



SAP Business One v10 – Setting Up E-mail functionality

619-241-4100

team@innormax.com



SAP® Business
ByDesign™

www.innormax.com

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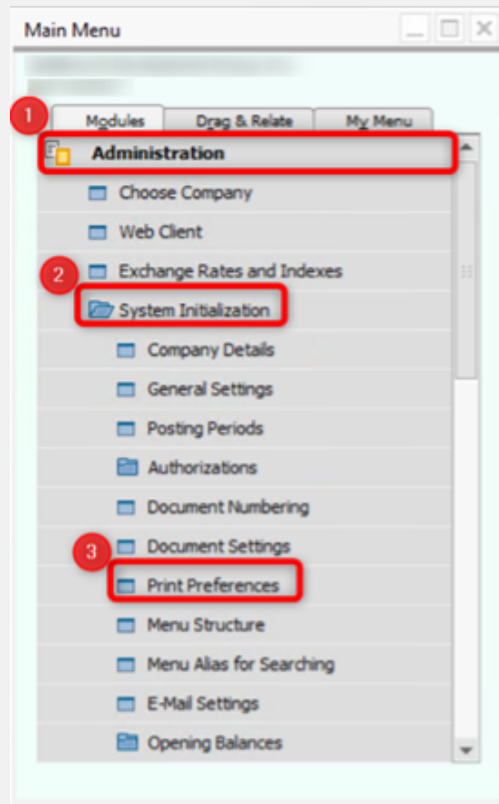
Introduction

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.

The screenshot shows the 'Print Preferences' dialog box with the 'Per Document' tab selected. The dialog is divided into several sections:

- General:** Contains options for 'Print Layout Designer and Cover', 'When Adding Document', 'Export to HTML', 'Print Document', 'E-Mail Document', and 'Export to PDF'. Annotations 1, 6, and 7 are present here.
- When Document is Available Approval:** Contains options to block various document types from being printed, emailed, or exported to PDF.
- Print Layout Designer Preferences Only:** Contains a checked option for 'Print Discount Data' and an unchecked option for 'Print Mfr Catalog No. Instead of Item Number'. A checked option for 'Print Amounts' is also visible.
- Document:** A dropdown menu is set to 'Sales Quotation'. A list of document types is shown, including 'Purchase Request', 'Purchase Quotation', 'Purchase Order', 'Goods Receipt PO', 'Goods Return Request', 'Goods Return', 'A/P Down Payment', 'A/P Invoice', 'A/P Credit Memo', 'Incoming Payment', 'Deposit', 'Outgoing Payment', 'Postdated Deposit', 'Check for Payment', 'Journal Entry', 'Journal Voucher', 'Goods Receipt', 'Goods Issue', 'Inventory Transfer Request', 'Inventory Transfer', 'Production Order', 'Inventory Revaluation', 'Pick List', 'Inventory Counting', 'Inventory Posting', and 'Inventory Opening Balances'. Annotation 5 is on the dropdown.
- E-Mail Subject:** A text field containing 'Insert the text you require.' with annotation 8.
- E-Mail Body:** A larger text area containing 'Insert the text you require.' with annotation 9.
- Buttons:** 'Update' and 'Cancel' buttons are at the bottom. Annotation 10 is on the 'Update' button.

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.

The screenshot shows the SAP Business Partner Master Data form for a contact named Ronald Allen Hadden. The form is divided into several tabs: General, Contact Persons, Addresses, Payment Terms, Payment Run, Accounting, Properties, Remarks, and Attachments. The 'General' tab is active, showing fields for Name, First Name, Title, Middle Name, Position, Last Name, Address, Telephone 1, Telephone 2, Mobile Phone, Fax, E-Mail, E-Mail Group, Web Enabled?, Remarks 1, Remarks 2, COI, and Country/Region of Birth. The 'E-Mail' and 'E-Mail Group' fields are highlighted with a red box and a red circle labeled '13'. The 'Update' button at the bottom left is also highlighted with a red box and a red circle labeled '14'. The window title is 'Business Partner Master Data' with a red circle labeled '11' next to it. The 'Name' field is highlighted with a red box and a red circle labeled '12'.

Field	Value
Code	Manual V1705 Vendor
Name	Ronald Allen Hadden
Formerly Known As	
Group	Building
Currency	US Dollar
FEIN / ReSale Cert	
Account Balance	0.00
Goods Receipt POs	0.00
Purchase Orders	0.00
Local Currency	
Name	Ronald Allen Hadden
First Name	Ronald Allen Hadden
Title	
Middle Name	
Position	
Last Name	
Address	
Telephone 1	
Telephone 2	
Mobile Phone	
Fax	
E-Mail	
E-Mail Group	
Web Enabled?	
Remarks 1	
Remarks 2	
COI	
Country/Region of Birth	
Block Sending Marketing Content	<input type="checkbox"/>
Active	<input checked="" type="checkbox"/>

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 whether you want to attach the document to the Email.

18) Click on **Yes**.

The screenshot shows an 'A/P Invoice' window with a dialog box overlay. The dialog box asks 'Do you want to attach an edited report to the E-Mail?' and has 'Yes', 'No', and 'Cancel' buttons. The 'Yes' button is highlighted with a red box and a red circle labeled '18'. The 'Add & New' button in the main window is also highlighted with a red box and a red circle labeled '16'. The 'A/R Invoice' dialog box has a red circle labeled '17' next to its title bar.

A/P Invoice (15)

Vendor: V1705
Name: Ronald Allen Hadden
Contact Person: Ronald Allen Hadden
Vendor Ref. No.:
BP Currency: \$

No.: Primary 22430
Status: Open
Posting Date: 11/15/22
Due Date: 11/15/22
Document Date: 11/15/22

Contents | Logistics | Accounting | Attachments

Item/Seq # Item 1 2 3 4

A/R Invoice (17)

Do you want to attach an edited report to the E-Mail?

Yes (18) No Cancel

Buyer: -No Sales Employee-
Owner:

Total Before Discount: \$ 24.03
Discount: %
Total Down Payment:
Freight:
Rounding: \$ 0.00
Tax:
Total Payment Due: \$ 24.03
Amount Paid:
Balance Due: \$ 24.03

Payment Order Run:
Remarks:

Add & New (16) Add Draft & New Cancel Copy From Copy To

- 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.

The screenshot shows a 'Send Message' window with the following details:

- Subject:** Order Confirmation and Invoice
- Priority:** Normal
- Table:**

#	To	Int.	E-Mail	E-Mail Address	SMS	Telepho...	Fax	Fax
1	Accounts Rece	<input type="checkbox"/>	<input checked="" type="checkbox"/>	shaboombop@ramala	<input type="checkbox"/>	5556667787	<input type="checkbox"/>	

Below the table are tabs for **Text**, **Data**, and **Attachments**. The **Text** tab is active, showing a large text area with the placeholder text: **Insert the text you require**.

At the bottom of the window are four buttons: **Send**, **Cancel**, **Save as Distribution List**, and **Add Recipient**.

Red callout boxes with numbers 17 through 20 highlight the following elements:

- 17: The window title bar.
- 18: The recipient row in the table.
- 19: The text input area.
- 20: The Send button.

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).

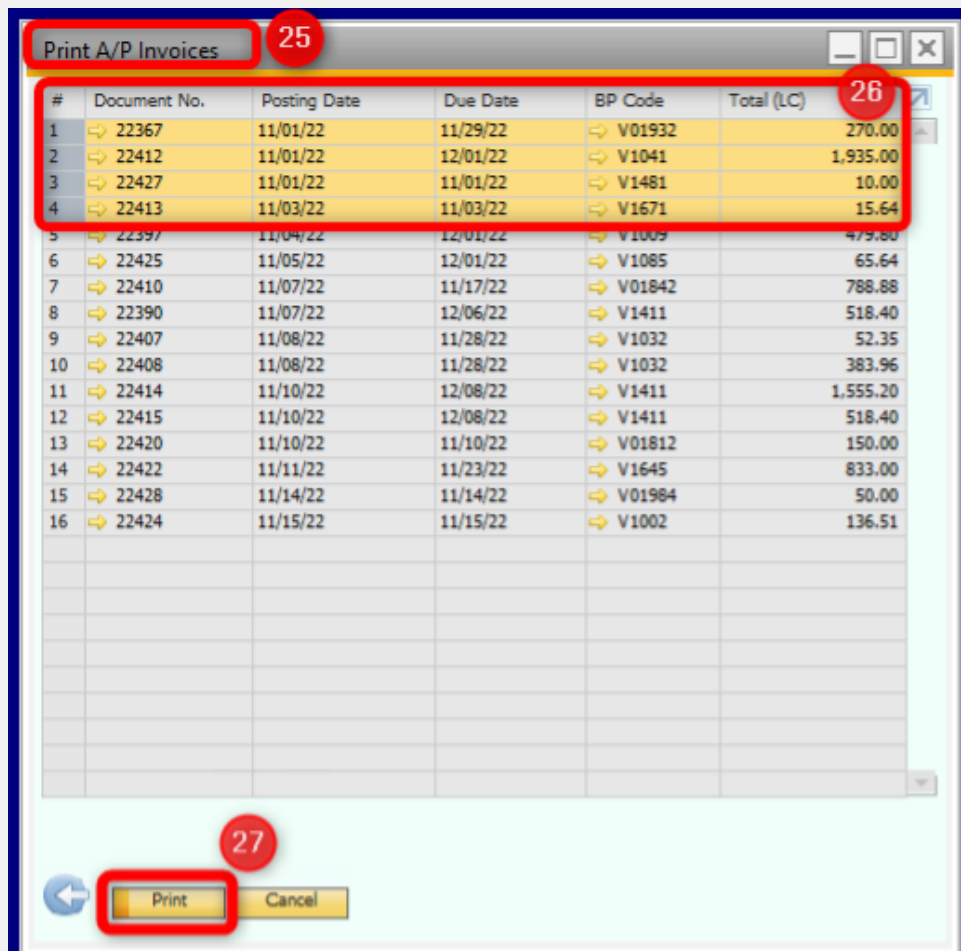
24) Click OK.

The screenshot shows the 'Document Printing - Selection Criteria' dialog box. The window title is 'Document Printing - Selection Criteria' (21). The 'Document Type' is set to 'A/P Invoices' (22). The 'Posting Date From' is '11/01/22' and 'To' is '11/30/22' (22). The 'Print When Batch/Serial No. Exists' is set to 'Document and Batch/Serial No.'. The 'BP Code From' and 'To' fields are empty. The 'Customer Group' is 'All', 'Vendor Group' is 'All', and 'Properties' is 'Ignore'. The 'Only Documents Still to Be Printed' (23) and 'Open Only' checkboxes are checked. The 'Exclude Canceled and Cancellation Marketing Documents' checkbox is also checked. The 'Internal Number From' and 'To' fields are empty. The 'No. of Copies' is '1' (24). The 'OK' button is highlighted (24).

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.

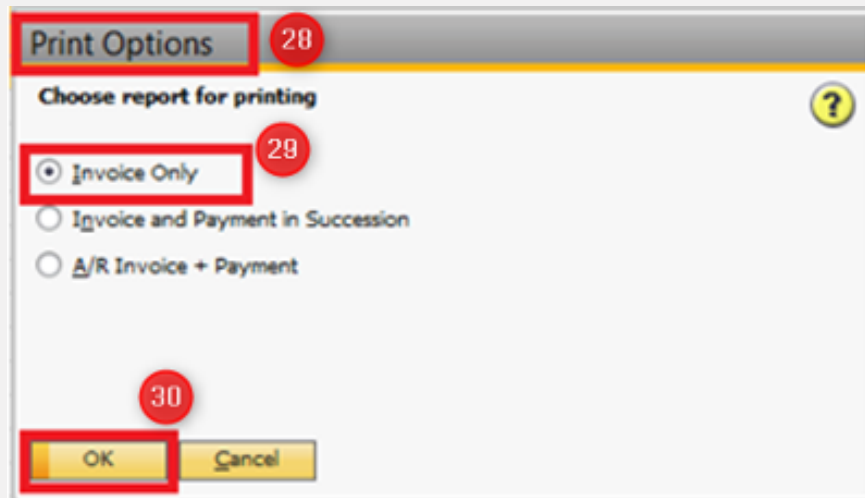
27) Click Print.



28) Print Options window appears.

29) Check Invoice Only.

30) Click OK.

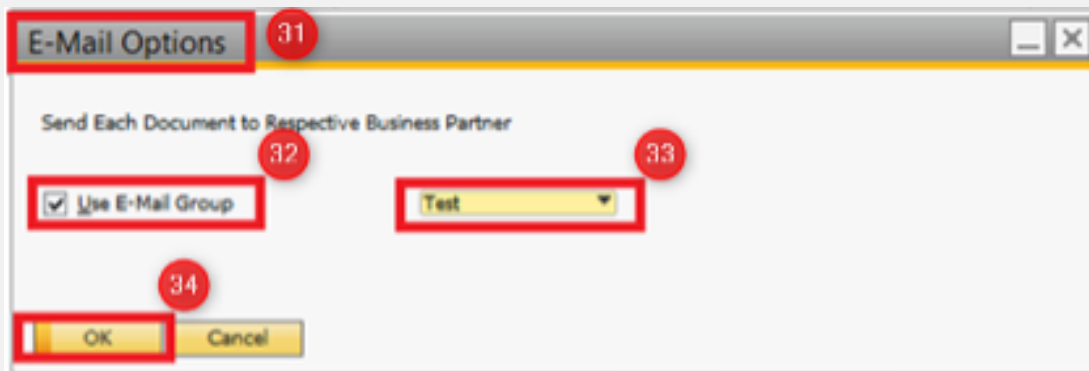


31) E-Mail options window appears.

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

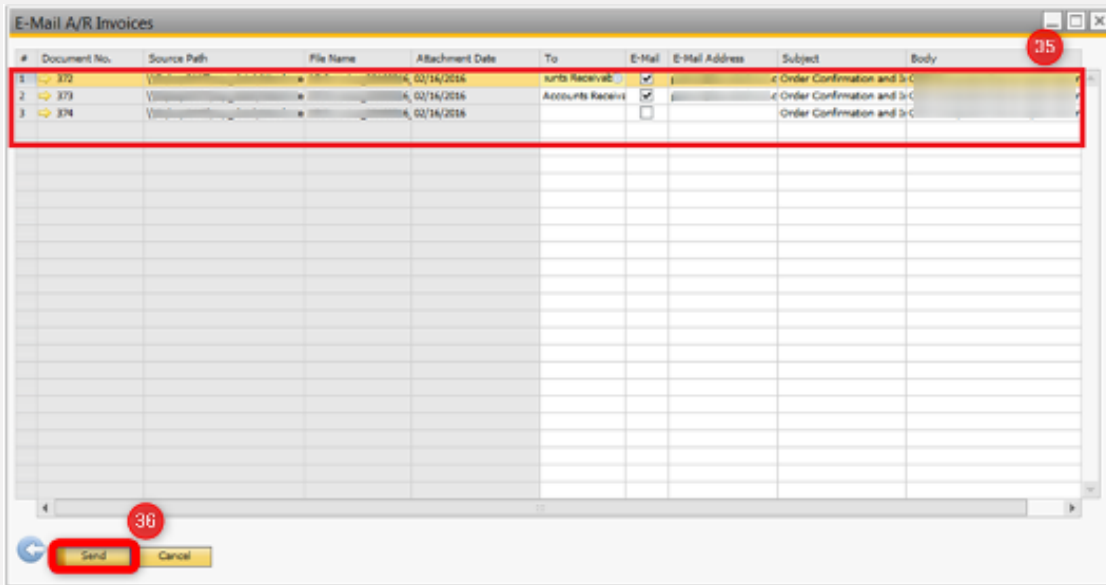
33) If you checked the **Use E-Mail Group**, then you must select a **Group**.

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.

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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.

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INNORMAX

www.innormax.com

619-241-4100

team@innormax.com

