CUSTOMER

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

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></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.

Document History

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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):

- o SAP Business One server with SAP Business One Service Manager
- o 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

•

6

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

- o SAP Business One and SAP Business One Service Manager are installed locally
- o 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.

- o 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.
- o 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.



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

o Windows XP

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.

o 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.

o 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.

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.



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

- 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.

You can add or remove com	nponents of Windows XP.	
To add or remove a compon part of the component will be Details.	ent, click the checkbox. A sha e installed. To see what's includ	ded box means that only led in a component, click
Components:		
Accessories and Util	lities	18.0 MB 🔺
party of the second sec		2700
Fax Services		3.7 MB
✓ 🥸 Fax Services □ 💬 Indexing Service		0.0 MB
Services Service Service Service Service Service Service		0.0 MB 0.0 MB
 ✓ ✓ ✓ Fax Services □ ✓ Indexing Service ✓ ✓ Internet Explorer ✓ ✓ ✓ Internet Information 	Services (IIS)	0.0 MB 0.0 MB 13 4 MB
 Fax Services P Indexing Service Internet Explorer Internet Information Description: Allows fax to be 	Services (IIS) e sent and received	0.0 MB 0.0 MB 13 4 MB
Fax Services Fax Services Fax Service Fax Service Fax Service Fax Internet Explorer Fax Internet Information Description: Allows fax to be Total disk space required:	Services (IIS) e sent and received 55.9 MB	0.0 MB 0.0 MB 13 4 MB

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.

Fa	x Services
	Share your fax printer to allow remote users to send and receive faxes with your fax devices.
	To set up your computer as a fax server, share your fax printer so that other users can connect to it.
	If you do not share your fax printer, only users on this computer can send and receive faxes with fax devices located on this computer.
	After installation you can enable or disable fax printer sharing in Printers and Faxes, available from the Start menu.
	Share the fax printer
	O Do not share the fax printer

4. Choose one of the following:

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

The installation begins.

1 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.

1 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 \rightarrow Programs \rightarrow Accessories \rightarrow Communications \rightarrow Fax \rightarrow Fax Console The Fax Configuration Wizard window opens.



2. Choose the *Next* button.

The Sender Information screen opens.

Fax Configuration \	Wizard			×
Sender Informa Enter sender	tion information that will appear or	n fax cover pages.		
Your f <u>u</u> ll name:		Eax number:		
<u>E</u> -mail address:				
<u>⊺</u> itle:		Co <u>m</u> pany:	SAP	
Office location:		Department:		
Home phone:		Work phone:		
<u>A</u> ddress:				A
Billing code:		j		
		< <u>B</u> ack	<u>N</u> ext>	Cancel

3. Enter your sender information.

1 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.

Fax Configuration Wizard	×
Select Device for Sending or Receiving Faxes Select the device that you want to use to send or receive faxes.	< a horizontal distribution of the second se
Please <u>s</u> elect the fax device	
Standard 33600 bps Modem	
✓ Enable Send	
Enable Receive	
C <u>M</u> anual answer	
Automatically answer after 2 rings	
< <u>B</u> ack <u>N</u> ext >	Cancel

1 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 modern 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.

Fax Configuration Wizard		×
Transmitting Subscriber Identification (Enter the Transmitting Subscriber Identific computer to a fax recipient.	(TSID) ation (TSID) to be used to identify your	
The TSID is transmitted when you send a fax number and a business name.	a fax, and usually consists of a	
ISID: Fax		
		1
	< <u>B</u> ack <u>N</u> ext>	Cancel

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

1 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.

Fax Configuration Wizard	×
Called Subscriber Identification (CSID) Enter the Called Subscriber Identification (CSID) to be used to identify your computer to a fax sender.	
The CSID is transmitted when you receive a fax, and usually consists of a fax number and a business name.	
<u>C</u> SID: Fax	
< <u>B</u> ack <u>N</u> ext >	Cancel

- 11. In the *CSID* box, type the information you want to appear on outgoing fax headers, so that the fax recipient can identify you.
 - **1** 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.

Fax Configuration Wizard	×
Routing Options Specify routing options for in-	coming faxes.
When a fax is received: ✓ Print it on: ✓ Store a copy in a folder: ✓ Successfully received fa Choose this option to se	C:\Documents and Settings\faxadmii Browse axes are stored in the Inbox archive of Fax Console. we an additional copy of the fax in the folder specified.
	< <u>B</u> ack <u>N</u> ext > Cancel

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

i 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.

Fax Configuration Wizard		×
	Completing the Fax Configuration Wizard You have successfully completed the Fax Configuration Wizard. Configuration Summary: Devices configured to send faxes: Standard 33600 bps Modem The TSID of these devices is Fax. Devices configured to receive faxes: Standard 33600 bps Modem Devices are configured to automatically answer	
	incoming fax calls after 2 rings. The CSID of these devices is Fax.	
	To close this wizard, click Finish.	
	< <u>B</u> ack [Finish] Cancel	

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.

2.3.1 Configuring SAP Business One Messaging Service

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

 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.

erielai Log Un	Recovery Dependencies
Service name:	SBOMail
Display <u>n</u> ame:	SAP Business One Messaging Service
Description:	A
Pat <u>h</u> to executat	
"C:\Program File	s\SAP\SAP Business One ServerTools\Mailer\B1mail.exe
Startup typ <u>e</u> :	Manual
Service status:	Started
<u>S</u> tart	Stop Pause Resume
	the start parameters that apply when you start the service

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

SAP Business One Messaging Service	Properties (Local Comput <mark>?</mark> 🗙
General Log On Recovery Depende	encies
Log on as:	
Local System account Allow service to interact with des	ktop
Ihis account:	Browse
Password:	
Confirm password:	
You can enable or disable this service for	or the hardware profiles listed below:
Hardware Profile Profile 1	Service Enabled
	<u>Enable</u> <u>D</u> isable
	Consel Acada
UK	Lancel Apply

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

Uses the System Administrator user account to access Microsoft Fax Services.

o 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.

1 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.

1 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:

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



 o 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.

ierver:	TLVD60158753A
ervice:	5BO BackUp
) II II

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

🐺 SAP Busin	ess One Service Manager
Server:	TLVD60158753A
Service:	5BO Mailer
	SBO BackUp SBO DI Server
	License Manager
	SBO Mailer
- 1 - 1 - 1	
Schedule	Settings Connection Database
x	OK

3. Choose the Settings button.

The General Settings dialog box opens.

General Settings	×			
Mail Settings:				
SMTP Server:	mail.sap.corp			
<u>A</u> uthentication:	No Authentication			
<u>U</u> ser name:				
Password:				
	<u>I</u> est Connection			
Encoding:	English (United States)			
HTML direction	right-to-left			
🔲 🔲 Include subject	in message body			
Fax Settings:				
Microsoft Fax Serve	er: <server name=""></server>			
Fax Server Type:	Microsoft Fax			
Send error notifi	ication to user			
Send success notification to user				
🔲 Send notificatio	n by internal mail			
<u>0</u> K	Change Email Signature			

- 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.

1 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.

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:

i 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.

i 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.
- o Install a PDF reader that supports the non-interactive mode.
- o 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.

i 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:

- Open the Fax Console, located in: Start → Programs → Accessories → Communications → Fax → Fax Console
- In the Fax Console window, choose:
 Tools → Fax Printer Status

The Fax Printers Status dialog box opens.

Fa	ax Printers Status		<u>? ×</u>
	Fax Printer	Status	
	📚 <printer name=""></printer>	Online	
			Close

The online or offline status is shown.

i 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.

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

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.





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



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

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.

🐻 Add or i	Remove Programs			_ 0	⊐ ×
\$	Currently installed programs:	Show updates	Sort by: Name]	•
C <u>h</u> ange or Remove	🚮 Acrobat Reader 7.0.8		Size	<u>63.49MB</u>	-
Programs	Click here for support information.		Used	<u>rarely</u>	
- 1	To change this program or remove it from your computer,	dick Change or Remove.	Change	Remove	
Add <u>N</u> ew Programs	🛃 Adobe PDF IFilter 6.0		Size	19.43MB	-
	Adobe SVG Viewer 3.0		Size	4.71 <mark>M</mark> B	
	📟 AI RoboForm		Size	8.05MB	
Add/Remove Windows	🕵 Alt-Tab Task Switcher Powertoy for Windows XP		Size	.04MB	
Components	Kavaya IP Softphone R5		Size	38.68MB	
	📰 Avaya Voice Player 2.0		Size	.97MB	
Set Program	6 Babylon		Size	56.76MB	
Access and Defaults	BGinfo		Size	.76MB	
	Calculator Powertoy for Windows XP		Size	.21MB	
	Citeknet RAR IFilter		Size	.34MB	
	🗓 Citeknet ZIP IFilter		Size	.26MB	
	DAEMON Tools		Size	.58MB	
	B DivX		Size	1.54MB	
	🕞 dog2 Screen Saver				and a
					•

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

You can add or remove com	ponents of Windows XP.	
To add or remove a compon	ent click the checkhov. A sha	ded box means that only
part of the component will be Details.	e installed. To see what's includ	led in a component, click
Components:		
Accessories and Util	lities	18.0 MB 🔺
🗹 🎸 Fax Services		3.7 MB
		0.0 MB
Indexing Service		
 Indexing Service Internet Explorer 		0.0 MB
 ↓ P Indexing Service ▼ Ø Internet Explorer ▼ Ø Internet Information 	Services (IIS)	0.0 MB
 Indexing Service Internet Explorer Internet Information Description: Allows fax to be 	Services (IIS) e sent and received	0.0 MB 13 4 MB
Pindexing Service Service Pindexing Service Pinde	Services (IIS) e sent and received 55.9 MB	0.0 MB 13 4 MB

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.

ax S	ervices 🛛
S d	hare your fax printer to allow remote users to send and receive faxes with your fax evices.
T	o set up your computer as a fax server, share your fax printer so that other users can onnect to it.
lf fa	you do not share your fax printer, only users on this computer can send and receive xes with fax devices located on this computer.
A a'	ter installation you can enable or disable fax printer sharing in Printers and Faxes, vailable from the Start menu.
	Share the fax printer
	O Do not share the fax printer

4. Choose one of the following:

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

The installation begins.

1 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.

1 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 \rightarrow Programs \rightarrow Accessories \rightarrow Communications \rightarrow Fax \rightarrow Fax Console The Fax Configuration Wizard opens.



2. Choose the *Next* button.

The Sender Information screen opens.

Enter sender information th	at will appear on fax cover pages.	Ę
Your f <u>u</u> ll name:	Eax number:	
E-mail address:		
<u>T</u> itle:	Company:	SAP
Office location:	Department:	
Home phone:	Work phone:	
Address:		
		-
Billing code:		

3. Enter your sender information.

i 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.

Fax Configuration Wizard
Select Device for Sending or Receiving Faxes Select the device that you want to use to send or receive faxes.
Please <u>s</u> elect the fax device
Standard 33600 bps Modem
🔽 Enable Send
O <u>M</u> anual answer
Automatically answer after
< <u>B</u> ack <u>N</u> ext > Cancel

1 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 modern you selected in step 5, select the *Enable Receive* checkbox. In addition, you can select:
 - o Manual Answer

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

o 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.

Fax Configuration Wizard		×
Transmitting Subscriber Identification (Enter the Transmitting Subscriber Identifica computer to a fax recipient.	TSID) ation (TSID) to be used to identify your	
The TSID is transmitted when you send a fax number and a business name.	a fax, and usually consists of a	
ISID: Fax		
	< <u>B</u> ack <u>N</u> ext >	Cancel

- 9. In the *TSID* box, type in the information you want to appear on incoming fax headers.
 - **1** 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.

Fax Configuration Wizard	×
Called Subscriber Identification Enter the Called Subscriber Ide computer to a fax sender.	(CSID) tification (CSID) to be used to identify your
The CSID is transmitted when y a fax number and a business na	u receive a fax, and usually consists of ne.
<u>C</u> SID:	
	< <u>B</u> ack <u>N</u> ext > Cancel

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

i 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.

Fax Configuration Wizard	X
Routing Options Specify routing options for inco	oming faxes.
When a fax is received: Image: Print it on: [Ima	C:\Documents and Settings\faxadmir es are stored in the Inbox archive of Fax Console. e an additional copy of the fax in the folder specified.
	< <u>B</u> ack <u>N</u> ext> Cancel

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

i 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.



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.

or Remove Programs			- 0
Currently installed programs:	Show updates	Sort by: Name	
Acrobat Reader 7.0.8		Size	63.49MB
S <u>Click here for support information.</u>		Used	<u>rarely</u>
To change this program or remove it from you	ur computer, click Change or Remove.	Change	Remove
Adobe PDF IFilter 6.0		Size	19.43MB
Adobe SVG Viewer 3.0		Size	4.71MB
AI RoboForm		Size	8.05MB
Alt-Tab Task Switcher Powertoy for Windows	XP	Size	.04MB
ts Avaya IP Softphone R5		Size	38.68MB
Avaya Voice Player 2.0		Size	.97MB
am (b) Babylon		Size	56.76MB
BGinfo		Size	.76MB
Calculator Powertoy for Windows XP		Size	.21MB
💭 Citeknet RAR IFilter		Size	.34MB
🗓 Citeknet ZIP IFilter		Size	.26MB
DAEMON Tools		Size	.58MB
🛞 DivX		Size	1.54MB
🔁 dog2 Screen Saver			

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

ndows Components Wizard	d			
Windows Components You can add or remove com	ponents of Windo	ws XP.		T
To add or remove a compone part of the component will be Details.	ent, click the cheo installed. To see	ckbox. A shaded what's included	box means that on in a component, clic	ly sk
Components:				
🗹 📻 Accessories and Utili	ties		18.0 MB	
🗹 🎯 Fax Services			3.7 MB	
Indexing Service			0.0 MB	
🗹 🧭 Internet Explorer			0.0 MB	
Mainternet Information .	Services (IIS)		13 4 MB	-
Description: Allows fax to be	e sent and receive	d		
Total disk space required:	55.9 MB		Datal	1
Space available on disk:	79952.2 MB		Details	
		< Back	Next >	Cancel

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.

Fa	x Services
	Share your fax printer to allow remote users to send and receive faxes with your fax devices.
	To set up your computer as a fax server, share your fax printer so that other users can connect to it.
	If you do not share your fax printer, only users on this computer can send and receive faxes with fax devices located on this computer.
	After installation you can enable or disable fax printer sharing in Printers and Faxes, available from the Start menu.
	Share the fax printer
	C Do not share the fax printer

- 4. Choose the Share the fax printer option. This enables you to connect another workstation to the fax printer
 - 1 Note

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

1 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:

 $\textit{Start} \rightarrow \textit{Programs} \rightarrow \textit{Accessories} \rightarrow \textit{Communications} \rightarrow \textit{Fax} \rightarrow \textit{Fax} \textit{Console}$

1 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.

Fax Configuration Wizard		×
	Welcome to Fax Configuration Wizard This wizard helps you configure your computer to send and receive faxes.	
S/	To continue, click the Next button.	
	K Back Cancel	

3. Choose the *Next* button.

The Sender Information screen opens.

Fax Configuration	Wizard			×
Sender Informa Enter sender	ation information that will appear or	n fax cover pages.		
Your f <u>u</u> ll name:		Eax number:		
<u>E</u> -mail address:				
<u>T</u> itle:		Co <u>m</u> pany:	SAP	
Office location:		<u>D</u> epartment:		
<u>H</u> ome phone:		Work phone:		
<u>A</u> ddress:				A 7
Billing code:		j		
		< <u>B</u> ack	<u>N</u> ext >	Cancel

4. Enter your sender information.

i 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.

Fax Configuration Wizard		×
	Completing the Fax Configuration Wizard You have successfully completed the Fax Corfiguration Wizard.	
	To close this wizard, click Finish. < Back Finish Cancel	

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:

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

Services				
File Action View	Help			
← → 🖬 😭 [∄ 🖳 😰 🕨 ■ 🗉 ■			
🍓 Services (Local)	🍇 Services (Local)			
	SAP Business One Messaging	Name A	Description	Statu: 🔺
	Service Stop the service Pause the service Restart the service	Content of the second s	Enables mu SAP Busine SAP Busine Apache To	Starte Starte Starte Starte
	Extended / Standard /	 Secondary Logon Security Accounts Manager Server Shell Hardware Detection Smart Card 	Enables st The startu Supports fil Provides n Manages a	Starte Starte Starte Starte
	(and A solution)			

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.

eneral Log Un	Recovery Dependencies
Service name:	SBOMail
Display <u>n</u> ame:	SAP Business One Messaging Service
Description:	<u></u>
Pat <u>h</u> to executab	ole:
"C:\Program File	s\SAP\SAP Business One ServerTools\Mailer\B1mail.exe'
Startup typ <u>e</u> :	Manual
Service status:	Started
<u>S</u> tart	Stop Pause Resume
You can specify from here.	the start parameters that apply when you start the service

3. Select the *Log On* tab.

Local System acco	ount	
Allow service to Inis account	<pre>conteract with desktop </pre> domain\user name>	Browse
Password:		
Confirm password:		
Confirm password: (ou can enable or dis-	able this service for the hardware	profiles listed below
Confirm password: (ou can enable or dis. Hardware Profile Profile 1	able this service for the hardware	profiles listed belov Service Enabled
Confirm password (ou can enable or dis Hardware Profile Profile 1	able this service for the hardware	profiles listed below Service Enabled

- 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.

1 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.

1 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:

- 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.

🐺 SAP Busir	ess One Service Manager
Server:	TLVD60158753A
Service:	5BO Mailer
	Start when operating system starts
Schedule	Settings Connection Database
	ОК

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

General Settings	×
_ Mail Settings: —	
SMTP Server:	mail.sap.corp
Authentication:	No Authentication
<u>U</u> ser name:	
Password:	
	<u>I</u> est Connection
Encoding:	English (United States)
🔲 🔲 HTML directi	on right-to-left
🔲 🔲 Include subje	ect in message body
Fax Settings:	
Microsoft Fax Se	(ver <server name=""></server>
Fax Server Type	Microsoft Fax
Send error no	otification to user
Send succes	s notification to user
🔲 Send notifica	tion by internal mail
<u>0</u> K	Change Email Signature

- 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:

1 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.

1 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.
- o 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.

😽 SAP Busin	ess One Service Manager
Server:	TLVD60158753A
Service:	5BO Mailer
Schedule	Settings Connection Database
	ОК

2. Click the *Play* button.

1 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 \rightarrow Programs \rightarrow Accessories \rightarrow Communications \rightarrow Fax \rightarrow Fax Console

2. In the Fax Console window, choose:

Tools \rightarrow Fax Printer Status

The Fax Printers Status dialog box opens.

F	ax Printers Status		<u>? ×</u>
	Fax Printer	Status	
	📚 < Printer name>	Online	
		C	Close

The online or offline status is shown.

1 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.

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.

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.



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.

- 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.

Add or R	emove Programs			- 🗆
5	Currently installed programs:	Show updates	Sort by: Name	•
L <u>h</u> ange or Remove	🚮 Acrobat Reader 7.0.8		Size	63.49MB
Programs	Click here for support information.		Used	rarely
*	To change this program or remove it from your computer, dick Ch	ange or Remove.	Change	Remove
idd <u>N</u> ew rograms	侵 Adobe PDF IFilter 6.0		Size	19.43MB
<u> </u>	Adobe SVG Viewer 3.0		Size	4.71MB
	AI RoboForm		Size	8.05MB
l/Remove /indows	Alt-Tab Task Switcher Powertoy for Windows XP		Size	.04MB
nponents	Avaya IP Softphone R5		Size	38.68MB
	Avaya Voice Player 2.0		Size	.97MB
Pr <u>o</u> gram	(b) Babylon		Size	56.76MB
ess and efaults	15 BGinfo		Size	.76MB
	Calculator Powertoy for Windows XP		Size	.21MB
	Citeknet RAR IFilter		Size	.34MB
	Diteknet ZIP IFilter		Size	.26MB
	DAEMON Tools		Size	.58MB
	S DivX		Size	1.54MB
	🔀 dog2 Screen Saver			
	1 D.LTL			

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

You can add or remove com	ponents of Windows XP.	
To add or remove a compon	ent, click the checkbox. A sha	ded box means that only
part of the component will be Details.	e installed. To see what's includ	led in a component, click
Components:		
Accessories and Util	ities	18.0 MB 🔺
🗹 🎯 Fax Services		3.7 MB 📃
🔲 🗊 Indexing Service		0.0 MB
🗹 🥭 Internet Explorer		0.0 MB
	Carriana (IIC)	13 4 MB 🗾
R anternet Information S	Services (0.5)	
Description: Allows fax to be	e sent and received	
Description: Allows fax to be	e sent and received 55.9 MB	

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.

ha	x Services
	Share your fax printer to allow remote users to send and receive faxes with your fax devices.
	To set up your computer as a fax server, share your fax printer so that other users can connect to it.
	If you do not share your fax printer, only users on this computer can send and receive faxes with fax devices located on this computer.
	After installation you can enable or disable fax printer sharing in Printers and Faxes, available from the Start menu.
	Share the fax printer
	C Do not share the fax printer

4. Choose one of the following:

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

The installation begins.

1 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.

i _{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)



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 \rightarrow Programs \rightarrow Accessories \rightarrow Communications \rightarrow Fax \rightarrow Fax Console The Fax Configuration Wizard opens.



2. Choose the *Next* button.

The Sender Information screen opens.

Your full name:	Eax number:	
E-mail address:		
<u>T</u> itle:	Company: SAF	,
Office location:	Department:	
Home phone:	Work phone:	
Address:		

3. Enter your sender information.

i 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.

Fax Configuration Wizard
Select Device for Sending or Receiving Faxes Select the device that you want to use to send or receive faxes.
Please <u>s</u> elect the fax device
Standard 33600 bps Modem
✓ Enable Send
O Manual answer
<u>A</u> utomatically answer after
< <u>B</u> ack <u>N</u> ext > Cancel

i Note

If the *Fax Configuration Wizard* does not display the screen for selecting a device for sending or receiving faxes (shown above), the modern 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 modern you selected in step 5, select the *Enable Receive* checkbox. In addition, you can select:
 - o Manual Answer

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

o 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.



- 9. In the *TSID* box, type in the information you want to appear on incoming fax headers.
 - 1 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.

Fax Configuration Wizard		×
Called Subscriber Identification (CSID) Enter the Called Subscriber Identification computer to a fax sender.) (CSID) to be used to identify your	< P
The CSID is transmitted when you receive	e a fax, and usually consists of	
a rax number and a business name.		
<u>C</u> SID:		
	< <u>B</u> ack <u>N</u> ext>	Cancel

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

i 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.

x Configuration Wizard 🛛 🗙
Routing Options Specify routing options for incoming faxes.
When a fax is received: Print it on: Store a copy in a folder: C:\Documents and Settings\faxadmi Browse Successfully received faxes are stored in the Inbox archive of Fax Console. Choose this option to save an additional copy of the fax in the folder specified.
< <u>B</u> ack <u>N</u> ext > Cancel

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

1 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.



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)

1 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.

or Remove Programs			- 0
Currently installed programs:	Show updates	Sort by: Name	
Acrobat Reader 7.0.8		Size	63.49MB
S <u>Click here for support information.</u>		Used	<u>rarely</u>
To change this program or remove it from you	ur computer, click Change or Remove.	Change	Remove
Adobe PDF IFilter 6.0		Size	19.43MB
Adobe SVG Viewer 3.0		Size	4.71MB
AI RoboForm		Size	8.05MB
Alt-Tab Task Switcher Powertoy for Windows	XP	Size	.04MB
ts Avaya IP Softphone R5		Size	38.68MB
Avaya Voice Player 2.0		Size	.97MB
am (a) Babylon		Size	56.76MB
BGinfo		Size	.76MB
Calculator Powertoy for Windows XP		Size	.21MB
💭 Citeknet RAR IFilter		Size	.34MB
🗓 Citeknet ZIP IFilter		Size	.26MB
DAEMON Tools		Size	.58MB
🛞 DivX		Size	1.54MB
🔁 dog2 Screen Saver			

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

ndows Components Wizard	ł			
Windows Components You can add or remove comp	ponents of Windo	ws XP.		Ē
To add or remove a compone part of the component will be Details.	ent, click the cheo installed. To see	ckbox. A shade what's include	ed box means that on d in a component, cli	ly ck
Components:				
Accessories and Utilit	ies		18.0 MB	
🗹 🍪 Fax Services			3.7 MB	
PIndexing Service			0.0 MB	
🗹 🥌 Internet Explorer			0.0 MB	_
Internet Information S	ervices (IIS)		13 4 MB	_
Description: Allows fax to be	sent and receive	d		
Total disk space required:	55.9 MB			-1
Space available on disk:	79952.2 MB		Details.	· .
	Th	< Back	Next	Cancel
				Cancer

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.

Fa	ax Services
	Share your fax printer to allow remote users to send and receive faxes with your fax devices.
	To set up your computer as a fax server, share your fax printer so that other users can connect to it.
	If you do not share your fax printer, only users on this computer can send and receive faxes with fax devices located on this computer.
	After installation you can enable or disable fax printer sharing in Printers and Faxes, available from the Start menu.
	Share the fax printer
	C Do not share the fax printer

- 4. Choose the Share the fax printer option. This enables you to connect another workstation to the fax printer.
 - 1 Note

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

1 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 \rightarrow Programs \rightarrow Accessories \rightarrow Communications \rightarrow Fax \rightarrow Fax Console

1 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.

Fax Configuration Wizard		×
	Welcome to Fax Configuration Wizard This wizard helps you configure your computer to send and receive faxes.	
S/	To continue, click the Next button.	
	K Back Cancel	

3. Choose the *Next* button.

The Sender Information screen opens.

Fax Configuration	Wizard			×
Sender Informa Enter sender	ation information that will appear or	n fax cover pages.		
Your f <u>u</u> ll name:				
<u>E</u> -mail address:				
<u>T</u> itle:		Co <u>m</u> pany:	SAP	
Office location:		Department:		
<u>H</u> ome phone:		Work phone:		
<u>A</u> ddress:				×
Billing code:		j		
		< <u>B</u> ack	<u>N</u> ext >	Cancel

4. Enter your sender information.

i 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.

Fax Configuration Wizard		×
	Completing the Fax Configuration Wizard You have successfully completed the Fax Corfiguration Wizard.	
	To close this wizard, click Finish. < Back Finish Cancel	

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

On the remote machine without a modern 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.

🐻 Add or R	emove Programs			- 🗆 ×
5	Currently installed programs:	Show updates	Sort by: Name	•
C <u>h</u> ange or Remove	🚮 Acrobat Reader 7.0.8		Size	63.49MB
Programs	Click here for support information.		Used	<u>rarely</u>
1	To change this program or remove it from your computer,	click Change or Remove.	Change	Remove
Add <u>N</u> ew Programs	Adobe PDF IFilter 6.0		Size	19.43MB
	Adobe SVG Viewer 3.0		Size	4.71MB
	🔛 AI RoboForm		Size	8.05MB
Add/Remove Windows	Reference Alt-Tab Task Switcher Powertoy for Windows XP		Size	.04MB
Components	🜃 Avaya IP Softphone R5		Size	38.68MB
	📼 Avaya Voice Player 2.0		Size	.97MB
Set Program	(b) Babylon		Size	56.76MB
Access and Defaults	侵 BGinfo		Size	.76MB
	Calculator Powertoy for Windows XP		Size	.21MB
	🐑 Citeknet RAR IFilter		Size	.34MB
	🚺 Citeknet ZIP IFilter		Size	.26MB
	DAEMON Tools		Size	.58MB
	🛞 DivX		Size	1.54MB
	🕞 dog2 Screen Saver			
				•

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

indows Components You can add or remove com	ponents of Windows XP.	
To add or remove a compon part of the component will be	ent, click the checkbox. A sha e installed. To see what's includ	ded box means that only led in a component, click
Details.		
Components:	ities	18 0 MB
Fax Services		3.7 MB
Indexing Service		0.0 MB
Internet Explorer		0.0 MB
	Services (IIS)	13 4 MB
IV Mainternet Information		
Description: Allows fax to be	e sent and received	
Description: Allows fax to be	e sent and received 55.9 MB	

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.

F	ax Services
	Share your fax printer to allow remote users to send and receive faxes with your fax devices.
	To set up your computer as a fax server, share your fax printer so that other users can connect to it.
	If you do not share your fax printer, only users on this computer can send and receive faxes with fax devices located on this computer.
	After installation you can enable or disable fax printer sharing in Printers and Faxes, available from the Start menu.
	Share the fax printer
	O Do not share the fax printer

4. Choose one of the following:

- o Share the fax printer enables you to connect another workstation to the fax printer
- o Do not share the fax printer prevents the addition of another workstation to the fax printer
- Choose the Next button.
- The installation begins.
 - i _{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.
 - 1 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 \rightarrow Programs \rightarrow Accessories \rightarrow Communications \rightarrow Fax \rightarrow Fax Console

1 Note

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

Fax Cont	figuration Wizard 🔀
?	There are currently no modems installed on this computer. If you want to send and receive faxes using a modem attached to this computer, you need at least one modem installed. Do you want to install a new modem? Yes

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



3. Choose the *Next* button.

The Sender Information screen opens.

Enter sender information th	at will appear on fax cover pages.	Ę
Your f <u>u</u> ll name:	Eax number:	
E-mail address:		
<u>T</u> itle:	Company:	SAP
Office location:	Department:	
Home phone:	Work phone:	
Address:		
		-
Billing code:		

4. Enter your sender information.

i 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.



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:

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

File Action View	Help			
Services (Local)	🍇 Services (Local)			
		Name /	Description	Shahu A
	SAP Business Une Messaging	Be Pouting and Perrote Access	Enables mu	
		SAP Business One Backl In Service	SAP Busine	
	Stop the service Pause the service Restart the service	SAP Business One DI Server	Di la Dabilio inte	
		SAP Business One Early Watch Alert		
	Research and service	SAP Business One EventSender Service	SAP Busine	Starte
		SAP Business One Integration Service	Apache To	Starte
		🖏 SAP Business One License Manager 2007		Starte
		SAP Business One Messaging Service		Starte
		🍓 Secondary Logon	Enables st	Starte
		Security Accounts Manager	The startu	Starte
		Server 🖓	Supports fil	Starte
		🎇 Shell Hardware Detection	Provides n	Starte
		🙀 Smart Card	Manages a	-
		4		F

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.

Service name:	SBOMail
Display <u>n</u> ame:	SAP Business One Messaging Service
Description:	
Pat <u>h</u> to executab	ole:
"C:\Program File	s\SAP\SAP Business One ServerTools\Mailer\B1mail.exe'
Startup typ <u>e</u> :	Manual
Service status:	Started
Service status: <u>S</u> tart	Started

3. Select the *Log On* tab.

SAP Business One Messaging	3 Service Properties (Local Comput <mark>?</mark> 🗙
General Log On Recovery	Dependencies
Log on as:	
C Local System account	at with desktop
• This account	omain\user name> Browse
Password:	
<u>C</u> onfirm password:	
You can enable or disable this	s service for the hardware profiles listed below:
Hardware Profile	Service
Profile 1	Enabled
	<u>Enable</u> Disable
	OK Cancel Apply

- 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.

i 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.

1 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:



- o 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.

Der ver .	TLVD60158753A	
Service:	5BO Mailer	

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

General Settings	×			
Mail Settings:				
SMTP Server:	mail.sap.corp			
<u>A</u> uthentication:	No Authentication			
<u>U</u> ser name:				
Password:				
	Iest Connection			
Encoding:	English (United States)			
HTML direction right-to-left				
Include subject in message body				
- Fax Settings:				
Microsoft Fax Server: <server name=""></server>				
Fax Server Type:	Microsoft Fax			
Send error notification to user				
Send success notification to user				
Send notification by internal mail				
<u>0</u> K	Cancel Change Email Signature			

- 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.

1 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.

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:

1 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.

1 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.
- o 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.

SAP	Business One Service Manager
« 🕅 🛒	

The SAP Business One Service Manager dialog box opens. In the Service dropdown box, select SBO Mailer.

ierver:	TLVD60158753A	
ervice:	5BO Mailer	
	• II II	

2. Click the *Play* button.

i 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 \rightarrow Programs \rightarrow Accessories \rightarrow Communications \rightarrow Fax \rightarrow Fax Console

2. In the Fax Console window, choose: $Tools \rightarrow Fax$ Printer Status

The Fax Printers Status dialog box opens.

Fax Printers Status		? ×
Fax Printer	Status	
So <printer name=""></printer>	Online	
1		Close

The online or offline status is shown.

i 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.

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.
- 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.

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 $File \rightarrow Send \rightarrow Fax$. Alternatively, choose in 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.

1 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

- From the SAP Business One Main Menu, choose Administration → Alerts Management. The Alerts Management window opens.
- 2. In the Fax column, select the checkbox.
 - 1 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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Click here to enter text.

