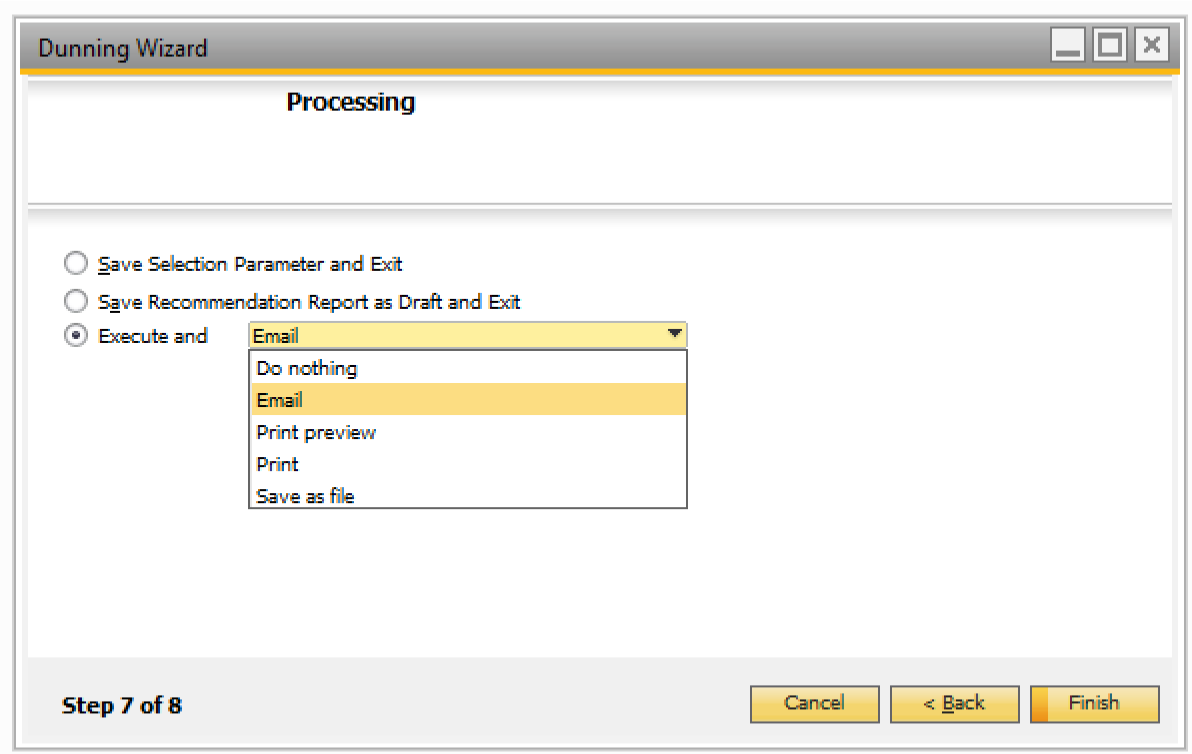


	Document No.	Posting Date	Due Date	BP Code	BP Name	Total (LC)
☐	2	10.01.06	09.02.06	C30000	Microchips	20.625,00
☐	4	20.01.06	19.02.06	C23900	Parameter Tekno	55.687,50
☐	5	25.01.06	24.02.06	C42000	Mashina A/S	131.539,06
☐	7	05.02.06	07.03.06	L10002	Werner Richter	125.859,38
☐	8	10.02.06	12.03.06	C30000	Microchips	67.812,50
☐	9	15.02.06	17.03.06	C40000	Earthshaker A/S	76.687,50
☐	10	20.02.06	22.03.06	C20000	Norm Thompson	49.500,00
☐	11	25.02.06	27.03.06	C23900	Parameter Tekno	74.250,00
☐	12	05.03.06	04.04.06	C50000	ADA Teknologi	137.109,38
☐	13	10.03.06	09.04.06	C60000	SG Electronics	127.406,25
☐	14	15.03.06	14.04.06	C70000	Aquent Systemer	211.312,50
☐	15	20.03.06	19.04.06	C70000	Aquent Systemer	52.500,00
☐	16	25.03.06	24.04.06	C60000	SG Electronics	157.828,13
☐	17	30.03.06	29.04.06	C40000	Earthshaker A/S	164.937,50
☐	18	05.04.06	05.05.06	C42000	Mashina A/S	29.921,88
☐	19	15.04.06	15.05.06	C50000	ADA Teknologi	100.031,25
☐	20	25.04.06	25.05.06	C70000	Aquent Systemer	216.234,38
☐	21	10.05.06	09.06.06	C20000	Norm Thompson	205.162,50
☐	22	15.05.06	14.06.06	C23900	Parameter Tekno	164.043,75
☐	23	20.05.06	19.06.06	C30000	Microchips	150.656,25
☐	24	30.05.06	29.06.06	C40000	Earthshaker A/S	46.406,25
☐	25	05.06.06	05.07.06	C50000	ADA Teknologi	84.218,75
☐	26	10.06.06	10.07.06	C42000	Mashina A/S	97.773,44
☐	27	20.06.06	20.07.06	C70000	Aquent Systemer	285.468,75
☐	28	25.06.06	25.07.06	C60000	SG Electronics	160.068,75
☐	29	02.07.06	01.08.06	C20000	Norm Thompson	174.150,00
☐	30	06.07.06	05.08.06	C30000	Microchips	149.000,00
☐	31	12.07.06	11.08.06	C42000	Mashina A/S	66.601,56
☐	32	18.07.06	17.08.06	C60000	SG Electronics	151.125,00
☐	33	27.07.06	26.08.06	C23900	Parameter Tekno	61.134,38
☐	34	03.08.06	02.09.06	C40000	Earthshaker A/S	113.125,00

Dunning Wizard

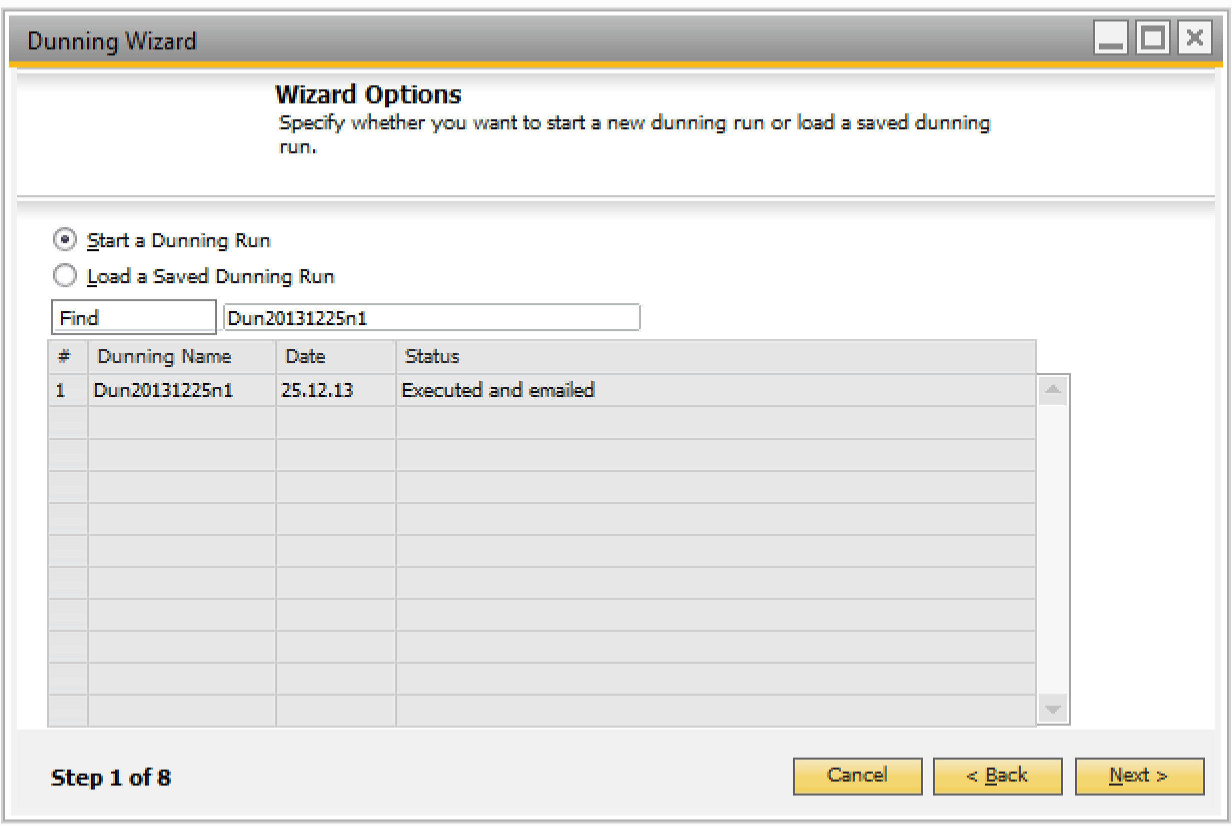
PLEASE NOTE: THIS IS ONLY ACTIVE IF YOU HAVE AN ACTIVE REPORT CONFIGURATION FOR THE DUNNING WIZARD

If the above is true B1 Print and Delivery will take control over the Dunning Wizard and allow you to email dunning reminders to the business partners.
The Dunning Wizard is to be used as normally the main difference is in the last step where you select what to do:



Here you have a new option called “Execute and” where you now may execute a B1 Print and Delivery action.

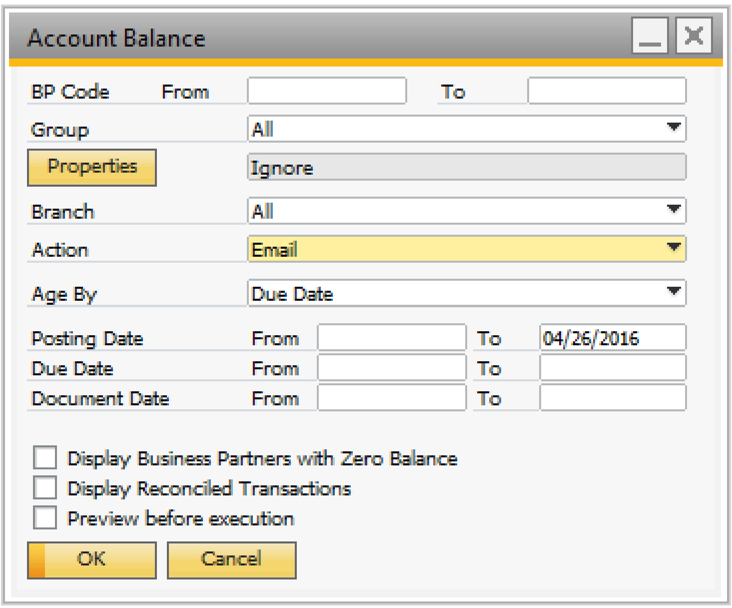
B1 Print and Delivery also replaces the “Status” column with its own to show what B1 Print and Delivery action has been performed for a given wizard:



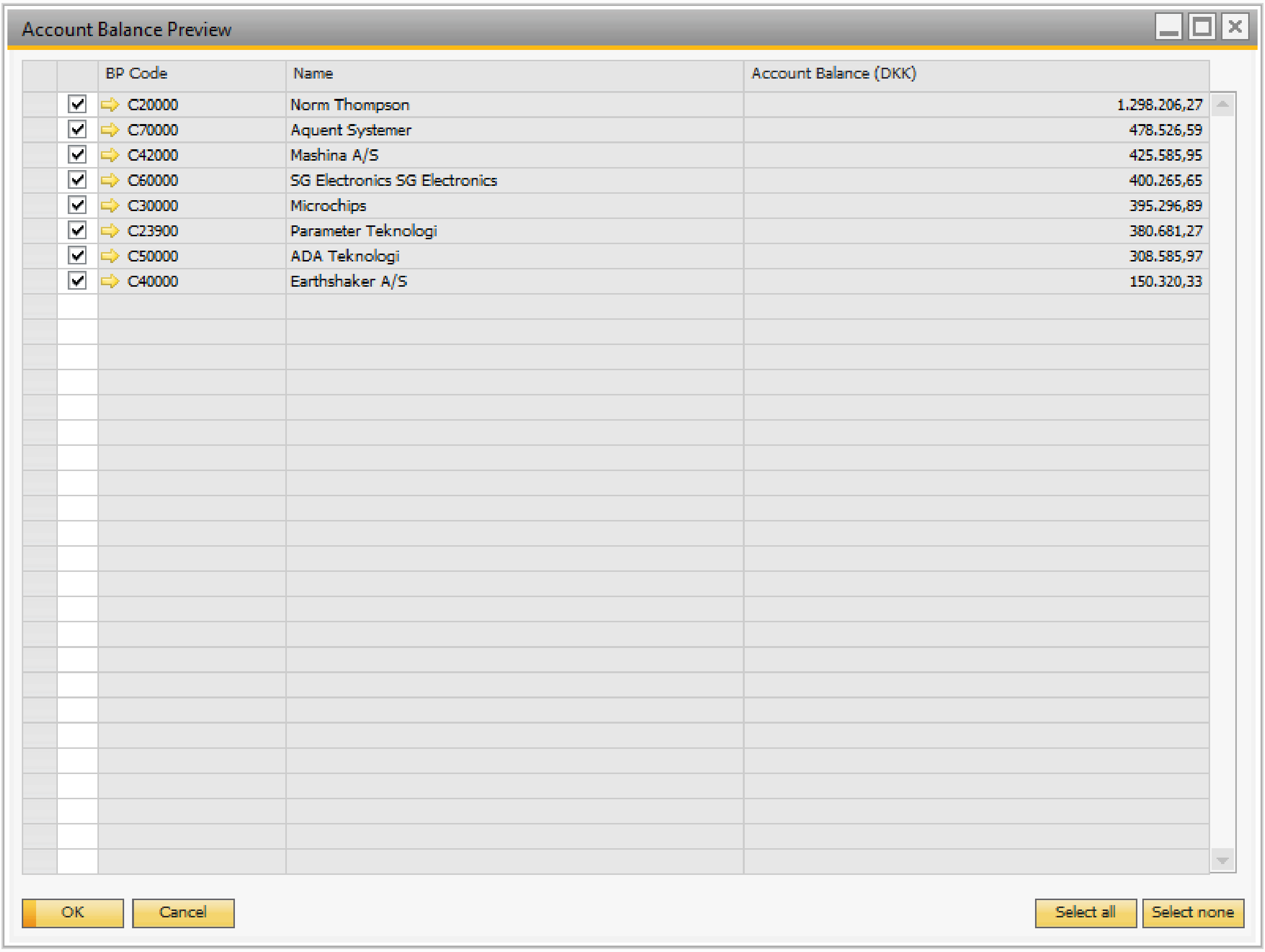
Special Usage

BP Account Balance printing

Other than the Sales and purchase document printing, B1 Print and Delivery offer the option to print account balances (Ageing reports). Under Business Partner > Account Balance, you have the following window.



You can here choose a range of customers via codes, group and/or properties and send each an account balance report. The report can be emailed, previewed, printed or saved. If you choose the option "Preview before execution" you will be presented with the following window where you can pick the customer s you wish to include.

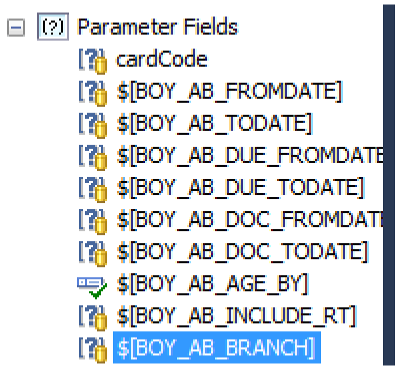


	BP Code	Name	Account Balance (DKK)
☑	C20000	Norm Thompson	1.298.206,27
☑	C70000	Aquent Systemer	478.526,59
☑	C42000	Mashina A/S	425.585,95
☑	C60000	SG Electronics SG Electronics	400.265,65
☑	C30000	Microchips	395.296,89
☑	C23900	Parameter Teknologi	380.681,27
☑	C50000	ADA Teknologi	308.585,97
☑	C40000	Earthshaker A/S	150.320,33

Special usage only for DK Localizations: It is possible to enable integration to the B1UP "Bank In" feature via the Base configuration. After activation, you will need to restart the add-on before it is applied.

Branches

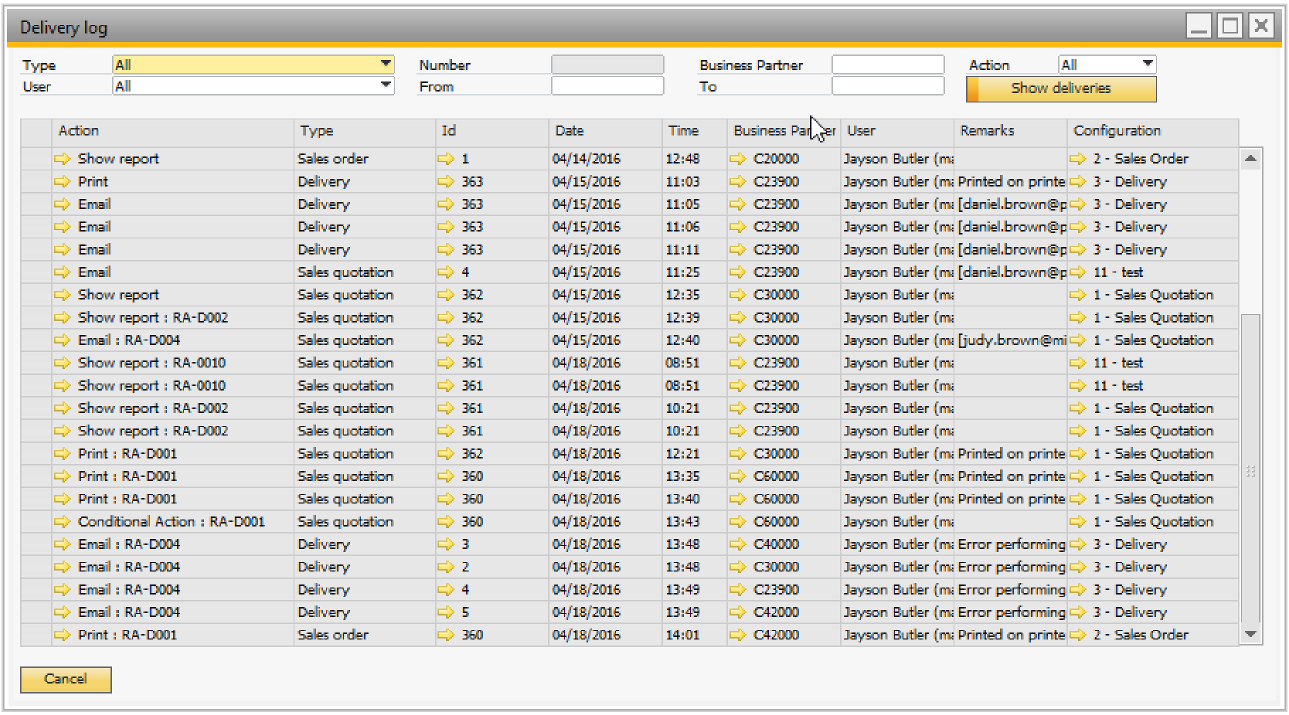
If you are using branches, it's possible to only get the account balance for all the documents associated with a single branch. To get the account balance associated with a branch a branch parameter need to be added to the account balance crystal report, and the SQL for the Lines and Primo needs to be updated with a check for the branch.



Delivery Log

As you use B1 Print and Delivery the system will log the activities in a Delivery Log. You can access the Delivery Log from two places:

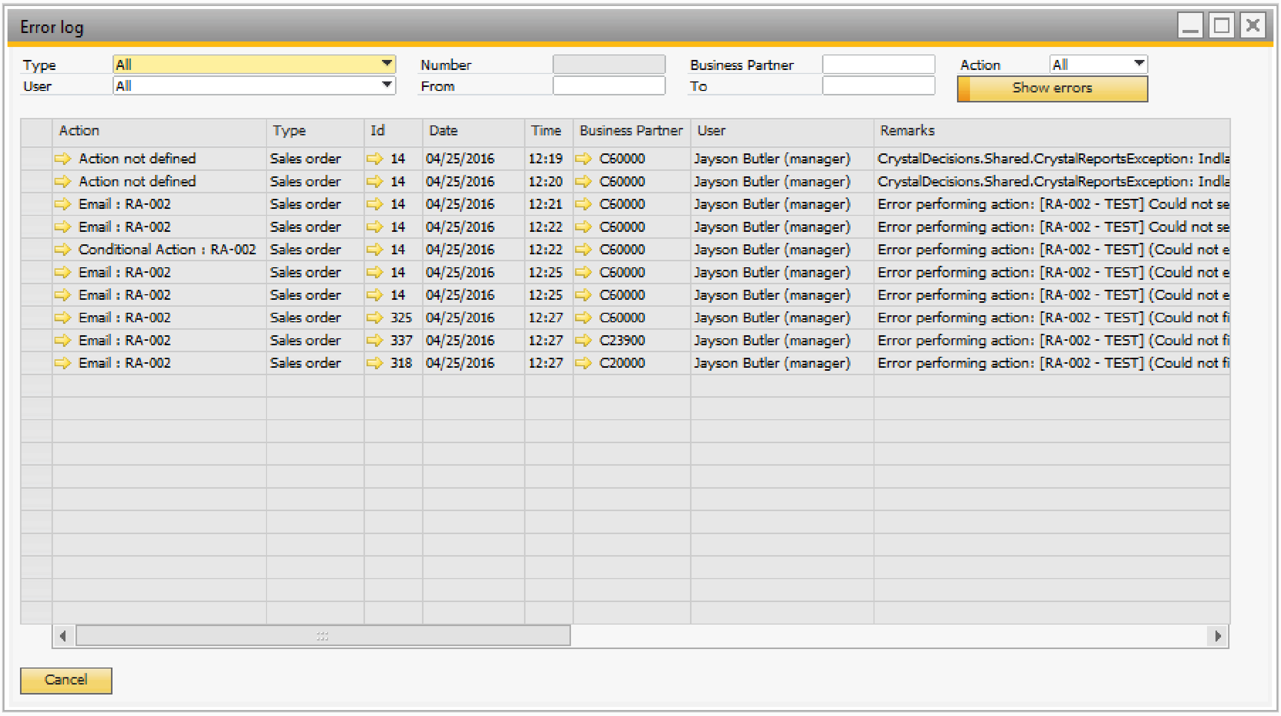
- From the main configuration under administration
- By right-click of any document where you can activate the B1 Print and Delivery



Action	Type	Id	Date	Time	Business Par er	User	Remarks	Configuration
Show report	Sales order	1	04/14/2016	12:48	C20000	Jayson Butler (ma		2 - Sales Order
Print	Delivery	363	04/15/2016	11:03	C23900	Jayson Butler (ma	Printed on printe	3 - Delivery
Email	Delivery	363	04/15/2016	11:05	C23900	Jayson Butler (ma	[daniel.brown@p	3 - Delivery
Email	Delivery	363	04/15/2016	11:06	C23900	Jayson Butler (ma	[daniel.brown@p	3 - Delivery
Email	Delivery	363	04/15/2016	11:11	C23900	Jayson Butler (ma	[daniel.brown@p	3 - Delivery
Email	Sales quotation	4	04/15/2016	11:25	C23900	Jayson Butler (ma	[daniel.brown@p	11 - test
Show report	Sales quotation	362	04/15/2016	12:35	C30000	Jayson Butler (ma		1 - Sales Quotation
Show report : RA-D002	Sales quotation	362	04/15/2016	12:39	C30000	Jayson Butler (ma		1 - Sales Quotation
Email : RA-D004	Sales quotation	362	04/15/2016	12:40	C30000	Jayson Butler (ma	[judy.brown@mi	1 - Sales Quotation
Show report : RA-0010	Sales quotation	361	04/18/2016	08:51	C23900	Jayson Butler (ma		11 - test
Show report : RA-0010	Sales quotation	361	04/18/2016	08:51	C23900	Jayson Butler (ma		11 - test
Show report : RA-D002	Sales quotation	361	04/18/2016	10:21	C23900	Jayson Butler (ma		1 - Sales Quotation
Show report : RA-D002	Sales quotation	361	04/18/2016	10:21	C23900	Jayson Butler (ma		1 - Sales Quotation
Print : RA-D001	Sales quotation	362	04/18/2016	12:21	C30000	Jayson Butler (ma	Printed on printe	1 - Sales Quotation
Print : RA-D001	Sales quotation	360	04/18/2016	13:35	C60000	Jayson Butler (ma	Printed on printe	1 - Sales Quotation
Print : RA-D001	Sales quotation	360	04/18/2016	13:40	C60000	Jayson Butler (ma	Printed on printe	1 - Sales Quotation
Conditional Action : RA-D001	Sales quotation	360	04/18/2016	13:43	C60000	Jayson Butler (ma		1 - Sales Quotation
Email : RA-D004	Delivery	3	04/18/2016	13:48	C40000	Jayson Butler (ma	Error performing	3 - Delivery
Email : RA-D004	Delivery	2	04/18/2016	13:48	C30000	Jayson Butler (ma	Error performing	3 - Delivery
Email : RA-D004	Delivery	4	04/18/2016	13:49	C23900	Jayson Butler (ma	Error performing	3 - Delivery
Email : RA-D004	Delivery	5	04/18/2016	13:49	C42000	Jayson Butler (ma	Error performing	3 - Delivery
Print : RA-D001	Sales order	360	04/18/2016	14:01	C42000	Jayson Butler (ma	Printed on printe	2 - Sales Order

Error Log

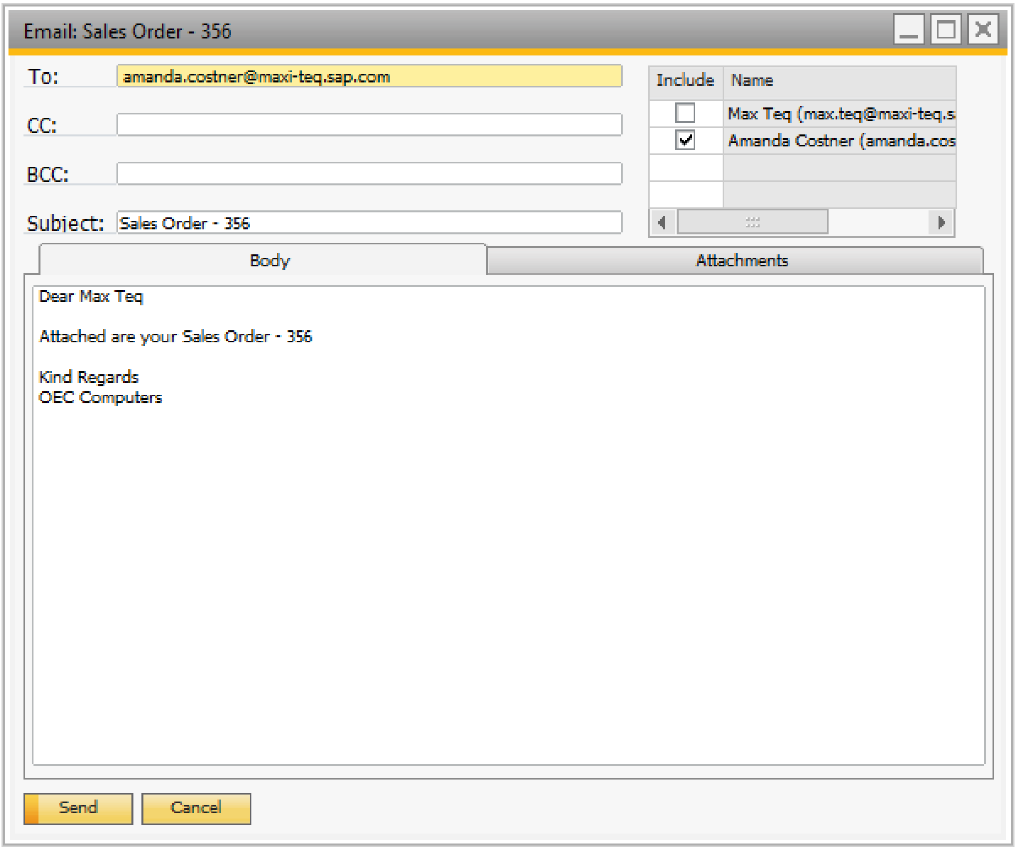
As you use B1 Print and Delivery the system will log the Errors in an Error Log. The Error log can be accessed from the main configuration under administration.



Preview Email

You can choose to preview emails in SAP before sending them by using the preview email option. If you do this, you will get the following window every time to make an email. Here it's possible to make several changes to the email before you send it.

NB: IT IS NOT POSSIBLE TO USE THE PREVIEW EMAIL OPTION WHEN USING MASS DELIVERY


Email: Sales Order - 356
To:
amanda.costner@maxi-teq.sap.com
CC:
BCC:
Subject:
Sales Order - 356
Include
Name
Max Teq (max.teq@maxi-teq.s
Amanda Costner (amanda.cos
Body
Attachments
Dear Max Teq
Attached are your Sales Order - 356
Kind Regards
OEC Computers
Send
Cancel

Appendix 1 - Keyword overview

The following keyword can be used in the add-on to customize fields in the various actions.

Keyword	Description
$[$<item>.<col>.<type>]	The normal SAP Dynamic syntax for items
$[<table>.<field>]	The normal SAP Dynamic syntax for fields
$[OBJECTNAME]	Keyword that give back the name of the type of object you are working on (Example: If you use it on an A/R Invoice then $[OBJECTNAME] = 'A/R Invoice')
$[OBJECTNAME_BP]	Same as the above $[OBJECTNAME] but in the language of the current Business Partner.
$[ATTACHMENT_FOLDER]	The path to SAP's Attachment folder
$[BITMAP_FOLDER]	The path to SAP's Bitmap (picture) folder
$[WORD_FOLDER]	The path to SAP's Word folder
$[EXTENSION_FOLDER]	The path to SAP's Extension folder
$[EXCEL_FOLDER]	The path to SAP's Excel folder
$[XML_FOLDER]	The path to SAP's XML folder
$[DOCUMENT_CONTACTPERSON]	The name of a document's contact person [Sales and purchase documents only]
$[DOCUMENT_CONTACTPERSON_FIRSTNAME]	The first name of a document's contact person [Sales and purchase documents only] (Derived from the full name)
$[DOCUMENT_CONTACTPERSON_LASTNAME]	The last name of a document's contact person [Sales and purchase documents only] (Derived from the full name)
$[DOCUMENT_CONTACTPERSON_FIRSTNAME_EX]	The first name of a document's contact person [Sales and purchase documents only] (OCPR.FirstName - Require 8.81 or higher)
$[DOCUMENT_CONTACTPERSON_LASTNAME_EX]	The last name of a document's contact person [Sales and purchase documents only] (OCPR.LastName - Require 8.81 or higher)
$[DOCUMENT_CONTACTPERSON_MIDDLENAME]	The last name of a document's contact person [Sales and purchase documents only] (OCPR.MiddleName - Require 8.81 or higher)
$[DOCUMENT_SALESEMPLOYEE]	The name of a document's sales employee [Sales and purchase documents only]
$[DOCUMENT_OWNER]	The name of a document's owner [Sales and purchase documents only]
$[DOCUMENT_SHIPPINGTYPE]	The name of a document's linked shipping type [Sales and purchase documents only]
$[DOCUMENT_PAYMENTTERMS]	The name of a document's linked payment terms [Sales and purchase documents only]
$[DOCUMENT_PROJECTNAME]	The name of a document's linked project [Sales and purchase documents only]
$[DOCUMENT_INDICATOR]	The name of a document's linked indicator [Sales and purchase documents only]
$[DOCUMENT_PAYMENTMETHOD]	The name of a document's linked payment method

	[Sales and purchase documents only]
$[BOY_AB_PAY_IN_FORM_KEY] (Please note that this is the keyword to be used both in the Crystal(as parameter name) and in SAP as value)	Special Keyword only used in DK localizations and can only be used in Crystal Report Definition that is linked to Account Balance configurations. It will generate a special key called Pay In Form Key for usage with B1UP special Bank In module (Only visible in DK localizations). In order to get a value you will need to activate the integration from B1 Print and Delivery BaseConfig and restart the add-on.
$[BOY_AB_TODATE] (Please note that this is the keyword to be used both in the Crystal(as parameter name) and in SAP as value)	Special Keyword used in account balance reports. If the keyword is found in a crystal (as parameter name) an extra field will be shown when running the account balance report.
$[BOY_DUNNING_WIZARDID]	Special Keyword used to get the dunning wizard id.
$[BOY_DUNNING_CARDCODE]	Special Keyword used to get the cardcode from the dunning wizard .
$[BOY_DUNNING_LETTERNUM]	Special Keyword used to get the letter number from the dunning wizard.
$[BOY_DUNNING_LETTERLEVEL]	Special Keyword used to get the letter dunning level from the dunning wizard.