

B1 Print & Delivery – Sample – Due Date Reminder System

Summary	
Module	B1 Print & Delivery
Level	Advanced
Requirements	B1UP 6.2.0

Scenario

This sample will use the B1 Print & Delivery module to email customers about invoices that are either overdue or due in less than 2 days.

Needed Configuration

User Defined Field

Create a UDF on A/R Invoice. The UDF will be used to check if the invoice has been sent in a due date reminder email already:

The screenshot shows the 'Field Data' configuration window. The fields are as follows:

- Title: BOY_DDRS
- Description: Due date reminder sent
- Type: Alphanumeric
- Length: 1
- Structure: Regular
- Set Valid Values for Field
- Set Default Value for Field (Value: N)
- Mandatory Field

Mass Delivery Configuration

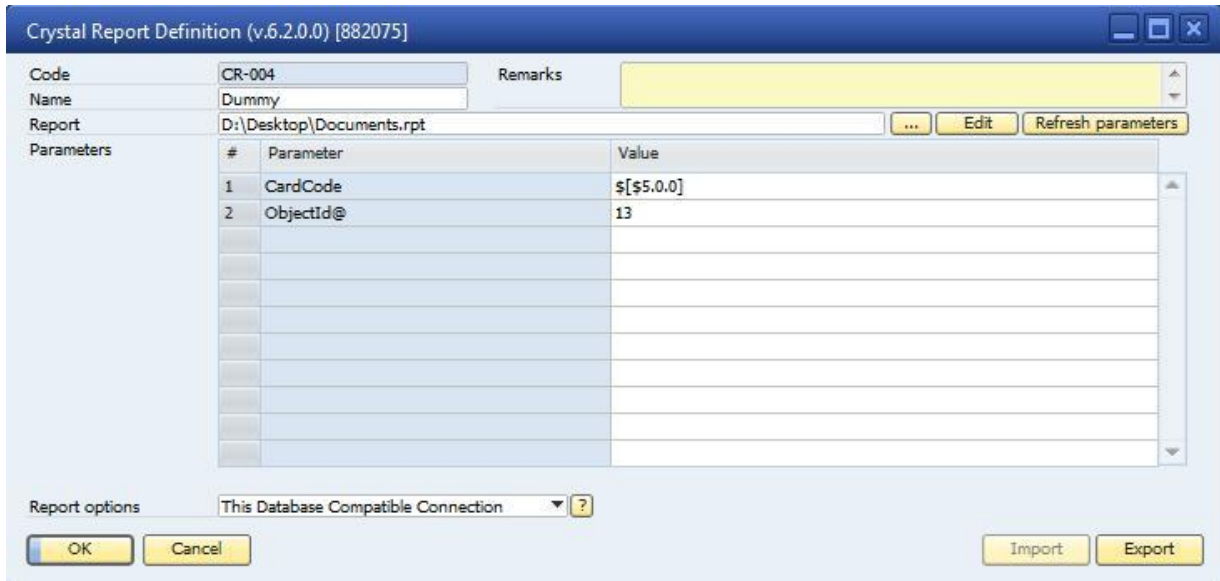
Define a Mass Delivery custom configuration. This SQL will return a list of customers that have invoices that are due in less than 2 days (also older invoices).



```
SELECT  
T0.CardCode  
FROM OCRD T0 WHERE  
(  
SELECT  
COUNT(*)  
FROM OINV TS0  
WHERE TS0.DOCSTATUS = 'O'  
AND TS0.DOCDUEDATE < GETDATE() + 2  
AND TS0.PAIDSUM = 0  
AND TS0.U_BOY_DDRS = 'N'  
AND TS0.CardCode = T0.CardCode  
) > 0
```

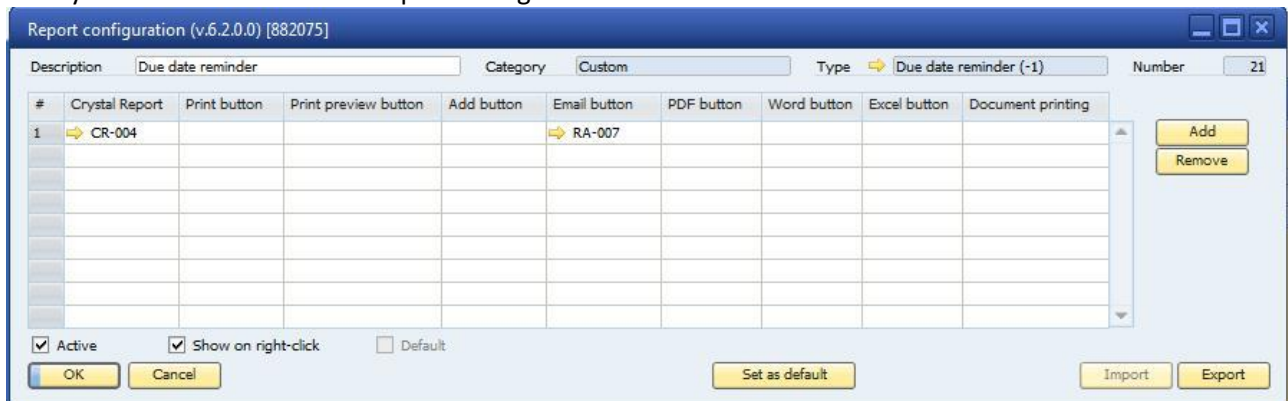
Crystal Report Definition

Attach a layout in crystal report to attach the past due A/R Invoices in the email sent to the customer.



Report Configuration

Next you will need to create a Report configuration:



Report Action

The “Email button” in the report configuration screen above, should be linked to a report action of type “Multiple actions”:

Report Action (v.6.2.0.0) [882075]

Code: RA-007 Remarks: [Empty]

Name: Due date reminder

Type: Multiple actions Mark documents as printed

Sub-actions

#	Action
1	➔ RA-005
2	➔ RA-006

Buttons: Add, Remove

1st Report Action

This report action will generate the email with the attachment to the customer

Report Action (v.6.2.0.0) [882075]

Code: RA-005 Remarks: [Empty]

Name: Due date reminder

Type: Email report Mark documents as printed

Subject: Due date reminder

Body: HTML Editor

```
<html>
  <head>
    <!--[if !IE 9]>
      <style type="text/css">
        table.defaultTable th {
          filter:
            progid:DXImageTransform.Microsoft.gradient( startColorstr='#d5e3e4',
              endColorstr='#b3c8cc',GradientType=0 );
        }
      </style>
    </!-->
  </head>
</html>
```

Attachment template: Missing invoices Attachment type: PDF 0 Additional attachments

Recipients

#	To / CC / BCC	Email to use	Direct Email	Email Category
1	To	BP: Header	<input checked="" type="checkbox"/>	

Buttons: Add, Remove

Client delivery method:

- Outlook Outlook: Save as draft
- SMTP
- Exchange Exchange: Save as draft

Server delivery method:

- SMTP
- Exchange

Group emails Document level

Buttons: Update, Cancel, Import, Export

Tip: If Multi-language support is activate, it is possible to translate subject, body, and attachment by pressing the small globe in the field

In "Direct Email" field, enter the following SQL statement, to use the email value in the email field on the Business Partner Master Data. (You can define a new email and change the setting if needed).

SQL: SELECT E_Mail FROM OCRD WHERE CardCode = '\${5.0.0}'


```

background:
url(data:image/svg+xml;base64,PD94bWwgdmVyc2l2bj0iMS4wliA/Pgo8c3ZnlHhtbG5zPSJodHRwOi8vd3d3L
nczLm9yZy8yMDAwL3N2Zylgd2lkdGg9IjEwMCUilGhlaWdodD0iMTAwJSldmllid0JveD0iMCAwIDEgMSlgcHJlc
2VydmVBc3BIY3RSYXRpbz0ibm9uZSI+CiAgPGxpbmVhckdyYWRpZW50IGlkPSJncmFkLXVjZ2ctZ2VuZXJhdGVkl
iBncmFkaWVudFVuaXRzPSJ1c2VyU3BhY2VpblVzZSIgeDE9IjAlIiB5MT0iMCUilHgyPSlWJSIgeTI9IjEwMCUipgogI
CAgPHN0b3Agb2Zmc2V0PSlWJSIgc3RvcC1jb2xvcj0iI2ViZWNNKYSIgc3RvcC1vcGFjaXR5PSlXli8+CiAgICA8c3RvcC
BvZmZzZXQ9IjQwJSIgc3RvcC1jb2xvcj0iI2UwZTBjNilgc3RvcC1vcGFjaXR5PSlXli8+CiAgICA8c3RvcCBvZmZzZXQ9
IjEwMCUilHN0b3AtY29sb3I9IiNjZWNIYjciIHN0b3Atb3BhY2I0eT0iMSlVpogIDwvbGluZWFyR3JhZGllbnQ+CiA
gPHJlY3QgeD0iMCIgeT0iMCIgd2lkdGg9IjEiIjEwMCUilGhlaWdodD0iMSIgeZmlsbD0idXJsKCNCmFkLXVjZ2ctZ2VuZXJhdG
VkKSIGLz4KPC9zdmc+);
background: -moz-linear-gradient(top, #ebecda 0%, #e0e0c6 40%, #ceceb7 100%);
background: -webkit-gradient(linear, left top, left bottom, color-stop(0%,#ebecda), color-
stop(40%,#e0e0c6), color-stop(100%,#ceceb7));
background: -webkit-linear-gradient(top, #ebecda 0%,#e0e0c6 40%,#ceceb7 100%);
background: -o-linear-gradient(top, #ebecda 0%,#e0e0c6 40%,#ceceb7 100%);
background: -ms-linear-gradient(top, #ebecda 0%,#e0e0c6 40%,#ceceb7 100%);
background: linear-gradient(to bottom, #ebecda 0%,#e0e0c6 40%,#ceceb7 100%);
border: 1px solid #999999;
}
table.defaultTable th p{
margin:0px;
padding:8px;
border-top: 1px solid #eefafc;
border-bottom:0px;
border-left: 1px solid #eefafc;
border-right:0px;}
table.defaultTable td p{
margin:0px;
padding:8px;
border-top: 1px solid #fcfdec;
border-bottom:0px;
border-left: 1px solid #fcfdec;;
border-right:0px;}
</style>
</head>
<body style="margin-top: 0px; background-color: #2A2A2A; background-image:url(http://www.boyum-
it.com/fileadmin/templates/images/gradientBG.jpg); background-position: top center; background-
repeat:repeat-x; font-size: 11px; font-family: Verdana,arial,Sans-serif,Monospace;">
<table border="0" width="600" align="center" cellpadding="0" cellspacing="0" style="width:
600px;"><tr><td valign="top" align="left" bgcolor="#FFFFFF" style="background-color:
#FFFFFF;"><table border="0" cellpadding="0" cellspacing="0" width="100%"><tr></tr> </table>

<table border="0" cellpadding="0" cellspacing="0"
width="100%"><tr> <td width="5%"></td>

<td width="90%" valign="middle" style="background-color:#E17010;padding-right:10px;
background-repeat:no-repeat; text-align:right; color:#fff; font-family: Verdana,arial,Sans-
serif,Monospace; font-size:10px; font-weight:bold;"></td><td width="5%"></td></tr> </table>

<table border="0" cellpadding="0" cellspacing="0"
width="100%"> <tr>

```

```

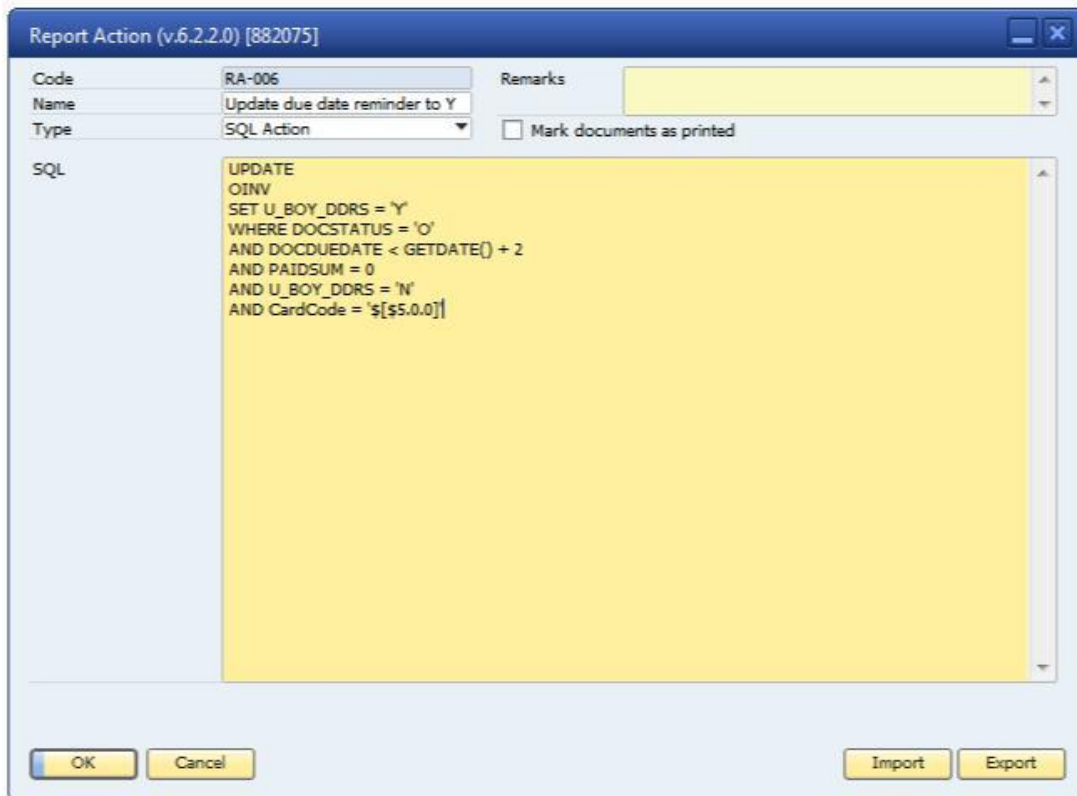
<td width="5%"></td>
<td height="500" width="95%" valign="top" style="font-size: 11px; font-family: Verdana,arial,Sans-serif,Monospace; font-weight: normal; color: #000000; padding-bottom:10px;"> <div style="margin-top:10px;">
<div class="csc-header csc-header-n1">
<div style="font-size: 15px; border-bottom:1px solid #ACB1C3; font-family: Verdana,arial,Sans-serif,Monospace; font-weight: 700; color: #000000; padding-bottom:6px; margin-bottom:5px;">
Invoice due reminder
</div>
</div>
<div class="csc-textpic-text">
According to our system you have the below mentioned invoices due soon. SQLHTMLTABLE(SELECT
T0.DOCDUEDATE AS 'Due date', CASE WHEN T0.DOCTOTALFC <> 0 THEN
T0.DOCTOTALFC-T0.PaidFC ELSE T0.DOCTOTAL-T0.PaidToDate END AS 'Total', T0.DOCCUR AS 'Currency'
FROM OINV T0 WHERE T0.DOCSTATUS = 'O' AND T0.DOCDUEDATE < GETDATE() + 2 AND T0.PAIDSUM =
0 AND T0.U_BOY_DDRS = 'N' AND T0.CardCode = '$[${5.0.0}]' <br />

Should there be any questions to the above, then please contact account@boyum-it.com or via phone
+45 87 329 008<br/>If you have recently paid the above then please ignore this message.<br/><br/>We
value your partnership and wish you a nice day<br/><br/>Kind regards<br/>Boyum IT Customer service.
</div></div></td><td width="5%"></td></tr></table></td></tr></table></body></html>

```

2nd Report Action

On the “Multiple actions” report action there is a second configuration:



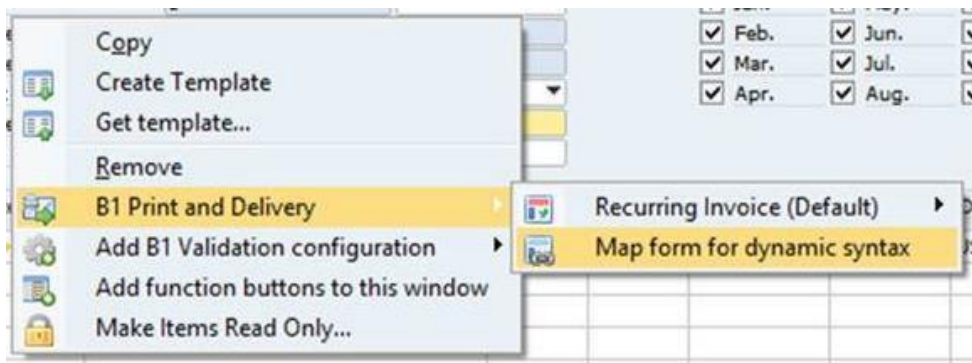

```
UPDATE  
OINV  
SET U_BOY_DDRS = 'Y'  
WHERE DOCSTATUS = 'O'  
AND DOCDUEDATE < GETDATE() + 2  
AND PAIDSUM = 0  
AND U_BOY_DDRS = 'N'  
AND CardCode = '$[$5.0.0]'
```

This will mark the invoices as “Reminder Sent” so that it will not be send again.

Map Form for Dynamic Syntax

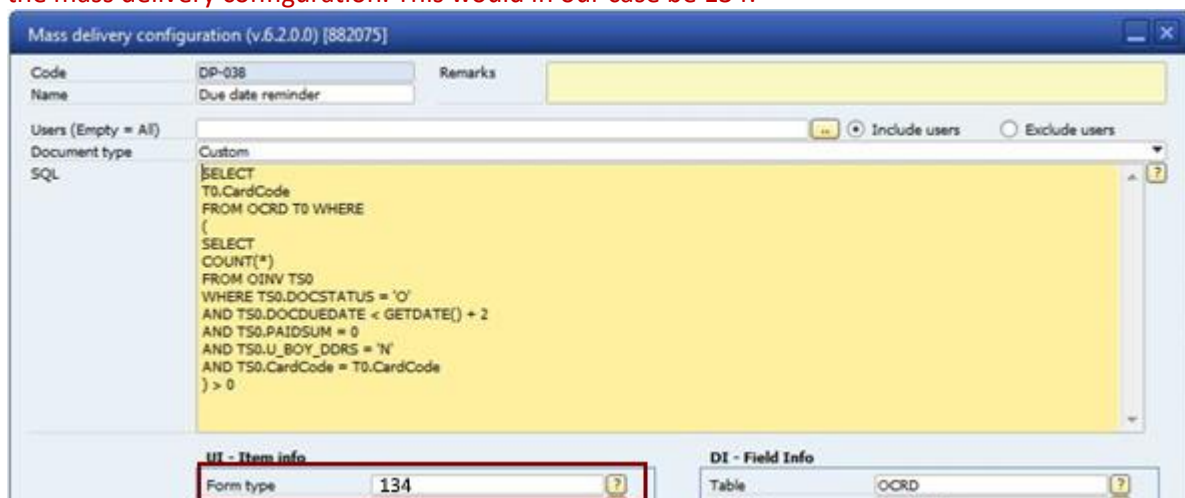
In order to allow mass delivery configuration of type Custom to know the dynamic syntax (for the server component) you need to go to the window of the configured configuration and choose “Map form for dynamic syntax”.

In our case, go to Business Partner Master Data > Right Click > B1 Print and Delivery > Map form for Dynamic Syntax.



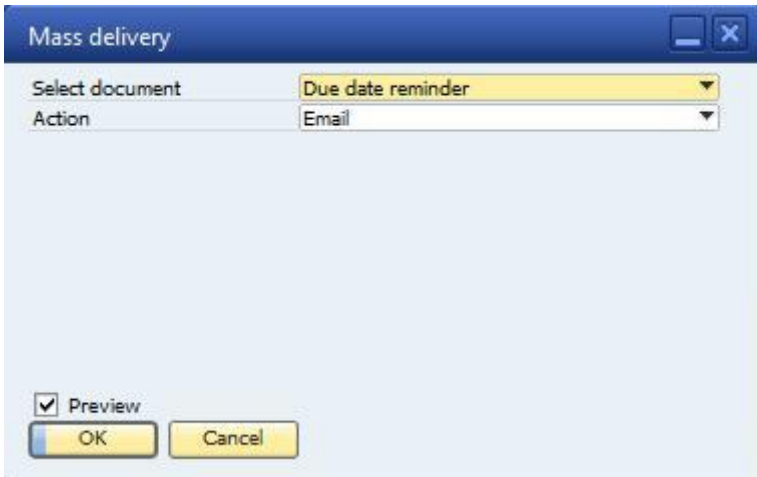
Next, restart the add-on and you are now ready to send out due date reminders.

Note: The “Map form for dynamic syntax” option will not show until you have entered the formtype into the mass delivery configuration. This would in our case be 134:



Use of functionality

To use the Due Date reminder system, you can open Sales > Mass Delivery and choose the “Due Date Reminder” as the document to email.



You will get a screen that list the Business Partner that A/R Invoices that are past due to due in 2 days.



Email will be created for all customers selected with an attachment of all A/R Invoices.

Send

From ▾ mlp@boyum-it.com

To... info@ada-tech.eu

Cc...

Subject Due date reminder

Invoice due reminder

According to our system you have the below mentioned invoices due soon.

Due date	Total	Currency
28-01-2008	1.438,59	EUR
09-03-2008	508,23	EUR
28-04-2008	3.811,75	EUR
23-08-2008	8.941,31	EUR
01-10-2008	4.866,01	EUR
18-11-2008	1.102,56	EUR
31-12-2008	693,05	EUR
02-04-2009	10.164,65	EUR
02-06-2009	7.991,00	EUR
25-07-2009	1.367,19	EUR
10-09-2009	592,24	EUR

Should there be any questions to the above, then please contact account@boyum-it.com or via phone +45 87 329 008
If you have recently paid the above then please ignore this message.

We value your partnership and wish you a nice day

Kind regards
Boyum IT Customer service.

Tip: Change part of the body template to fit your business as they are set to Boyum IT template.