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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.



# 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

B1 Print and Delivery Startup Wizard					
Welcome to the B1 Print and Delivery Wizard					
Should you need more advanced setups later or wit	use-case scenarios. Please go through the options below sh to change any settings created here, this can be done S)\SAP\SAP Business One Server\Attachments\Crystal R	from Administration > Add-Ons.			
Sales A/R Sales > Sales Quotation Sales > Sales Order Sales > Delivery Sales > Return Sales > A/R Invoice Sales > A/R Invoice + Payments Sales > A/R Credit Memo Sales > A/R Down Payment Request Sales > A/R Down Payment Invoice Sales > A/R Down Payment Invoice Ales > A/R Dewn Payment Invoice Sales > A/R Dewn Payment Invoice	Sales Opportunities Sales Opportunities > Sales Opportunity Business Partners Business Partners > Activity Banking Banking > Incoming Payments Banking > Outgoing Payments Inventory > Outgoing Payments Inventory > Picklist Inventory > Goods Receipt Inventory > Goods Issue Inventory > Inventory Transfer Inventory > Inventory Transfer	Service > Service Call Service > Customer Equipment Card Service > Service Contract Service > Solutions Knowledge Base Other Other Other > Account Balance Other > Dunning Wizard			
Purchase > Purchase Order     Purchase > Goods Receipt PO     Purchase > Goods Return     Purchase > A/P Down Payment Request     Purchase > A/P Down Payment Invoice     Purchase > A/P Invoice     Purchase > A/P Credit Memo     Purchase > A/P Reserve Invoice	Production Production > Bill of Materials Production > Production Order Default action when adding documents Default account balance action Default mass delivery action Default dunning wizard action	Do not react to adding documents  Email Email Email Do not use Wizard (Manual setup)			

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	Here you can check and uncheck which documents you normally work with
documents	and the add-on should setup up automatically (You can later add/remove documents in the Report Configuration)
Default action when	Here you can define what the default action should be when you add a
adding document	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	Here you can define your default delivery method of the Account Balance
running account Balance	feature. Default is Email.
Default mass delivery	Here you can define your default delivery method of the Mass delivery
action	feature. Default is Email.
Default dunning wizard	Here you can define your default delivery method of the Dunning feature.
action	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
  - o 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

Configuration				
Use delivery log Account Balance Preview is defa Use Exchange 2013 compatible C			<ul> <li>Show 'Account Balance' menuitem under 'Business Partners'</li> <li>Show 'Mass Delivery' menuitem under 'Sales Opportunities'</li> <li>Show 'Mass Delivery' menuitem under 'Sales - A/R'</li> </ul>	
Default account balance action Account balance sorting method Account Balance - Age By Default mass delivery action Default dunning wizard action	Email By Balance (DESC) Due Date Email Email	* * * *	<ul> <li>Show 'Mass Delivery' menuitem under 'Purchasing - A/P'</li> <li>Show 'Mass Delivery' menuitem under 'Banking'</li> <li>Show 'Mass Delivery' menuitem under 'Service'</li> </ul>	
Shared folder OK Cancel	C:\Program Files (x86)\SAP\SAP Business One Server\Attachments\Crystal Reports			

Field	Description
Use delivery log	Is the delivery log system to be used
Account Balance	Is this option is enabled the Account Balance Preview will be checked by default
Preview is	
default	
Use Exchange	If this option is enabled B1Print & Delivery will use a new Exchange 2013 compatible
2013 compatible	way of interacting with the Outlook client. Enable this option if you have problem with
Outlook send method	Outlook and Exchange 2013.
Default account	Default account balance action for the account balance functionality
balance action	belaut decourt bulance declor for the decourt bulance functionality
Account balance	Determines in what order B1 Print and Delivery will send out account balances.
sorting method	
Default mass	Default mass delivery action for the mass delivery functionality
delivery action	
Default dunning	Default dunning wizard action for the dunning wizard functionality
wizard action	
Shared folder	The shared folder to be used
	HINT: YOU CAN SELECT A FOLDER BY CLICKING THE "" BUTTON
Show 'x'	These options allow you to control where B1P&D add menuitems om the main menu
menuitem under	in other places that administration. This is handy if you use the form-settings to have a
ʻy'	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.

Crystal Report De	efinition		
Code Name Report Parameters	CR-D001 Sales and Purchase document \\sap-server\Attachments\Cry # Parameter 1 DocKey@ 2 ObjectId@		This Crystal Report Definition is a generic Crystal Report that can handle all sales and purchase documents.         ments.rpt          Edit       Refresh parameters         Value       ObjectId@         ObjectId@
Report options	This Database Compatible Con Cancel	nection 💌 ?	Import Export

Field	Description		
Code	The unique code of the report-definition (Can be up to 8 chars)		
Name	The name of the report-definition		
Report	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.		
		AWARE THAT IF MULTIPLE USERS NEED TO RUN THE REPORT, THE PATH TO D BE A SHARED PATH (EXAMPLE: \\SAP-SERVER\CRYSTAL\DOCUMENT	
Edit-button	If you are on a machine with the Crystal Report designer installed you can press the Edit-button to edit the selected report.		
Refresh parameter-	If you have already chosen a Crystal Report file, but after selection, you update the		
button	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.		
Parameters	In Crystal Reports, you have the option pass along parameters to the report		
	(example: a specific customer code or a specific document number).		
	Colum	Description	
	Parameter	Here the names of the parameters in the report is automatically drawn and shown	
	Value	alueHere you enter the value that you wish to send along to the report. You have several options on how to pass along	

ра	rameters
	- No value
	$\circ$ If you leave the value empty the report at launch
	ask you for a value before showing the report
	- Fixed value
	$\circ$ You can enter any fixed value (123, abcetc. all
	depending on your report parameters value)
	<ul> <li>DocKey@ keyword</li> </ul>
	<ul> <li>This special keyword defined by SBO8.8 will give</li> </ul>
	you the DocEntry-field of all sales and purchase
	documents
	<ul> <li>ObjectId@ keyword</li> </ul>
	<ul> <li>This special keyword defined by SBO8.8 will give</li> </ul>
	you the object-type of the document.
	<ul> <li>23 = A/R Quotation</li> </ul>
	<ul> <li>17 = A/R Order</li> </ul>
	<ul> <li>15 = A/R Delivery Note</li> </ul>
	<ul> <li>16 = A/R Return</li> </ul>
	<ul> <li>203 = A/R Down Payment</li> </ul>
	<ul> <li>13 = A/R Invoice</li> </ul>
	<ul> <li>14 = A/R Credit Note</li> </ul>
	<ul> <li>22 = A/P Order</li> </ul>
	<ul> <li>20 = A/P Goods Receipt PO</li> </ul>
	21 = A/P Goods Return
	204 = A/P Down Payment
	18 = A/P Invoice
	<ul> <li>19 = A/P Credit Note</li> <li>22 Activity</li> </ul>
	<ul> <li>33 = Activity</li> <li>24 Incoming Decement</li> </ul>
	<ul> <li>24 = Incoming Payment</li> <li>46 Outpoing Payment</li> </ul>
	<ul> <li>46 = Outgoing Payment</li> <li>OZ Solas Opportunity</li> </ul>
	<ul> <li>97 = Sales Opportunity</li> <li>150 - Disk List</li> </ul>
	<ul> <li>156 = Pick List</li> <li>[Other can be found in the "SDK Help Center" under</li> </ul>
	BoLinkedObject Enum]
	- Null value
	<ul> <li>Enter the special keyword \$[NULL] to pass along a</li> </ul>
	NULL value
	<ul> <li>Dynamic Syntax Value (Header level data only)</li> </ul>
	<ul> <li>Use the common dynamic syntax</li> </ul>
	(\$[\$ <item>.<col/>.<type>] or</type></item>
	<pre>\$[.<field>.<type>]) to pass along data</type></field></pre>
	from the active window in SAP Business One. For
	more information on the dynamic syntax, see the
	dynamic syntax guide
	<ul> <li>Sample: <u>\$[\$8.0.NUMBER]</u> to pass the</li> </ul>
	document number on a Sales Order.
	- SQL value
	• Use the SQL: <your sql=""> syntax to execute your</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]</your>	
Report options	<ul> <li>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.</li> <li>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.</li> </ul>	
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:

Data	source on MSSQL	Datasource on SAP HANA
We recommend using	g OLE DB (ADO) datasource with	We recommend using ODBC (RDO) datasource
provider Microsoft O	LE DB Provider for SQL Server	with following HANA connection string:
OLE DB (ADO)		DRIVER={B1CRHPROXY};DATABASE= <some_dat< td=""></some_dat<>
OLE DB Provider	ł	ABASE>;PWD= <some_password>;SERVERNOD</some_password>
Select a provider from the	list or select a data link file.	E= <some_ip_address></some_ip_address>
Provider:	Microsoft OLE DB Provider for ODBC Drivers Microsoft OLE DB Provider for Oracle Microsoft OLE DB Provider for Search Microsoft OLE DB Provider for SQL Server Microsoft OLE DB Simple Provider MSDataShape OLE DB Provider for Microsoft Directory Serv SQL Server Native Client 11.0	
Use Data Link File:		
Microsoft Data Link File:	Finish Cancel Help	

	ODBC (RDO)	1
st T	Data Source Selection Choose a data source from the list or open a file dsn from the browse button	
x	Select Data Source:     Image: Control of the second	
– ∩ C ta DE E P	End File DSN:  File DSN: Enter Connection String: Connection String: DRIVER={B1CRHPROXY};DATABASE= <some< th=""><th></th></some<>	
	Connection String: DRIVER={B1CRHPROXY};DATABASE= <some< th=""><th></th></some<>	

# **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.).

Report Action				-	×
Code	RA-001	Remarks			*
Name Type	Show report	Mark documer	nts as printed		Ŧ
Viewer type	Show in external viewer (Outside	SAP)			•
Add	Cancel			Import Expo	ort

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	
Туре	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	Should the action mark the document as printed (Sales and purchase documents only)	
as printed	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

Report Action			_ ×
Code Name	RA-D002 Show Report	Remarks	Default Report Action to show a report in the built-in viewer
Туре	Show report 🔻	Mark docu	ments as printed
Viewer type	Show in external viewer (Outside	SAP)	
ОК	Cancel		Import Export

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.

Report Actio	n		
Code Name	RA-D001 Print report to default printer	Remarks	Default Report Action to print to the default printer
Туре		<ul> <li>Mark doc</li> </ul>	uments as printed
Printer	Tip: If no printer is selected the	e default printer will	be used
Copies	1 Use printer dialog (this disa	ble the above settin	gs)
ОК	Cancel		Import Export

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.

# B1 Print and Delivery Manual

Report Action			_ ×
Code	RA-D003	Remarks	Default Report Action to save a document to PDF
Name	Save Document Report		<b>T</b>
Туре	Save report 💌	Mark docu	ments as printed
File type	PDF		•
File template	\$[ATTACHMENT_FOLDER]\\$[OB	JECTNAME_BP] -	\$[\$8.0.0]
	Open file after generation		
ОК	Cancel		Import Export

Field	Description
File type	<ul> <li>Here you choose the file type. Supported file types are:</li> <li>PDF</li> <li>Excel</li> <li>RTF (Rich Text Format)</li> <li>Word</li> <li>CSV</li> <li>RTF (Editable)</li> <li>Excel (Records)</li> <li>Tab Seperate Text (TTX)</li> <li>Text (TXT)</li> <li>HTML</li> <li>XML</li> <li>Word For Windows (RTF)</li> </ul>
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.

Report Action (v.) [92	20110]			×
Code RA-D004		Remarks	Default Report Action to Email a document	٦.
Name	Name Email Document Report			
Туре	Email report 🔹	<ul> <li>Mark documents as printed</li> </ul>		
Subject	\$[OBJECTNAME_BP] - \$[\$8.0.0]			
Body HTML T	Dear \$[DOCUMENT_CONTACTP	ERSON]		
Editor	Attached are your \$[OBJECTNA!	ME_BP] - \$[\$8.0.0]	1	
			-	
	Kind Regards \$[COMPANYNAME]			
Attachment template	\$[OBJECTNAME_BP] - \$[\$8.0.0]	? Attachment	nt type PDF   O Additional attachments	
Recipients	# To / CC / BCC Email to us	e	Direct Email Email Category	
Preview Email	1 To 🔻 BP: Default	contact person	▼ Add	
			Remove	1
				-
	Client delivery method		Server delivery method	
	Outlook Save as draft +      SMTP	display ▼	O SMTP	
	O Exchange	<b>-</b>	Exchange: Save as draft	
	Exchange: Save as draft			
Group emails	Document level	• ?		
OK Cancel Tip: If Multi-language support is activate, it is possible to translate subject, body, and attachment by pressing the small globe in the field Import Export				

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. <u>TIP: FOR FULL LIST OF SPECIAL KEYWORDS, PLEASE SEE APPENDIX 1</u>
Preview	Here you can choose to preview before you choose the send it
email	
	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. <u>TIP: FOR FULL LIST OF SPECIAL KEYWORDS, PLEASE SEE APPENDIX 1</u>
	Keywords DateFormat(DynamicSyntax / FORMAT) can be used to format dates using a format.
	Example:

	DateForma	at(\$[\$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					
	<u>DATE</u>					
	Formats av	vailable:				
	Format	Description	Example			
	d	Day without leading zero	5			
	dd	Day with leading zero	05			
	ddd	Day as text (shot)	Мо			
	dddd	Day as text (long)	Monday			
	М	Month without leading zero	9			
	ММ	Month with leading zero	09			
	MMM	Month as text (short)	Sep			
	ММММ	Month as text (long)	September			
	уу	2-digit year	08			
	уууу	4 digit year	2008			
		e the TimeFormat keyword to form	at a time:			
		at(Time Format).				
	Example:					
	TimeForm	at(\$[SERVERTIME] h:mm).				
	Formats av	vailable: <u>http://msdn.microsoft.com</u>	/en-us/library/8kb3d	ddd4.aspx (Or google		
	Custom Da	ite and Time Format Strings)				
	SQLHtmlT	able( <sql>) this will if given a SQL cr</sql>	eate a HTML table w	ith a header containing		
		of the columns and create rows con-				
		QLHtmlTable(SELECT CardCode, Car				
		in style the table using normal CSS.				
	PLEASE NOT	E: IT WILL MAKE A HTML TABLE SO YOU	SHOULD SWITCH THE BO	ODY TYPE TO HTML		
	SQL( <sql>) this will if given a SQL insert the first value returned by the SQL into the email</sql>					
	body. Example: SQL(SELECT Balance FROM OCRD WHERE CardCode = '\$[\$4.0.0]')					
Attachment	Herevour	hoose the name of the report attac	hment As you can se	e in the screenshot you		
template		ption to use the SAP dynamic syntax	•	-		
		dernumber).				
		ILL LIST OF SPECIAL KEYWORDS, PLEASE S	EE APPENDIX 1			
Attachment		hoose the attachment type. Suppor		s are:		
type	- PD		tes attaciment type			
		cel				
	- RTF (Rich Text Format)					
	- Word					

	- CSV - RTF (Editab	•
	- Excel (Reco	rds) te Text (TTX)
	- Text (TXT)	
	- HTML	
	- XML	
		/indows (RTF)
Additional		nent (Will result in there being no attachment attached to the mail) In to attach additional files to the emails.
attachment		ttachments click the button and a new window will show:
S	Additional attachment	rs (v.2016.0.3.0) [920110]
	Path to file	
	M:\SSP\Print and D	elivery.pdf Add
		Remove
	✓ Ignore missing attach	
	OK Cancel	Double click a cell to select a file
	You can double clic	k a cell to select a file and you have the option to use the SAP dynamic
		a folder path and it will take all the files in the folder.
		n to ignore missing attachments. If an attachment is missing and this u will get an error and the mail will not be send.
	•	chments also supports "SQL:" and "SQLMulti:" where SQLMulti: can be
		e rows from a table.
		ption to compress the attachments to a zip file and give the file a name.
	The name neid sup	ports dynamic syntax.
	Example: "SQLMult	i:SELECT CAST(T1.trgtPath AS nvarchar(4000)) + '\' + T1.FileName + '.' +
		2DR TO JOIN ATC1 T1 ON TO.AtcEntry = T1.AbsEntry WHERE TO.DocNum =
<b>.</b>		h all attachments on a Sales order to the email.
Recipients		email you need to specify one or more recipients for the email. You can ients as you like by adding lines.
	Column	Description
	To / CC / BCC	Here you decide how the recipient will get the email. You can
		choose To, CC or BCC.
	Email to use	Here you choose among predefined BP emails or direct emails (see
		below)

	_		
	Туре		
	BP: Default contact	Use the email of the default	
	person	contact person defined for the	
		Business partner.	
	BP: Header	Use the email defined on the	
		Business partner's general tab.	
	Document: Selected	Use the email of the selected	
	contact person	document's selected contact	
		person.	
		(Can only be used when	
		printing documents)	
		Does not work on the dunning	
		wizard.	
	Email Category	Use all BP Contact persons that	
		have the specified Email-	
		category (see below)	
	BP Consolidation:	Use the Header email of the	
	Header	BP's consolidation business	
		partner.	
	BP Consolidation:	Use the Default contactperson	
	Default Contact	email of the BP's consolidation	
	Person	business partner.	
	BP Consolidation:	Use all BP Contact persons that	
	Email Category	have the specified Email-	
	Lindii Category	category (see below) of the	
		BP's consolidation business	
		partner.	
	BP Consolidation:	As "BP Consolidation: Header"	
	Header (with	but if no consolidation then it	
	fallback)	revert to "BP: Header"	
	· · · · · · · · · · · · · · · · · · ·	As "BP Consolidation: Default	
	BP Consolidation:		
	Default Contact	Contact Person" but if no	
	Person (with	consolidation then it revert to	
	fallback)	"BP: Default Contact Person"	
	BP Consolidation:	As "BP Consolidation: Email	
	Email Category (with	Category" but if no	
	fallback)	consolidation then it revert to	
		"BP: Email Category"	
Direct email		in be used to send the report to a fixed en	
		ration. Also it can be used to send to custo	
	<b>.</b>	ntax if needed. The direct email supports	
		where SQLMulti: can be used to get multi	iple
	rows from a table.		
		s order have defined a user-defined field	
		an email, you could set up a direct email	to
		rder to send the sales order to the email	
	specified in the UDF.		

			• · · · · · · ·
	Email Category	Here you can choose the t	ype 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.
			· · · · · · · · · · · · · · · · · · ·
		General Contact Persons Addresses	s Payment Terms <u>P</u> ayment Run Accounting Properties Remar Remarks 1
		Amanda Costner Norm Thompson	Remarks 2
		Define New	Password Country of Birth
			Date of Birth
			Gender   Profession
			City of Birth
			Email Category
			Email Category 2  Email Category 3
			Email Category 4
		Color Defects	Email Category 5
		Set as Defa <u>u</u> lt	Active
		As default there are no sa	togories but from the contact persons you
			tegories but from the contact persons you
		can define as many catego	ories as you want.
		Fach contact person can h	e associated with up to 5 different e-mail
			lex e-mail configurations (Example: a
		contact person has primar	ry category "Accounting" but is also "COO"
		as secondary category. All	invoices should be sent to the accounting
			eed to be CC'ed on service calls. This
		would not have been poss	ible with a single category and for that
		reason there are multiple)	).
Client	Here you decide if y		1TP or Exchange to send the report from the
		fou wish to use outlook, siv	The of Exchange to send the report non the
delivery	client.		
method	<ul> <li>If you chool</li> </ul>	se Outlook, you have the op	ption to decide if the email should be
	generated a	as a outlook draft. darft + di	splay of this draft or directly sent.
	Client delive		
		·	
	<ul> <li>Outlool</li> </ul>	k Save as draft 💌	
	SMTP	Send directly	
	🔵 Exchan	ge Save as draft	
		Save as draft + display	
	_	Save as drait + display	
	<ul> <li>If you chool</li> </ul>	se SMTP you need to choos	e one of the defined SMTP configurations.
	-	up SMTP configurations by	
	Client deliver	ry method	
	<ul> <li>Outlook</li> </ul>	Save as draft 🔻	
	SMTP	▼	
	O Exchange	ge Smtp1	
		Smtp2 aft	

	[	Manage SM	TP									×
		Name	Use authentication	SSL	Domain	Server	Port	User Name	Password	From Email		
		Smtp1					0			info@server1.com	Add	
		Smtp2	✓		domain01	Server2	0	abc	1234	info@server2.com	Remove	
											-	
											_	
				-			-					
		Update	Cancel								Test selected SMTP	
	- 1	fvouch	oose Evch	an		I NOO	d to	choose	oneo	f the defined	Fychange	
										tions by click		
										f your excha	inge server	and you
	r	need to s	select the	со	rrect e	excha	nge	version	ı.			
		Manage ev	hange server									_ 🗆 ×
					-	-						
		Name	Server			/=		Jser Name Pa				Add
		Internal	https://myD	omair	1.COM/EVVS	/Ecnange.	asmx		EXC	hange 2010 SP1	R	emove
												enove
		4									Þ	
		ОК	Cancel								Test selected	SMTP
Server	Horovou	, docido	if you wie	h +			Or	Evchand	to to c	and the rene	rt from the	o client
									-	end the repo		
delivery										e defined SN	IIP configu	irations.
method	١	You can	setup SM1	ΓP (	config	urati	ons	by click	ing the	Button.		
		Server d	lelivery metho	bd								
		<ul> <li>SMT</li> </ul>	TP Smt	<b>D1</b>		,	•					
		OExc										
			-				drat	<b>t</b>				
			Smt	p2				•				

Image endogesee       Image endogesee       Image endogesee       Image endogesee         Image endogesee       Image endogesee       Image endogesee       Image endogesee         Image endogesee       Image endogesee       Image endogesee       Image endogesee			Manage SM	ТР							
If you choose Exchange you need to choose one of the defined Exchange configurations. You can setup Exchange configurations by clicking the Buttom The server field needs to point to the ASMX URL of your exchange server and y need to select the correct exchange version.           Image exchange server         Image exchange server           Internal         https://myDomain.com/EWS/Echange.asmx			Name Smtp1	Use authentication		Server1	0			info@server1.com	Add
If you choose Exchange you need to choose one of the defined Exchange configurations. You can setup Exchange configurations by clicking the Buttom The server field needs to point to the ASMX URL of your exchange server and y need to select the correct exchange version.           Image exchange server         Image exchange server           Internal         https://myDomain.com/EWS/Echange.asmx											
If you choose Exchange you need to choose one of the defined Exchange configurations. You can setup Exchange configurations by clicking the Buttom The server field needs to point to the ASMX URL of your exchange server and y need to select the correct exchange version.           Image exchange server         Image exchange server           Internal         https://myDomain.com/EWS/Echange.asmx											
If you choose Exchange you need to choose one of the defined Exchange configurations. You can setup Exchange configurations by clicking the Buttom The server field needs to point to the ASMX URL of your exchange server and y need to select the correct exchange version.           Image exchange server         Image exchange server           Internal         https://myDomain.com/EWS/Echange.asmx											
If you choose Exchange you need to choose one of the defined Exchange configurations. You can setup Exchange configurations by clicking the Buttom The server field needs to point to the ASMX URL of your exchange server and y need to select the correct exchange version.           Image exchange server         Image exchange server           Internal         https://myDomain.com/EWS/Echange.asmx											
If you choose Exchange you need to choose one of the defined Exchange configurations. You can setup Exchange configurations by clicking the Buttom The server field needs to point to the ASMX URL of your exchange server and y need to select the correct exchange version.           Image exchange server         Image exchange server           Internal         https://myDomain.com/EWS/Echange.asmx											
If you choose Exchange you need to choose one of the defined Exchange configurations. You can setup Exchange configurations by clicking the Buttom The server field needs to point to the ASMX URL of your exchange server and y need to select the correct exchange version.           Image exchange server         Image exchange server           Internal         https://myDomain.com/EWS/Echange.asmx											
configurations. You can setup Exchange configurations by clicking the Buttom The server field needs to point to the ASMX URL of your exchange server and y need to select the correct exchange version.			Update	Cancel							Test selected SMTP
configurations. You can setup Exchange configurations by clicking the Buttom The server field needs to point to the ASMX URL of your exchange server and y need to select the correct exchange version.		- 1	f you ch	oose Exch	ange	e you nee	d to	choose	e one d	of the defined	Exchange
need to select the correct exchange version.		(	configur	ations. You	u car	n setup E	kcha	nge co	nfigura	ations by clicki	ng the Button
Name       Server       User Name       Password       Exchange version       Add         Internal       https://myDomain.com/EWS/Echange.asmx       Exchange 2010 SP1       Add         Internal       https://myDomain.com/EWS/Echange.asmx       Exchange 2010 SP1       Add         Internal       https://myDomain.com/EWS/Echange.asmx       Exchange 2010 SP1       Add         Internal       Internal       Internal       Internal       Internal         Internal						•				of your exchar	nge server and y
Name       Server       User Name       Password       Exchange version         Internal       https://myDomain.com/EWS/Echange.asmx       Exchange 2010 SP1       Add         Internal       https://myDomain.com/EWS/Echange.asmx       Internal       Exchange 2010 SP1       Add         Internal       Internal       Internal       Internal       Internal       Internal       Internal         Internal       Internal       Internal<		r			corr	ect excha	inge	versio	า.		
Internal       https://myDomain.com/EWS/Echange.asmx       Exchange 2010 SP1       Add         Image: Second Secon					-			Jser Name P	assword E	change version	
			Internal	https://myD	omain.co	om/EWS/Echange					
											Remove
OK Cancel Test selected SMTP											
				Cancel							Test selected SMTP.
				Cancel							Test selected SMTP
<b>b</b> Check this option to allow the system to group emails to the same recipient.	0	Check th	ОК	]	thes	system to	e gro	up ema	ails to t	the same recip	
			ок is option	n to allow		-	-	-			pient.
s In B1 Print & delivery you can choose to group by "Document level" or "Business Partn		In B1 Pri	ок is option	n to allow		-	-	-			pient.
		In B1 Pri	ок is option	n to allow		-	-	-			pient.
s In B1 Print & delivery you can choose to group by "Document level" or "Business Partn		In B1 Prin level".	is option nt & del	n to allow ivery you o	can d	choose to	gro	up by "	Docun		pient.
s In B1 Print & delivery you can choose to group by "Document level" or "Business Partne level". ✓ Group emails Business Partner level (With Consolix▼?	-	In B1 Prin level".	ок is option nt & del up emails	n to allow ivery you o Busine	can c ess Pa	rtner level (	gro	up by "	Docun		pient.
s In B1 Print & delivery you can choose to group by "Document level" or "Business Partne level". ✓ Group emails Business Partner level (With Consolix▼?	-	In B1 Prin level".	ок is option nt & del up emails	n to allow ivery you o Busine Cance Docu	can c ess Pa ment	rtner level (	gro	up by "	Docun		pient.
s In B1 Print & delivery you can choose to group by "Document level" or "Business Partne level". ✓ Group emails Business Partner level (With Consolix▼? OK Cance Document level		In B1 Prin level".	ок is option nt & del up emails	to allow ivery you o Busine Cance Docu Busine	ess Pa ment l ess Pa	rtner level () Ievel Irtner level	gro	up by " Consolix▼	Docun		pient.
s In B1 Print & delivery you can choose to group by "Document level" or "Business Partne level". ✓ Group emails Business Partner level (With Consolix♥? OK Cance Document level Business Partner level	p Is	In B1 Prin level".	is option nt & del	to allow ivery you o Busine Cance Busine Busine	ess Pa ment l ess Pa ess Pa	rtner level () Inther level Inther level Inther level	With With	up by " Consolix▼ Consolida	Docun ?	nent level" or	pient. "Business Partn

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.

Report Action (v.2	2016.0.3.0) [920110]					_×_
Code Name	RA-002 RA-002 Create A	Activity	Remarks			
Zype	Create Activity	*	Mark docum	ients as printed		
Activity	Meeting		<ul> <li>Type</li> </ul>		General	•
Contact person	BP: Default cont	act person	<ul> <li>Subject</li> </ul>			•
Remarks		-				
Assigned to			the report action			•
	Closed		ocument			PDF 🔻
	Inactive	Link doc				
	Personal	Start time	0		trigger date @	
		Duration		in interes	•	
		Reminde	r 🗌	Days	•	
Add	Cancel				Import	Export

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.

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	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.
Turne I Cubient	
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.
	<b>Example</b> : 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.

Report Action				_	×
Code	RA-001		Remarks		*
Name	Send internal				-
Туре	Create Internal m	essage 💌	Mark documents as printe	ed	
Users to send to	Include Us	ser	Name		
	Jin	1	Jim Boswick	1	
	Jol	hn	John Peterson		
	Ju	an	Juan Peron		
	Ju	lie	Julie Bowens		
	Ke	iko	Keiko Matsui		
	Ke	ith	Keith Trahan		
	Le	0	Leo Laporte		
	Lir	ıda	Linda Hudson		
	🖌 ma	anager	manager		
	Ma	aria	Maria Bridi		
	Ma	ary	Mary Heske		Ŧ
Priority	Normal				Ŧ
5ubject	Some subject				_
Message	Some message				*
					Ŧ
✓ Internal Link	Link Title				
	Link Description				
	<ul> <li>Attach docun</li> </ul>	nent Nam	of attachment	PDF	•
Add Ca	ancel			Import Export	:

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

Messa	iges/Alerts (	Overview					×
	Inbox		O <u>u</u> tbox	Ĭ	Sent Messag	jes	
1 9	5ubject	Date -	From	Ľ	0		Attach document
S	iome Subject	25.12.13	manager		0		
Som	e Message ┥	$\sum$	Desc	ription te	xts	~	
# 1	Link Title	1		all use dyr		itax +	
	<ul> <li>Link descrip</li> </ul>	ption				•	
Fo	orw <u>a</u> rd	<u>R</u> eply		Delete	<u>O</u> ut o	f Office	
	Sales Que	otation					
	Customer		C42000	. /=		No.	Hardware 247
	Name Contact P	erson	Mashina /		•	Statu Dosti	us Open ing Date 11.12.09
	CONTACLE	C. Serie			G		ing out Intervy

#### **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:

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- 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.

Code Name Type SQL Condition		03 with gift URL?	Remarks			
Туре		with gift URL?				×
	Cond					<b>T</b>
50L Condition		litional Action	Mark docum	ients as printed		
5OL Condition			Comm	on SQL structures	IF / ELSE	
	BEGI SELE END ELSE BEGI	CT 'EMAIL_WITH_GIFT_UR		5E		
						-
	#	Conditional result	Action	to execute		
	#	Conditional result EMAIL_WITH_GIFT_URL	Action			- <u>A</u> dd
	-		📫 RA	-001		
	1	EMAIL_WITH_GIFT_URL	📫 RA	-001		<u>A</u> dd <u>R</u> emove

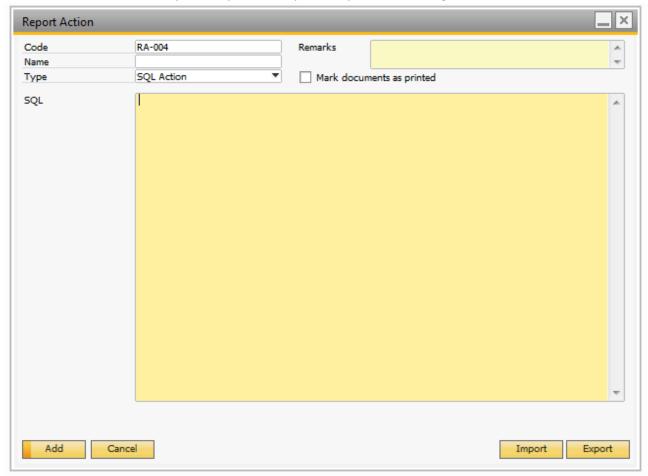
Field	Description
SQL Condition	First you need to create you SQL, which in most cases will have an IF/ELSE or a CASE/WHEN Structure (You can select such from the Common SQL combobox). In the SQL you can use the syntax \$[\$ <item>.<column>.<type>] for dynamic values from items and \$[<table>.<field>.<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"</type></field></table></type></column></item>
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).

Report Action					_ × _
Code	RA-004		Remarks		~
Name	Print and	Mail			-
Туре	Multiple a	ctions 💌			
Sub-actions	# Act	ion			
	1 🛶	RA-001			Add
		RA-002			Remove
					Keniove
Add	Cancel			Import	Export

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.

Code	RA-D004				Remarks	Default Report	t Action to Email a document	*		
Name	Email Docume	ent Repo	rt					-		
Туре	Email report			•	Mark do	cuments as printed	1			
Subject	\$[OBJECTNA	ME BP1	- \$[\$8.0	0.01						
	Dear \$[DOC				SON]			A 2 .		
		-			-					
	Attached are	your ş[	OBJECT	NAME	_Bh] - \$[\$97					
	Kind Regards			-	nslations		K			
	\$[COMPANY	NAMEJ		Irar	islations					
				Tab	le		B1Print: ReportActions			
Attachment template	\$[OBJECTNA	ME_BP]	- \$[\$8.	Field	£		Email Body			
Recipients	# To / CO	C / BCC	Email	Cod	e		RA-D004			
	1 To		Docun	Defa	ault Descriptio	on	Dear \$[DOCUMENT_CONT	ACTPERSON]Attach	ed are your \$[OBJE(	
	1 10		Docun	Tran	nslated Value	5				
				#	Language		Translation			
					Spanish					
				1	Spanish					
	Client delivery	y metho	ł	2	F	ow Text Details.				
	<ul> <li>Outlook</li> </ul>		Outlook							
	O SMTP					Estimado \$ [DOCL	JMENT_CONTACTPERSON]			*
	C Exchange		Exchan			Se adjuntan los \$	[OBJECTNAME_BP] - \$ [\$ 8.0.0]	1		
		•	Exchan					,		
Group emails	Document lev	/el	_			Saludos cordiales \$ [COMPANYNAM	IEJ			
OK Cano		f Multi-la				÷[000000000000000000000000000000000000				
Cane	subjec	ct, body	, and at							
					Add					
			L.							
										1

On Save report actions you can translate File template.

Code	RA-D003		Remarks	Default Report Ac	tion to save a document to PDF				
Name	Save Document Report				-				
Туре	Save report		Mark docu	ments as printed					
File type	PDF				•				
File template	\$[ATTACHMENT_FOLDER	\$[ATTACHMENT_FOLDER]\\$[OBJECTNAME_BP] - \$[\$8.0.0]							
	Open file after generation								
		Ira	nslations						
			ole		B1Print: ReportActions				
					Save File				
		Cod	de		RA-D003				
		Def	ault Description		<pre>\$[ATTACHMENT_FOLDER]\\$[OBJECTNAM</pre>	4E_BP] - \$[\$8.0.0]			
		Tra	nslated Values						
		#	Language		Translation				
		1	Danish		\$[ATTACHMENT_FOLDER]\\$[OBJECTNAM				
		2	Swedish	•	\$[ATTACHMENT_FOLDER]\\$[OBJECTNAM	IE_BP] - \$[\$8.0.0] SE			
		3		•					
			_						
OK	Cancel		_						

#### **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).

Report Action	
Code Name	RA-D004 Remarks Default Report Action to Email a document
Туре	Email report  Mark documents as printed
Subject	\$[OBJECTNAME_BP] - \$[\$8.0.0]
Body Plain text	Paste
	Attached are your \$[OBJECTNAME_BP] - \$[\$8. Select All
	Kind Regards \$[COMPANYNAME] Remove
	<u>D</u> uplicate
Attachment template	\$[OBJECTNAME_BP] - \$[\$8.0.0] ? Attachn Import language data file tional attachments
Recipients	# To / CC / BCC Email to use Direct Email Email Category
	1 To To Document: Selected contact p Add
	Remove
	Client delivery method Server delivery method
	Outlook       ✓ Outlook: Save as draft         SMTP       ▼         Exchange       ▼         Exchange: Save as draft       SMTP
Group emails	Document level       ?         Tip: If Multi-language support is activate, it is possible to translate subject, body, and attachment by pressing the small globe in the field       Import       Export

# 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.

esc	ription Sales	Quotation		Categor	y Sales			Type	Sales Qu	otation (149)	Number
ŧ	Crystal Report	Print button	Print preview button	Add button	Email button	PDF button	Word button	Excel button	Fax button	Document printing	
	⇒ CR-D001	📫 RA-D001	⇒ RA-D002		📫 RA-D004	📫 RA-D003		9		➡ RA-D004	Add
											Remove

Description							
Here you can de	scribe tl	ne configuration. Example "Default A/R Invoice" or					
		egory in where the different types of windows are					
located. As default the following categories exist:							
Category	Descri	ption					
Business	-	Activity window					
Partner	NB: BUSINESS PARTNER MASTER DATA IS COVERED BY 'OTH						
		UNT BALANCE'					
	R documents						
	P documents						
Service	Service Call						
	Customer Equipment Card						
	-	Service Contract					
	Solution Knowledge base.						
Banking		Incoming Payment					
Incontent		Outgoing Payment					
		Pick Lists					
Custom		you to run custom defined Mass Deliveries (the type					
Other	-	e the Mass Deliveries of type Custom)					
Other		al category with windows that does not belong to a					
	•						
-		category all types of windows under the selected and you need to choose the type that suits your					
	in nere a	and you need to choose the type that suits you					
	ns are v	where you choose the Crystal report definition to use					
-		to it. Most of the time you will only have one line					
		ve the option to have more than one report being used					
	•	A/R Invoice + a specification to the invoice)					
		Description					
		Here you choose the report definition (Crystal					
		report file) to use.					
Print button		Here you define the action you wish to happen					
		when you press the SAP Print button.					
	Here you can de "Sales orders for Here you choose located. As defaCategoryBusiness 	Here you can describe the "Sales orders for VIP custors for VIP					

	The default action here is a print-action, but you
<b></b>	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
	🗟 🚍 🖂 🕞 🛄   📩   📩

I		
	SMS Buttons	Here you define the action you wish to happen
		when you press the SAP SMS button (Only available in IL and PA localizations)
	Document printing	Here you define the action you wish to happen
		when you press the Print button in the document
		printing.
		Document Printing - Selection Criteria
		Series All  Vhen Batch/Serial No. Exist, Print  Document and Batch/Serial No.
		Qniy Documents Still to Be Printed     Open Only     privilusing Default Layout Printing Options
		Print A/R Invoices
		Interna 2 -> 2 27.01.06 27.01.06 C30000 20.625.00 3 -> 3 -> 3 11.02.06 11.02.06 C40000 99.609.38
		4         → 5         12.02.06         C42000         131.539.06           No. of 0         5         → 4         16.02.06         C23900         55.687.50           6         → 6         09.03.06         09.03.06         C30000         67.812.50
		Of         7         15.03.06         15.03.06         C40000         76.687,59           8         ⇔ 8         19.03.06         19.03.06         C20000         49.500,00
		9 → 9 27.03.06 227.03.06 C23900 74.250,00 10 → 11 01.04.06 01.04.06 C60000 127.406.25 11 → 10 07.04.06 07.04.06 C50000 137.109.38
		12         →         16.04.06         C7000         211.312,50           13         →         13         21.04.06         21.04.06         C70000         52.500,00
		14         ≥14         24.04.06         24.04.06         C60000         157.828,13           15         ⇒15         27.04.06         27.04.06         C40000         164.937,50         ▼
		Print Cancel Select al Select none
		The default action here is a Print action, but you
		can choose any action you wish.
Active	The checkbox here indic	ate if the configuration is active or not. As long as a
	layout is inactive it will r	not be used at runtime.
Show on right-click	The checkbox indicate if	the configuration should be shown as an option when
	right-click is used on wir	ndows.
	Example the A/R Invoice	e window:
	B1 Print and Delive	ry 🔰 🔂 Sales Quotation (Default) 🕨
	<u>R</u> ow Details	Report selection
	New Activity	Delivery log
Default / Set as default	Each combination of cat	egory/type can have a default configuration if you
-		ations for the same type. At runtime, the system will if
	having multiple configur	rations to choose from and the business partners is not
	specifically set to one co	onfiguration, choose the default layout.
Select Business partners		n make selection of multiple configuration Business
	partner specific (see mo	·
Import		mport exported Report configurations from XML
Export		e option to export the current or multiple Report-
	definitions to XML.	
		he option to export multiple Report-definitions from
	XML	

# **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

election type usiness Partner Code	Business Partner Code	<b></b>	Add and manage sele	ction types		
Category	Туре	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	🔿 🚺	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					Ŧ

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".

Туре		UDF Uid	
Business Partner Code	*	•	Add
Language	•	•	Remov
Business partner group	*	•	Kellion
			Move
			Move do

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.

Mass delivery config	guration (v.) [920110]			_	×
Code Name	DP-008 A/R Invoice	Remarks	Default configuration		
Users (Empty = All)				<ul> <li>Include users</li> <li>Exclude users</li> </ul>	
Document type	A/R Invoice				<b>_</b>
SQL	SELECT DISTINCT T0.Doc	Entry AS DocEntry, TO	.CardCode AS CardCode, T0.DocNum AS DocN	Ium FROM OINV T0	?
Where Condition SQL Variables					
Additional columns				Format Additional Columns	
Order by condition				Ignore SQL DISTINCT	
Active	Show as an option in the	e mass delivery form	Allow the user to select a different report of	configuration when running mass delivery	
OK Can	cel Did you know that you	u can run these on a so	hedule ?	Import Export	t

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)	<ul> <li>Here you have the option to make the Configuration user-specific.</li> <li>All you need to do is to enter the wanted users (their usercodes) separated by ";" (Depending on the user-setting: <ul> <li>Include users = All users entered will use the configuration</li> <li>Exclude users = All users entered will not use the configuration</li> </ul> </li> <li>If you do not enter anything, all users will use the configuration</li> <li>Samples: <ul> <li>Entered: manager;user1;user2 (Include users option)</li> <li>The 3 users with usercode "manager", "user1" and "user2" will use the configuration.</li> </ul> </li> <li>Entered: user3 (Exclude users option) <ul> <li>All users except user with usercode "user3" will use the configuration.</li> </ul> </li> </ul>		
	Document	Here you can select what document type this configuration		
	type	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 edited.	the system to function correctly. This cannot be
Where	Field	Description	
condition	Where condition	This is your Where An example (Invoid	condition to be used for filtering the data. ce document type) could be <i>WHERE TO.CardCode =</i> Id when Mass delivery is run only return the Invoices 20000.
	SQL Variables	Here you have the [%3] [%19]) ther	option to define up to 20 Variables ([%0], [%1], [%2], e can be used in the where condition. CANNOT BE USED IN CONFIGURATIONS THERE IS USED BY THE
		Mass Delivery Sql Variab	les Wizard (v.) [920110]
		Variable Source	
		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.

			SELECT <value>,<de< th=""><th>SCRIPTION&gt; FROM &lt; TABLE</th><th>&gt;</th></de<></value>	SCRIPTION> FROM < TABLE	>
			would result in a list CardCode will be the	Code, CardName FROM OC of all Business Partners. value for the customer sele e the description that help	ect
		Title	user for the values	ow shown when prompting s 'Define survey variables' i	
					_
Order by	Field	Description			
condition	Order by condition		n write an Order By conditi the result should be. Exam	ion that will decide how the ple DocEntry DESC	2
Additional	Here vou can	-		imns in the database you w	ant to
Columns			ry preview window.		
	Additional columns	T0 Address T0 V	atSum,T1.CreateDate,T0.CreateDate,		Ø
	Additional columns	TU:Address, TU:Va	abom, Proteacoace, Poloreacoace,		
	NB: if you use		ere condition you need to	use prefixes on the column	names
Columns	NB: if you use to ensure the Here it is pose	e joins in the who correct column sible to format t	ere condition you need to u is shown	iving them a new caption t	
Columns	NB: if you use to ensure the Here it is pose be shown as t	e joins in the who correct column sible to format t	ere condition you need to a is shown he additional columns by g der on the mass delivery pr	iving them a new caption t	
Additional Columns Format	NB: if you use to ensure the Here it is pose be shown as t Additional Co	e joins in the who correct column sible to format t the column head	ere condition you need to a is shown he additional columns by g der on the mass delivery pr	iving them a new caption t	
Columns	NB: if you use to ensure the Here it is pose be shown as t Additional Co	e joins in the who correct column sible to format t the column head	ere condition you need to r is shown he additional columns by g der on the mass delivery pr ) [920110]	iving them a new caption t	
Columns	NB: if you use to ensure the Here it is poss be shown as t Additional Co	e joins in the who correct column sible to format t the column head plumns Format (v. Default name for	ere condition you need to r is shown he additional columns by g der on the mass delivery pr ) [920110]	iving them a new caption the view form.	
Columns	NB: if you use to ensure the Here it is poss be shown as t Additional Co	e joins in the who correct column sible to format t the column head plumns Format (v. Default name for Address	ere condition you need to r is shown he additional columns by g der on the mass delivery pr ) [920110]	iving them a new caption the view form.	
Columns	NB: if you use to ensure the Here it is pose be shown as t Additional Co	e joins in the who correct column sible to format t the column head olumns Format (v. Default name for Address VatSum	ere condition you need to a is shown he additional columns by g der on the mass delivery pr ) [920110] r Column Caption	iving them a new caption the view form.	
Columns	NB: if you use to ensure the Here it is poss be shown as t Additional Co	e joins in the who correct column sible to format t the column head olumns Format (v. Default name for Address Vatsum CreateDate	ere condition you need to the is shown he additional columns by geder on the mass delivery property (1920110) (1920110) r Column Caption	iving them a new caption the view form.	
Columns	NB: if you use to ensure the Here it is poss be shown as t Additional Co	e joins in the who correct column sible to format t the column head olumns Format (v. Default name for Address Vatsum CreateDate	ere condition you need to the is shown he additional columns by geder on the mass delivery property (1920110) (1920110) r Column Caption	iving them a new caption the view form.	
Columns	NB: if you use to ensure the Here it is poss be shown as t Additional Co	e joins in the who correct column sible to format t the column head olumns Format (v. Default name for Address Vatsum CreateDate	ere condition you need to the is shown he additional columns by geder on the mass delivery property (1920110) (1920110) r Column Caption	iving them a new caption the view form.	
Columns	NB: if you use to ensure the Here it is possible shown as to Additional Co Column # 1 2 3 4 5 6 7 8	e joins in the who correct column sible to format t the column head olumns Format (v. Default name for Address Vatsum CreateDate	ere condition you need to the is shown he additional columns by geder on the mass delivery property (1920110) (1920110) r Column Caption	iving them a new caption the view form.	
Columns	NB: if you use to ensure the Here it is pose be shown as t Additional Co Column # 1 2 3 4 5 6 7 8 9	e joins in the who correct column sible to format t the column head olumns Format (v. Default name for Address Vatsum CreateDate	ere condition you need to the is shown he additional columns by geder on the mass delivery property (1920110) (1920110) r Column Caption	iving them a new caption the view form.	
Columns	NB: if you use to ensure the Here it is poss be shown as to Additional Co Column # 1 2 3 4 5 6 7 8 9 10	e joins in the who correct column sible to format t the column head olumns Format (v. Default name for Address Vatsum CreateDate	ere condition you need to the is shown he additional columns by geder on the mass delivery property (1920110) (1920110) r Column Caption	iving them a new caption the view form.	
Columns	NB: if you use to ensure the Here it is pose be shown as t Additional Co Column # 1 2 3 4 5 6 7 8 9	e joins in the who correct column sible to format t the column head olumns Format (v. Default name for Address Vatsum CreateDate	ere condition you need to the is shown he additional columns by geder on the mass delivery property (1920110) (1920110) r Column Caption	iving them a new caption the view form.	
	NB: if you use to ensure the Here it is possible shown as to Additional Co Column # 1 2 3 4 5 6 7 8 9 10 11	e joins in the who correct column sible to format t the column head olumns Format (v. Default name for Address Vatsum CreateDate	ere condition you need to the is shown he additional columns by geder on the mass delivery property (1920110) (1920110) r Column Caption	iving them a new caption the view form.	
Columns	NB: if you use to ensure the Here it is possible shown as to Additional Co Column # 1 2 3 4 5 6 7 8 9 10 11 12	e joins in the who correct column sible to format t the column head olumns Format (v. Default name for Address VatSum CreateDate CreateDate	ere condition you need to r is shown he additional columns by g der on the mass delivery pr ) [920110] r Column Caption BP Date Order Date	iving them a new caption the view form.	

Active	Is the configuration active		
Show in the mass delivery from	Is the configuration to be shown in the mass delivery form		
Show report selection	Should the mass delivery from let the user optionally select a different report configuration: Example without:		
	Mass delivery		
	Select document         Sales quotation           Action         Email		
	Posting Date From To To Internal Number From To To Internal Number From To To Include Documents already handled by B1 Print & Delivery Include Documents already printed Open Only Exclude Canceled and Cancelation Marketing Documents           Preview           OK           Cancel		
	Mass delivery		
	Select document Sales quotation  Action Email		
	Report configuration Default BP Selection		
	Posting Date From     -1     Default BP Selection       Internal Number From     1     - Sales Quotation       Include Documents already handled by B1 Print & Delivery       Include Documents already printed       Open Only		
	Include Documents already printed		

#### 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.

Code	DP-036	Remarks		
ame				
sers (Empty = All)			Include use	rs 🔘 Exclude users
ocument type	Custom			A
	UI - Item info		DI - Field Info	
	Form type	?	Table	?
		?	DocKey	?
	DocKey		BP Code	?
	BP Code	?		
Active		? ? ? ? ?	Contact code	?

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
	In this field you need to provide the dynamic syntax of where on the provided
UI – Language Id	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.

	Example: 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'.
	Example: 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
	Example: 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

nber	1	*		🖌 Jan.	<ul> <li>May.</li> </ul>	🖌 Sep
tomer nc	Сору			<ul> <li>Feb.</li> </ul>	🗹 Jun.	✓ Od
tomer na	B1 Usability Package			Mar.	V Jul.	V No
mace pers -	· · ·			✓ Apr.	✓ Aug.	V De
tomer re 👸	Add B1 Validation configura	ation •				
oice day 退	Add function buttons to thi	s window				
Item n 💷	Create Template	y	Unit price	Discount %	VAT group	Docum
🔿 100 🔜	Get template		0,00	0,0000	S1 💌	
	Make Items Read Only					
	<u>R</u> emove	ŀ				
23	B1 Print and Delivery	) i	Cust	om (Default)		•
23	_				) namic syntax	

### **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.

Schedules				Schedules		_×_
Name		Number	1	Name		Number 1
Select mass delivery			•	Select mass delivery		•
Select report configuration			*	Select report configuration		•
Select report action			*	Select report action		•
Success email				Success email		
Error email				Error email		
Filter		Schedule		Filter		Schedule
Posting Date From	То			Server start time (24 H/M)	2 : 0	
Internal Number From	То			Recurrence pattern	Daily	•
				Range of recurrence		
				Start 25.12.13	<ul> <li>No end date</li> <li>End by</li> </ul>	
Active Add Cancel			Preview	Active Add Cancel	]	Preview

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	

		the name that will be shown in success and error emails from the
		scheduler.
	Select mass	Here you select the mass delivery to be executed.
	delivery	
	Select report	Here you may overwrite the report configuration.
	configuration	
	Select report	Here you select the report action to be executed.
	action	
	Success	If set you will receive an email confirming that the schedule
	email	where run correctly.
	Error email	The email that will receive an error report if the schedule
		encounters and error.
Filter		together with the mass delivery where condition to determine if there
	is anything to be	
	PLEASE NOTE: DIF	FERENT FILTERS MAY BE SHOWN DEPENDING ON WHAT CONFIGURATION IS
	<u>SELECTED</u>	
Schedule	Field	Description
	Server start tim (24 H/M)	<b>ne</b> When the schedule should be executed the first time.
	Recurrence	There are currently five supported types:
	pattern	<b>Minutely:</b> Run the schedule every X minutes.
		<b>Hourly:</b> 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.
		the server time. Monthly: Run the schedule every X day of the month on the
	Range of	Monthly: Run the schedule every X day of the month on the
	Range of recurrence	<b>Monthly:</b> Run the schedule every X day of the month on the server time.

### **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.

	Name		Ma ⇒ Ar	ashina A/S athony Smith	<b>`</b>		No. Hardware Status Posting Date Valid Until Document Date		247 Open 11.12.09 31.12.09 11.12.09			
	ſ		Contents		Log	istics	Ĭ	Accounting	Ĭ	Attac	hments	
	1	Iter	m/Service Type	Ite	em			Summary Type	(	No Summar	у	Ŧ
		#	Item No.	BF	Catalog No.	Quantity		Unit Price	Disc	Tax Code	Total (LC)	
		1	➡ 100007	⇒			5	DKK 210,00	0,0000	S1 🔻		*
		2	i00008	-			6	DKK 292,50	0,0000	S1 🔻		
	3 🖬		⇒ 100009	-			8	DKK 1.125,00	0,0000	S1 🔻		
		4							0,0000	51		
												-
	1		4		111						Þ	
											,	
Sales Employee			Employee	Jir	n Boswick	•	8	Total Before Discou	nt		DKK 11.8	05,00
C	)w	vne	er in the second se					Discount	%			
								Freight	>			
								Rounding	Ļ			
								Tax			DKK 2.9	
R	ler	mar	rks	Т				Total			DKK 14.7	56,2:

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.

ales Quotation									_				
lustomer	-	C4200			_	No.	Hardwar	e	247				
lame	_	Mashir	-		▼(3)	Status			Open				
Contact Person Customer Ref. No.		Antno	ny Smit	1	•••	Posting Valid U			11.12.09 31.12.09		-		
ocal Currency	-						ent Date		11.12.09		-		
,				<u>C</u> ancel Close							_		
Contents				<u>D</u> uplicate				L_	A11 - 1		1		
Contents			23	B1 Print and	Delive	ry		19	Sales Quota	ation (Defaul	t) 🕨	8	Print
Item/Service Type		Item		Row Details					Report sele	ction		à	Print preview
# Item No.		BP Ca		New Activit					Delivery log	1			Email
1 📫 100007		⇒		Gross Profit				1 0,000		,			Fax
2 📫 100008		⇒		-				0,000					
		Volume and	-			0,000				PDF	PDF		
4				Op <u>e</u> ning an	d Closi	ng Rema	irks	0,000	0 51			W	Word
				Related Acti	vities			L				×	Excel
	_			Relationship	Map			-				<b>V</b>	Edit
	_		_		-			-			11	_	
•										•	-		
les Employee		Jim Bo	swick		▼ 🗐	Total B	efore Disco	unt		DKK 11.805,	00		
wner						Discour	nt	%					
						Freight							
						Ro	unding						
						Tax				DKK 2.951,			
emarks						Total				DKK 14.756,	25		
		'											
OK Ca	ncel									Copy To			

# **In Document Printing**

You can also use B1Print and Delivery in document printing

		neutriniting 5	election Criteria				
	Docu	ment Type		A/R Invoices		•	
	Serie	5		All		•	
	Wher	n Batch/Seria N.p. E	xist, Print	Document and Ba	atch/Serial No.	•	
[	Prin	nt A/R Invoices				_ 0	][
	#	Document No.	Posting Date	Due Date	BP Code	Total (LC)	1
l	1	⇒ 1	22.01.06	22.01.06	C20000	101.953,13	4
l	2	⇒ 2	27.01.06	27.01.06	C30000	20.625,00	C
l	3	⇒ 3	11.02.06	11.02.06	C40000	99.609,38	
l	4	⇒ 5	12.02.06	12.02.06	C42000	131.539,06	
l	5	⇒ 4	16.02.06	16.02.06	C23900	55.687,50	
l	6	⇒ 6	09.03.06	09.03.06	C30000	67.812,50	
l	7	-> 7	15.03.06	15.03.06	C40000	76.687,50	1
l	8	📫 8	19.03.06	19.03.06	C20000	49.500,00	1
	9	📫 9	27.03.06	27.03.06	C23900	74.250,00	1
	10	📫 11	01.04.06	01.04.06	C60000	127,406,25	1
	11	⇒ 10	07.04.06	07.04.06	C50000	137.109,38	
	12	⇒ 12	16.04.06	16.04.06	C70000	211.312,50	
	13	📫 13	21.04.06	21.04.06	C70000	52,500,00	1
4	14	➡ 14	24.04.06	24.04.06	C60000	157.828,13	
	15	⇒ 15	27.04.06	27.04.06	C40000	164.937,50	

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 m	enu items	will oper	n a window:
, locessing any	01 1110 111	cind iterino	un opei	

Mass delivery			
Select document	Sales quotation		•
Action	Email		*
Report configuration	Default BP Selection	'n	•
Posting Date From		То	
Internal Number From		To	
<ul> <li>Include Documents al</li> <li>Open Only</li> <li>Exclude Canceled and</li> </ul>		g Document	5

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	\Rightarrow C30000	Microchips	20.62
📫 4	20.01.06	19.02.06	C23900	Parameter Tekno	55.68
📫 5	25.01.06	24.02.06	C42000	Mashina A/S	131.53
\Rightarrow 7	05.02.06	07.03.06	⇒ L10002	Werner Richter	125.85
📫 8	10.02.06	12.03.06	C30000	Microchips	67.81
\Rightarrow 9	15.02.06	17.03.06	⇒ C40000	Earthshaker A/S	76.68
📫 10	20.02.06	22.03.06	C20000	Norm Thompson	49.50
➡ 11	25.02.06	27.03.06	C23900	Parameter Tekno	74.25
📫 12	05.03.06	04.04.06	C50000	ADA Teknologi	137.10
📫 13	10.03.06	09.04.06	C60000	SG Electronics	127.40
📫 14	15.03.06	14.04.06	⇒ C70000	Aquent Systemer	211.31
⇒ 15	20.03.06	19.04.06	⇒ C70000	Aquent Systemer	52.50
-> 16	25.03.06	24.04.06	C60000	SG Electronics	157.82
➡ 17	30.03.06	29.04.06	⇒ C40000	Earthshaker A/S	164.93
-> 18	05.04.06	05.05.06	C42000	Mashina A/S	29.92
📫 19	15.04.06	15.05.06	C50000	ADA Teknologi	100.03
<b>⇒</b> 20	25.04.06	25.05.06	⇒ C70000	Aquent Systemer	216.23
📫 21	10.05.06	09.06.06	⇒ C20000	Norm Thompson	205.16
⇒ 22	15.05.06	14.06.06	C23900	Parameter Tekno	164.04
📫 23	20.05.06	19.06.06	⇒ C30000	Microchips	150.65
📫 24	30.05.06	29.06.06	📫 C40000	Earthshaker A/S	46.40
⇒ 25	05.06.06	05.07.06	C50000	ADA Teknologi	84.21
⇒ 26	10.06.06	10.07.06	C42000	Mashina A/S	97.77
📫 27	20.06.06	20.07.06	⇒ C70000	Aquent Systemer	285.46
⇒ 28	25.06.06	25.07.06	C60000	SG Electronics	160.06
📫 29	02.07.06	01.08.06	C20000	Norm Thompson	174.15
⇒ 30	06.07.06	05.08.06	⇒ C30000	Microchips	149.00
iii -> 31	12.07.06	11.08.06	📫 C42000	Mashina A/S	66.60
⇒ 32	18.07.06	17.08.06	C60000	SG Electronics	151.12
⇒ 33	27.07.06	26.08.06	⇒ C23900	Parameter Tekno	61.13
⇒ 34	03.08.06	02.09.06	⇒ C40000	Earthshaker A/S	113.12

## **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:

Dunning Wizard		
	Processing	
Save Selection	Parameter and Exit	
Save Recommended	endation Report as Draft and Exit	
<ul> <li>Execute and</li> </ul>	Email	
	Do nothing	
	Email	
	Print preview	
	Print	
	Save as file	
Step 7 of 8		Cancel < <u>B</u> ack Finish
•		

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:

Inn	ing Wizard		
		Wizard ( Specify wł run.	<b>Options</b> hether you want to start a new dunning run or load a saved dunning
۲	<u>S</u> tart a Dunning	g Run	
0	Load a Saved (	Dunning Run	
Fir	nd	Dun20131225n1	
#	Dunning Nam	e Date	Status
1	Dun20131225n	1 25.12.13	Executed and emailed
Ste	ep 1 of 8		Cancel < <u>Back</u> <u>Next</u> >

# **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.

Account Balance		_	_ >						
BP Code From		То							
Group	All		•						
Properties	Ignore	Ignore							
Branch	All	All							
Action	Email		•						
Age By	Due Date		•						
Posting Date	From	То	04/26/2016						
Due Date	From	То							
Document Date	From	То							
Display Reconcile		Balance							

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,
✓	📫 C70000	Aquent Systemer	478.526,
✓	C42000	Mashina A/S	425.585,
~	C60000	SG Electronics SG Electronics	400.265,
~	C30000	Microchips	395.296,
✓	C23900	Parameter Teknologi	380.681,
✓	📫 C50000	ADA Teknologi	308.585,
✓	📫 C40000	Earthshaker A/S	150.320,
ок	Cancel	1	Select all Selec

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.

Parameter Fields
CardCode
[1] \$[BOY_AB_FROMDATE]
[17] \$[BOY_AB_TODATE]
[%] \$[BOY_AB_DUE_FROMDATE
[%] \$[BOY_AB_DUE_TODATE]
[%] \$[BOY_AB_DOC_FROMDATI
[%] \$[BOY_AB_DOC_TODATE]
😅 \$[BOY_AB_AGE_BY]
[%] \$[BOY_AB_INCLUDE_RT]
[1] \$[BOY_AB_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

pe	All	*	Number			usiness Partner		Action A		
er	All	*	From		То	<b>,</b>		Show de	iveries	
Action	I	Туре	Id	Date	Time	Business Par Jer	User	Remarks	Configuration	
⇒ Sho	ow report	Sales order	<b>⇒</b> 1	04/14/2016	12:48	⇒ C20000	Jayson Butler (ma		📫 2 - Sales Order	
📫 Prir	nt	Delivery	-> 363	04/15/2016	11:03	⇒ C23900	Jayson Butler (ma	Printed on printe	📫 3 - Delivery	
📫 Em	ail	Delivery	-> 363	04/15/2016	11:05	→ C23900	Jayson Butler (ma	[daniel.brown@p	3 - Delivery	
\Rightarrow Em	ail	Delivery	-> 363	04/15/2016	11:06	→ C23900	Jayson Butler (ma	[daniel.brown@p	3 - Delivery	
📫 Em	ail	Delivery	-> 363	04/15/2016	11:11	→ C23900	Jayson Butler (ma	[daniel.brown@p	🔿 3 - Delivery	
📫 Em	ail	Sales quotation	📫 4	04/15/2016	11:25	→ C23900	Jayson Butler (ma	[daniel.brown@p	📫 11 - test	
i Sho	ow report	Sales quotation	-> 362	04/15/2016	12:35	⇒ C30000	Jayson Butler (ma		➡ 1 - Sales Quotation	
i Sho	ow report : RA-D002	Sales quotation	-> 362	04/15/2016	12:39	⇒ C30000	Jayson Butler (ma		➡ 1 - Sales Quotation	
\Rightarrow Em	ail : RA-D004	Sales quotation	-> 362	04/15/2016	12:40	⇒ C30000	Jayson Butler (ma	[judy.brown@mi	➡ 1 - Sales Quotation	
🔿 Sho	ow report : RA-0010	Sales quotation	-> 361	04/18/2016	08:51	C23900	Jayson Butler (ma		📫 11 - test	
📫 Sho	ow report : RA-0010	Sales quotation	-> 361	04/18/2016	08:51	C23900	Jayson Butler (ma		📫 11 - test	
🔿 Sho	ow report : RA-D002	Sales quotation	-> 361	04/18/2016	10:21	C23900	Jayson Butler (ma		1 - Sales Quotation	
🔿 Sho	ow report : RA-D002	Sales quotation	-> 361	04/18/2016	10:21	📫 C23900	Jayson Butler (ma		1 - Sales Quotation	
📫 Prir	nt : RA-D001	Sales quotation	-> 362	04/18/2016	12:21	\Rightarrow C30000	Jayson Butler (ma	Printed on printe	📫 1 - Sales Quotation	
📫 Prin	nt : RA-D001	Sales quotation	iii 360	04/18/2016	13:35	📫 C60000	Jayson Butler (ma	Printed on printe	📫 1 - Sales Quotation	
📫 Prir	nt : RA-D001	Sales quotation	-> 360	04/18/2016	13:40	📫 C60000	Jayson Butler (ma	Printed on printe	1 - Sales Quotation	
🗢 Cor	nditional Action : RA-D001	Sales quotation	-> 360	04/18/2016	13:43	📫 C60000	Jayson Butler (ma		📫 1 - Sales Quotation	
📫 Em	ail : RA-D004	Delivery	📫 3	04/18/2016	13:48	📫 C40000	Jayson Butler (ma	Error performing	📫 3 - Delivery	
📫 Em	ail : RA-D004	Delivery	📫 2	04/18/2016	13:48	📫 C30000	Jayson Butler (ma	Error performing	📫 3 - Delivery	
📫 Em	ail : RA-D004	Delivery	📫 4	04/18/2016	13:49	📫 C23900	Jayson Butler (ma	Error performing	📫 3 - Delivery	
📫 🔿 Em	ail : RA-D004	Delivery	📫 5	04/18/2016	13:49	📫 C42000	Jayson Butler (ma	Error performing	📫 3 - Delivery	
📫 Prir	nt : 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.

be .	All			Number			Business Partne	er	Action All 🔻
r	All		٣	From			То		Show errors
Actio	on	Туре	Id	Date	Time	Business Partner	User		Remarks
🔿 A	ction not defined	Sales order	-> 14	04/25/2016	12:19	⇒ C60000	Jayson Butler	(manager)	CrystalDecisions.Shared.CrystalReportsException: Indla
\Rightarrow A	ction not defined	Sales order	📫 14	04/25/2016	12:20	⇒ C60000	Jayson Butler	(manager)	CrystalDecisions.Shared.CrystalReportsException: Indla
🔿 E	mail : RA-002	Sales order	-> 14	04/25/2016	12:21	⇒ C60000	Jayson Butler	(manager)	Error performing action: [RA-002 - TEST] Could not se
🔿 E	mail : RA-002	Sales order	-> 14	04/25/2016	12:22	⇒ C60000	Jayson Butler	(manager)	Error performing action: [RA-002 - TEST] Could not se
-> C	Conditional Action : RA-002	Sales order	📫 14	04/25/2016	12:22	⇒ C60000	Jayson Butler	(manager)	Error performing action: [RA-002 - TEST] (Could not e
📫 E	mail : RA-002	Sales order	-> 14	04/25/2016	12:25	⇒ C60000	Jayson Butler	(manager)	Error performing action: [RA-002 - TEST] (Could not e
📫 E	mail : RA-002	Sales order	📫 14	04/25/2016	12:25	⇒ C60000	Jayson Butler	(manager)	Error performing action: [RA-002 - TEST] (Could not e
📫 E	mail : RA-002	Sales order	-> 325	04/25/2016	12:27	⇒ C60000	Jayson Butler	(manager)	Error performing action: [RA-002 - TEST] (Could not fi
🔿 E	mail : RA-002	Sales order	📫 337	04/25/2016	12:27	➡ C23900	Jayson Butler	(manager)	Error performing action: [RA-002 - TEST] (Could not fi
🔿 E	mail : RA-002	Sales order	-> 318	04/25/2016	12:27	📫 C20000	Jayson Butler	(manager)	Error performing action: [RA-002 - TEST] (Could not fi
						_			
4				<b>&gt;</b>					

### **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 - 3	356				X
	stner@maxi-teq.sap.com	Include		x.teq@maxi-teq.s	5
CC: BCC:				mer (amanda.co	
Subject: Sales Order	- 356	 •	-	•	
	Body	Atta	achments		
Kind Regards OEC Computers					
Send Canc	el				

# **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>]</type></item>	The normal SAP Dynamic syntax for items
\$[. <field>]</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) The last name of a document's contact person [Sales
\$[DOCUMENT_CONTACTPERSON_LASTNAME_EX]	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]	Special Keyword only used in DK localizations and can
(Please note that this is the keyword to be used	only be used in Crystal Report Definition that is linked
both in the Crystal(as parameter name) and in SAP as value)	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 P1 Print and Delivery
	activate the integration from B1 Print and Delivery BaseConfig and restart the add-on.
\$[BOY_AB_TODATE]	Special Keyword used in account balance reports. If
(Please note that this is the keyword to be used	the keyword is found in a crystal (as parameter
both in the Crystal(as parameter name) and in	name) an extra field will be shown when running the
SAP as value)	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.