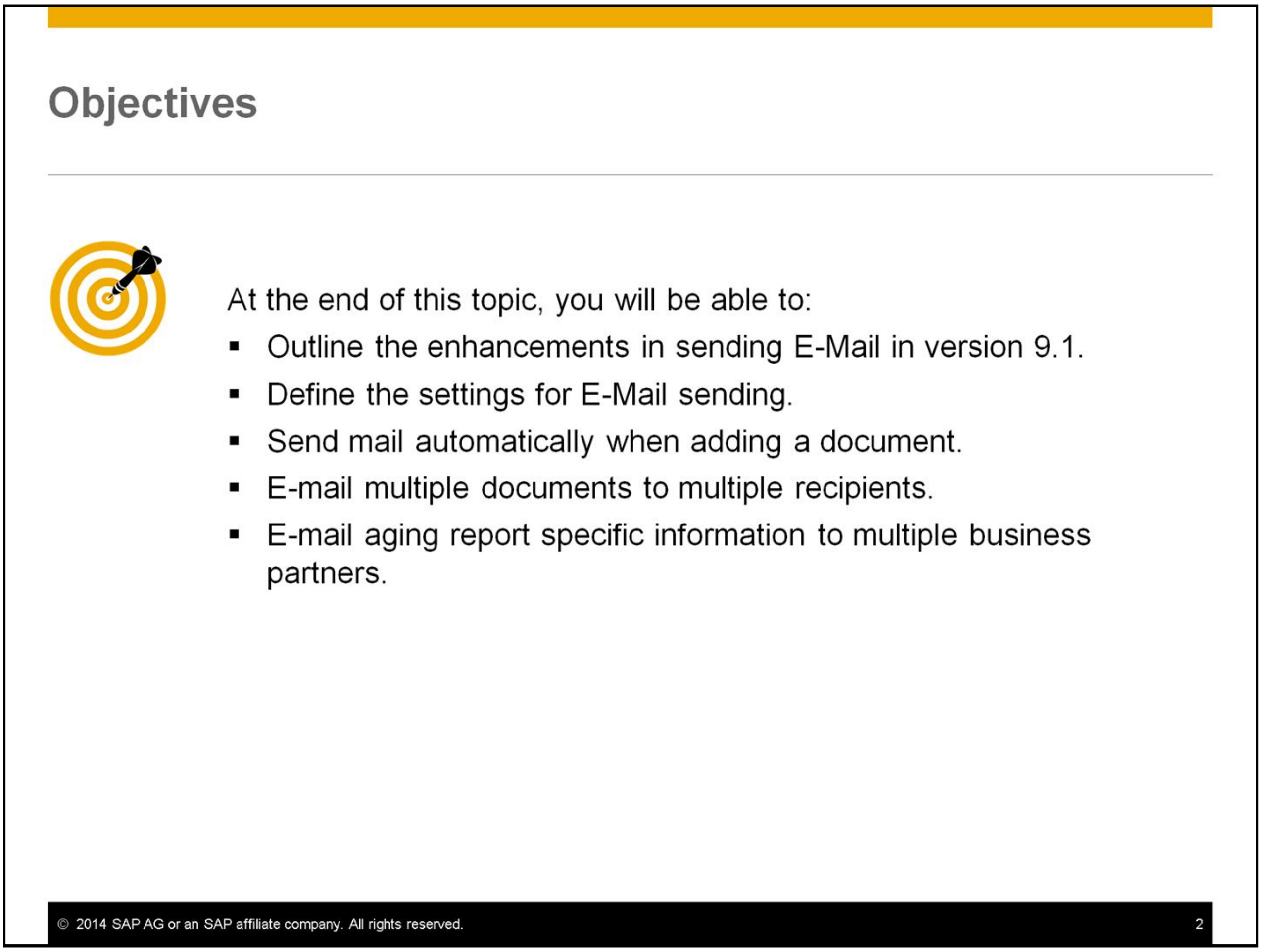
Enhancements in Sending E-Mail

SAP Business One 9.1

July, 2014

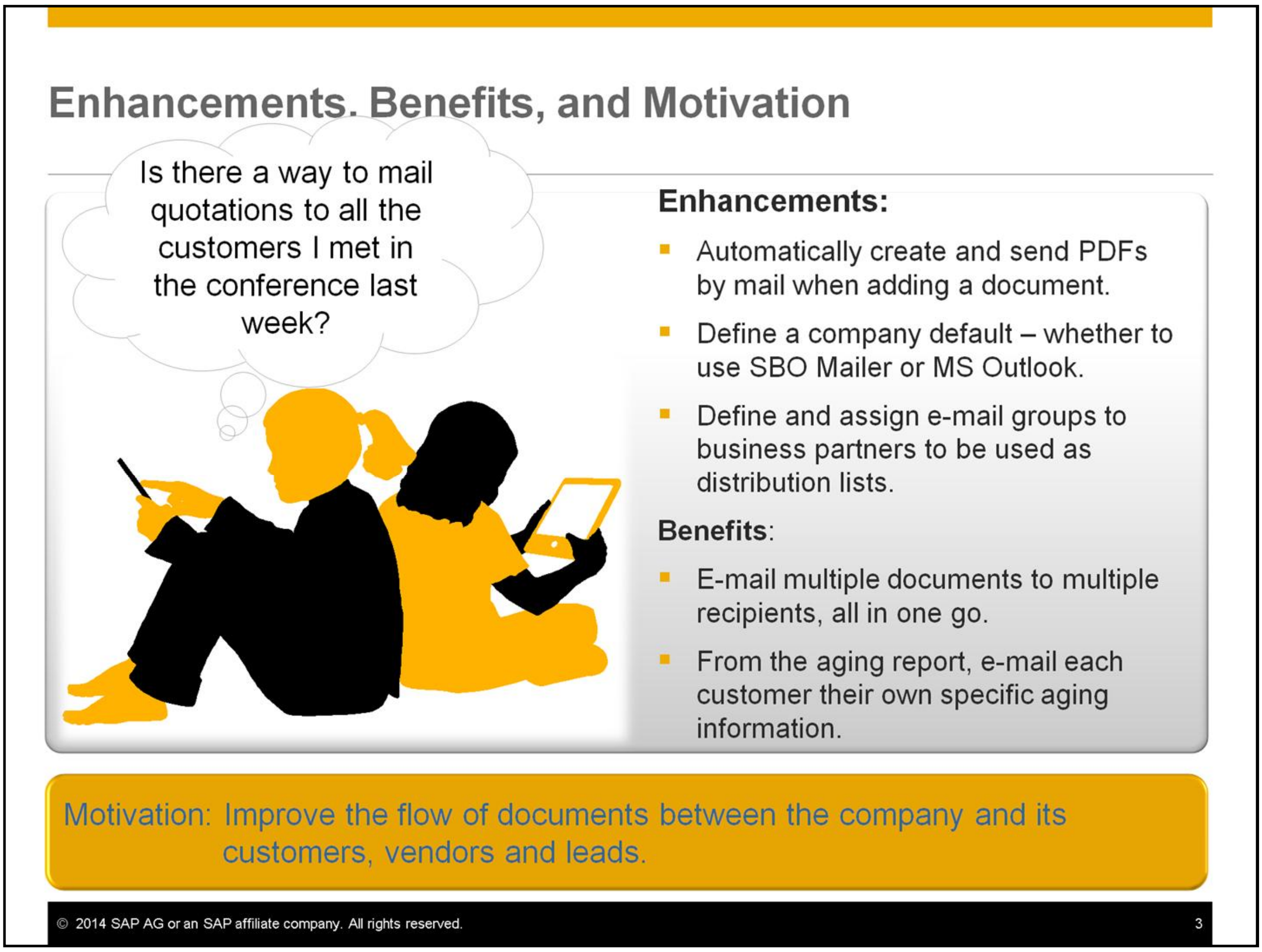
SAP

Welcome to the topic on Enhancements in Sending E-Mail in release 9.1

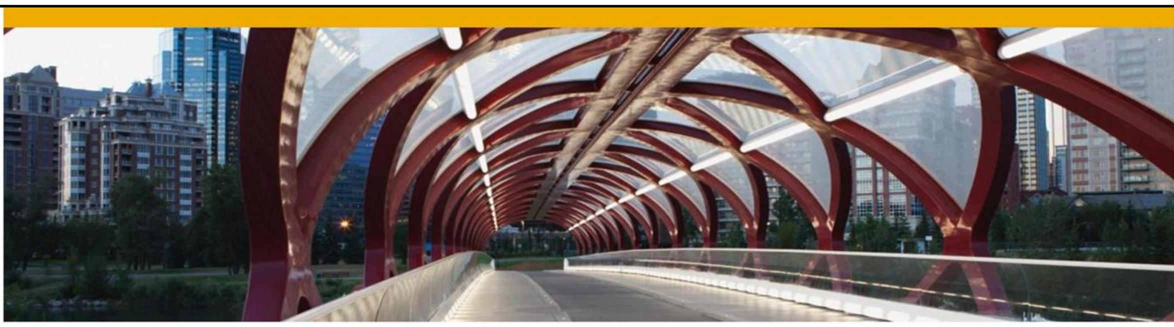


After completing this topic, you will be able to:

- Outline the enhancements in sending E-Mail in version 9.1.
- Define the settings for E-Mail sending.
- Send mail automatically when adding a document.
- E-mail multiple documents to multiple recipients and e-mail aging report specific information to multiple business partners.



- In version 9.1 you can automatically create and send PDFs by mail when adding a document.
- You can define a company default on whether to use SBO Mailer or Microsoft Outlook.
- You can also assign e-mail groups to business partners to be used as distribution lists.
- As a result you will be able to e-mail multiple documents to multiple recipients, all in one go.
- And from the aging report, e-mail each customer their own specific aging information.
- In summary, you improve the flow of documents between the company and its customers, vendors and leads.



E-Mail Methods

You can use the SBO Mailer or Microsoft Outlook when sending mails automatically

First, let us discuss the methods for sending mails.

SBO Mailer and Microsoft Outlook

E-Mail Methods:

- SBO Mailer
  - In the SAP Business One Service Manager, start the SBO Mailer service.
- Outlook E-Mail
  - Ensure that MS Outlook is installed in your working station.

- In previous versions you could use the SBO Mailer when sending mails from SAP Business One. When this is used, the SBO Mailer service must be configured and started in the SAP Business One Service Manager.
- Starting at release 9.1, you can also use Microsoft Outlook when sending mails automatically.
- For this option, you only need to have MS Outlook installed in your working station.

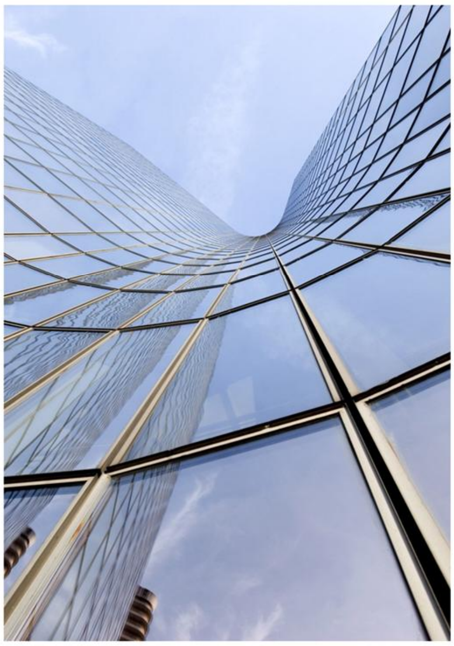
Settings at the Company Level
SBO Mailer or MS Outlook

***Administration → System Initialization → General Settings → Services* tab.**

Default E-Mail Method:

- E-Mail (SBO Mailer)
- Outlook E-Mail

Ensure to define the *Attachments* folder under the *Path* tab.



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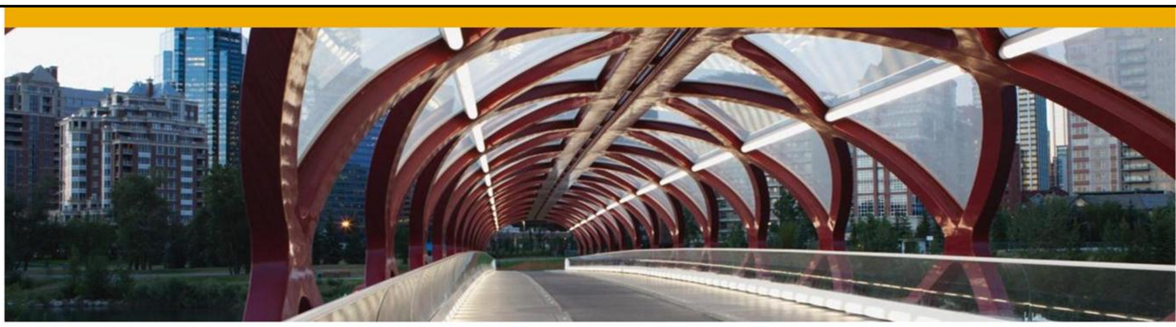
- You can now define a company default on whether to use the SBO Mailer or Microsoft Outlook when sending mails automatically.
- This is done on the *Services* tab of the *General Settings*.
- The first option E-mail sets SBO Mailer as the default.
- The second option sets MS Outlook as the default.
- Note that a user has the ability to change the mailing method for single mail sending.
- Also note that the document will be attached as a PDF file to the mail. Therefore, ensure to define the *Attachments* folder under the *Path* tab.



E-Mail Document Automatically

Automatically create and send PDFs by mail when adding a document

Next, let us discuss the option to automatically create and send PDFs by mail when adding a document.

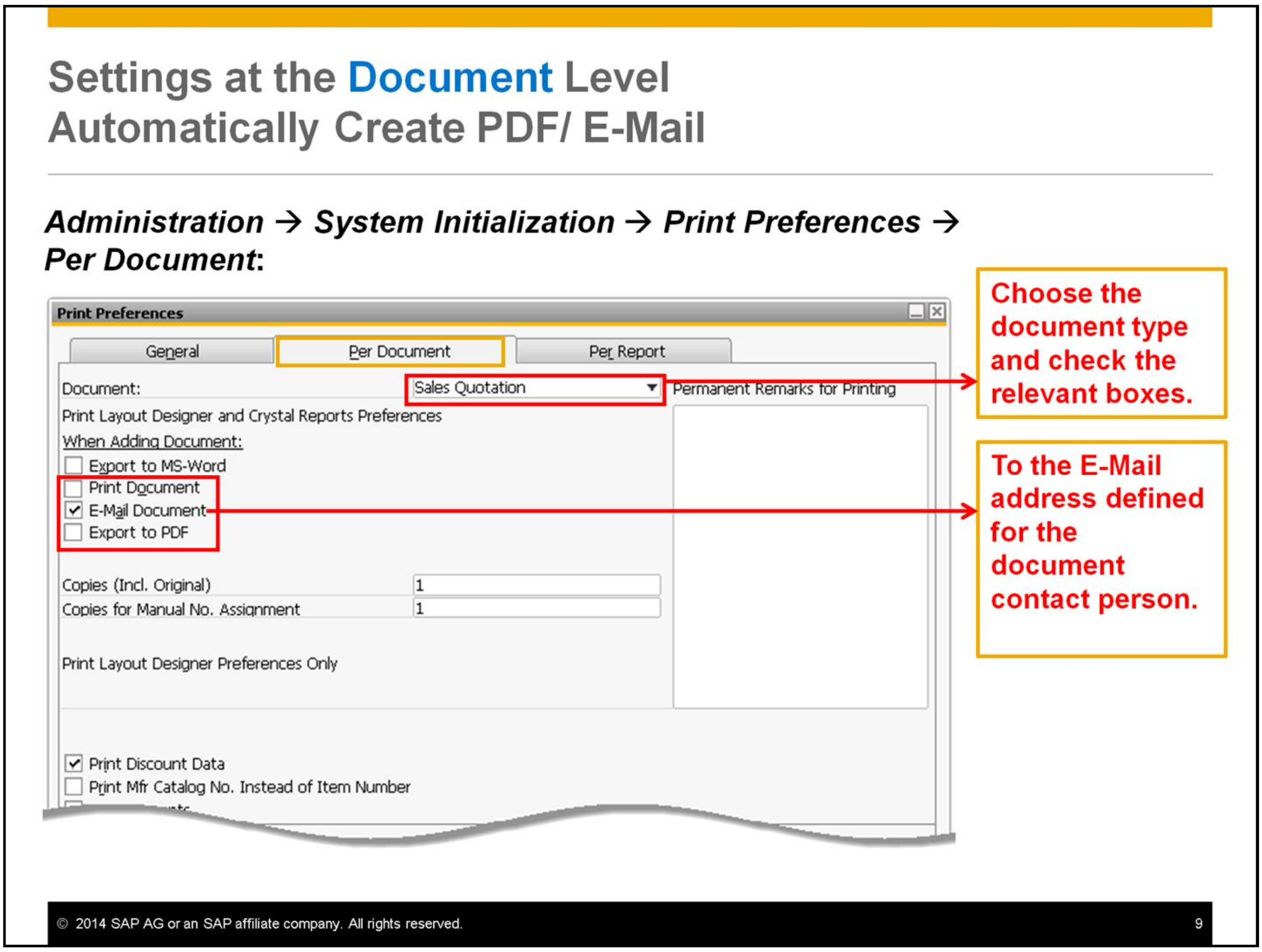
Business Example #1
E-Mail Documents Automatically

OEC Computers set environment saving as one of their objectives for the coming year. Therefore, they use e-mail to send documents electronically to customers and vendors.

To streamline this process further, they want the system to automatically send the e-mail when a document is added.

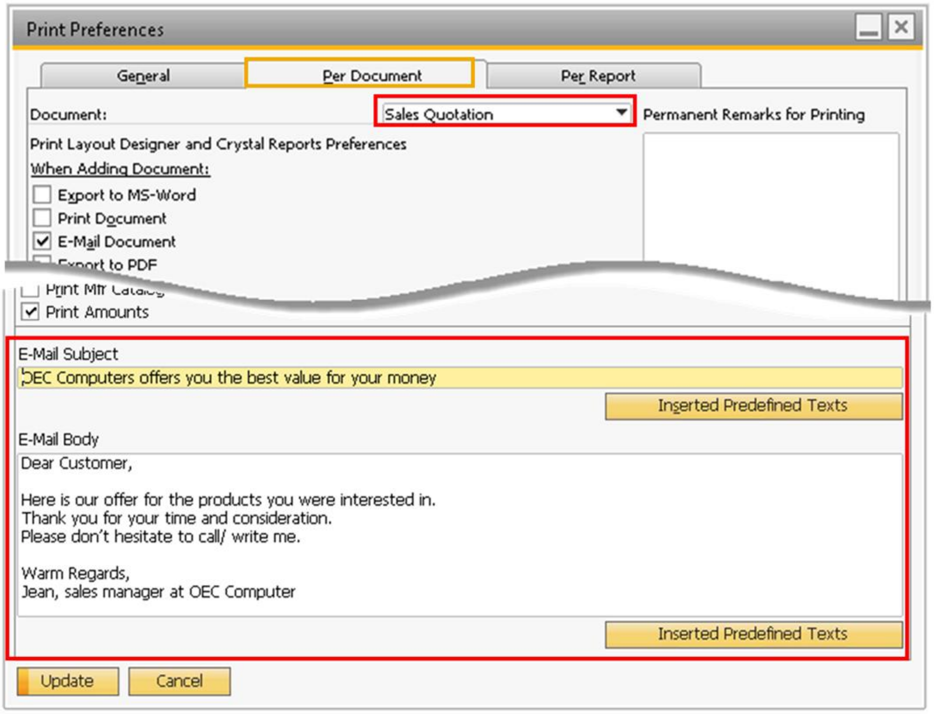
Jean, the sales manager, wants to use this option for the sales quotations her department creates.

- Here is a business example:
  - **OEC Computers** set environment saving as one of their objectives for the coming year. Therefore, they use e-mail to send documents electronically to customers and vendors.
  - To streamline this process further, they want the system to automatically send the e-mail when a document is added.
  - Jean, the sales manager, wants to use this option for the sales quotations her department creates



- In the Print Preferences window, you can now define for each document type whether to:
  - Automatically export it to PDF and/ or
  - Send it by mail when adding a document. The document will be attached as a PDF file to the mail.
- Use the menu path shown on the graphic. Choose the document type and check the relevant boxes.
- In the example shown Jean, the sales manager of OEC Computers, decided that she wants to automatically create and send PDFs by mail when adding a sales quotation.
- The mail will be automatically sent to the E-Mail address defined for the document contact person.

Settings at the Document Level
Default Text for Automatic Mail Sending



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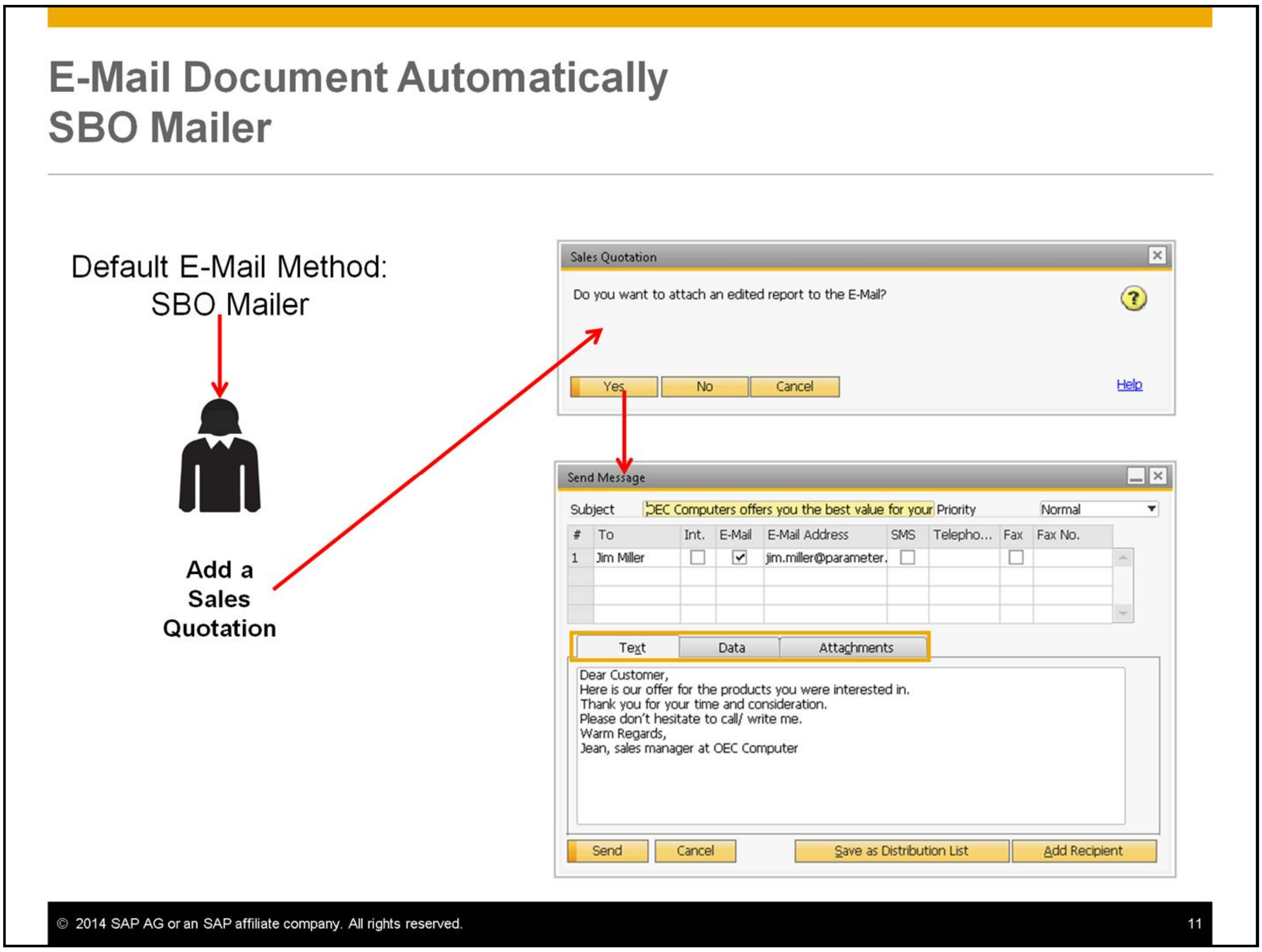
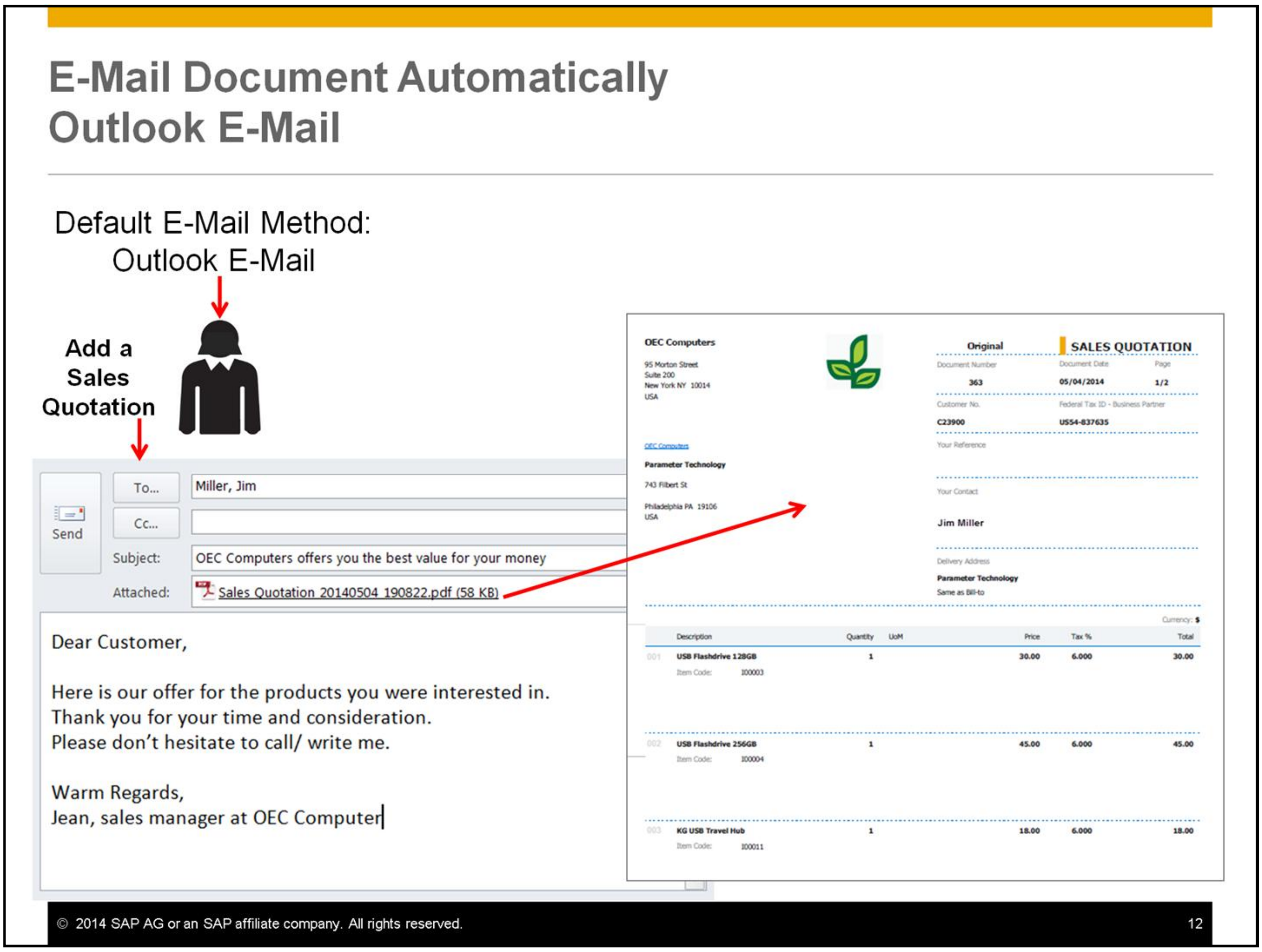
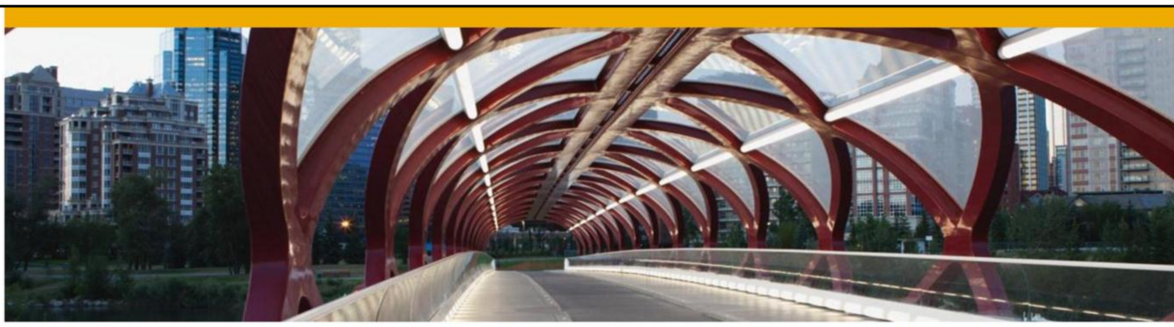
- When you define the print preferences for a document type, you can also define default text for the automatic e-mail subject and body.
- Use the *Insert Predefined Texts* button to copy text that is already defined in the system.
- For the sales quotation, Jean entered default text in the *E-Mail Subject* and the *E-Mail Body* fields.



- Let us see what happens when adding a document.
- If the company default is the SBO mailer, then when adding the document, the system populates a message asking if you want to attach an edited report to the E-Mail.
- When choosing *Yes*, the *Send Message* window appears with the details of the contact person defined in the document
- In the *Text* tab you can see the default text that Jean entered in the *E-Mail Subject* and the *E-Mail Body* fields (in the *Print Preferences* window). You can change this text.
- The sales quotation document you have just added appears under the *Data* tab and the created PDF file to be sent in the mail appears under the *Attachments* tab.
- Choose the *Send* button to send the mail.



- If the company default is the Outlook E-Mail, then when adding the document, a mail window opens with the contact person mail in the *To* field.
- The default text that Jean entered appears in the *E-Mail Subject* and the *E-Mail Body* fields.
- And the document is attached as a PDF file to the mail.
- Choose the *Send* button to send the mail.



E-Mail Documents in a Bundle

E-mail multiple documents to multiple recipients, all in one go.

Send to several customers their aging report.

Next, I will show you the option for e-mail documents in a Bundle. That is, e-mail multiple documents to multiple recipients, all in one go.

In addition, we will see the option of sending several customers their aging report.

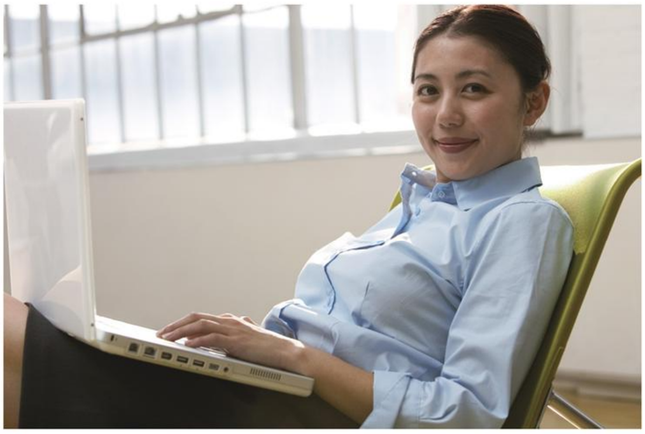
Business Example #2
E-mail multiple documents to multiple recipients

Recently, OEC Computers introduced their new products to prospects and existing customers at an industry conference.

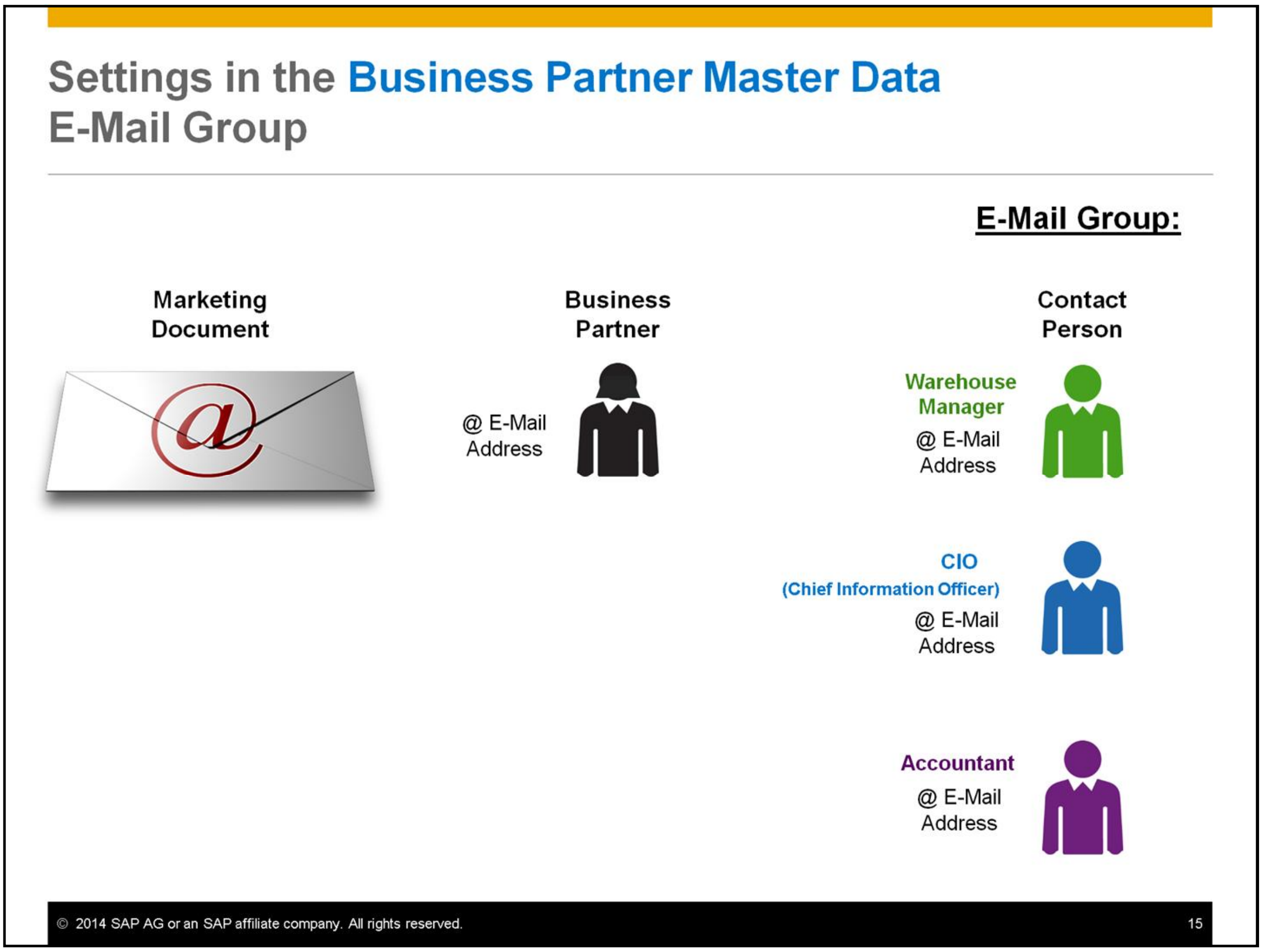
Jean, the sales manager, created sales quotations to customers and leads who approached her during the conference.

Now, she is looking for a way to mail these quotations in one go.

She also wants to address the relevant person in the business partner organization.



- Here is another business example:
- Recently, OEC Computers introduced their new products to prospects and existing customers at an industry conference.
- Jean, the sales manager, created sales quotations to customers and leads who approached her during the conference. Now, she is looking for a way to mail these quotations in one go.
- She also wants to address the relevant person in the business partner organization.

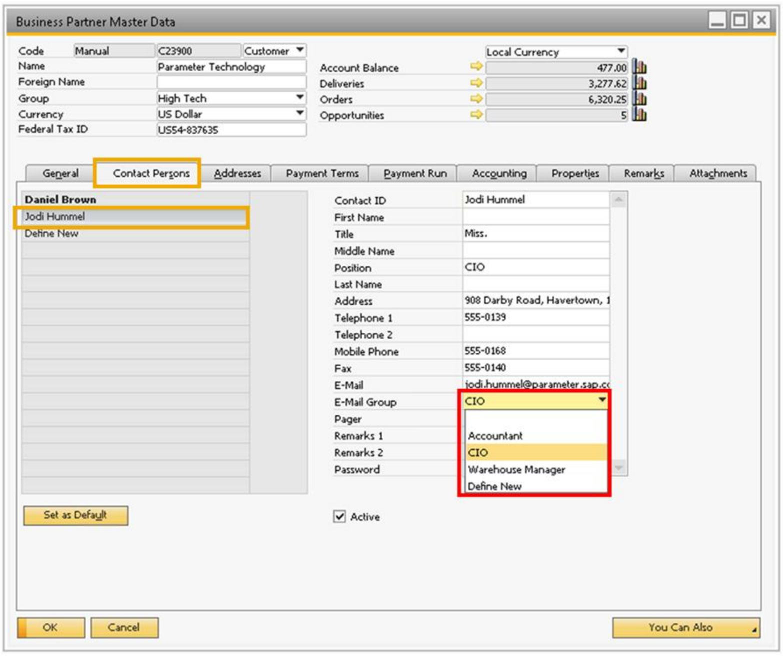


- When using the option to automatically e-mail a document, the mail is sent to the mailing address defined for the contact person in the document.
- You can now define E-Mail Groups to specify the recipients within the business partner organization that will receive the e-mail. The e-mail group then acts as a distribution list; for example, to send various A/R Invoices created for different customers to their respective accountants.
- You do that by assigning an E-Mail group to given contact person in the business partner master data record to be used as a distribution list.
- This way, whenever documents are sent via e-mail to the selected e-mail group, this contact person receives the document produced for his company.
- In the example shown OEC Computers has defined three e-mail groups to be assigned to contact persons:
  - One for the warehouse manager.
  - Another for the Chief Information Officer.
  - And the last one for the company accountant.
- Most likely that sales quotations will be sent to the chief information officer, deliveries to the warehouse manager and A/R invoices to the accountant.

Settings in the **Business Partner Master Data**
E-Mail Group

Define and assign E-Mail group:

- Select a contact person in the Business Partner Master Data window, and assign this person to an e-mail group.
- To define a new e-mail group, choose the *Define New* option.



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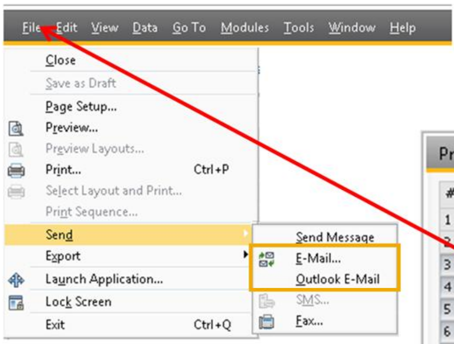
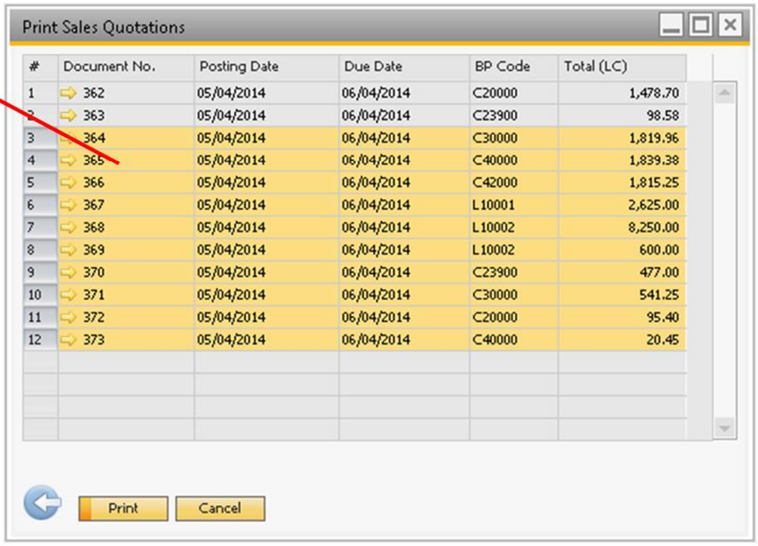
- After you have defined e-mail groups, you select a contact person in the *Business Partner Master Data* window, and assign this person to an e-mail group.
- You can define new e-mail groups from here by choosing the *Define New* option.

Send Multiple Documents to Multiple E-Mail Recipients



***Sales A/R → Document Printing → Sales Quotations*:**



#	Document No.	Posting Date	Due Date	BP Code	Total (LC)
1	362	05/04/2014	06/04/2014	C20000	1,478.70
2	363	05/04/2014	06/04/2014	C23900	98.58
3	364	05/04/2014	06/04/2014	C30000	1,819.96
4	365	05/04/2014	06/04/2014	C40000	1,839.38
5	366	05/04/2014	06/04/2014	C42000	1,815.25
6	367	05/04/2014	06/04/2014	L10001	2,625.00
7	368	05/04/2014	06/04/2014	L10002	8,250.00
8	369	05/04/2014	06/04/2014	L10002	600.00
9	370	05/04/2014	06/04/2014	C23900	477.00
10	371	05/04/2014	06/04/2014	C30000	541.25
11	372	05/04/2014	06/04/2014	C20000	95.40
12	373	05/04/2014	06/04/2014	C40000	20.45

Note that the selection of multiple documents requires Crystal Reports Layout.

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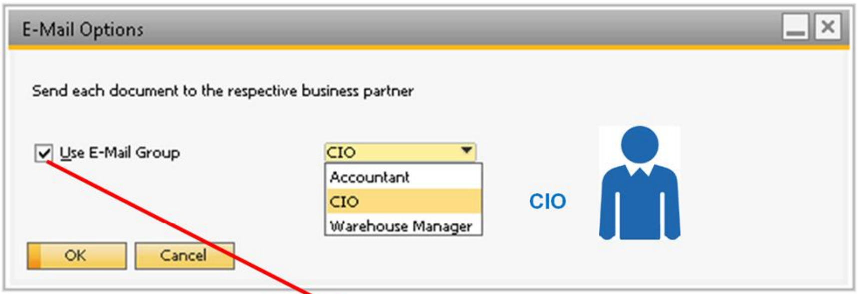
- In order to send a batch of documents, for example sales quotations created for different customers, to the respective contact persons of these customers, use the document printing window:
- After generating the list of the documents you wish to send by E-Mail, sales quotations in our example, select the documents by clicking the first record and then choose the other records with Control or Shift.
- From the *File* menu choose *Send*, and then either *E-Mail* or *Outlook E-Mail*.
- Note that the selection of multiple documents requires Crystal Reports Layout. The PLD layout supports mailing a single document only.

Send Multiple Documents to Multiple E-Mail Recipients



Select this box to email the documents to the contact persons associated with the specified E-Mail group.

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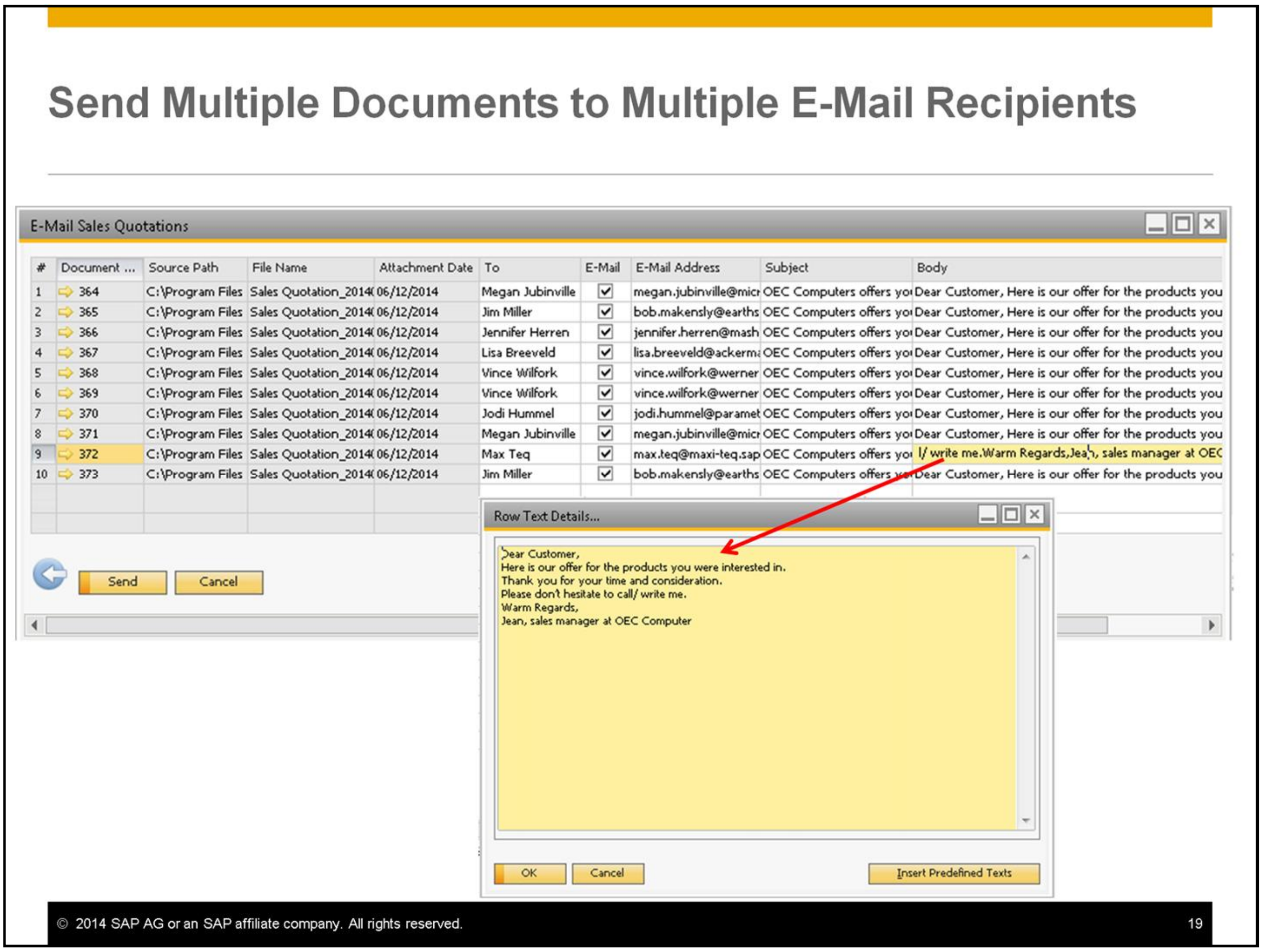
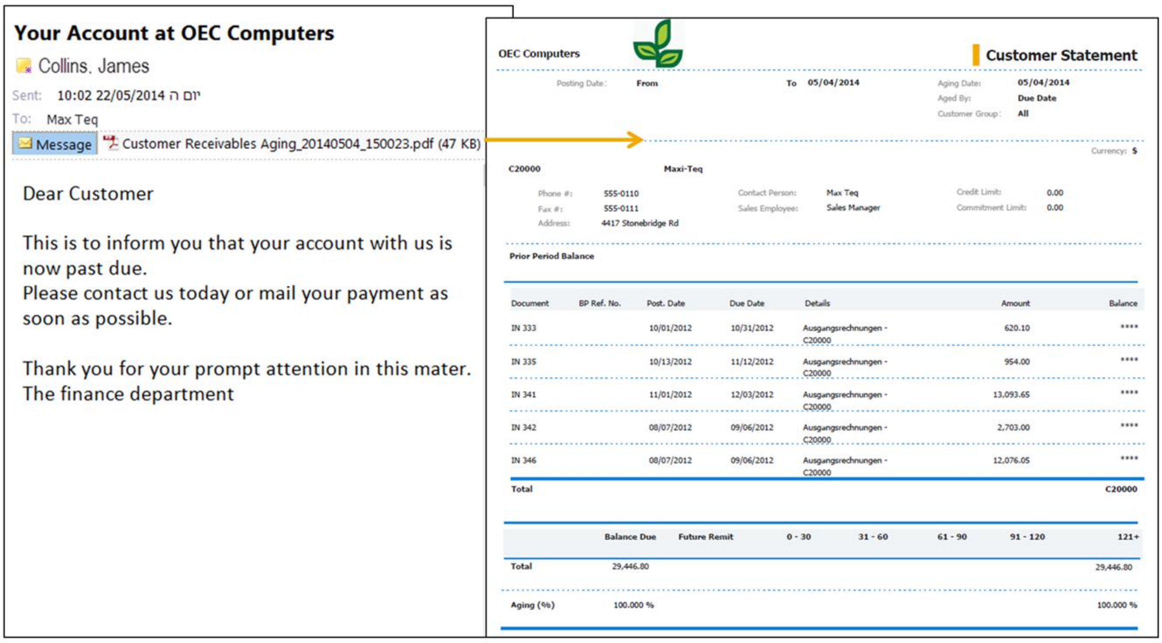
- After you have selected the documents to be printed, The *E-Mail Options* window appears.
- First, you define how to send the selected documents. You can choose whether to use an E-Mail group or not.
- Select the *Use E-Mail Group* box and specify the required group to email the documents to the contact persons associated with the selected E-Mail group.
- If you clear this box, the selected documents will be sent to the E-mail address of the contact person defined in the document. If there is no contact person in the document, then the E-Mail address defined for the business partner master data under the *General* tab will be selected.
- You can change the default contact person and the email address in the next window.



- After approving the *E-Mail Options* window, the E-Mail window appears for the document type, listing the selected documents.
- The name of the contact person and its E-Mail address appear depending on the selection you did in the previous window. If an E-Mail group was selected then the details of the contact person associated with the selected E-mail group appear.
- If the selected E-mail group does not contain a contact person who is associated with the respective business partners, no name or E-Mail address will appear.
- You can update the name and the E-mail address manually if required.
- The *E-Mail* column is selected by default. If you want to cancel sending a certain document, deselect this option.
- In the *Subject* and *Body* columns the text inserted for the given document type in the *Print Preferences* window appears. To edit the text, double-click the field in the required line. A text editor appears, enables you to add and edit text, or insert any existing predefined text.
- Finally, choose *Send*.
- As a result, the document will be mailed to each contact person defined in this window, and therefore to each company.

Send **Aging Report** to Several Business Partners



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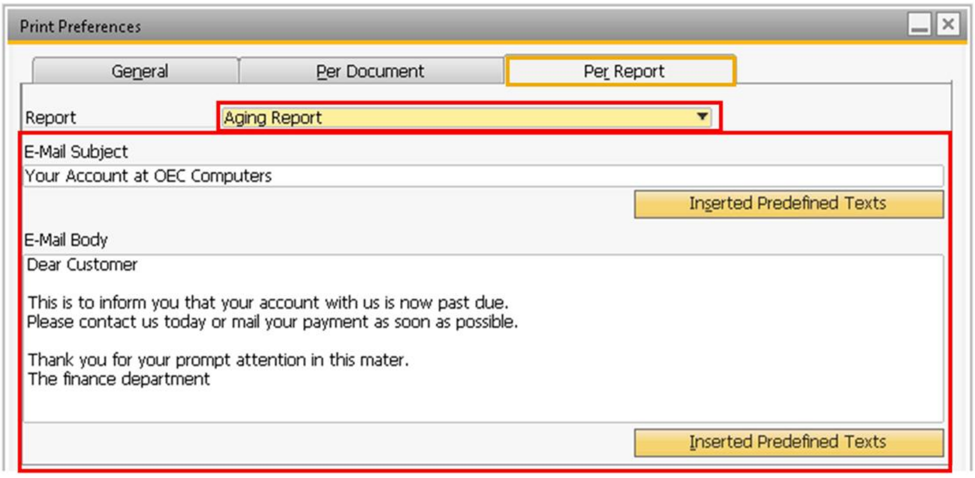
- After generating the aging report, either for customers or for vendors, you can now e-mail the respective aging data to the relevant business partners.

Settings at the Report Level
Default Text for Automatic Mail Sending

***Administration → System Initialization → Print Preferences → Per Report*:**



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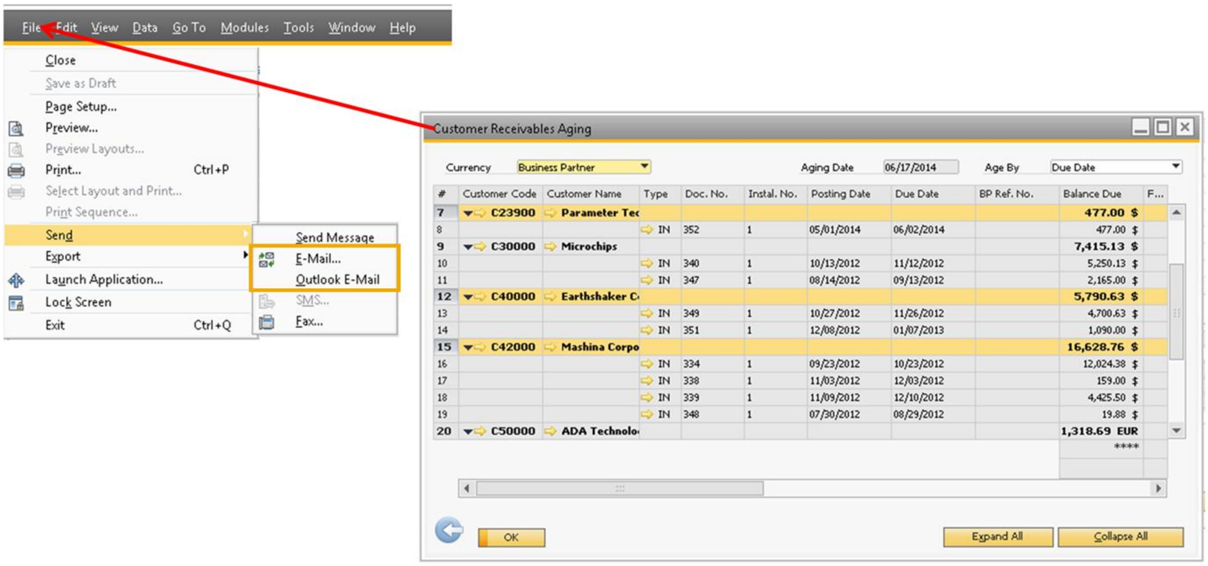
- Similarly to the document option, you can define default text for the automatic mail subject and body.
- Use the menu path shown on the graphic.
- In the slide example, the finance department manager has entered default text in the *E-Mail Subject* and the *E-Mail Body* fields.

Send Aging Report to Several Business Partners



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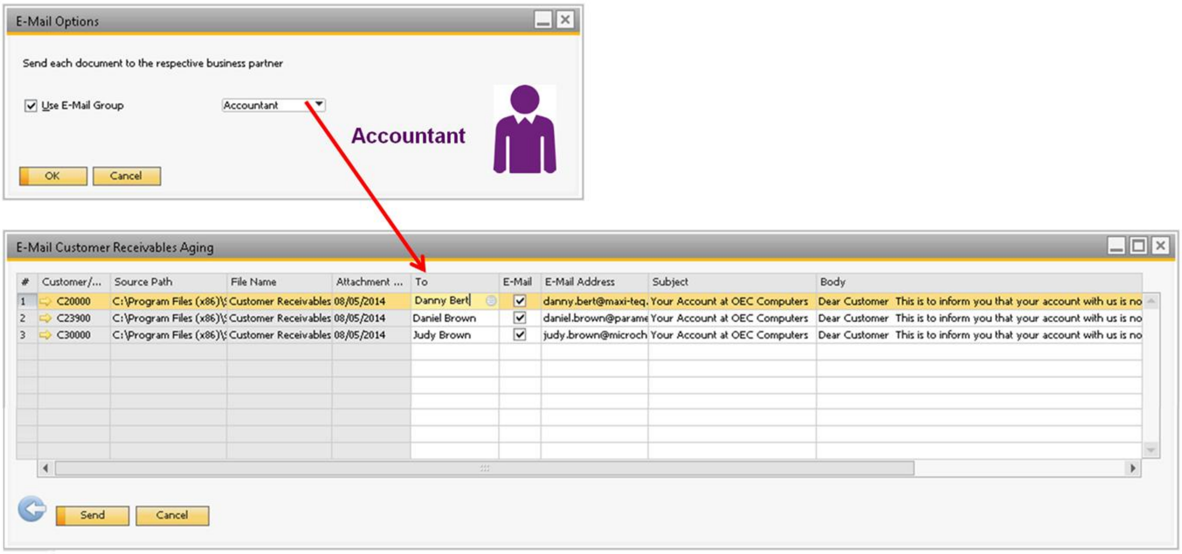
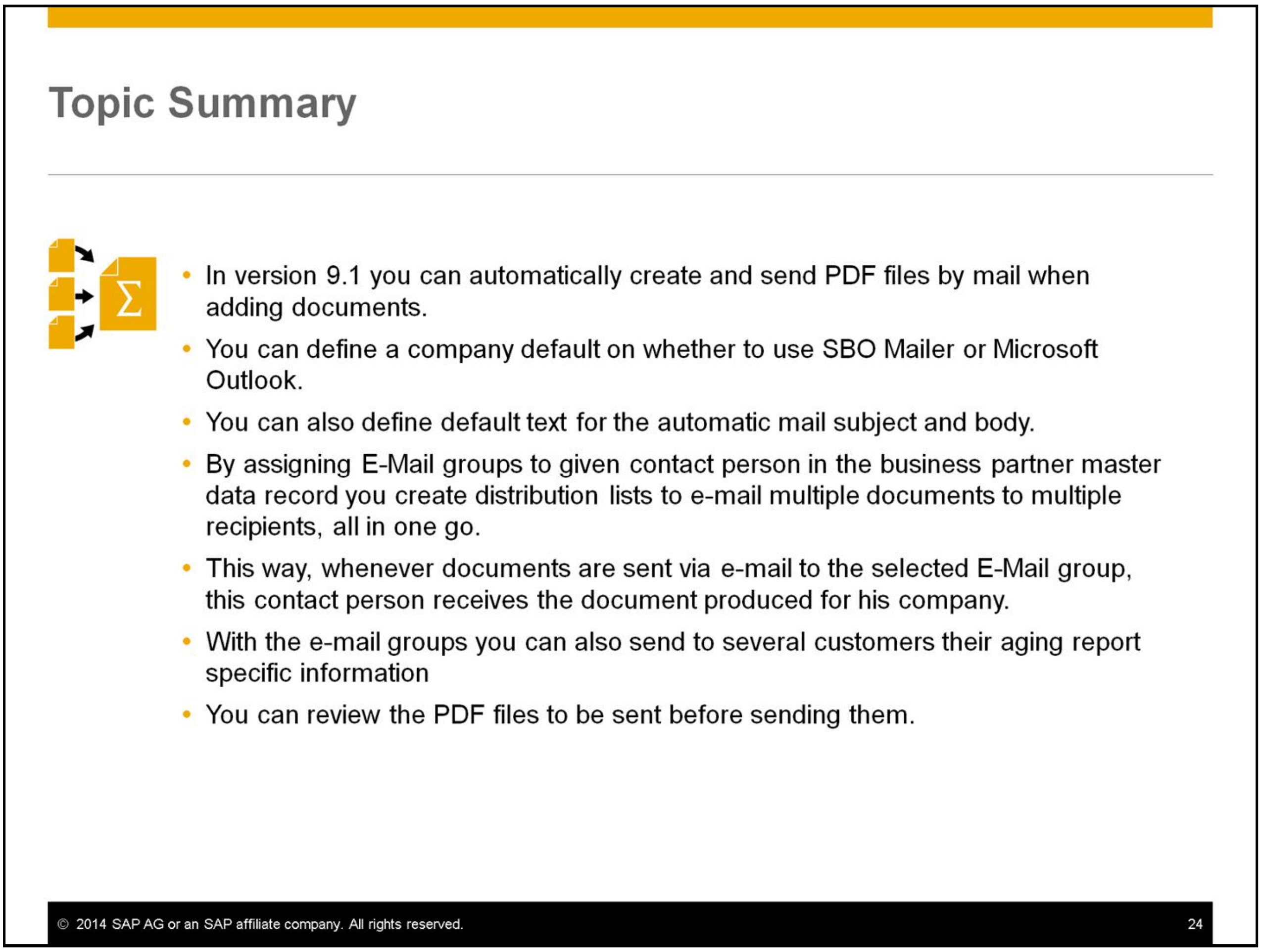
- After generating the aging report, for customers in our example, choose the business partners you wish to E-Mail their aging data.
- From the *File* menu choose *Send*, and then either *E-Mail* or *Outlook E-Mail*.

Send Aging Report to Several Customers



Note that the PDF files with the aging data to be sent are already created and you can view them. Follow the details in the *Source Path* and the *File Name* columns.

- Similarly to the sending multiple documents to multiple E-Mail recipients options, in the *E-Mail Options* window define whether to use an E-Mail group or not.
- After approving the *E-Mail Options* window, the *E-Mail Aging* window appears, listing the selected business partners.
- The name of the contact person and its E-Mail address appear:
  - If an E-Mail group was selected then the details of the contact person associated with the selected E-mail group appear.
  - Otherwise, the E-Mail address defined for the business partner master data under the *General* tab appears.
- You can change the name and the E-mail address manually if required.
- Note that the PDF files with the aging data to be sent are already created and you can view them. Follow the details in the *Source Path* and the *File Name* columns.
- Finally, choose *Send*.
- As a result, each contact person defined in this window will receive the aging data relevant for his company.



- In version 9.1 you can automatically create and send PDF files by mail when adding documents.
- You can define a company default on whether to use SBO Mailer or Microsoft Outlook.
- You can also define default text for the automatic mail subject and body.
- By assigning E-Mail groups to given contact person in the business partner master data record you create distribution lists to e-mail multiple documents to multiple recipients, all in one go.
- This way, whenever documents are sent via e-mail to the selected E-Mail group, this contact person receives the document produced for his company.
- With the e-mail groups you can also send to several customers their aging report specific information
- You can review the PDF files to be sent before sending them.

Thank you

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Thank you for your time.