SAP Business One v10 – Setting Up E-mail functionality

619-241-4100
team@innormax.com

www.innormax.com

Table of Contents

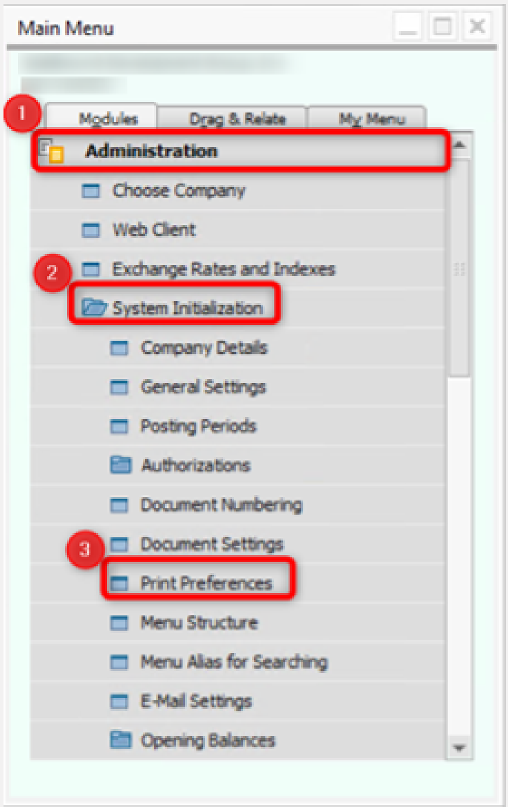
Introduction

In the next pages, you will find the instructions for setting up the email functionality, how to execute individual sending invoices and the bulk sending of invoices.

Setting Up the Bulk Mail Function

2.1 Print Preferences

To enable the bulk email function please proceed to **Menu > Administration > System Initialization > Print Preferences.**



In the **Print Preferences** window, proceed as follows:

4) Click on **Per Document** tab.

5) Choose which document you want to email and or send a PDF file. *For example, A/P Invoice.*

6) Go to the **When Adding Document** section.

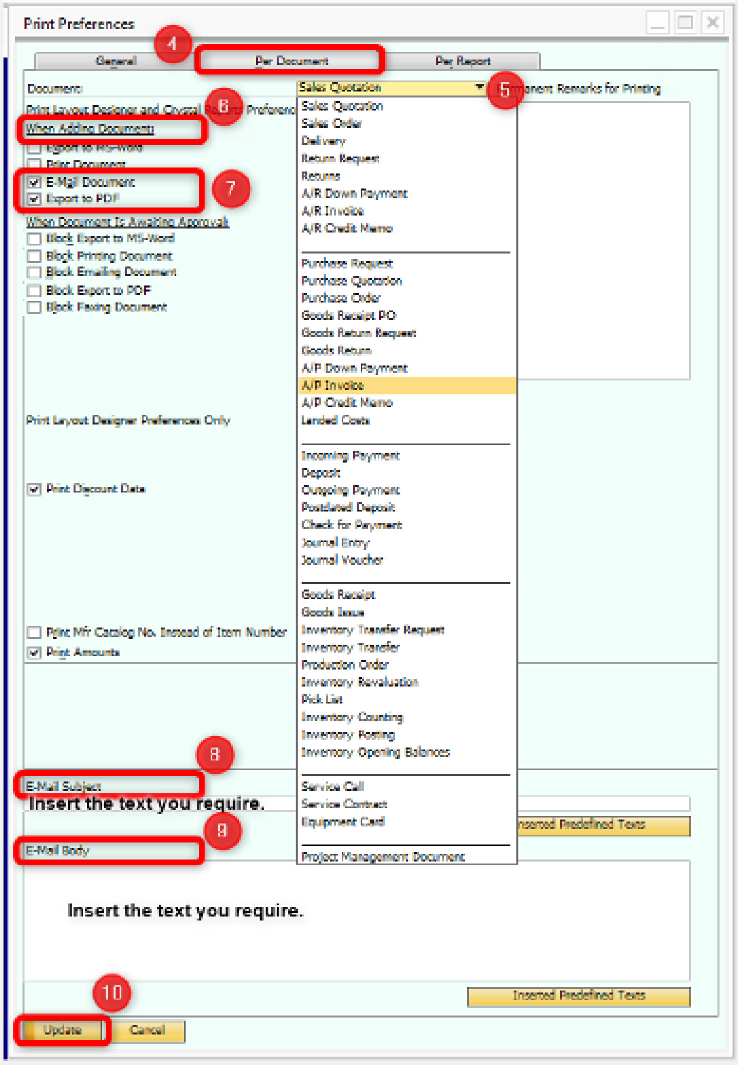
7) Check **E-Mail Document** and **Export to PDF**.

Note: The system will automatically prompt you if you wish to attach the A/P Invoice to the E-mail.

8) In the **E-Mail Subject** section, add the subject to be displayed for the E-Mail.

9) In the **E-Mail Body** type the text or message to be include.

10) Click **Update**.



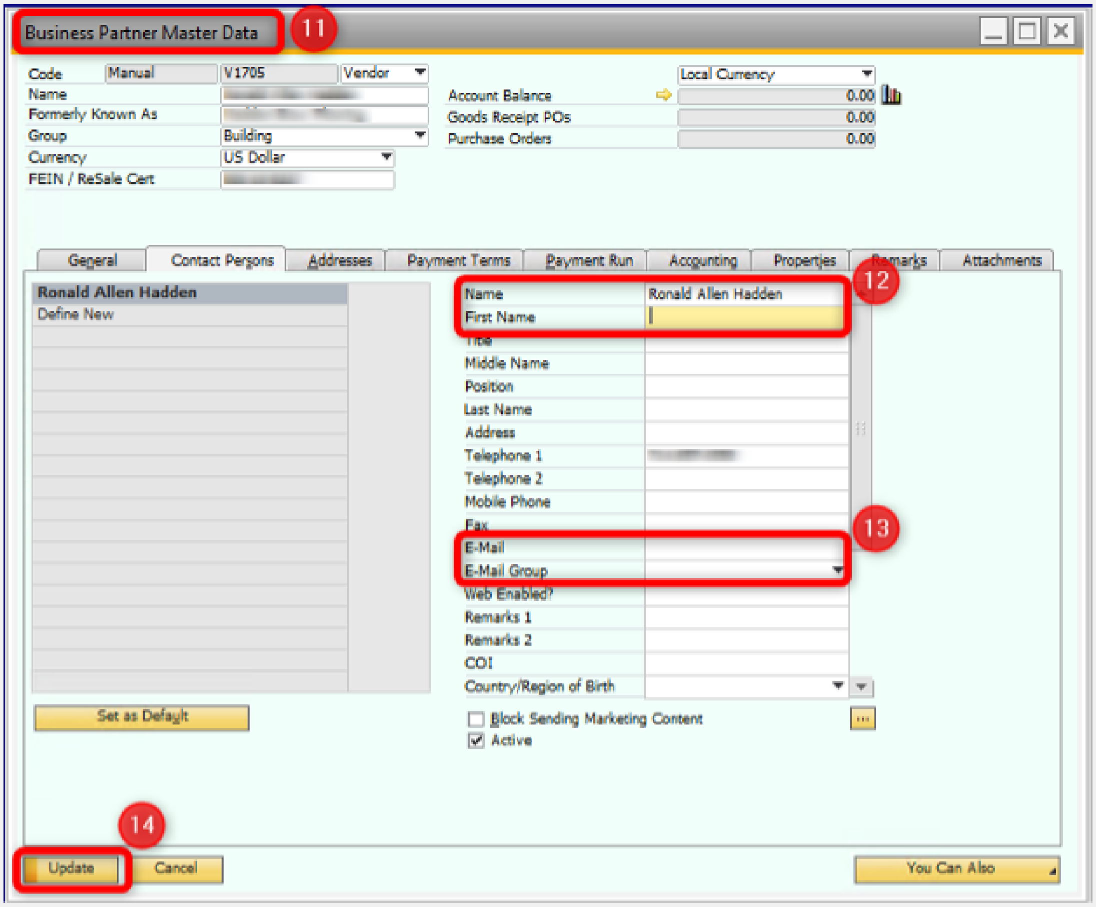
2.2. Business Partner Master Data

11) Go to **Business Partner Master Data**.

12) Make sure you have contact Name.

13) Type the Email and / or select an E-Mail Group.

14) Click **Update**.

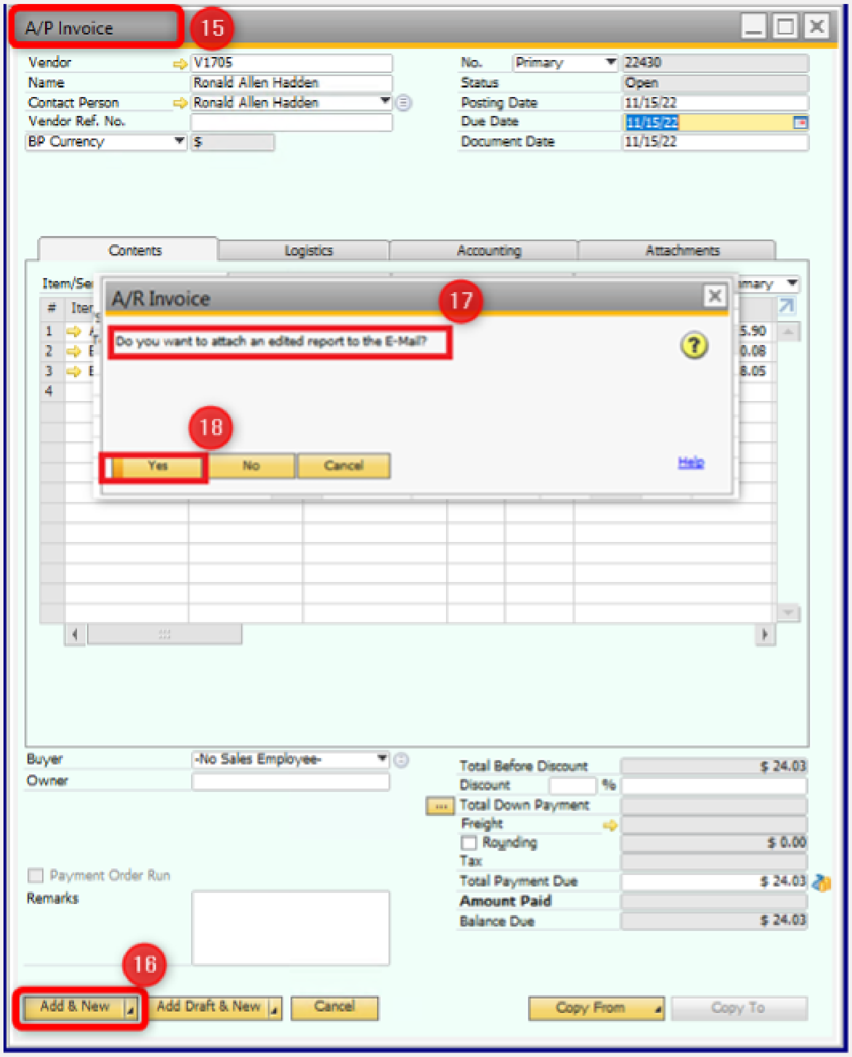


Sending a document by E-mail

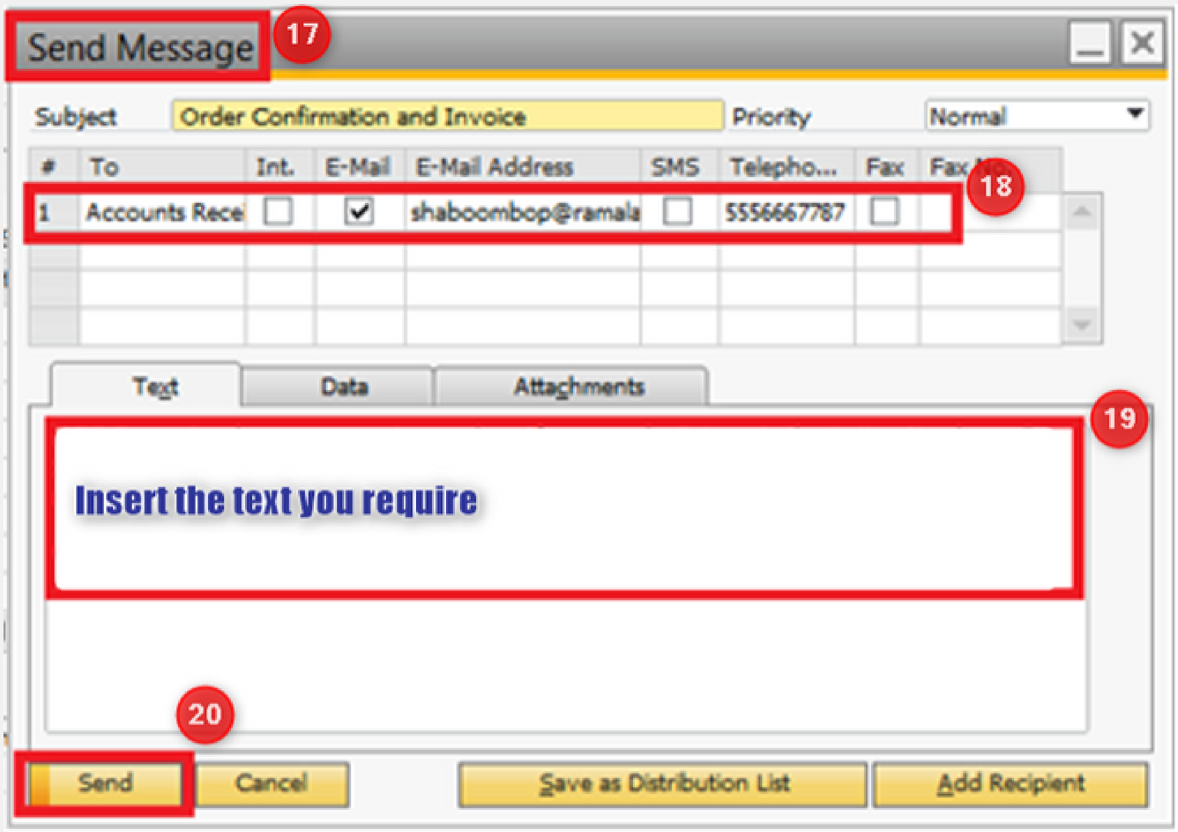
If **E-mail Document** is checked in Printing Preferences, and you assigned an email to your Business Partner contact.

16) When you click on the **Add** button in an A/P Invoice, you are going to be prompted wether you want to attach the document to the Email.

18) Click on **Yes**.



17) **Send Message** window will be opened.
18) Choose the email address as required.
19) Confirm or update the text as needed.
20) Click on **Send**.



Bulk E-mail

In the case, you did not check **Email Document** and / or **Export to PDF** in **Print Preferences**, you can use **Bulk E-mail** option.

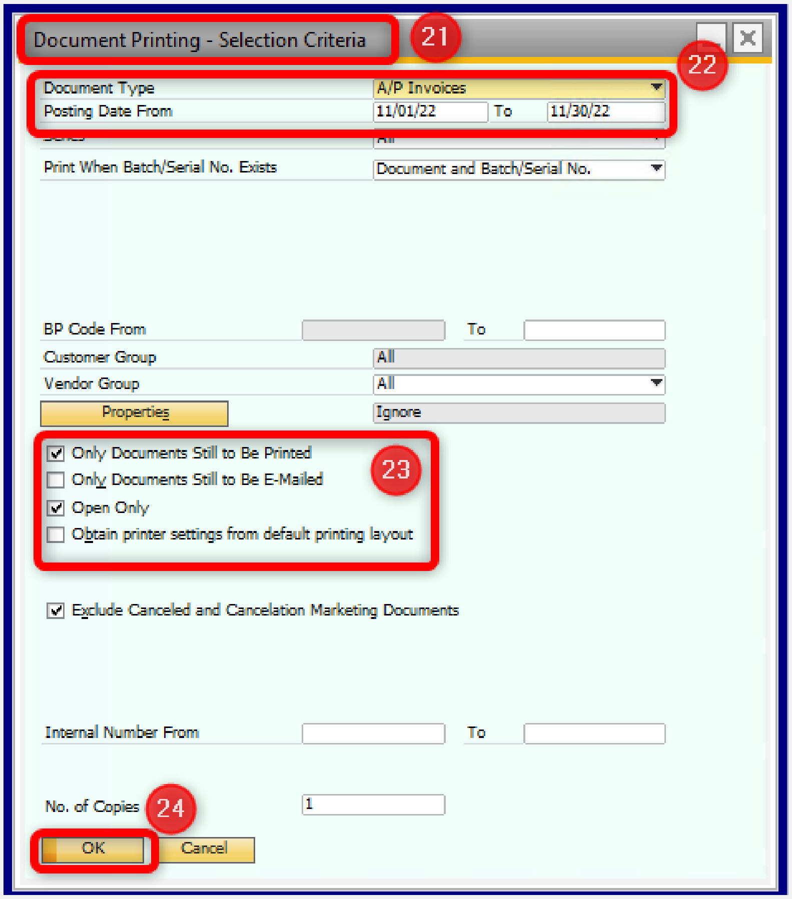
Proceed to **Purchasing A/P > Document Printing.**

21) **Document Printing – Selection Criteria** window will open.

22) Select the **Document Type** and **Posting Date** period.

23) Select your preferences for e-mailing (printing).

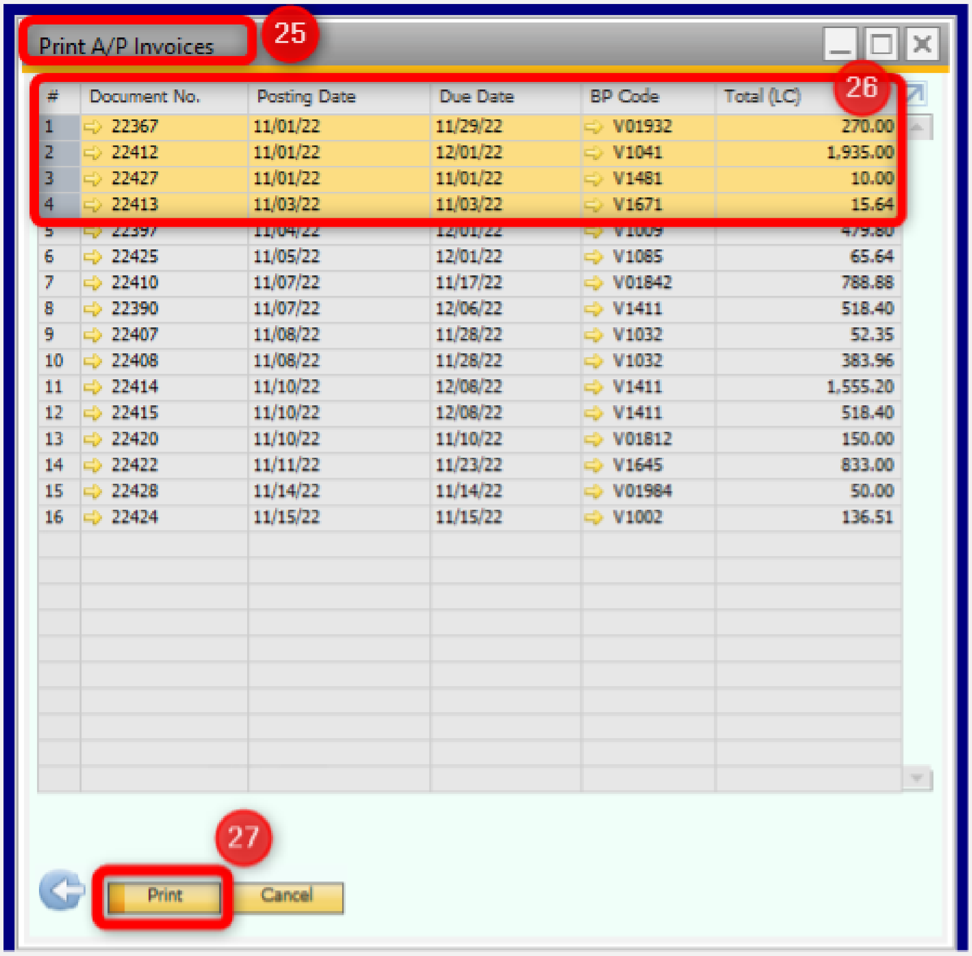
24) Click **OK**.



25) **Print A/P Invoices** window appears.

26) Select the document you want to send by E-mail or export to PDF by clicking on the number in the # column.

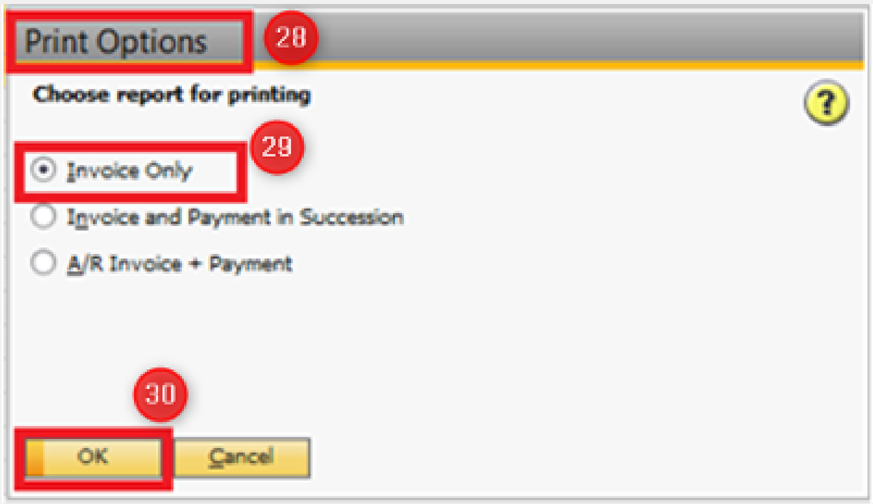
27) Click **Print**.



28) **Print Options** window appears.

29) Check **Invoice Only**.

30) Click **OK**.

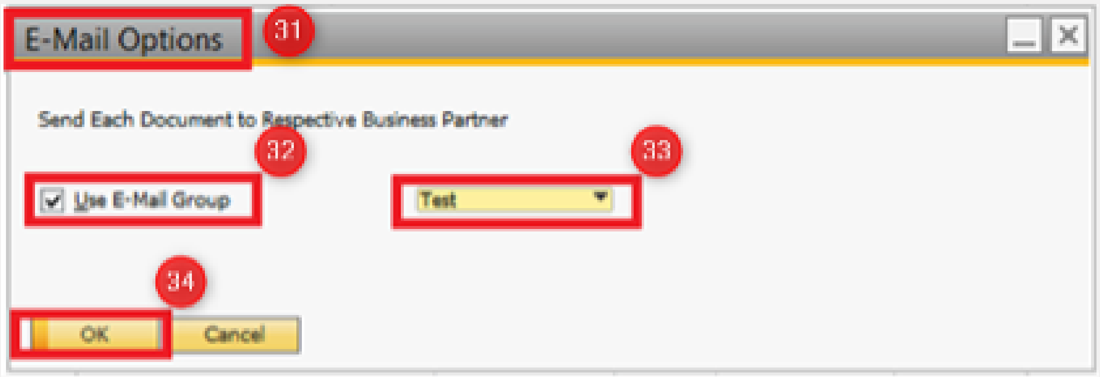


31) **E-Mail options** window appears.

32) Checking **Use E-Mail Group** is up to you. You can check or uncheck E-mails in the last step.

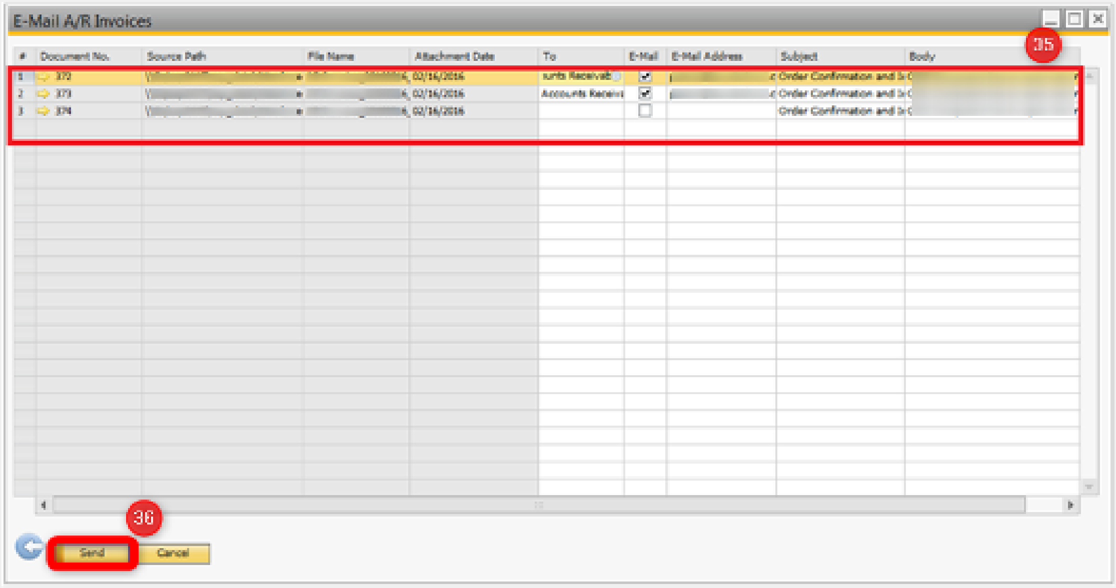
33) If you checked the **Use E-Mail Group**, then you must select a **Group**.

34) Click **OK**



35) Contact List appears, according to the documents selected. You can check or uncheck E-mail addresses, according to your requirements.

36) Clic **Send**.



Note: In this procedure, you may select Outlook Integration or SBO mailer, either program can work. It will depend on how your system is set up.

SAP Business One v10 –
Setting Up E-mail functionality

Innormax can help guide you through the analysis and implementation of the most suitable solution for your company. Our consultants have a long track record of helping businesses of all shapes and sizes succeed in many different industries in the area of traceability.

Using our resources and supporting technology like SAP Business One Lot Tracking & Batch Traceability, we are the trusted advisors you need to help your business succeed.

Contact Innormax today to get started with your customized solution.

INNORMAX

www.innormax.com
619-241-4100
team@innormax.com

SAP Business One
Manage my business in the cloud

SAP® Business ByDesign®