SAP Business One How to Guide
SAP Business One
Document Version: 1.1 – 2017-01-06

CUSTOMER

How to Install and Configure Microsoft Fax Services in SAP Business One

All Countries

Typographic Conventions

Type Style	Description
Example	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
Example	Emphasized words or expressions.
`EXAMPLE`	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
`Example`	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
`Example`	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
`<Example>`	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
`EXAMPLE`	Keys on the keyboard, for example, `F2` or `ENTER`.

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Document History

Version	Date	Change
1.0	2010-02-01	First version
1.1	2017-01-06	Template Update

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1 Introduction

This document provides instructions for installing and configuring Microsoft Fax for use with SAP Business One.

Applicable Releases:

- SAP Business One 8.8
- SAP Business One 9.0
- SAP Business One 9.1
- SAP Business One 9.2

You can install Microsoft Fax Services using any of the following scenarios:

- Standalone Mode

  For installing Microsoft Fax Services locally (on the same machine):

  - SAP Business One server with SAP Business One Service Manager
  - Local modem
  - Microsoft Fax Services

  To install Microsoft Fax Services in Standalone mode, go to Installing Microsoft Fax Services in Standalone Mode.Installing Microsoft Fax Services in Standalone Mode
- Remote Fax Mode

  For installing Microsoft Fax Services remotely (on a different machine):

  - SAP Business One and SAP Business One Service Manager are installed locally
  - The fax and modem are installed on a remote machine

  To install Microsoft Fax Services in Remote Fax mode, go to Installing Microsoft Fax Services with Remote Fax.
- Local SAP Business One Server with Remote Applications Mode

  For installing SAP Business One server locally and connecting to a remote fax machine that is installed with a modem and to a remote SAP Business One Service Manager.

  - SAP Business One server and Microsoft Fax Services (optional) are installed locally.
  - SAP Business One Service Manager and Microsoft Fax Services are installed on the same remote machine without a modem.
  - Microsoft Fax Services are installed on another remote machine with a modem.

  To install SAP Business One server locally with remote applications, go to Installing Local SAP Business One Server with Remote Applications.

  Caution

  There are limitations for Microsoft Fax Services in some operating systems that are defined as servers:

  - Windows XP

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Fax printer cannot be shared; that is, if Microsoft Fax Services modem (printer) is installed on a machine with Windows XP, remote clients cannot connect to the printer, unless the machine with XP is in standalone configuration.

- Server 2003

Fax printer can be shared; that is, workstations with Microsoft Fax Services installed, but without modems can be connected to the fax printer server.

- SBS

Remote fax printers can be shared; that is, workstations with Microsoft Fax Services installed, but without modems can be connected to the fax printer server. To see the fully supported operating system, go to: http://channel.sap.com/sbo/platforms.

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2 Installing Microsoft Fax Services in Standalone Mode

In this scenario, the SAP Business One server is installed with SAP Business One Service Manager together with Microsoft Fax Services with a local modem on the same machine.

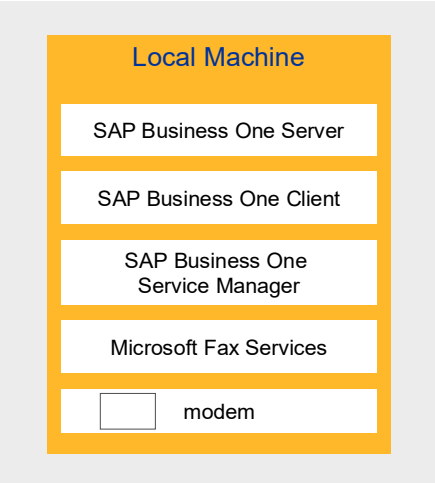

Figure 1: Standalone Scenario

Prerequisites

A modem must be installed on the local machine before you install Microsoft Fax Services.

SAP Business One must be installed either before or after installing Microsoft Fax Services.

> **Caution**
>
> If you configure the SAP Business One attachment folder to a remote PC folder, you must configure the Mailer service with a user who has the appropriate privileges for that designated remote PC folder or faxes will not be delivered. It is also important to make sure that the remote attachment folder has user privileges.

Procedures

In this standalone scenario, you must perform the following procedures:

1. Install Microsoft Fax Services on the local machine
2. Configure Microsoft Fax Services on the local machine
3. Configure SAP Business One for Microsoft Fax Services:
    1. Configure SAP Business One Messaging Service

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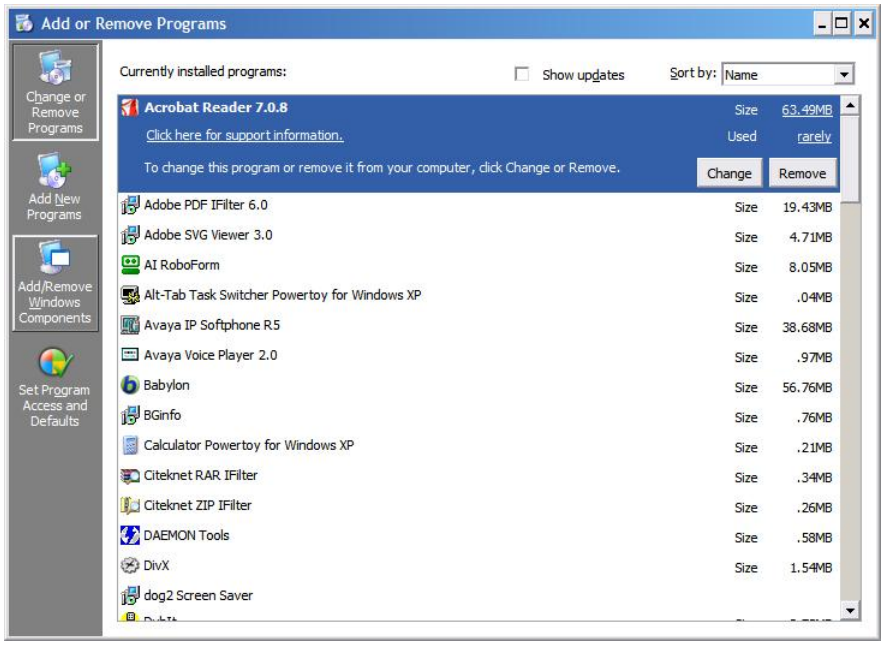
2. Configure SAP Business One Service Manager
3. Connect the SBO Mailer service
4. Check the fax printer connection

2.1 Installing Microsoft Fax Services on a Local Machine

To install Microsoft Fax Services:

1. In the *Control Panel*, select *Add* or *Remove Programs*. The *Add* or *Remove Programs* window opens.



2. In the shortcut bar on the left, select *Add/Remove Windows* Components.
   The *Windows Components Wizard* window opens.

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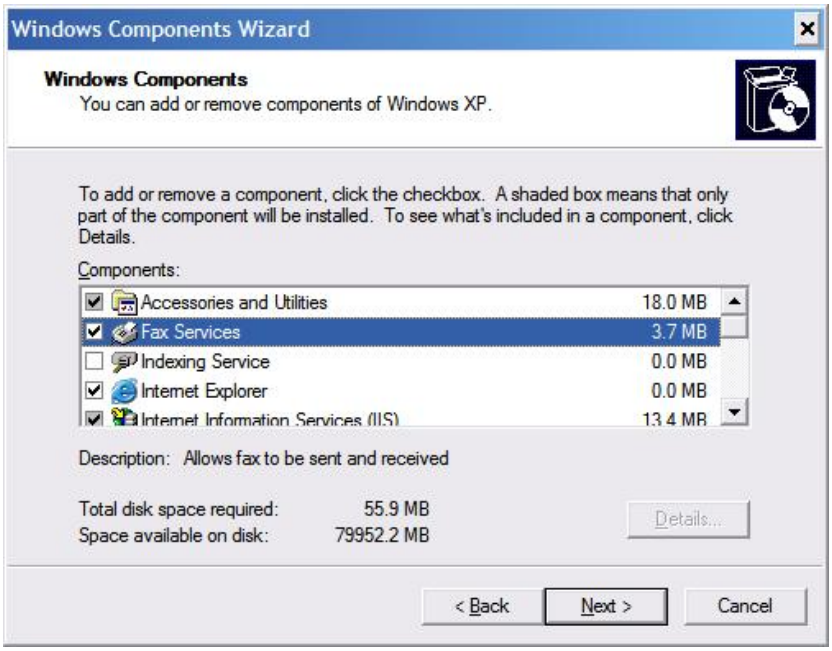
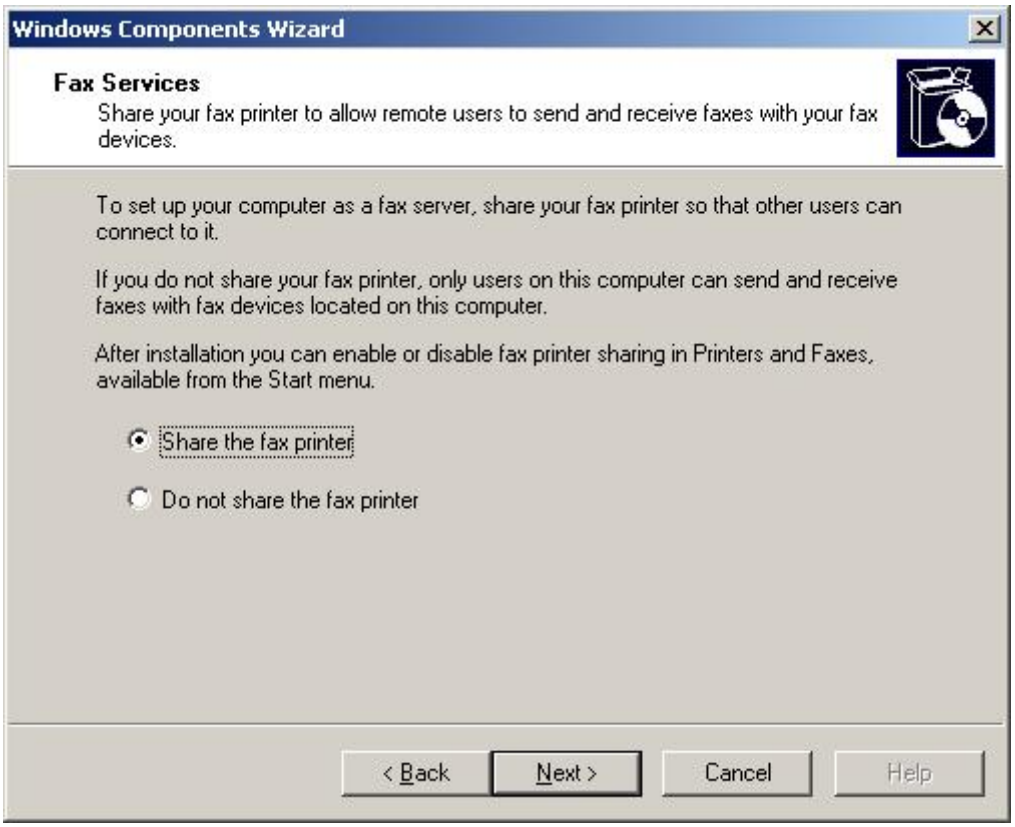


3. Select *Fax Services*, and then choose the Next button. The Microsoft Fax Services installation begins.

   During the installation; (for Server 2003 or the SBS operating system), in the *Windows Components Wizard*, you are asked to choose whether you want to enable sharing of the fax printer, as shown below.



4. Choose one of the following:

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- *Share the fax printer* – enables you to connect another workstation to the fax printer
- *Do not share the fax printer* – prevents the addition of another workstation to the fax printer
- Choose the *Next* button.

The installation begins.

> **Note**
>
> You may be required to insert the Microsoft Windows installation CD / DVD.

5. At the end of the installation process, choose the *Finish* button.

> **Note**
>
> After the installation is complete, you may be required to restart the operating system.

2.2 Configuring Microsoft Fax Services on a Local Machine

After the installation is complete, you need to configure Microsoft Fax Services as described below.

1. Open Microsoft Fax Services:

   Start → *Programs* → *Accessories* → *Communications* → *Fax* → *Fax Console*

   The *Fax Configuration Wizard* window opens.

2. Choose the *Next* button.

   The *Sender Information* screen opens.

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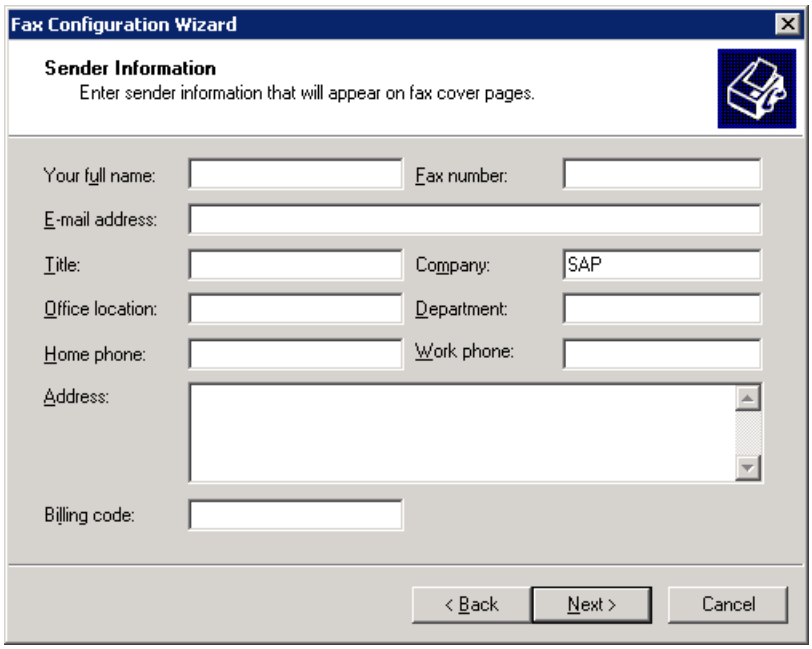


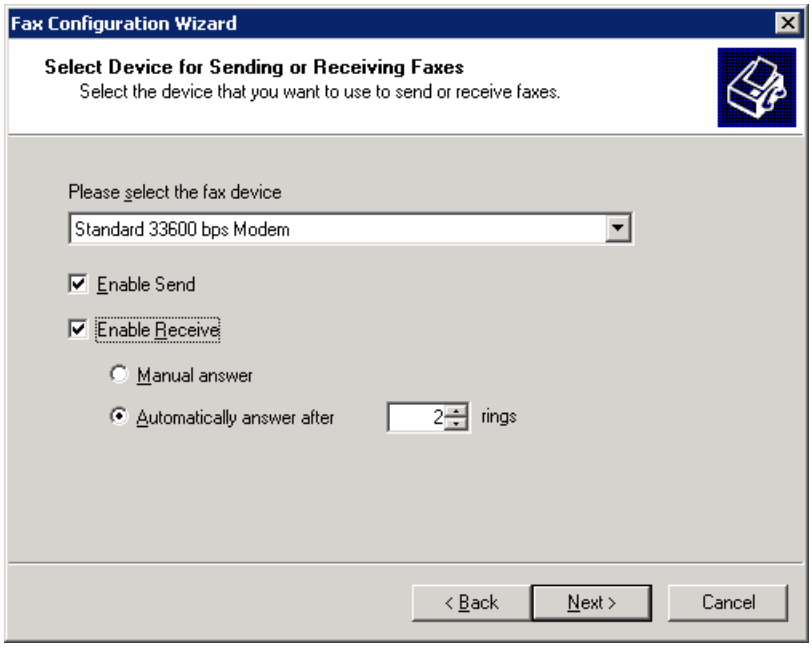
3. Enter your sender information.

   Note

   This information will appear on fax cover pages.

4. Choose the *Next* button.

   The *Fax Configuration Wizard* displays *Select Device for Sending* or *Receiving Faxes* screen.



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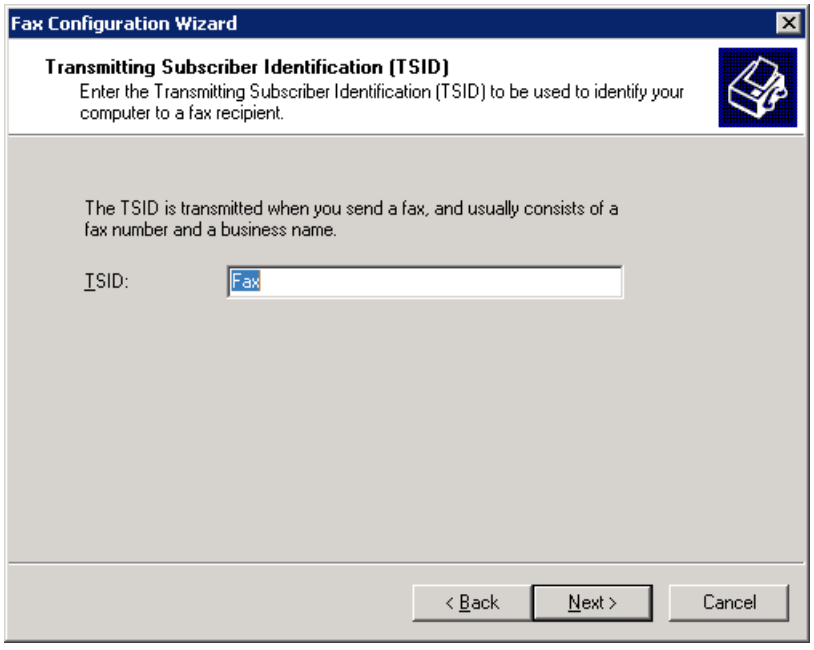
> **Note**
>
> If the Fax Configuration Wizard does not display the screen for selecting a device for sending or receiving faxes (shown above), the modem may not have been installed properly. In this case:
>
> 1. Choose the Cancel button.
> 2. Re-install your modem according to the manufacturer's instructions.
> 3. Return to the beginning of this section, Configuring Microsoft Fax Services on a Local Machine.

5. From the *Please Select the Fax Device* dropdown box, select the modem installed on your machine.
6. To enable sending faxes from the modem you selected in step 5, select the *Enable Send* checkbox.
7. To enable receiving faxes from the modem you selected in step 5, select the *Enable Receive* checkbox.

   In addition, you can select:

   - *Manual Answer* – Lets you receive a fax manually; that is, only if you do not want the computer to automatically receive faxes.
   - *Automatically Answer After X Rings* – Lets you select the number of rings before the fax is automatically received. To select the number of rings, in the spin box, scroll to the desired number.
8. Choose the *Next* button.

   The *Transmitting Subscriber Identification (TSID)* window of the *Fax Configuration Wizard* is displayed.



9. In the TSID box, type in the information you want to appear on incoming fax headers.

   > **Note**
   >
   > This feature is enabled only if the Enable Receive option was not selected in step 7.
10. Choose the *Next* button.

    The *Called Subscriber Identification (CSID)* window of the *Fax Configuration Wizard* is displayed.

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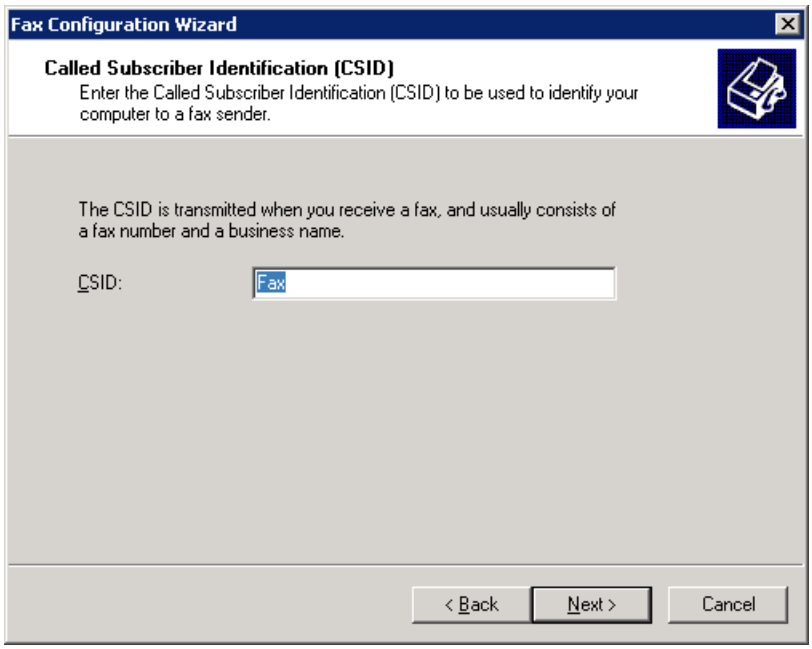
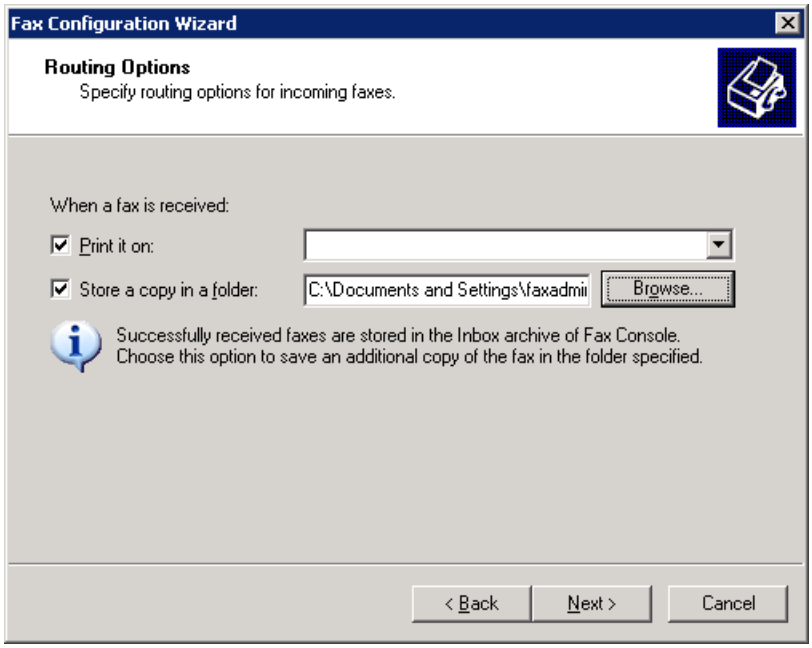


11. In the *CSID* box, type the information you want to appear on outgoing fax headers, so that the fax recipient can identify you.

    > **Note**
    >
    > This feature is enabled only if the Enable Receive option was selected in step 7.

12. Choose the *Next* button.

    The *Routing Options* window of the *Fax Configuration Wizard* is displayed.



13. To print all incoming faxes, select the *Print it on* checkbox, then select a printer from the dropdown box.

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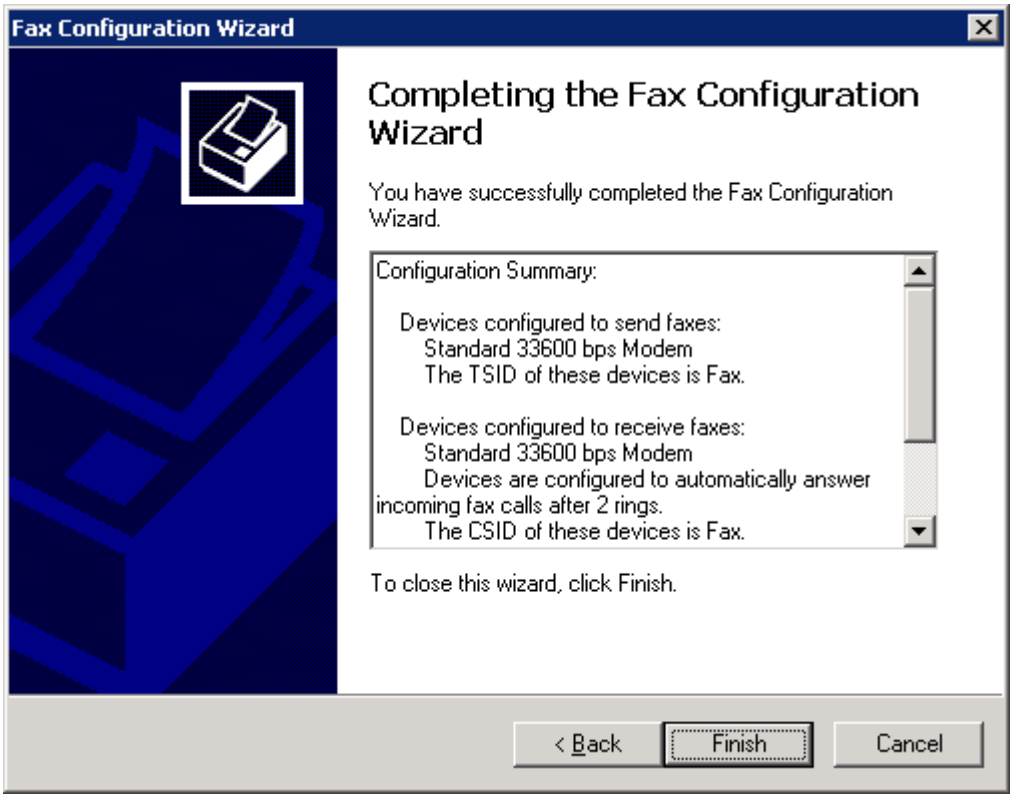
Note

You must have a printer installed before you can select this option.

14. To store a copy of each fax in a folder, select the *Store a copy in a folder* checkbox. Choose *Browse* and navigate to the folder where you want to store faxes.
15. Choose the *Next* button, then choose the *Finish* button.



2.3 Configuring SAP Business One for Microsoft Fax Services

SAP Business One can be configured to work with Microsoft Fax Services after Microsoft Fax Services has been installed and configured.

Configuring SAP Business One for Microsoft Fax Services comprises the following procedures:

1. Configuring SAP Business One Messaging Service.
2. Configuring SAP Business One Service Manager.
3. Connecting the SBO Mailer Service.
4. Checking the Fax Printer Connection.

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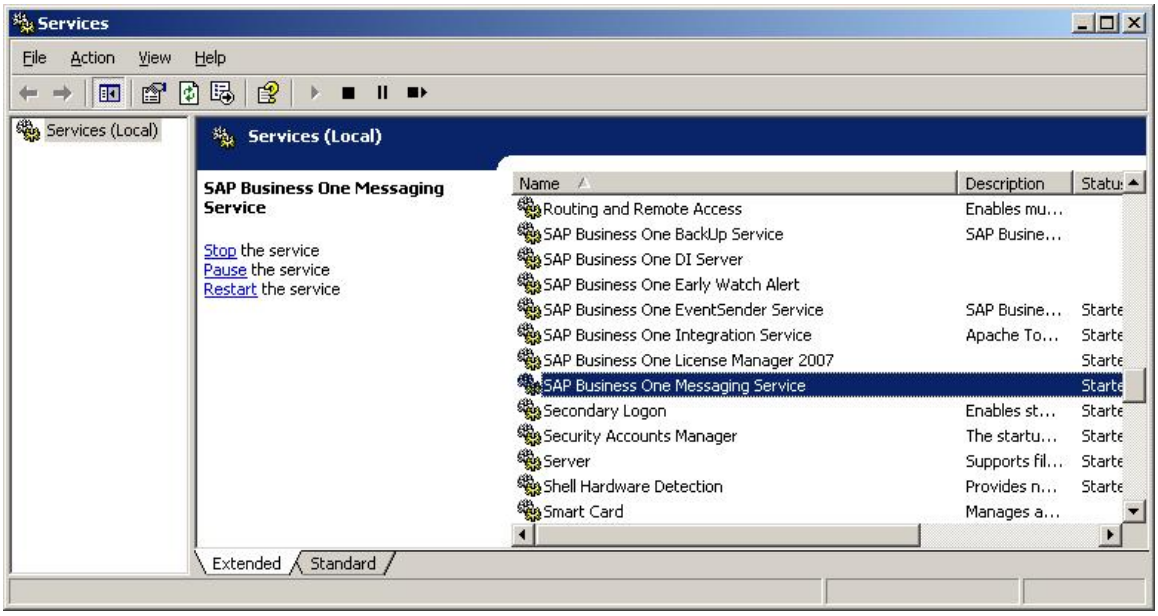
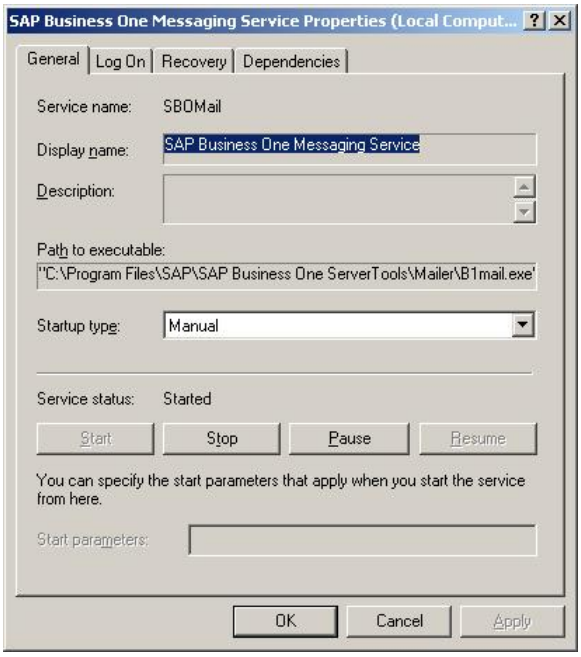
2.3.1 Configuring SAP Business One Messaging Service

After you have configured SAP Business One Service Manager, configure SAP Business One Messaging Service:

1. Navigate to *SAP Business One Messaging Service* as follows:
   Control Panel → *Administrative Tools* → *Services*



2. In the Services window, right-click *SAP Business One Messaging Service* and from the popup menu select *Properties*.
   The SAP Business One Messaging Service Properties (Local Computer) dialog box opens.



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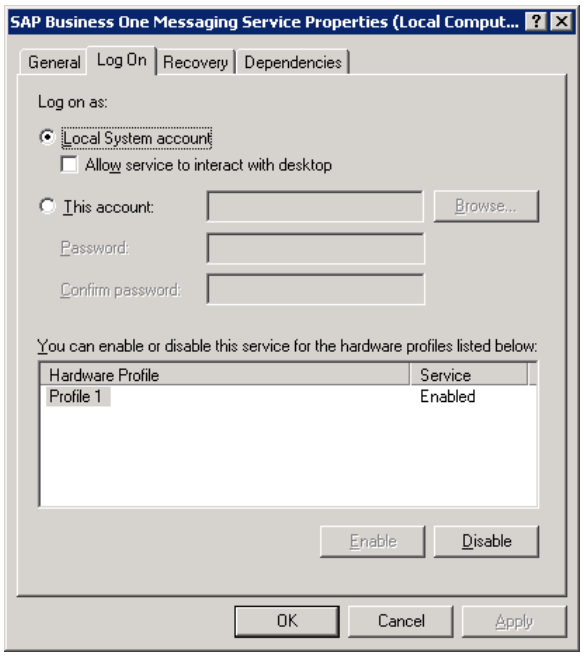
3. Select the *Log On* tab, shown below.



4. Select one of the following options:
   - *Local System Account*

     Uses the System Administrator user account to access Microsoft Fax Services.
   - *This Account*

     Uses a specific account that is created on the local PC or in the workgroup. The user who is indicated must have the appropriate privileges in the group that he or she is related to.
5. Type in the account name or choose the *Browse* button and navigate to the account.
6. In the *Password* field, enter the password for the account chosen in step 4.
7. In the *Confirm Password* field, retype the password you wrote in step 6.
8. Choose the *OK* button.

> **Note**
>
> When you select This Account, you can add any account that has the appropriate privileges on the server machine. If you add a user who does not have these privileges, faxes will not be sent.

> **Note**
>
> If you configure the Attachment folder to a remote PC folder, you must configure the Mailer service with a user who has the appropriate privileges for that folder. Faxes cannot be delivered if there is no user with the appropriate privileges specified.

2.3.2 Configuring SAP Business One Service Manager

To configure SAP Business One Service Manager:

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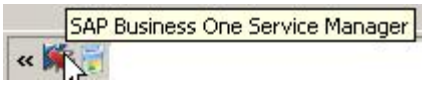
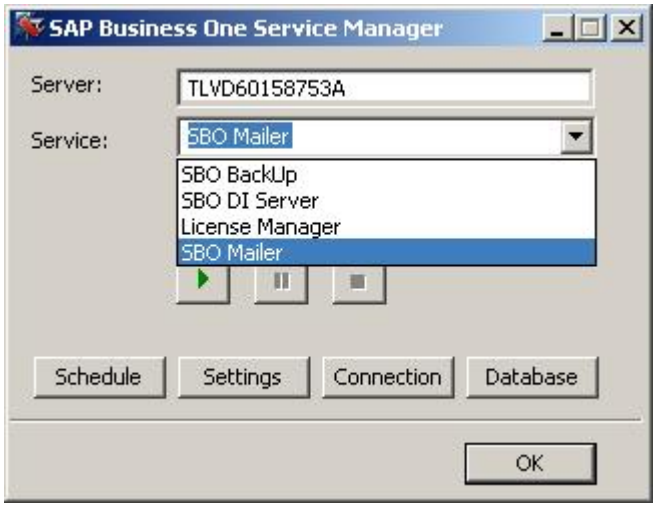
1. Access SAP Business One Service Manager in either of the following ways:
   - In the system tray, double-click the *SAP Business One Service Manager* icon:



   - From the workstation where SAP Business One Service Manager is installed, choose: *Start* → *All Programs* → *SAP Business One* → *Server Tools* → *Service Manager*

   The *SAP Business One Service Manager* dialog box opens.

2. In the Service dropdown box, select *SBO Mailer*.



3. Choose the *Settings* button.

   The *General Settings* dialog box opens.

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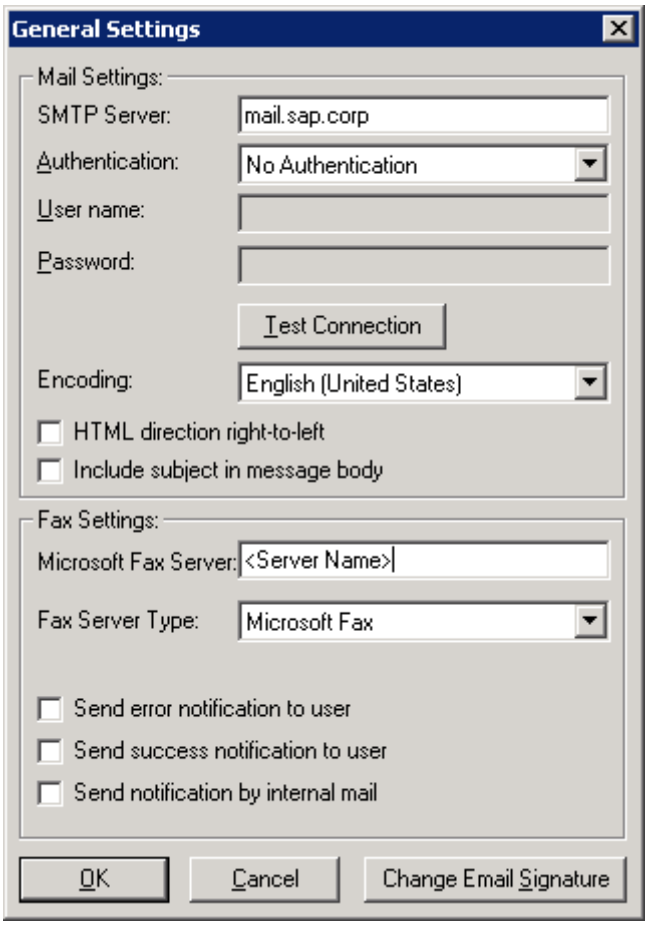

4. In the *Fax Settings* section, in the *Microsoft Fax Server* box, enter your computer IP address or computer name.
   - To view your computer name, see Viewing Computer Name.
   - To view your computer IP address, see Viewing Computer IP Address.
5. In the *Fax Server Type* dropdown box, select Microsoft Fax.

Select or deselect any or all of the notification checkboxes according to your requirements.

> **Note**
>
> You can change these notification options at any time via the SAP Business One Service Manager.

> **Caution**
>
> The configuration described here is not enough for operating this service. For more information, refer to the Administrator's Guide in the documentation area of SAP Business One Customer Portal at http://service.sap.com/smb/sbocustomer/documentation.

6. Choose the *OK* button.
7. In the *SAP Business One Service Manager* dialog box, choose the *OK* button.

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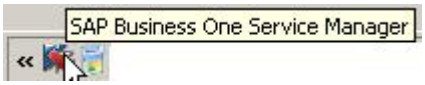
2.3.3 Connecting the SBO Mailer Service

The mailer service must be connected so that faxes can be delivered to the fax recipient. To connect the mailer service:

> **Note**
>
> You must configure the SBO Mailer Service before you can operate it. For full instructions, refer to the Administrator's Guide in the documentation area of SAP Business One Customer Portal at http://service.sap.com/smb/sbocustomer/documentation.

> **Note**
>
> If SBO Mailer is installed on Windows Server 2008 or Windows Vista and the installed PDF reader does not reliably support a non-interactive mode, SBO Mailer may fail to send faxes with PDF attachment in SAP Business One.
>
> To avoid this issue, we recommend one of the following:
>
> - Change the SBO Mailer Service User.
> - Install a PDF reader that supports the non-interactive mode.
> - Install SBO Mailer on Windows Server 2003 or Windows XP.
>
> For more information, see SAP Note 1415860.

1. In the system tray, double-click the *SAP Business One Service Manager* icon.



The *SAP Business One Service Manager* dialog box opens.

In the *Service* dropdown box, select *SBO Mailer*.

2. Click the Play button.

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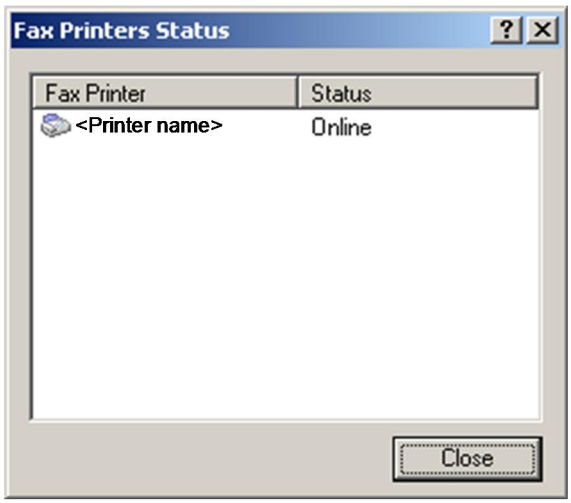
Note

When the Play button is inactive, the mailer service is connected.

2.3.4 Checking the Fax Printer Connection

To make sure the fax printer is connected:

1. Open the Fax Console, located in:
   Start → *Programs* → *Accessories* → *Communications* → *Fax* → *Fax Console*
2. In the *Fax Console* window, choose:
   Tools → *Fax Printer Status*
   The *Fax Printers Status* dialog box opens.



The online or offline status is shown.

Note

For more information about the Attachment folder, see the SAP Business One Online Help.

2.3.5 Viewing Computer System Information

Locate and view computer name or IP address, which may be required for configuring SAP Business One to work with Microsoft Fax Services.

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2.3.5.1 Viewing Computer Name

To view your computer's name:

1. On your computer Desktop, right-click the *My Computer* icon.
2. From the popup menu, choose *Properties*.
   The *System Properties* window opens.
3. Select the *Computer Name* tab.
   The computer name appears next to *Full Computer Name*.

2.3.5.2 Viewing Computer IP Addres

To find the IP Address of your computer:

1. Choose the *Start* menu.
2. Choose *Run*.
3. In the *Run* dialog box, in the *Enter* box, write **`cmd`** and choose the *OK* button.
   The *Command Line Console* box opens.
4. At the prompt, type **`ipconfig`** and press `Enter`.
   Your computer's IP address appears in the list of information.

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3 Installing Microsoft Fax Services with Remote Fax

In this scenario, SAP Business One, SAP Business One Service Manager, and Microsoft Fax Services are installed on the local machine without a modem and connected to Microsoft Fax Services on a remote machine with a modem.

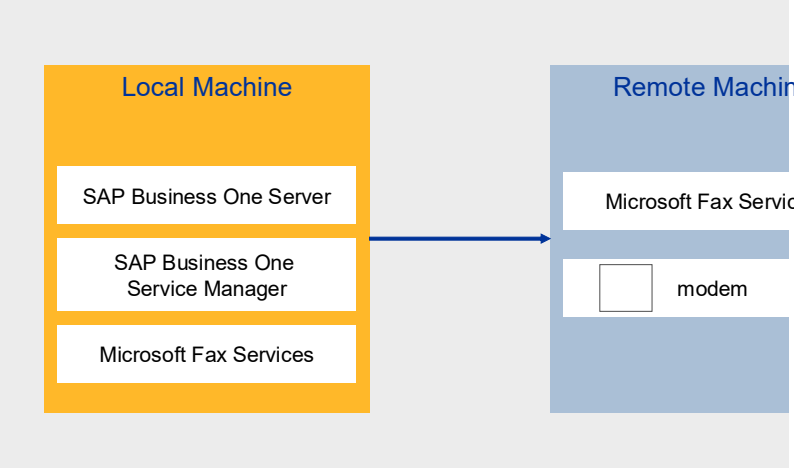

Figure 2: Remote Fax Scenario

Prerequisites

A modem must be installed on the remote server before you install Microsoft Fax Services.

SAP Business One must be installed either before or after installing Microsoft Fax Services.

The server you want to connect to the Fax printer must be either Server 2003 or the SBS operating system, or any other operating system that allows the following printer definitions:

- Connecting remotely
- Sharing

> **Caution**
>
> If you configure the SAP Business One attachment folder to a remote PC folder, you must configure the Mailer service with a user who has the appropriate privileges for that designated remote PC folder or faxes will not be delivered. It is also important to make sure that the remote attachment folder has user privileges.

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Procedures

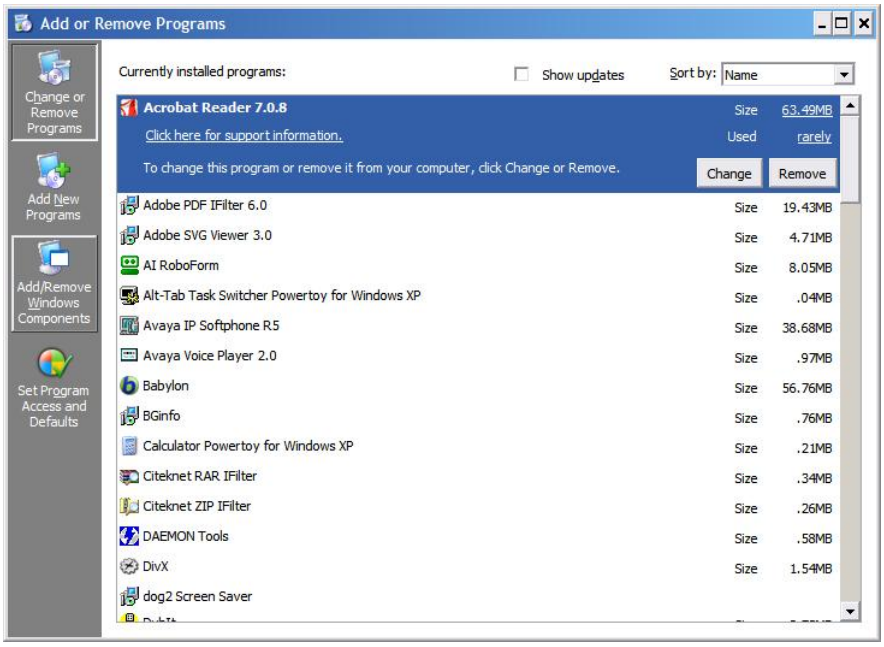
To install and configure Microsoft Fax Services on a remote machine, follow these steps, which are described in the subsequent sections:

1. Install Microsoft Fax Services on the remote machine with a modem.
2. Configure Microsoft Fax Services on the remote machine with a modem.
3. Install Microsoft Fax Services on the local machine without a modem.
4. Configure Microsoft Fax Services on the local machine without a modem.
5. Configure SAP Business One for Microsoft Fax Services:
    1. Configure SAP Business One Messaging Service on the local machine without a modem.
    2. Configure SAP Business One Service Manager
    3. Connect Microsoft Fax Services to a remote fax printer
    4. Check the fax printer connection

3.1 Installing Microsoft Fax Services on Remote Machine (with Modem)

To install Microsoft Fax Services on a remote machine with a modem:

1. In the Control Panel, select *Add or Remove Programs*. The *Add or Remove Programs* window opens.



2. In the shortcut bar on the left, select *Add/Remove Windows Components*.
   The *Windows Components* Wizard window opens.

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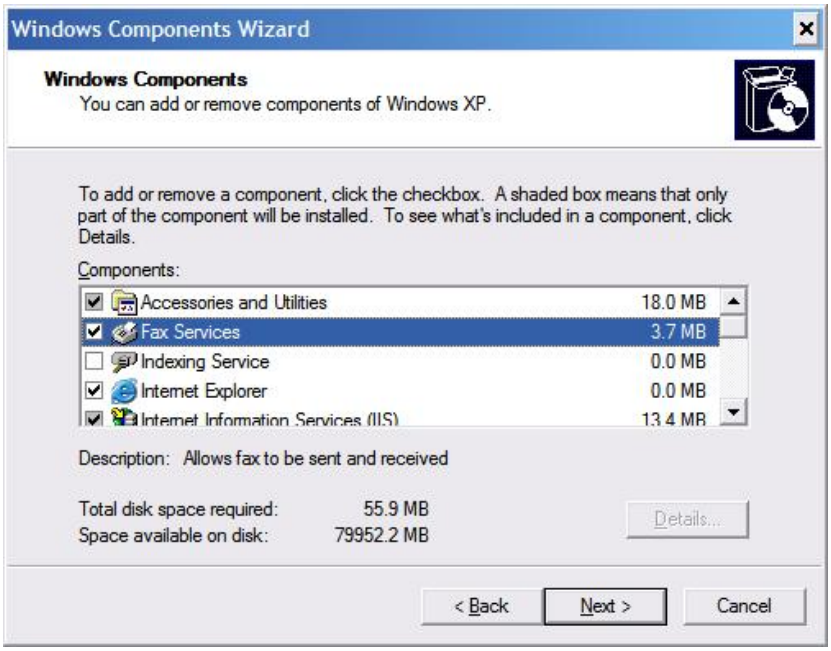
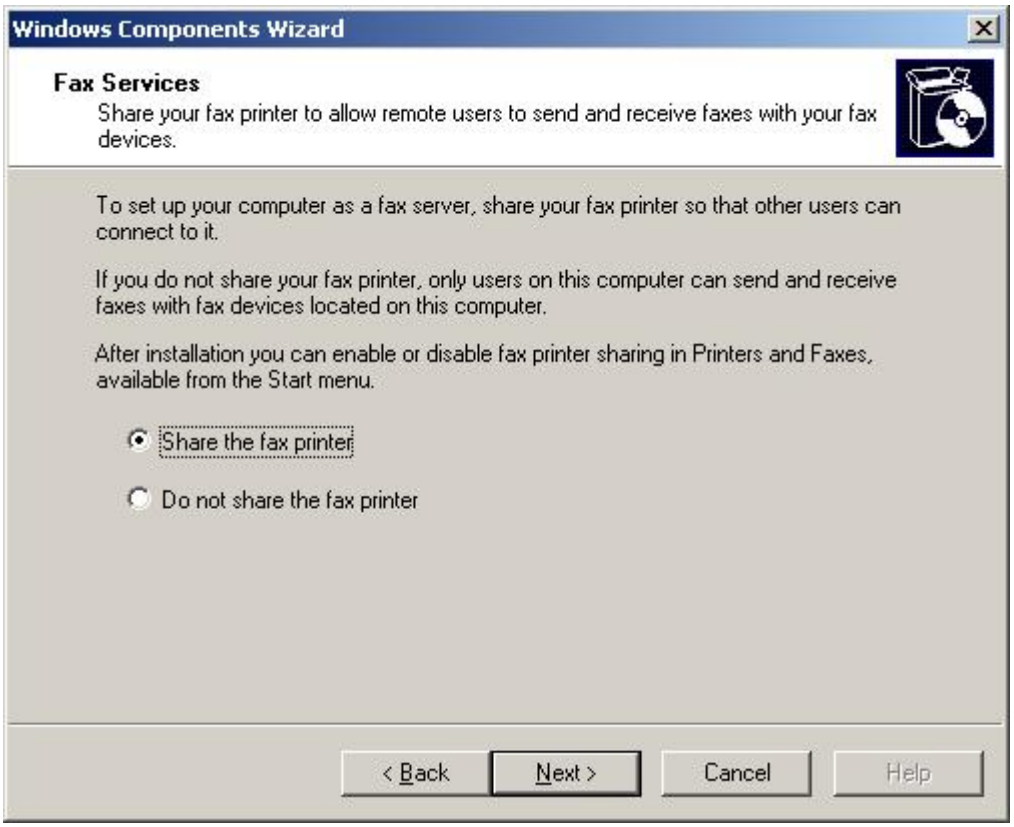


3. Select *Fax Services*, and then choose the *Next* button. The Microsoft Fax Services installation begins.

   During the installation; (for Server 2003 or the SBS operating system), in the *Windows Components Wizard*, you are asked to choose whether you want to enable sharing of the fax printer, as shown below.



4. Choose one of the following:

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- *Share the fax printer* – enables you to connect another workstation to the fax printer
- *Do not share the fax printer* – prevents the addition of another workstation to the fax printer
- Choose the *Next* button.

The installation begins.

> **Note**
>
> You may be required to insert the Microsoft Windows installation CD / DVD.

5. At the end of the installation process, choose the Finish button.

> **Note**
>
> After the installation is complete, you may be required to restart the operating system.

3.2 Configuring Microsoft Fax Services on Remote Machine (with Modem)

> **Caution**
>
> If you configure the SAP Business One attachment folder to a remote PC folder, you must configure the Mailer service with a user who has the appropriate privileges for that designated remote PC folder or faxes will not be delivered. In addition, the same user must also have the appropriate privileges for the Microsoft Fax Services on the remote machine. It is important to make sure that both the remote attachment folder and the Microsoft Fax Services server have the same user privileges.

After the installation is complete, you need to configure Microsoft Fax Services on a remote machine:

1. To open Microsoft Fax Services, choose:

   Start → *Programs* → *Accessories* → *Communications* → *Fax* → *Fax Console*

   The *Fax Configuration Wizard* opens.

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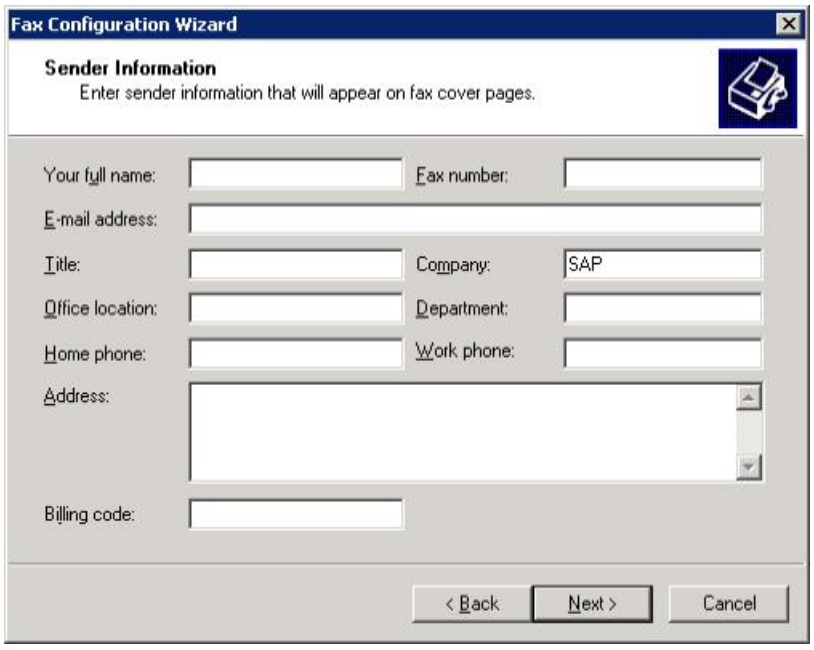
2. Choose the *Next* button.

   The *Sender Information* screen opens.



3. Enter your sender information.

   > **Note**
   >
   > This information will appear on fax cover pages.

4. Choose the *Next* button.

   The *Fax Configuration Wizard* displays the *Selecting Device for Sending or Receiving Faxes* screen.

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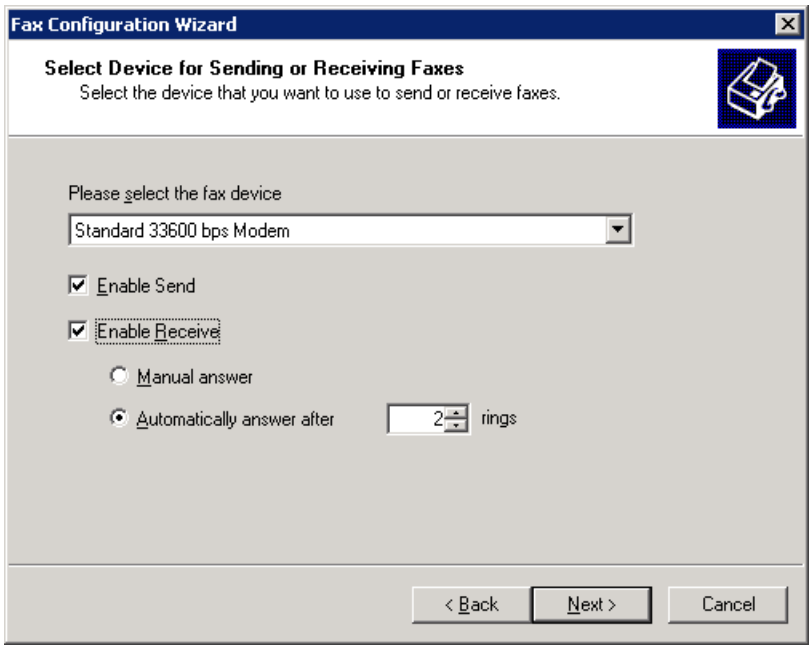

Note

If the *Fax Configuration Wizard* does not display the *Selecting Device for Sending or Receiving Faxes* screen (shown above), the modem may not have been installed properly. In this case:

1. Choose the *Cancel* button.
2. Re-install your modem according to the manufacturer's instructions.
3. Return to the beginning of this section, Configuring Microsoft Fax Services on a Local Machine.

5. From the *Please select the fax device* dropdown box, select the modem installed on your machine.
6. To enable sending faxes from the modem you selected in step 5, select the *Enable Send* checkbox.
7. To enable receiving faxes from the modem you selected in step 5, select the *Enable Receive* checkbox.

   In addition, you can select:

   - Manual Answer

     Lets you receive a fax manually; that is, only if you do not want the computer to automatically receive faxes.
   - Automatically answer

     Lets you select the number of rings before the fax is automatically received. To select the number of rings, in the spin box, scroll to the desired number.
8. Choose the *Next* button.

   The *Transmitting Subscriber Identification (TSID)* window of the *Fax Configuration Wizard* is displayed.

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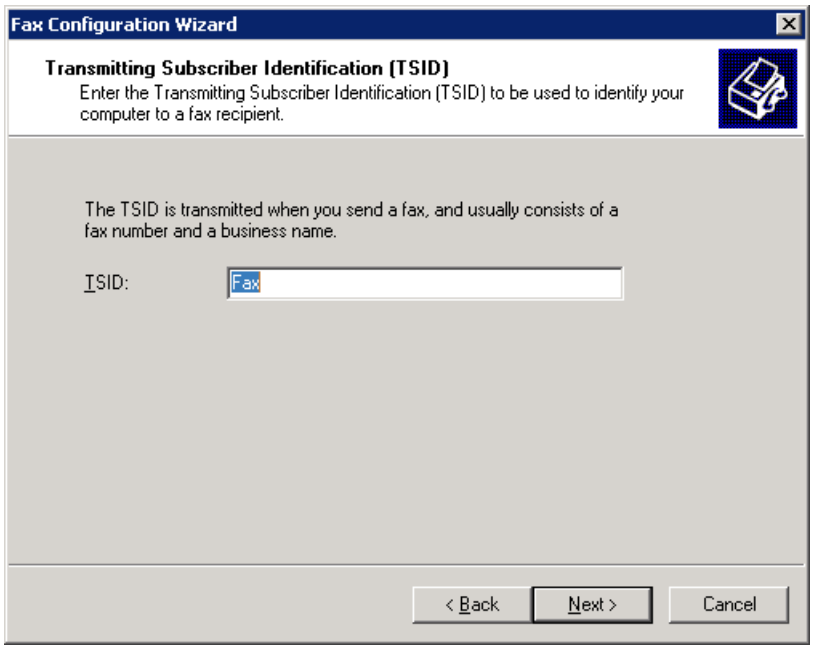
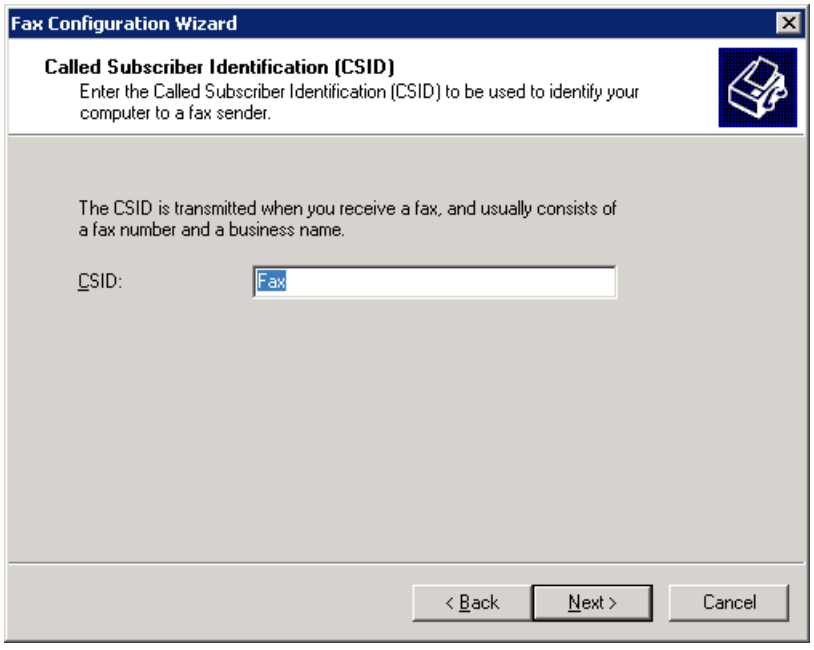


9. In the *TSID* box, type in the information you want to appear on incoming fax headers.

   > **Note**
   >
   > This feature is enabled only if the *Enable Receive* option was not selected in step 7.

10. Choose the *Next* button.

    The *Called Subscriber Identification (CSID)* screen of the *Fax Configuration Wizard* is displayed.



11. In the *CSID* box, type the information you want to appear on outgoing fax headers, so that the fax recipient can identify you.

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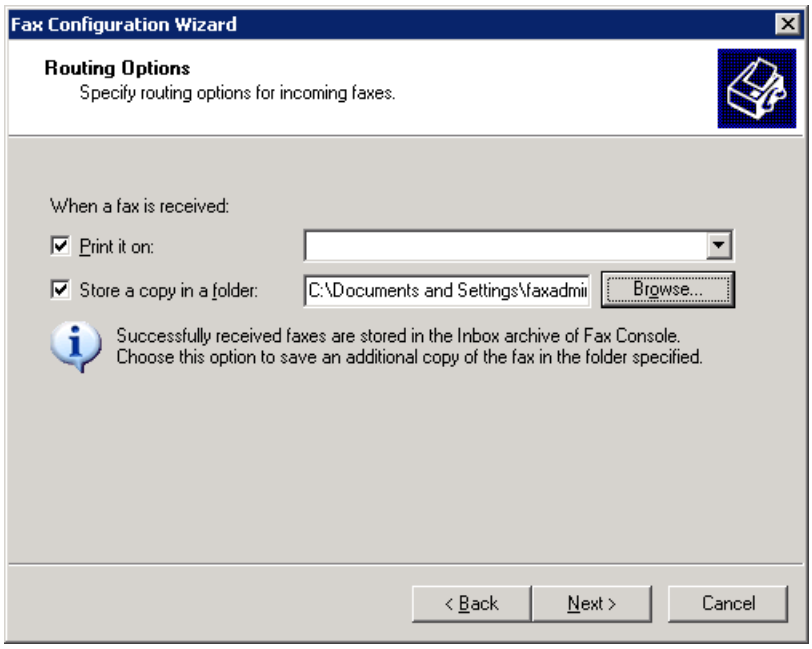
Note

This feature is enabled only if the *Enable Receive* option was selected in step 7.

12. Choose the *Next* button.

    The *Routing Options* screen of the *Fax Configuration Wizard* is displayed.



13. To print all incoming faxes, select the *Print it* on checkbox, then select a printer from the dropdown box.

Note

You must have a printer installed before you can select this option.

14. To store a copy of each fax in a folder, select the *Store a Copy in a Folder* checkbox. Choose *Browse* and navigate to the folder where you want to store faxes.
15. Choose the *Next* button, and then choose the *Finish* button.

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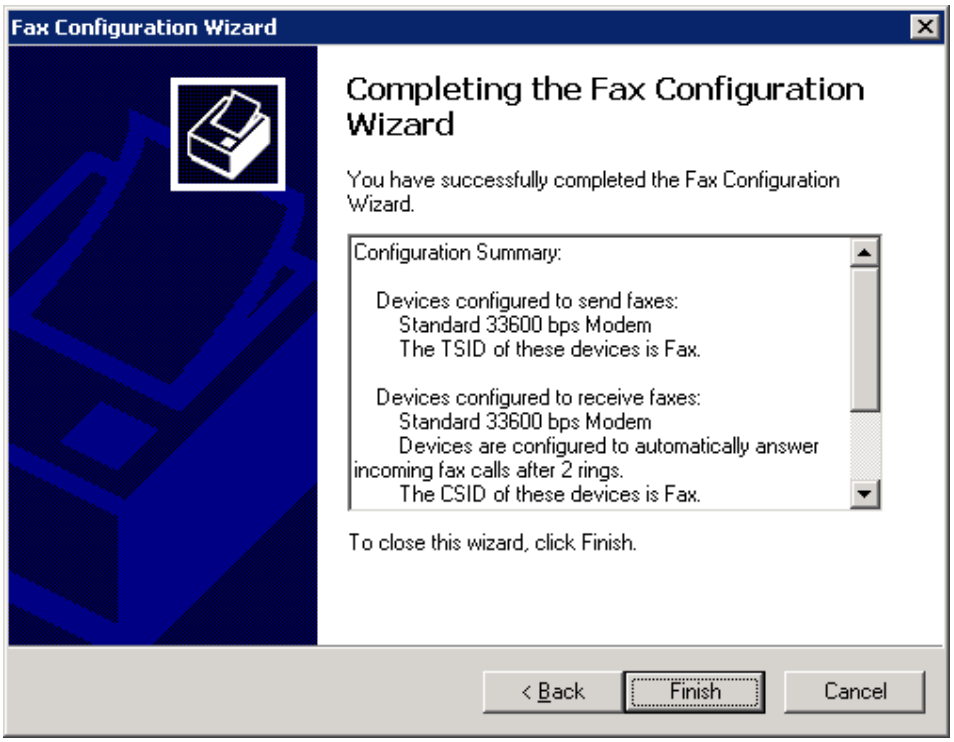

3.3 Installing Microsoft Fax Services on Local Machine (without Modem)

To install Microsoft Fax Services:

1. In the *Control Panel*, select *Add or Remove Programs*. The *Add or Remove Programs* window opens.

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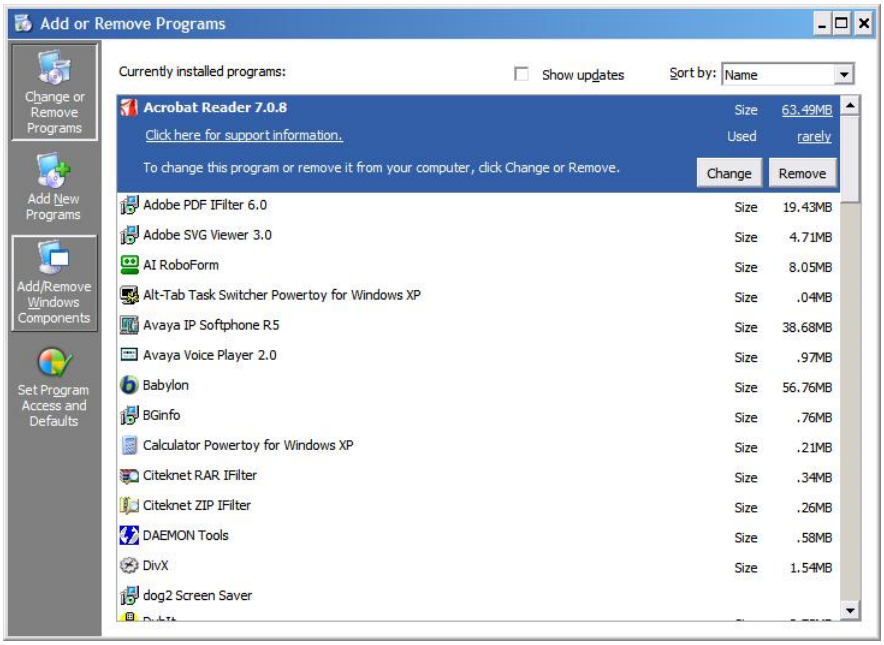
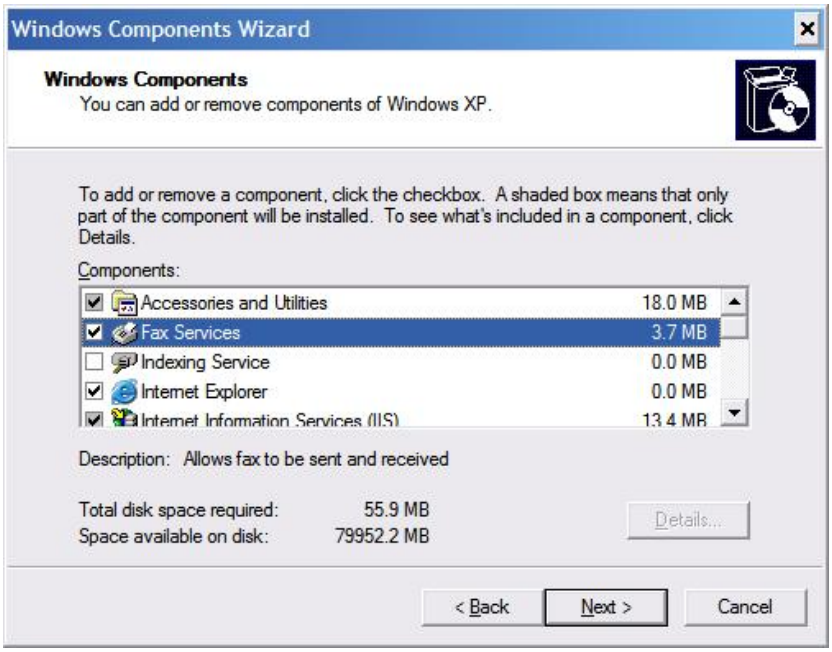


2. In the shortcut bar on the left, select *Add/Remove Windows Components*. The *Windows Components Wizard* opens.



3. Select *Fax Services*, and then choose the *Next* button. The Microsoft Fax Services installation begins.

   During the installation; (for Server 2003 or SBS OS), in the *Windows Components Wizard*, you are asked to choose whether you want to enable sharing of the fax printer, as shown below.

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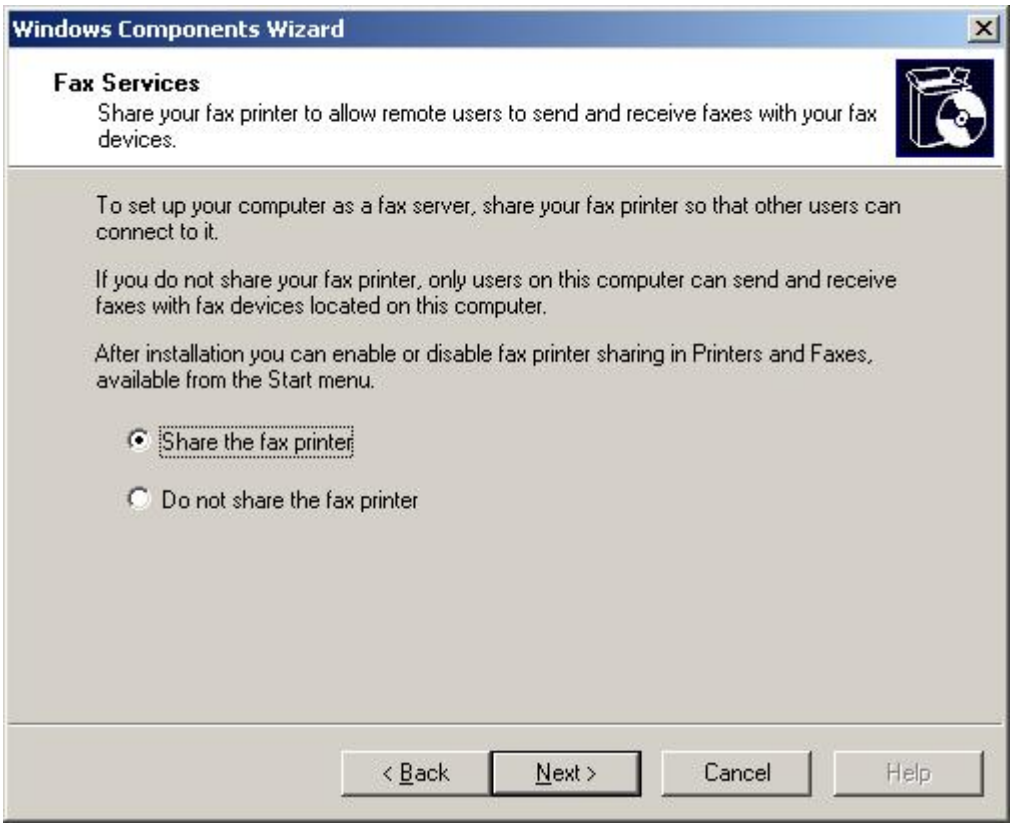

4. Choose the *Share the fax printer* option. This enables you to connect another workstation to the fax printer

   Note

   You may be required to insert the Microsoft Windows installation CD / DVD.

   Note

   After the installation is complete, you may be required to restart the operating system.

3.4 Configuring Microsoft Fax Services on Local Machine (without Modem)

To configure Microsoft Fax Services on the local machine having no modem after the installation is complete:

1. To open Microsoft Fax Services, choose:
   Start → *Programs* → *Accessories* → *Communications* → *Fax* → *Fax Console*

   Note

   If you do not have a modem installed on the local machine the following warning message appears:

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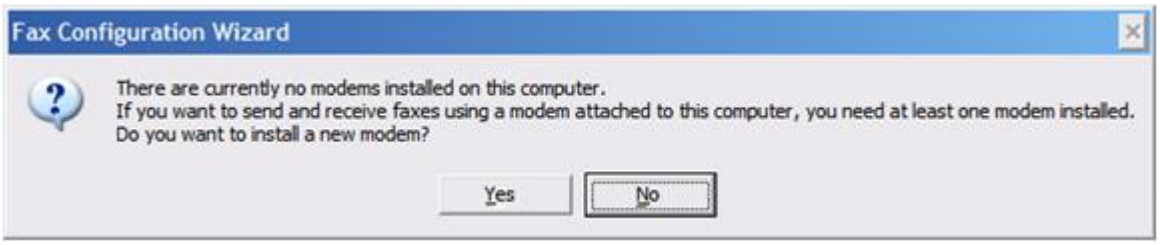

2. Choose the *No* button. The *Microsoft Fax Configuration Wizard* opens.

3. Choose the *Next* button.

   The *Sender Information* screen opens.

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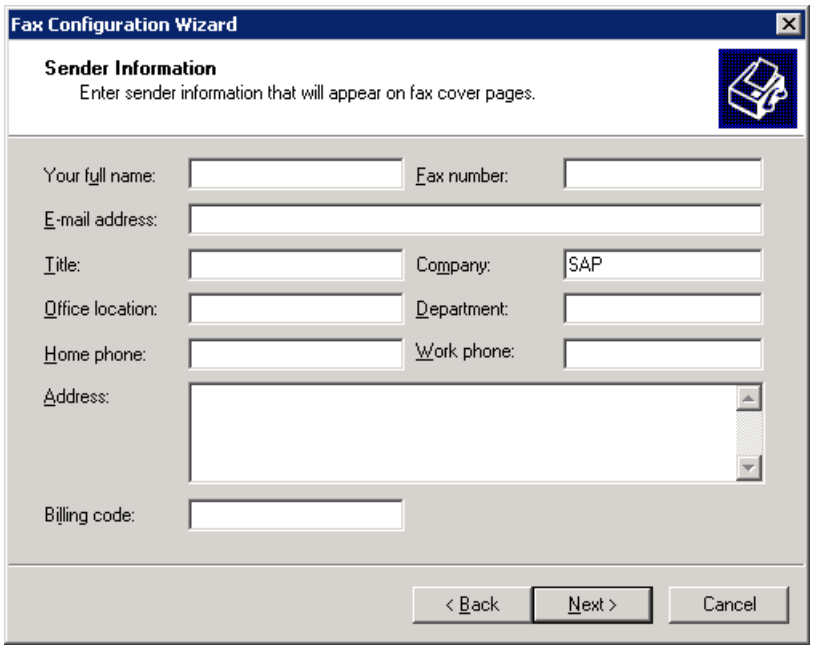

4. Enter your sender information.

   Note

   This information will appear on fax cover pages.

5. Choose the *Next* button.

   At the end of the procedure, the *Completing the Fax Configuration Wizard* screen appears.

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6. Choose the *Finish* button.

3.5 Configuring SAP Business One for Microsoft Fax Services

SAP Business One can be configured to work with Microsoft Fax Services after Microsoft Fax Services has been installed and configured.

Configuring SAP Business One for Microsoft Fax Services comprises the following procedures:

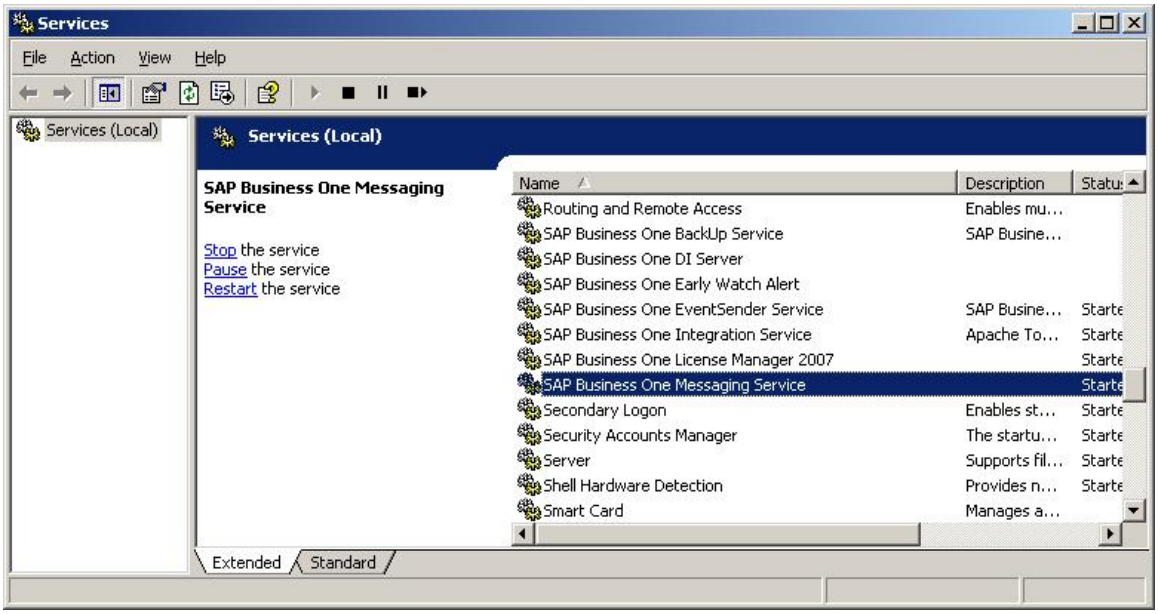
1. Configuring SAP Business One Messaging Service.
2. Configuring SAP Business One Service Manager.
3. Connecting the SBO Mailer Service.
4. Checking the Fax Printer Connection.

3.5.1 Configuring SAP Business One Messaging Service

After you have installed and configured Microsoft Fax Services, configure SAP Business One Messaging Service:

1. Navigate to SAP Business One Messaging Service as follows:

   Control Panel → *Administrative Tools* → *Services*



2. In the *Services* window, right-click *SAP Business One Messaging Service* and from the popup menu select *Properties*.

   The *SAP Business One Messaging Service Properties (Local Computer)* dialog box opens.

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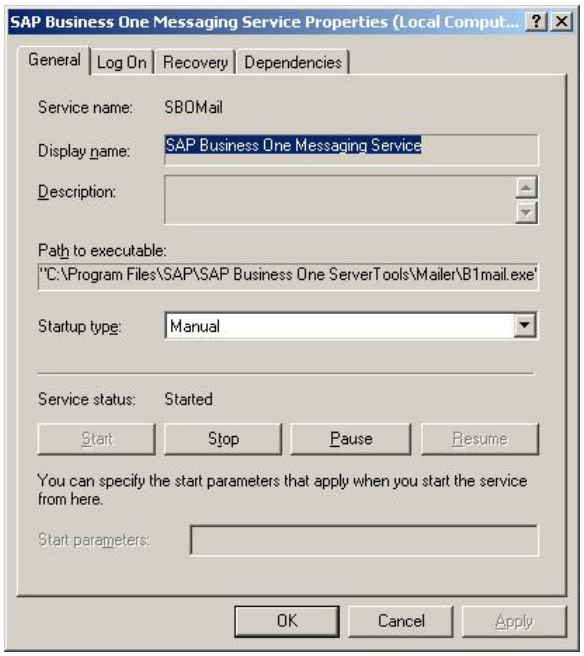
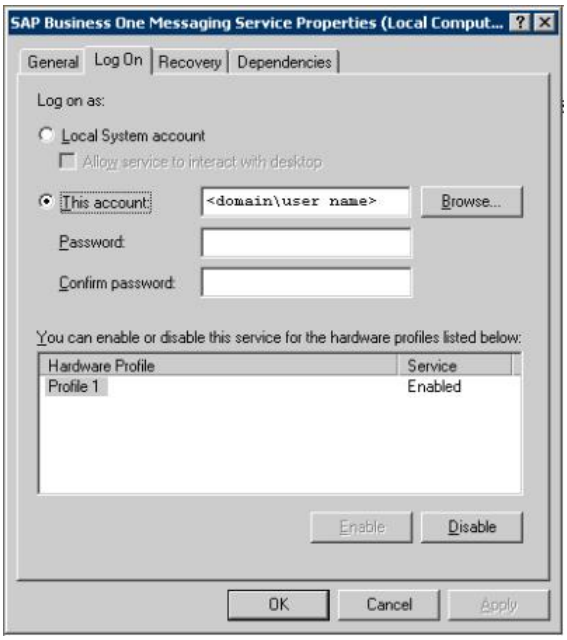


3. Select the *Log On* tab.



4. Select the *This Account* option. The user who is indicated must have the appropriate privileges in his or her related group.
5. Type in the account name or choose the *Browse* button and navigate to the account.
6. In the *Password* field, enter the password.
7. In the *Confirm Password* field, retype the password you wrote in step 6.
8. Choose the *OK* button.

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Note

When you select This Account, you can add any account that has the appropriate privileges on the server machine. If you add a user who does not have these privileges, faxes will not be sent.

Note

If you configure the Attachment folder to a remote PC folder, you must configure the Mailer service with a user who has the appropriate privileges for that folder. Faxes cannot be delivered if there is no user with the appropriate privileges specified.

3.5.2 Configuring SAP Business One Service Manager

To configure SAP Business One Service Manager:

1. Open SAP Business One Service Manager (server tool).
   Start → *Programs* → *SAP Business One* → *Server Tools* → *Service Manager*
   The *SAP Business One Service Manager* dialog box opens.
2. In the *Service* dropdown box, select *SBO Mailer*.

3. Choose the *Settings* button. The *General Settings* dialog box opens.

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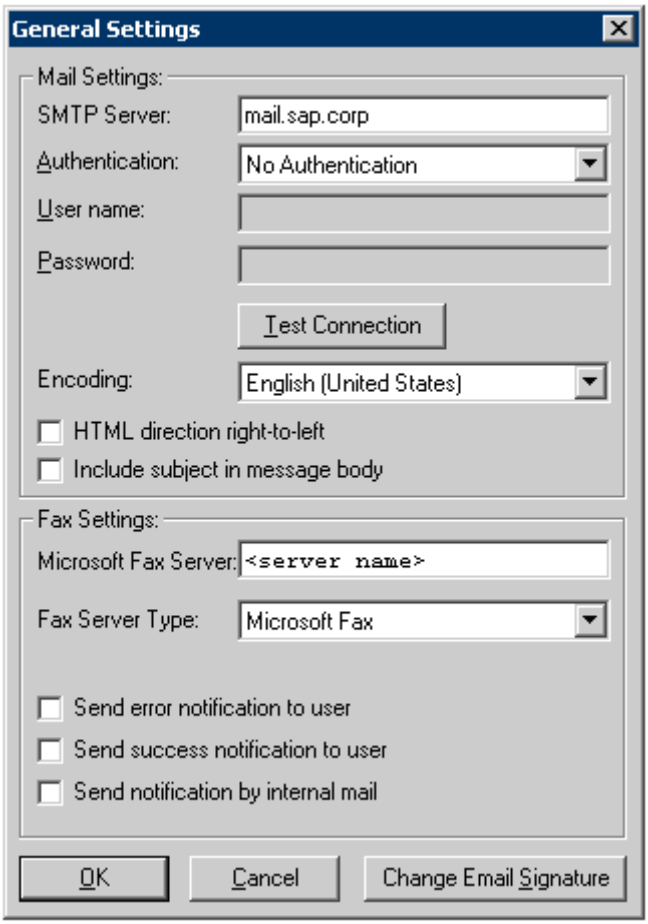

4. In the *Fax Settings* area, in the *Microsoft Fax Server* field, write either the fax IP address or computer name of the shared fax printer. For instructions on locating the IP address or computer name, see Viewing Computer System Information.
5. In the *Fax Server Type* dropdown box, select *Microsoft Fax*.
6. Choose the *OK* button.

3.5.3 Connecting the SBO Mailer Service

The mailer service must be connected so that faxes can be delivered to the fax recipient. To connect the mailer service:

> **Note**
>
> You must configure the SBO Mailer Service before you can operate it. For full instructions, refer to the 8.8 Administrator's Guide in the documentation area of SAP Business One Customer Portal at http://service.sap.com/smb/sbocustomer/documentation.

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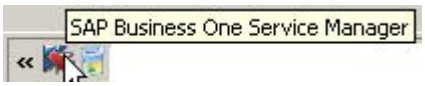
> **Note**
>
> If SBO Mailer is installed on Windows Server 2008 or Windows Vista and the installed PDF reader does not reliably support a non-interactive mode, SBO Mailer may fail to send faxes with PDF attachment in SAP Business One.
>
> To avoid this issue, we recommend one of the following:
>
> - Change the SBO Mailer Service User.
> - Install a PDF reader that supports the non-interactive mode.
> - Install SBO Mailer on Windows Server 2003 or Windows XP.
>
> For more information, see SAP Note 1415860.

1. In the system tray, double-click the *SAP Business One Service Manager* icon.



The *SAP Business One Service Manager* dialog box opens.

In the *Service* dropdown box, select *SBO Mailer*.

2. Click the *Play* button.

> **Note**
>
> When the *Play* button is inactive, the mailer service is connected.

3.5.4 Checking the Fax Printer Connection

To make sure the fax printer is connected:

1. Open the Fax Console, located in:

   Start → *Programs* → *Accessories* → *Communications* → *Fax* → *Fax Console*

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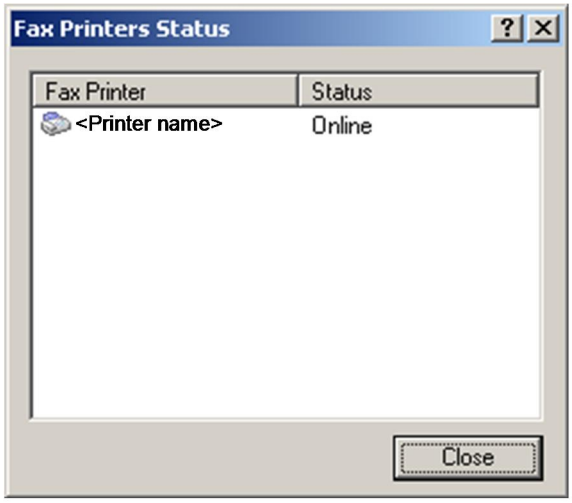
2. In the *Fax Console* window, choose:

   Tools → *Fax Printer Status*

   The *Fax Printers Status* dialog box opens.



   The online or offline status is shown.

   Note

   For more information about the Attachment folder, see the SAP Business One Online Help.

3.5.5 Viewing Computer System Information

Locate and view computer name or IP address, which may be required for configuring SAP Business One to work with Microsoft Fax Services.

3.5.5.1 Viewing Computer Name

To view your computer's name:

1. On your computer Desktop, right-click the *My Computer* icon.
2. From the popup menu, choose *Properties*.

   The *System Properties* window opens.
3. Select the *Computer Name* tab.

   The computer name appears next to *Full Computer Name*.

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3.5.5.2 Viewing Computer IP Address

To find the IP Address of your computer:

1. Choose the *Start* menu.
2. Choose *Run*.
3. In the *Run* dialog box, in the *Enter* box, write **`cmd`** and choose the *OK* button.
   The *Command Line Console* box opens.
4. At the prompt, type **`ipconfig`** and press **`Enter`**.
   Your computer's IP address appears in the list of information.

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4 Installing Local SAP Business One Server with Remote Applications

Use this scenario when you want to install:

- SAP Business One on the local machine
- SAP Business One Service Manager on a remote machine
- Microsoft Fax Services on a second remote machine that has a modem

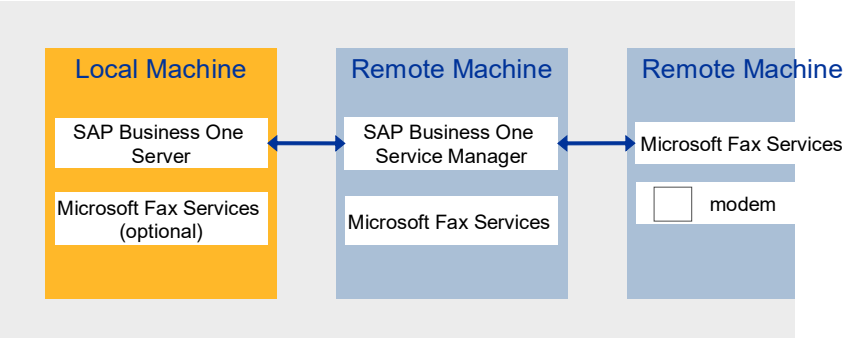

Figure 3: Local SAP Business One Server with Remote Applications Scenario

Prerequisites

SAP Business One must be installed either before or after installing Microsoft Fax Services.

The local machine must have SAP Business One Server installed without SAP Business One Service Manager.

There must be a modem installed on the remote machine where you want to install Microsoft Fax Services.

Caution

If you configure the SAP Business One attachment folder to a remote PC folder, you must configure the Mailer service with a user who has the appropriate privileges for that designated remote PC folder or faxes will not be delivered. It is also important to make sure that the remote attachment folder has user privileges.

Procedures

In this scenario, you must perform the following procedures:

1. Install Microsoft Fax Services on the remote machine with modem
2. Configure Microsoft Fax Services on the remote machine with modem
3. Install Microsoft Fax Services on the local machine without a modem
4. Configure Microsoft Fax Services on the local machine without a modem
5. Install Microsoft Fax Services on the remote server where SAP Business One Service Manager is installed.

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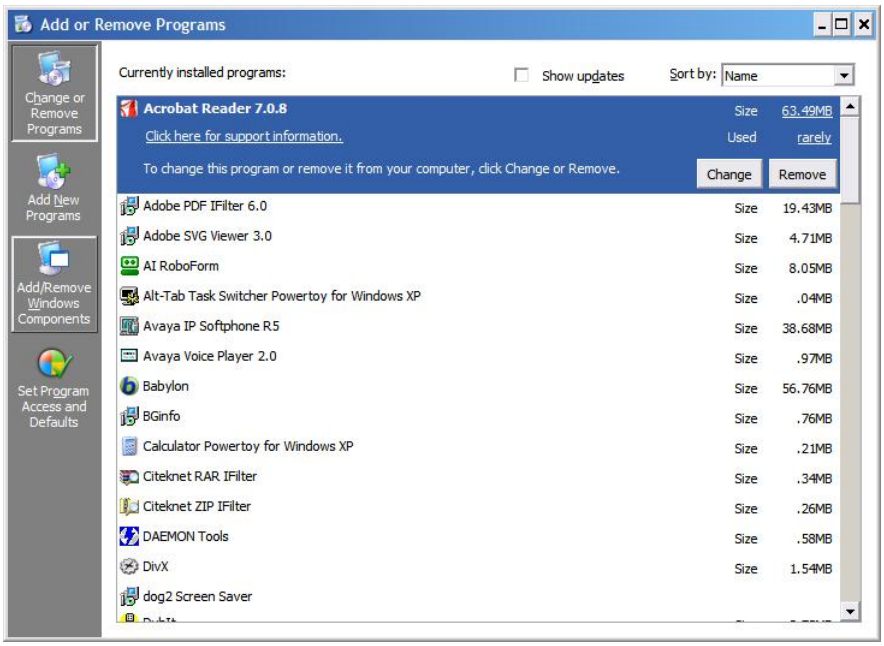
6. Configure Microsoft Fax Services on the remote server where SAP Business One Service Manager is installed.
7. Configure SAP Business One for Microsoft Fax Services:
    1. Configure SAP Business One Messaging Service
    2. Configure SAP Business One Service Manager
    3. Connect the SBO Mailer service
    4. Check the fax printer connection

4.1 Installing Microsoft Fax Services on Remote Machine (with Modem)

To install Microsoft Fax Services on a remote machine that has a modem:

1. In the Control Panel, select *Add or Remove Programs*. The *Add or Remove Programs* window opens.



2. In the shortcut bar on the left, select *Add/Remove Windows Components*.
   The *Windows Components Wizard* window opens.

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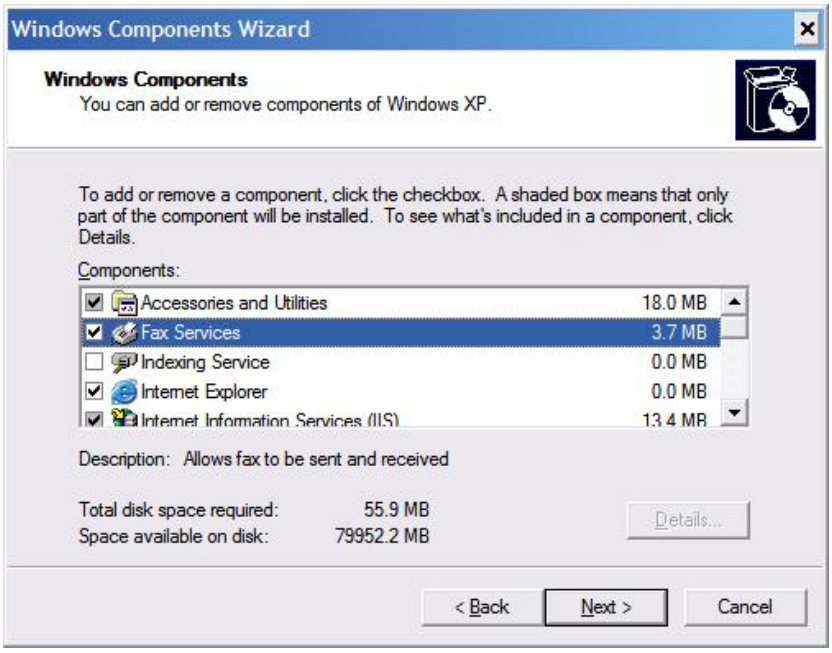
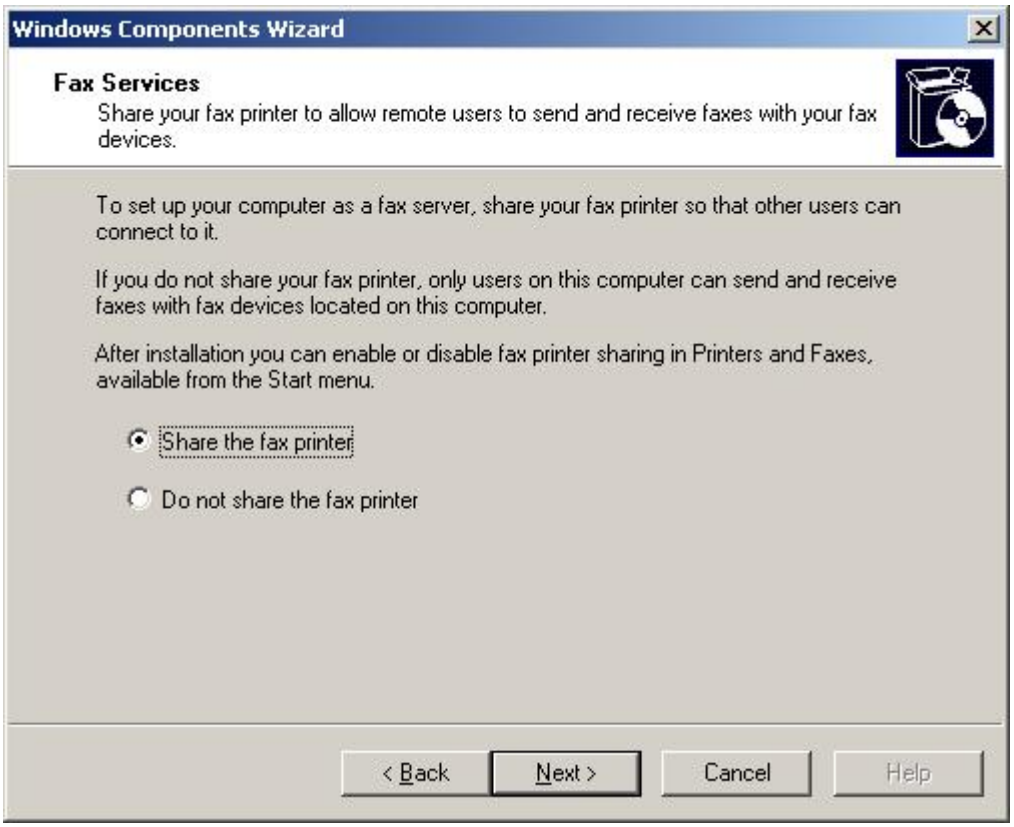


3. Select *Fax Services*, and then choose the *Next* button. The Microsoft Fax Services installation begins.

   During the installation; (for Server 2003 or the SBS operating system), in the *Windows Components Wizard*, you are asked to choose whether you want to enable sharing of the fax printer, as shown below.



4. Choose one of the following:

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- *Share the fax printer* – enables you to connect another workstation to the fax printer
- *Do not share the fax printer* – prevents the addition of another workstation to the fax printer
- Choose the *Next* button.

The installation begins.

> **Note**
>
> You may be required to insert the Microsoft Windows installation CD / DVD.

5. At the end of the installation process, choose the *Finish* button.

> **Note**
>
> After the installation is complete, you may be required to restart the operating system.

4.2 Configuring Microsoft Fax Services on Remote Machine (with Modem)

> **Caution**
>
> If you configure the SAP Business One attachment folder to a remote PC folder, you must configure the Mailer service with a user who has the appropriate privileges for that designated remote PC folder or faxes will not be delivered. In addition, the same user must also have the appropriate privileges for the Microsoft Fax Services on the remote machine. It is important to make sure that both the remote attachment folder and the Microsoft Fax Services server have the same user privileges.

After the installation is complete, you need to configure Microsoft Fax Services on a remote machine:

1. To open Microsoft Fax Services, choose:

   Start → *Programs* → *Accessories* → *Communications* → *Fax* → *Fax Console*

   The *Fax Configuration Wizard* opens.

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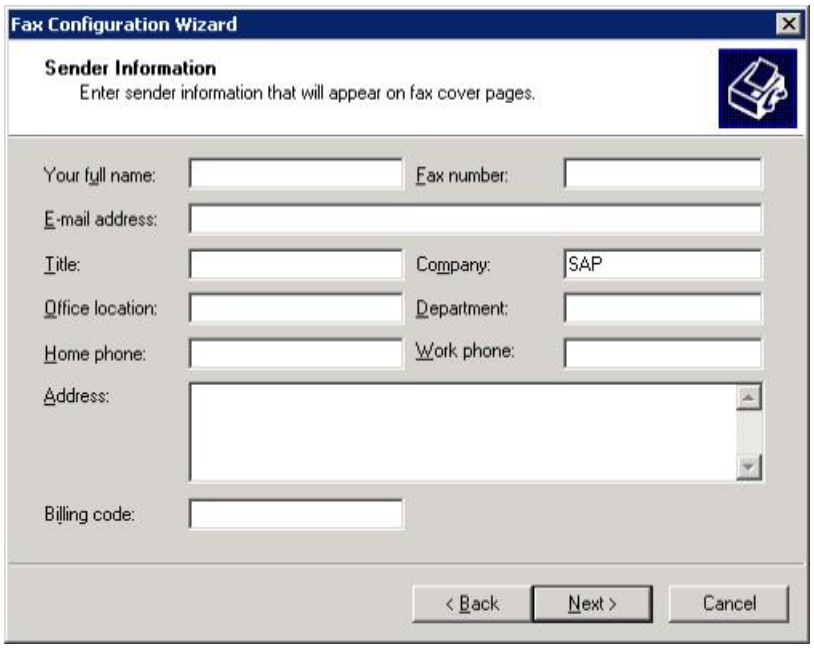
2. Choose the *Next* button.

   The *Sender Information* screen opens.



3. Enter your sender information.

   Note

   This information will appear on fax cover pages.

4. Choose the *Next* button.

   The *Fax Configuration Wizard* displays *Select Device for Sending or Receiving Faxes* screen.

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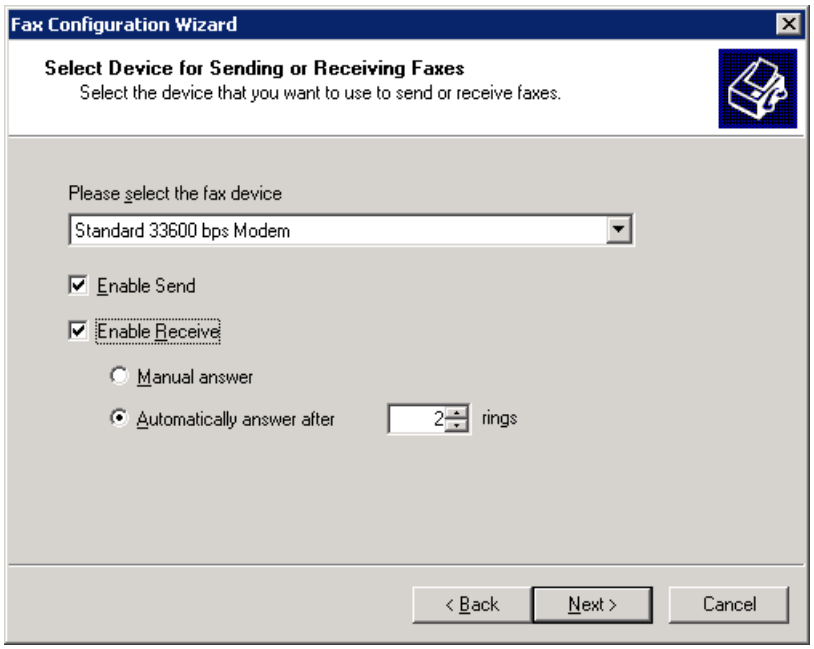

> **Note**
>
> If the *Fax Configuration Wizard* does not display the screen for selecting a device for sending or receiving faxes (shown above), the modem may not have been installed properly. In this case:
>
> 1. Choose the *Cancel* button.
> 2. Re-install your modem according to the manufacturer's instructions.
> 3. Return to the beginning of this section, Configuring Microsoft Fax Services on a Local Machine.

5. From the *Please select the fax device* dropdown box, select the modem installed on your machine.
6. To enable sending faxes from the modem you selected in step 5, select the *Enable Send* checkbox.
7. To enable receiving faxes from the modem you selected in step 5, select the *Enable Receive* checkbox.

   In addition, you can select:

   - *Manual Answer*

     Lets you receive a fax manually; that is, only if you do not want the computer to automatically receive faxes.
   - *Automatically answer*

     Lets you select the number of rings before the fax is automatically received. To select the number of rings, in the spin box, scroll to the desired number.
8. Choose the *Next* button.

   The *Transmitting Subscriber Identification (TSID)* dialog box is displayed.

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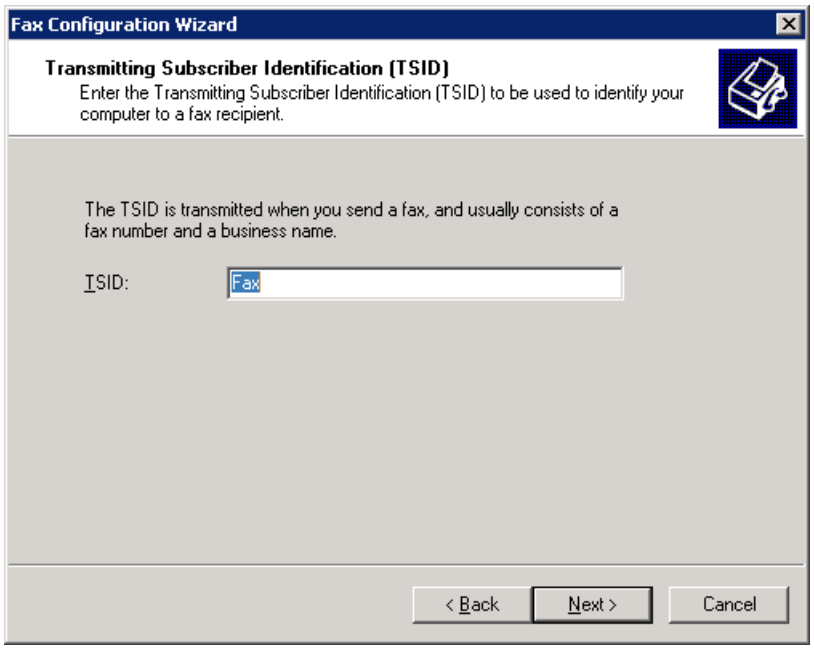


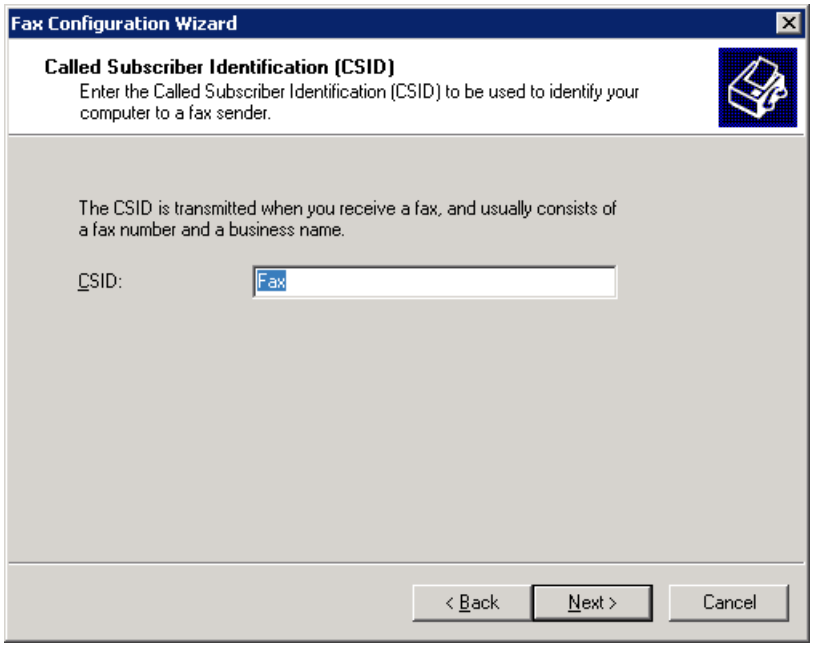
9. In the *TSID* box, type in the information you want to appear on incoming fax headers.

   Note

   This feature is enabled only if the *Enable Receive* option was not selected in step 7.

10. Choose the *Next* button.

    The *Called Subscriber Identification (CSID)* dialog box is displayed.



11. In the *CSID* box, type the information you want to appear on outgoing fax headers, so that the fax recipient can identify you.

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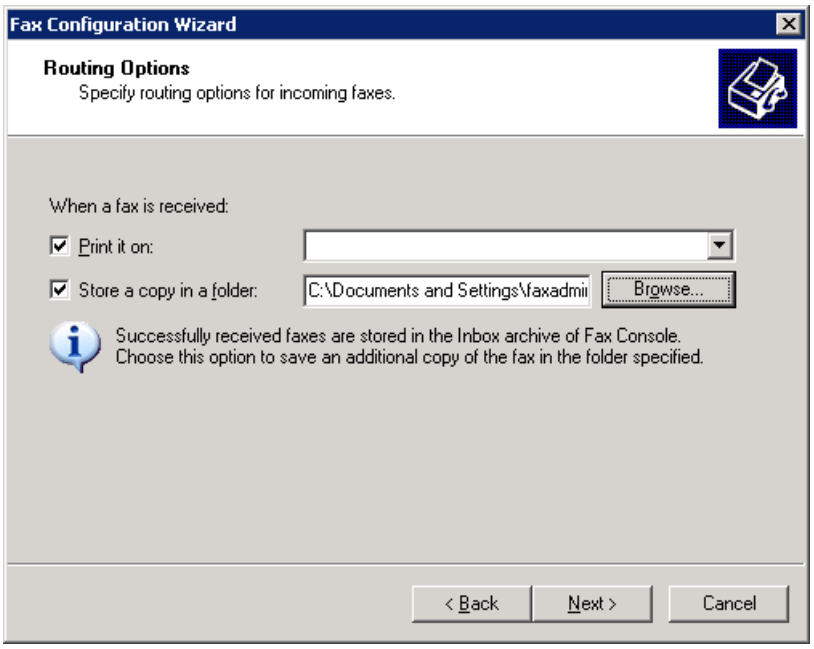
Note

This feature is enabled only if the *Enable Receive* option was selected in step 7.

12. Choose the *Next* button.

    The *Routing Options* dialog box is displayed.



13. To print all incoming faxes, select the *Print it* on checkbox, then select a printer from the dropdown box.

Note

You must have a printer installed before you can select this option.

14. To store a copy of each fax in a folder, select the *Store a Copy in a Folder* checkbox. Choose *Browse* and navigate to the folder where you want to store faxes.
15. Choose the *Next* button, then choose the *Finish* button.

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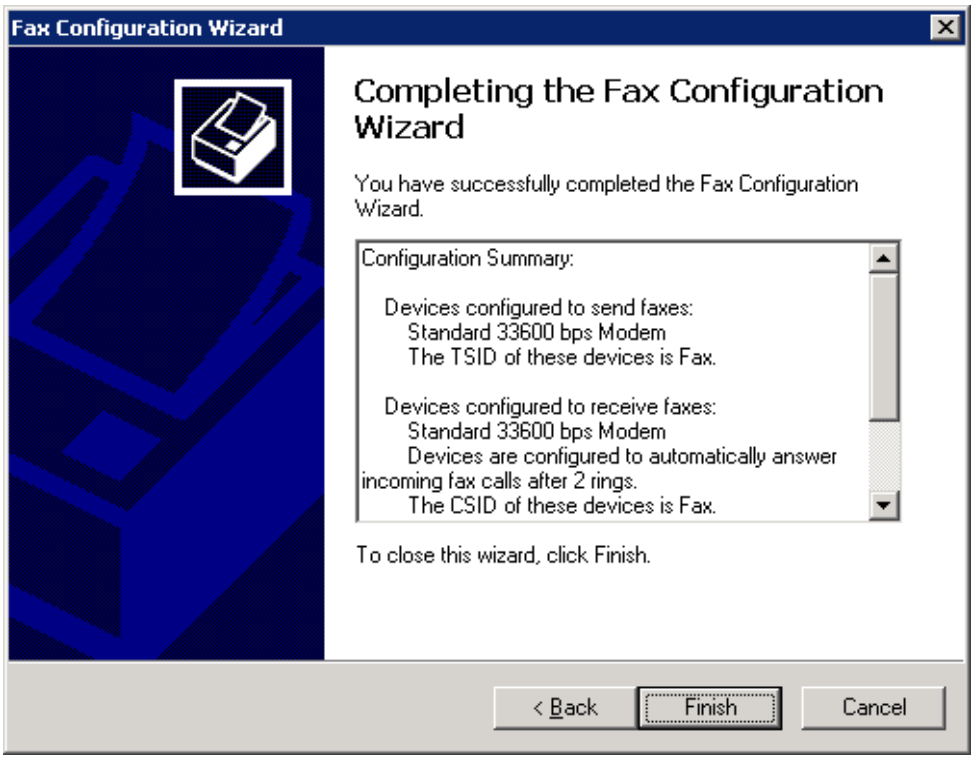

16. After installing and configuring Microsoft Fax Services, you must configure SAP Business One Mailer, as described in the next section.

4.3 Installing Microsoft Fax Services on Local Machine (without Modem)

> **Note**
>
> If you want to be able to see the sent faxes from SAP Business One, you need to install Microsoft Fax Services on the local machine where the Business One Server is installed.

To install Microsoft Fax Services on a local machine without a modem:

1. In the *Control Panel*, select *Add or Remove Programs*. The *Add or Remove Programs* window opens.

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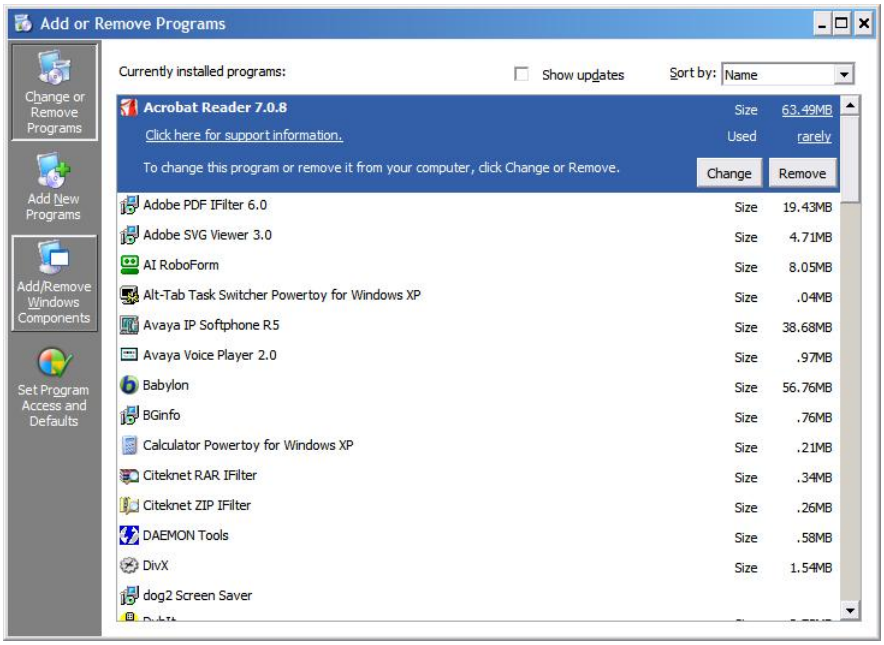
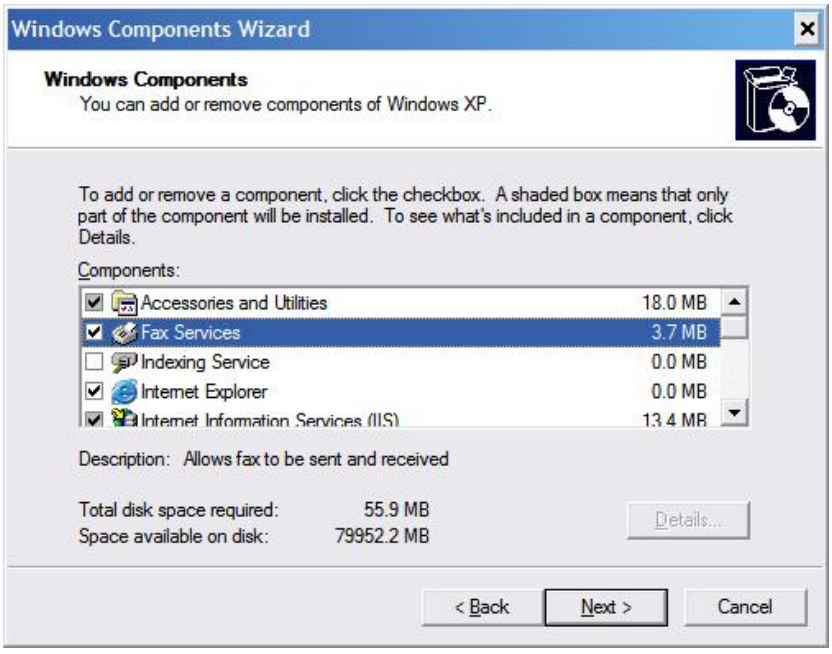


2. In the shortcut bar on the left, select *Add/Remove Windows Components*. The *Windows Components Wizard* opens.



3. Select *Fax Services*, and then choose the *Next* button. The Microsoft Fax Services installation begins.

   During the installation; (for Server 2003 or SBS OS), in the *Windows Components Wizard*, you are asked to choose whether you want to enable sharing of the fax printer, as shown below.

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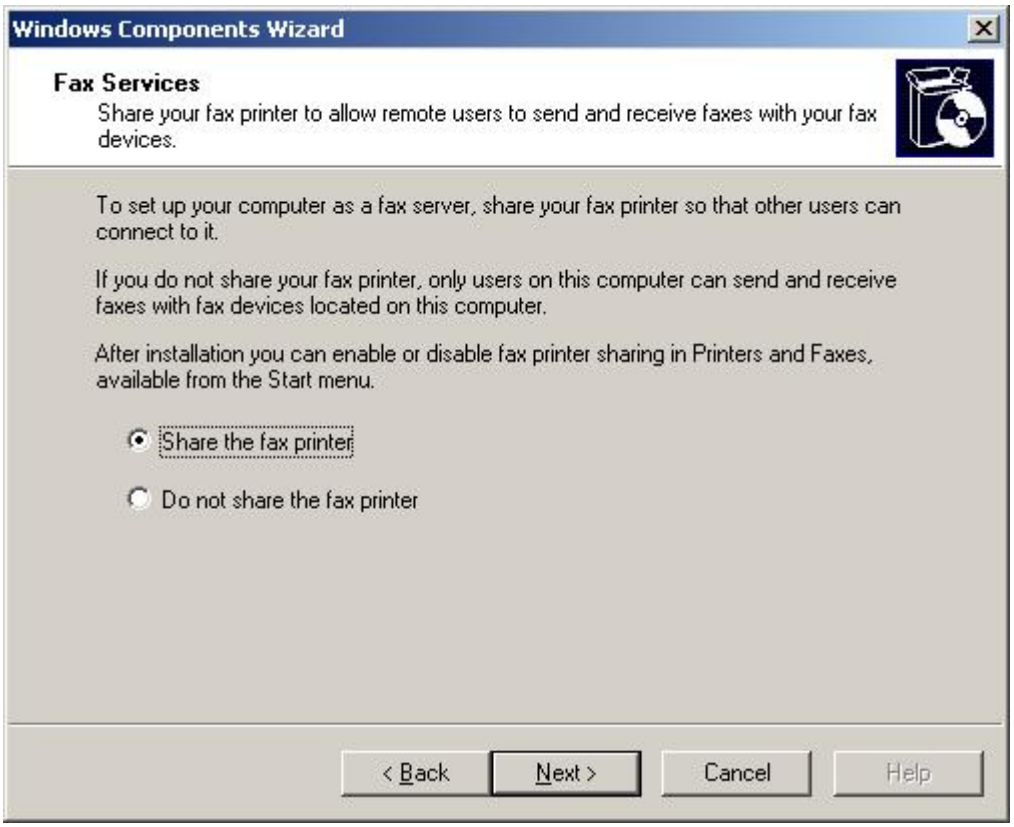

4. Choose the *Share the fax printer* option. This enables you to connect another workstation to the fax printer.

   Note

   You may be required to insert the Microsoft Windows installation CD / DVD.

   Note

   After the installation is complete, you may be required to restart the operating system.

4.4 Configuring Microsoft Fax Services on Local Machine (without Modem)

After the installation of Microsoft Fax Services is complete, configure Microsoft Fax Services on the local machine having no modem:

1. Open Microsoft Fax Services:

   Start → *Programs* → *Accessories* → *Communications* → *Fax* → *Fax Console*

   Note

   If you do not have a modem installed on the local machine the following warning message appears:

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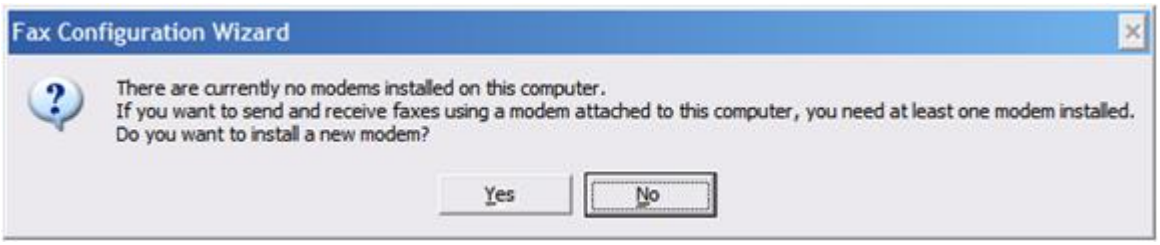

2. Choose the *No* button. The *Microsoft Fax Configuration Wizard* opens.

3. Choose the *Next* button.

   The *Sender Information* screen opens.

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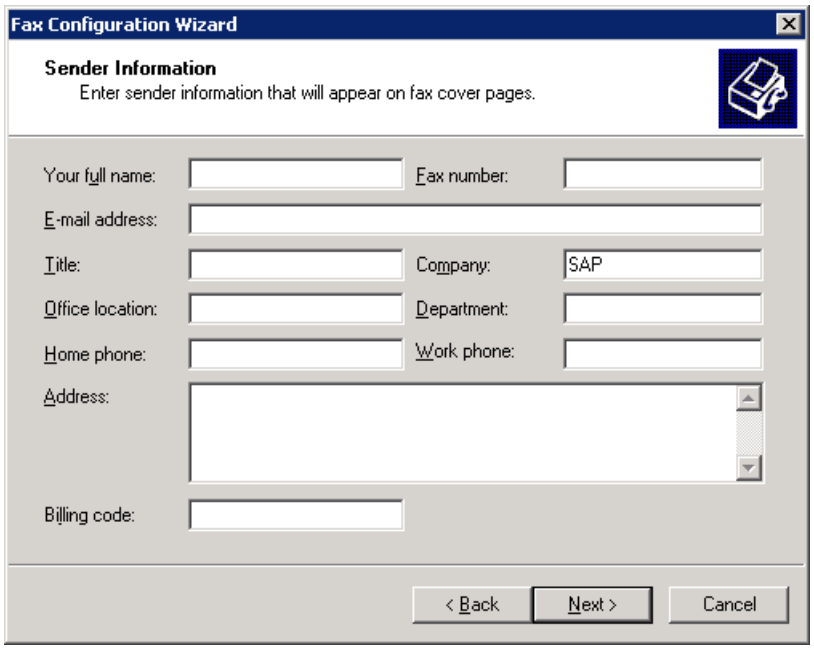

4. Enter your sender information.

   > **Note**
   >
   > This information will appear on fax cover pages.

5. Choose the *Next* button.

   At the end of the procedure, the *Completing the Fax Configuration Wizard* screen appears.

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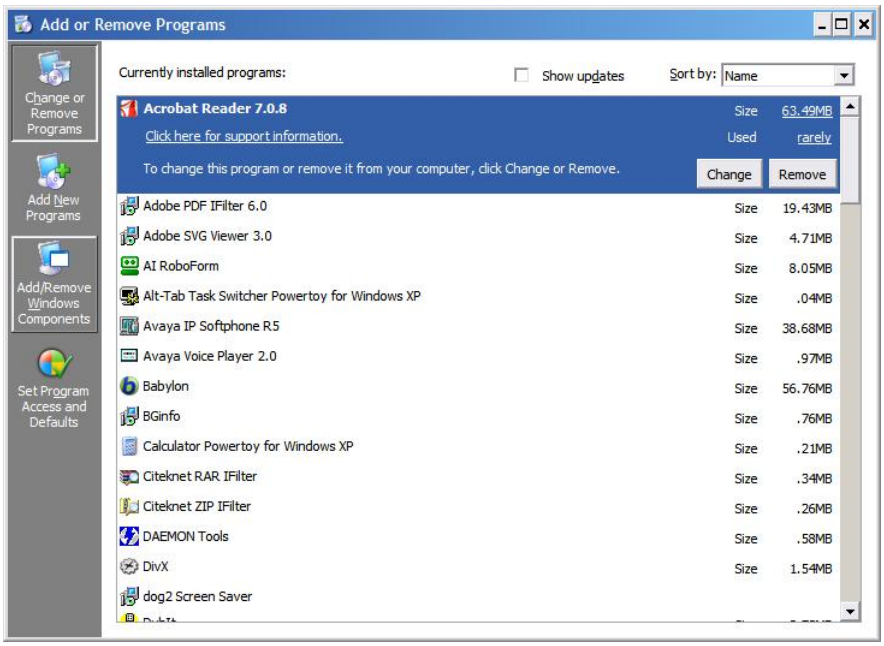
6. Choose the *Finish* button.

4.5 Installing Microsoft Fax Services on Remote Machine with SAP Business One Service Manager

On the remote machine without a modem where SAP Business One Service Manager is installed, you need to install Microsoft Fax Services.

To install Microsoft Fax Services:

1. In the Control Panel, select *Add or Remove Programs*. The *Add or Remove Programs* window opens.



2. In the shortcut bar on the left, select *Add/Remove Windows Components*.

   The *Windows Components Wizard* window opens.

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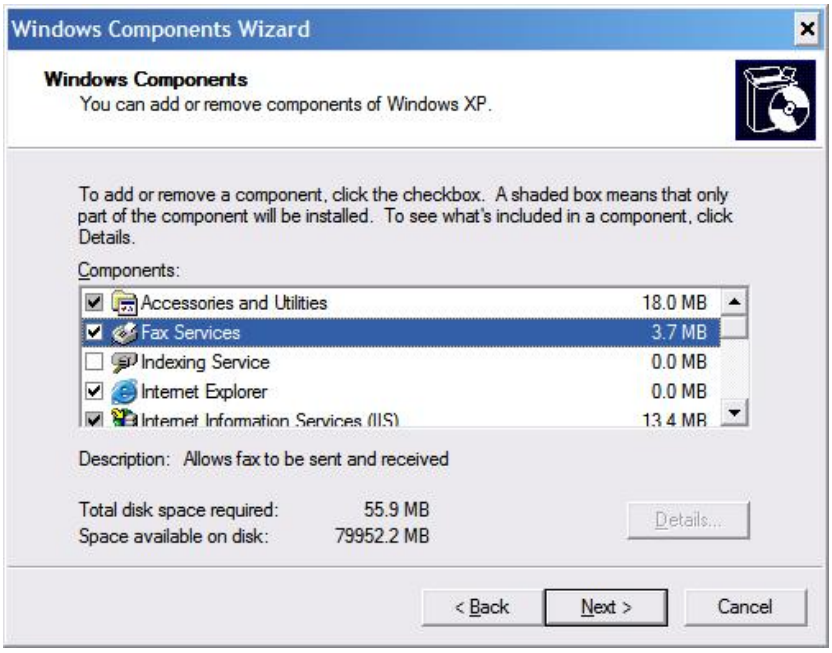
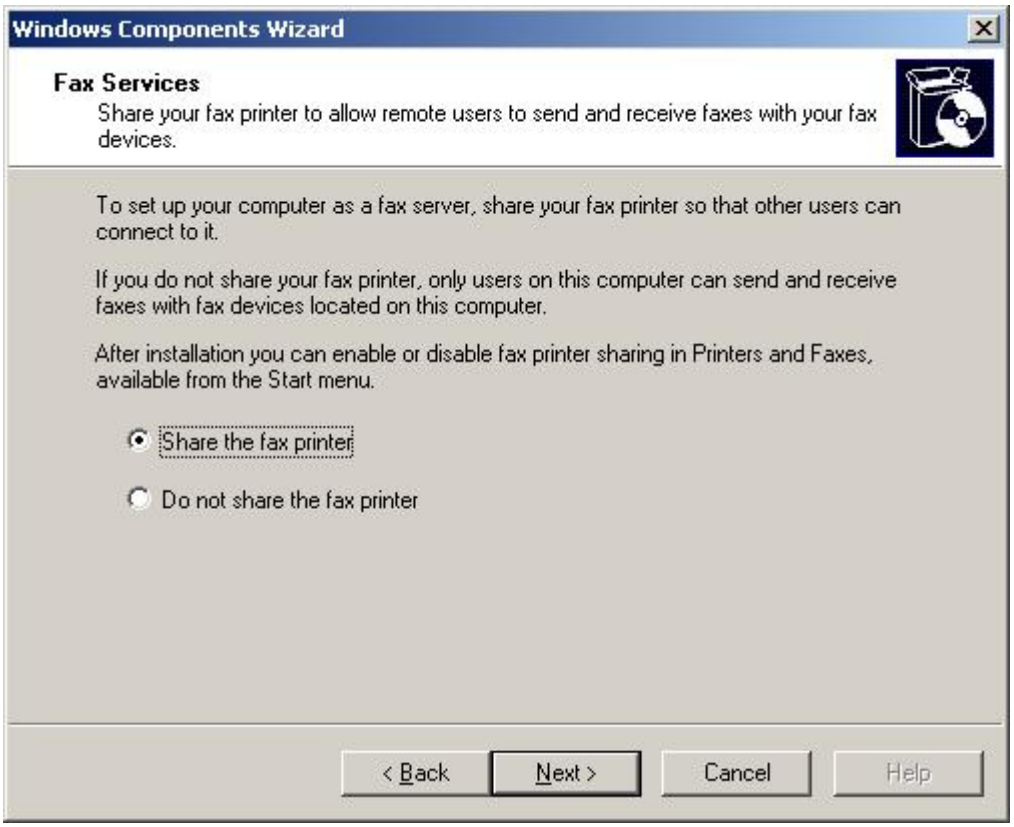


3. Select *Fax Services*, and then choose the *Next* button. The Microsoft Fax Services installation begins.

   During the installation; (for Server 2003 or the SBS operating system), in the *Windows Components Wizard*, you are asked to choose whether you want to enable sharing of the fax printer, as shown below.



4. Choose one of the following:

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- *Share the fax printer* – enables you to connect another workstation to the fax printer
- *Do not share the fax printer* – prevents the addition of another workstation to the fax printer
- Choose the *Next* button.

The installation begins.

> **Note**
>
> You may be required to insert the Microsoft Windows installation CD / DVD.

5. At the end of the installation process, choose the *Finish* button.

> **Note**
>
> After the installation is complete, you may be required to restart the operating system.

4.6 Configuring Microsoft Fax Services on Remote Machine with SAP Business One Service Manager (without Modem)

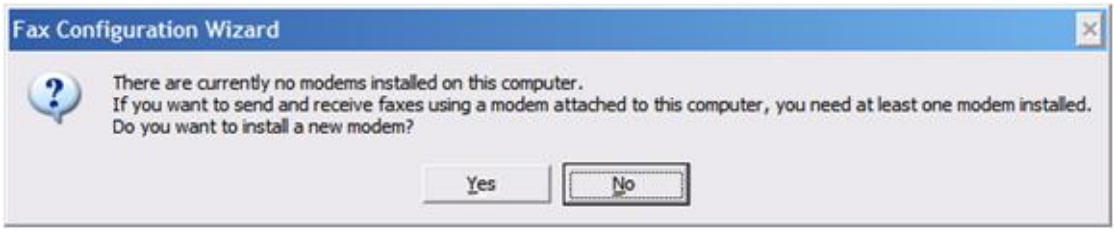
On the remote machine where SAP Business One Service Manager is installed with no modem, after you have installed Microsoft Fax Services, follow the configuration procedure below.

To configure Microsoft Fax Services on the local machine having no modem after the installation is complete:

1. Open Microsoft Fax Services:

   Start → *Programs* → *Accessories* → *Communications* → *Fax* → *Fax Console*

   > **Note**
   >
   > If you do not have a modem installed on the local machine the following warning message appears:



2. Choose the *No* button. The *Microsoft Fax Configuration Wizard* opens.

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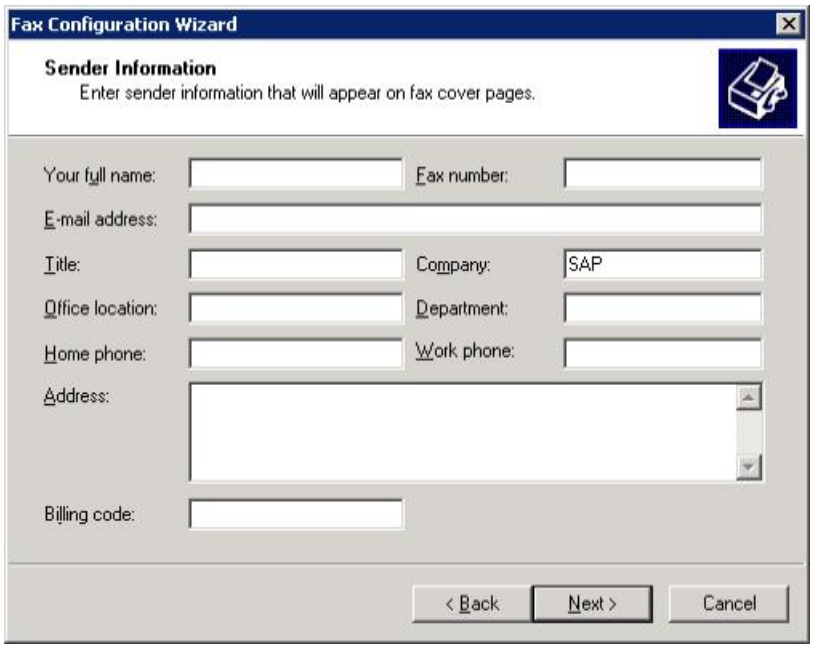
3. Choose the *Next* button.

   The *Sender Information* screen opens.



4. Enter your sender information.

   Note

   This information will appear on fax cover pages.

5. Choose the *Next* button.

   At the end of the procedure, the *Completing the Fax Configuration Wizard* screen appears.

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6. Choose the *Finish* button.

4.7 Configuring SAP Business One for Microsoft Fax Services

To configure SAP Business One for Microsoft Fax Services, follow the procedures listed below, which are described in the following sections:

1. Configuring SAP Business One Messaging Service.
2. Configuring SAP Business One Service Manager.
3. Connecting the SBO Mailer Service.
4. Checking the Fax Printer Connection.

4.7.1 Configuring SAP Business One Messaging Service

To configure SAP Business One Messaging Service:

1. Navigate to *SAP Business One Messaging Service* as follows:
   Control Panel → *Administrative Tools* → *Services*

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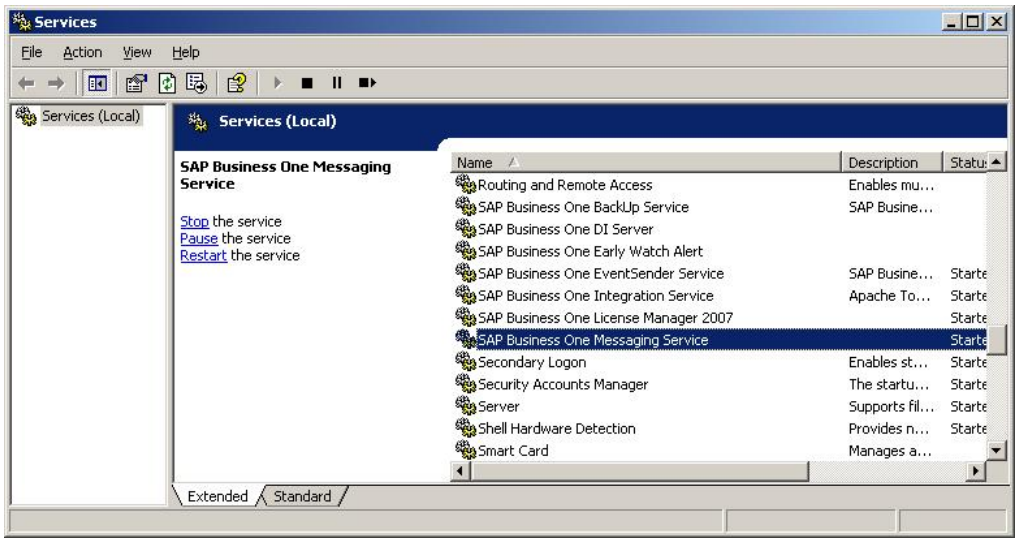
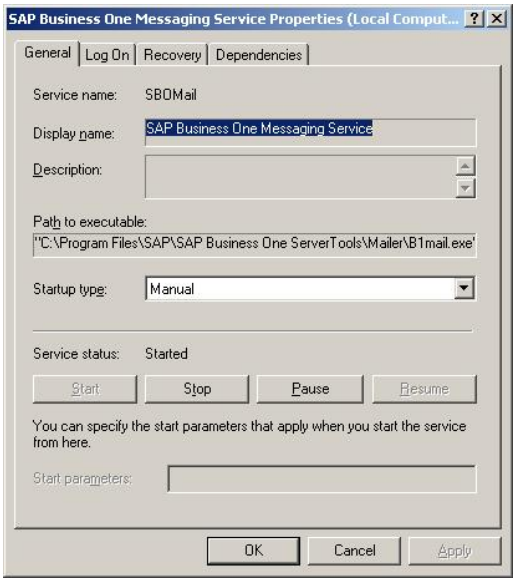


2. In the Services window, right-click *SAP Business One Messaging Service* and from the popup menu select *Properties*.

   The *SAP Business One Messaging Service Properties (Local Computer)* dialog box opens.



3. Select the *Log On* tab.

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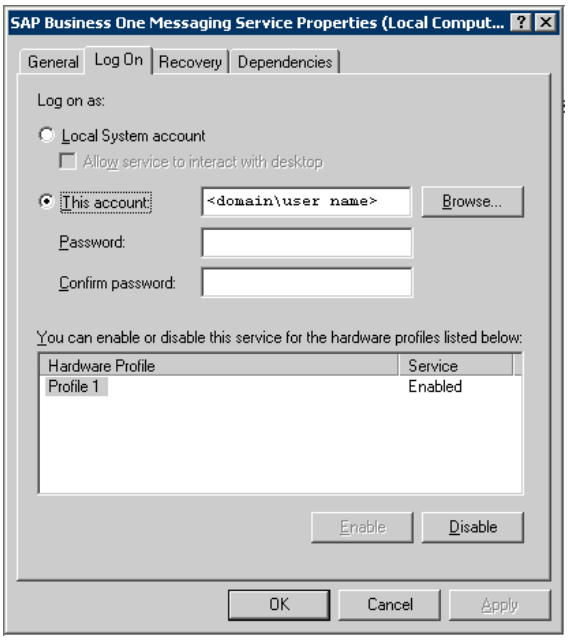


4. Select the *This Account* option. The user who is indicated must have the appropriate privileges in his or her related group.
5. Type in the account name or choose the *Browse* button and navigate to the account.
6. In the *Password* field, enter the password.
7. In the *Confirm Password* field, retype the password you wrote in step 6.
8. Choose the *OK* button.

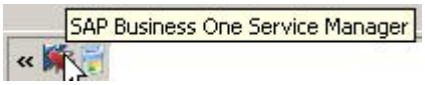
> **Note**
>
> When you select *This Account*, you can add any account that has the appropriate privileges on the server machine. If you add a user who does not have these privileges, faxes will not be sent.

> **Note**
>
> If you configure the Attachment folder to a remote PC folder, you must configure the Mailer service with a user who has the appropriate privileges for that folder. Faxes cannot be delivered if there is no user with the appropriate privileges specified.

4.7.2 Configuring SAP Business One Service Manager

To configure SAP Business One Service Manager:

1. Access SAP Business One Service Manager in either of the following ways:
   - In the system tray, double-click the *SAP Business One Service Manager* icon:



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- From the workstation where SAP Business One Service Manager is installed, choose: *Start* → *All Programs* → *SAP Business One* → *Server Tools* → *Service Manager*

  The *SAP Business One Service Manager* dialog box opens.

2. In the *Service* dropdown box, select *SBO Mailer*.

3. Choose the *Settings* button.

   The *General Settings* dialog box opens.

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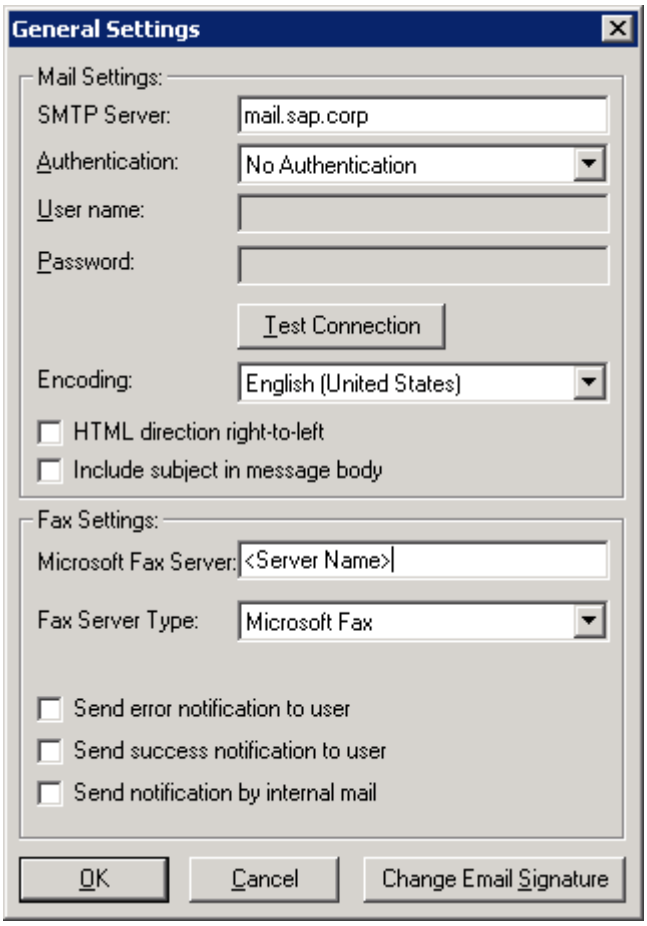

4. In the *Fax Settings* section, in the *Microsoft Fax Server* box, enter the computer name or IP address of the machine where the modem and Microsoft Fax Services are installed.
   - To view computer name, see Viewing Computer Name.
   - To view computer IP address, see Viewing Computer IP Address.
5. In the *Fax Server Type* dropdown box, select Microsoft Fax.

   Select or deselect any or all of the notification checkboxes according to your requirements.

   > **Note**
   >
   > You can change these notification options at any time via the SAP Business One Service Manager.

   > **Caution**
   >
   > The configuration described here is not enough for operating this service. For more information, refer to the 8.8 Administrator's Guide in the documentation area of SAP Business One Customer Portal at http://service.sap.com/smb/sbocustomer/documentation.

   Choose the *OK* button.
6. In the *SAP Business One Service Manager* dialog box, choose the *OK* button.

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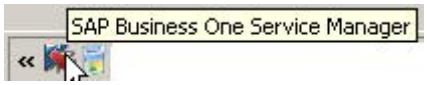
4.7.3 Connecting the SBO Mailer Service

The mailer service must be connected so that faxes can be delivered to the fax recipient. To connect the mailer service:

> **Note**
>
> You must configure the SBO Mailer Service before you can operate it. For instructions, refer to the 8.8 Administrator's Guide in the documentation area of SAP Business One Customer Portal at http://service.sap.com/smb/sbocustomer/documentation.

> **Note**
>
> If SBO Mailer is installed on Windows Server 2008 or Windows Vista and the installed PDF reader does not reliably support a non-interactive mode, SBO Mailer may fail to send faxes with PDF attachment in SAP Business One.
>
> To avoid this issue, we recommend one of the following:
>
> - Change the SBO Mailer Service User.
> - Install a PDF reader that supports the non-interactive mode.
> - Install SBO Mailer on Windows Server 2003 or Windows XP.
>
> For more information, see SAP Note 1415860.

1. In the system tray, double-click the *SAP Business One Service Manager* icon.



The *SAP Business One Service Manager* dialog box opens.

In the *Service* dropdown box, select *SBO Mailer*.

2. Click the *Play* button.

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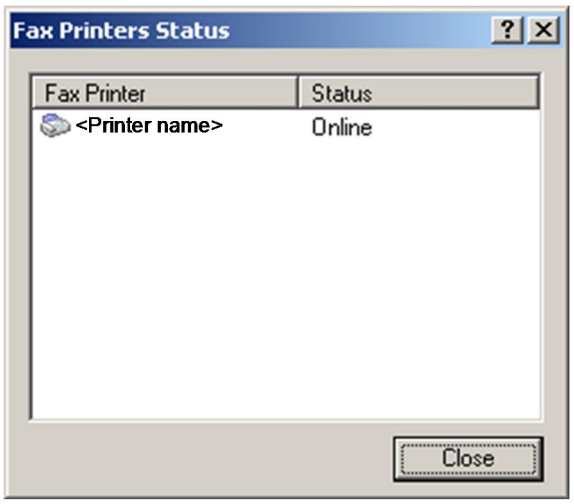
Note

When the *Play* button is inactive, the mailer service is connected.

4.7.4 Checking the Fax Printer Connection

To make sure the fax printer is connected:

1. Open the Fax Console, located in:
   Start → *Programs* → *Accessories* → *Communications* → *Fax* → *Fax Console*
2. In the *Fax Console* window, choose:
   Tools → *Fax Printer Status*
   The *Fax Printers Status* dialog box opens.



The online or offline status is shown.

Note

For more information about the Attachment folder, see the SAP Business One Online Help.

4.7.5 Viewing Computer System Information

Locate and view computer name or IP address, which may be required for configuring SAP Business One to work with Microsoft Fax Services.

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4.7.5.1 Viewing Computer Name

To view your computer's name:

1. On your computer Desktop, right-click the *My Computer* icon.
2. From the popup menu, choose *Properties*.
   The *System Properties* window opens.
3. Select the *Computer Name* tab.
   The computer name appears next to *Full Computer Name*.

4.7.5.2 Viewing Computer IP Address

To find the IP Address of your computer:

1. Choose the *Start* menu.
2. Choose *Run*.
3. In the *Run* dialog box, in the *Enter* box, write **`cmd`** and choose the *OK* button.
   The *Command Line Console* box opens.
4. At the prompt, type **`ipconfig`** and press **`Enter`**.
   Your computer's IP address appears in the list of information.

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5 Sending a Fax from SAP Business One

With SAP Business One you can send fax messages and alerts. Messages can be sent to system users, business partners, or any other recipients. Alerts can be sent to internal users only.

Prerequisite

You have installed and configured Microsoft Fax services using one of the following scenarios:

- Installing Microsoft Fax Services in Standalone Mode
- Installing Microsoft Fax Services with Remote Fax
- Installing Local SAP Business One Server with Remote Applications

Procedure

5.1 Sending Fax Messages

1. From the SAP Business One menu bar, choose *File* → *Send* → *Fax*. Alternatively, choose from the toolbar.
   The *Send Message* window opens.
2. In the *Fax* column, select the checkbox.
3. In the *Fax No.* column, enter the fax number.

   Note

   For more information about sending messages, see the online help for SAP Business One on the SAP Business One product DVD or in the documentation area of SAP Business One Customer Portal at http://service.sap.com/smb/sbocustomer/documentation.

5.2 Sending Alerts

1. From the *SAP Business One Main Menu*, choose *Administration* → *Alerts Management*.
   The *Alerts Management* window opens.
2. In the *Fax* column, select the checkbox.

   Note

   For more information about managing alerts, see the online help for SAP Business One on the SAP Business One product DVD or in the documentation area of SAP Business One Customer Portal at http://service.sap.com/smb/sbocustomer/documentation.

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https://innormax.com/what-is-sap-and-why-is-it-used/

What does SAP stand for?
https://innormax.com/what-does-sap-stand-for/

What is ERP?
https://innormax.com/what-is-erp-system-software/

What does ERP stand for?
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Click here to enter text.