

ACHIEVE DOCUMENT DELIVERY

USER MANUAL Version 6.5

PRESENTED BY ACHIEVE IT SOLUTIONS









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Achieve Document Delivery is part of the Achieve One Suite, which has been certified by SAP as conforming to SAP's standards for Business One add-on solutions.

SAP[®] Certified SAP Business One Integration

Achieve IT Solutions 640 Belle Terre Road Building B Port Jefferson, New York 11777 631-543-3200



ACHIEVE DOCUMENT DELIVERY USER MANUAL

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Introduction

Achieve Document Delivery refers to the ability to preset destinations for documents that are sent to business partners. You may choose from the following methods of routing documents:

- Fax (requires MS-Fax, Vsi-Fax, or email to faxing service or software)
- Email
- Internal Message
- Print
- You may choose more than one method at a time, with different recipients. For example, you may wish to send Purchase Orders by fax to a vendor's main office, and also by email to the vendor's salesperson at a remote location.
- You may establish different routings for different types of documents for the same customer or vendor. For example, Sales Quotations might be emailed to a purchasing agent, while A/R Invoices might be faxed to the customer's accounts payable office.
- You may establish different routings for documents based on the originating contact person on the document. In this way, orders from different contacts may be sent to their individual email addresses, rather than sending all orders from a company to the same destination.
- Achieve Document Delivery allows you to send batches of documents to multiple business partners simultaneously. For example, you may list all unprinted invoices and send them by Document Delivery with one command. The system will examine each one, determine the correct routing, and send each to its assigned destination. By contrast, the SAP Document Printing program will print multiple documents at one time, but in order to fax or email, you would need to open each document separately, determine how it is to be sent, confirm the fax number or email address, and send it individually.
- After a document has been delivered through Document Delivery, it is marked as "Printed". It may be selected for re-sending at a later time, but it will no longer appear in the list of unprinted documents.



The following documents are available within the Document Delivery system:

Customer Documents: Sales Quotation Sales Order Sale Confirmation Delivery Returns A/R Invoice A/R Credit Memo A/R Down Payment Invoice Customer Statement Blanket Agreements - Sales Freight Control Packing List (if using Achieve Freight Control)

Vendor Documents: Purchase Quotation Purchase Order Goods Receipt PO Goods Return A/P Invoice A/P Down Payment Invoice A/P Credit Memo Blanket Agreements - Purchasing Container Shipment (if using Achieve Container Management)



Version 6.5

This manual is specific to Version 6.5 of *Achieve Document Delivery*, which is distributed in conjunction with SAP Business One version 9.1 and above. In addition to various minor enhancements and changes to screen formats, it includes the following new elements:

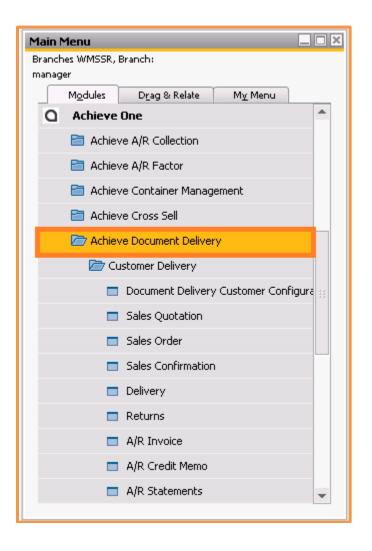
- Document Delivery for Blanket Agreements
- Document Delivery configuration on marketing documents
- Change logs for the following programs:
 - Document Delivery Initialization
 - o Customer and Vendor Configuration
- Order-To-Cash (OTC) inquiry screens for Customers, Vendors, and Items show documents of all types related to the specified Business Partner or Item.

See the Achieve One Special Features manual for details of this feature.



Location

The Document Delivery programs are located on the Achieve One menu.



Note: There is a separate section for customers and vendors. In each section, the first program is the setup entry, and the other programs are for delivering specific document types.



Setup

Document Delivery Initialization

Administration > Achieve One > Achieve Document Delivery > Document Delivery Configuration

The Document Delivery Configuration screen allows you to set the basic parameters for the system to utilize Document Delivery.

Header

	inters)	\\pri-adsync				2	2	
eport Path		\\sap91test\B1_SHR\@	CrystalReports				3	
ternal Store Path		\\sap91test\B1_SHR\\$	Storage				8	
erver Message								
ient Prints (not Server Side)		\checkmark		Create Rei	cords on BP or Contact Additic	on 🔽		
ient Emails (not Server Side)		✓		Set to Prin	it on Created Records			
Consolidated Emails		\checkmark		Create Ac	tivity per Document Delivery	✓		
Consolidate into single PDF				Save Atta	chment on Activity	✓		
ient FAXs (not Server Side)				5end zero	total Invoices			
Consolidated Faxes				Enable Ma	rketing Document Configuration	on 🗸		
ient Internal (not Server Side)		\checkmark		Restrict 'D	elivery Name' to BP Contacts			
ax Client Records to Process		50						
Sales A/R			Purchasing A/P		Emailing		FAXing	
Sales Quotation	~	Default Crystal Report	None	*	Default Crystal Printer	None		
Sales Order		Default Crystal Report	None	*	Default Crystal Printer	None	*	
Sales Confirmation		Default Crystal Report	None	•	Default Crystal Printer	None	*	
Deliverv	~	Default Crystal Report	None	•	Default Crystal Printer	None	*	
Returns		Default Crystal Report	None		Default Crystal Printer	None	*	
A/R Invoice		Default Crystal Report	AR Invoice(calibri) - Items.rpt	•	Default Crystal Printer	HP4300	*	
A/R Credit Memo	~	Default Crystal Report	None	•	Default Crystal Printer	None	*	
A/R Statements	~	Default Crystal Report	DD_AR_Statement(2).rpt	•	Default Crystal Printer	HP4300	*	
Freight Control	~	Default Crystal Report	None	•	Default Crystal Printer	None	*	
A/R Down Payment Invoice	\checkmark	Default Crystal Report	None		Default Crystal Printer	None	*	
Blanket Agreement	\checkmark	Default Crystal Report	None		Default Crystal Printer	None	*	

Enter the following information in the header:

Name (to find Crystal Printers)	Enter the name of a server on which all system printers are defined. This eliminates problems that may arise if the same printer is configured with different names on different PC's.
Report Path	Enter the path for Crystal Reports report and forms definitions. All users must have access to this path.
Internal Store Path	Enter the path where pdf attachment files are to be stored. This should be different from the Business One attachments folder. All users must have access to this path.
Server Message	This field should be left blank unless instructed otherwise by an Achieve IT consultant. When the Document Delivery Processor is



Client Prints Client Emails	running, this field is automatically populated to prevent a second instance of the processor from running simultaneously. Check if printing will occur on client PC's rather than the server. It is recommended to uncheck this box to avoid performance problems on the individual workstation. Check if email processing will occur on client PC's rather than the server. It is recommended to uncheck this box to avoid performance problems on the individual workstation.
	Note : If you wish to use Outlook as the Email Sending Method, this must use Client side emails.
Consolidate Emails	Check if you wish to have multiple documents addressed to the same recipient to be sent on a single email message.
Consolidate into Single PDF	Check if you wish to have multiple attachments combined into a single pdf file.
Client Faxes	Check if fax processing will occur on client PC's rather than the server. It is recommended to uncheck this box to avoid performance problems on the individual client.
Consolidate Faxes	Check if you wish to have multiple faxes addressed to the same recipient to be sent as a single fax transmission.
Client Internal	Check if you wish to optionally save documents as pdf files without delivering them.
Max Client Records to	This field will allow the selection of an upper limit of documents
Process	that can be selected to be processed in one batch by a client side process. This is to prevent large jobs from consuming all the resources on an individual workstation. If large numbers of records are sent, it is recommended to use Server Side processing.
Create Records on BP or	Check if you wish the system to automatically create a new
Contact Addition	Document Delivery Configuration record whenever a new Business Partner or Contact is added to the system. The fax number and/or email address for the BP or Contact will be used in the configuration record. (<i>Note: If there is no fax or email address, the</i>
Set to Print on Created	record will not be created). Check if you wish the automatically created configuration records
Records	to have the Print option selected.
Create Activity per Document Delivery	Check if you wish the system to automatically create an Activity each time a document is delivered. The Activity would reference the Business Partner, and the delivered document would be a linked document. The Activity will be set to Closed.



Save Attachment on	Check if Activities will be created, and you wish to save the pdf
Activity	document as an attachment on the Activity.
Send Zero Total	Check if you wish to include invoices with zero balance due in the
Invoices	list of invoices to be delivered.
Enable Marketing	Check if you wish to enable a tab on all marketing documents for
Document	Document Delivery configuration.
Configuration	
Restrict "Delivery	Check if you wish to restrict the delivery recipient names to existing
Name" to BP Contacts	contacts of the Business Partner.



Sales Tab

Sales Quotation	✓	Default Crystal Report	None	Default Crystal Printer	None	•
5ales Order	\checkmark	Default Crystal Report	None	Default Crystal Printer	None	•
Sales Confirmation	\checkmark	Default Crystal Report	None	Default Crystal Printer	None	•
Delivery	✓	Default Crystal Report	None	Default Crystal Printer	None	*
Returns	\checkmark	Default Crystal Report	None	Default Crystal Printer	None	•
A/R Invoice	\checkmark	Default Crystal Report	AR Invoice(calibri) - Items.rpt	Default Crystal Printer	HP4300	•
A/R Credit Memo	✓	Default Crystal Report	None	Default Crystal Printer	None	*
A/R Statements	✓	Default Crystal Report	DD_AR_Statement(2).rpt	Default Crystal Printer	HP4300	*
Freight Control	✓	Default Crystal Report	None	Default Crystal Printer	None	*
A/R Down Payment Invoice	✓	Default Crystal Report	None	Default Crystal Printer	None	•
Blanket Agreement	✓	Default Crystal Report	None	Default Crystal Printer	None	•

The Sales tab lists the various types of sales documents that may be utilized in the Document Delivery program. For each document type, enter the following information:

Document Type	Check to indicate that this type of document may be delivered by means of <i>Achieve Document Delivery</i> .
Default Crystal Report	Select the file name of the Crystal Report to be printed for this document type. Note that the file must exist in the Report Path indicated in the header.
Default Crystal Printer:	Select the name of the printer to be used when printing documents by means of <i>Achieve Document Delivery</i> . Note that the printer must be configured on the server indicated in the header.

Note: Document types that are not checked will not appear in any of the document configuration screens, menus, or delivery screens.



Purchasing Tab

Sales A/R			Purchasing A/P		Emailing		FAXing
Purchase Quotations		Default Crystal Report	None		Default Crystal Printer	HP4000	•
Purchase Order	\checkmark	Default Crystal Report	Purchase Order DD.rpt		Default Crystal Printer	HP4000	•
Goods Receipt PO	✓	Default Crystal Report	None		Default Crystal Printer	None	•
Goods Return	~	Default Crystal Report	None		Default Crystal Printer	None	•
A/P Invoice	~	Default Crystal Report	None		Default Crystal Printer	None	•
A/P Credit Memo	✓	Default Crystal Report	None		Default Crystal Printer	None	•
Container Management	✓	Default Crystal Report	None		Default Crystal Printer	None	•
A/P Down Payment Invoice	~	Default Crystal Report	None		Default Crystal Printer	None	•
Blanket Agreement	~	Default Crystal Report	None	-	Default Crystal Printer	None	

The Purchasing tab lists the various types of purchasing documents that may be utilized in the Document Delivery program. For each document type, enter the following information:

Document Type	Check to indicate that this type of document may be delivered by means of <i>Achieve Document Delivery</i> .
Default Crystal Report	Select the file name of the Crystal Report to be printed for this document type. Note that the file must exist in the Report Path
Default Crystal Printer	indicated in the header. Select the name of the printer to be used when printing documents by means of Achieve Document Delivery . Note that the printer must be configured on the server indicated in the header.

Note: Document types that are not checked will not appear in any of the document configuration screens, menus, or delivery screens.



Emailing Tab

Sales A/R	Purchasing A/P	Emailing	FAXing
Email Sending Method	SMTP		
SMTP Server Name or IP Address	smtp.office365.com		
SMTP Server Login User	dblumkin@achieveits.com		
SMTP Server Login Password	****		
SMTP Port (25 is standard)	587		
SMTP Encryption Method	SSL 🔻		
Save Outlook Emails as Draft Only			
Use Outlook Email Signatures			
Default Email Reply Address	dblumkin@achieveits.com		

The Emailing tab provides the connection with the email system to be used by *Achieve Document Delivery*.

Email Sending Method	Select "SAP", "SMTP" or "Outlook":			
	• SAP Use the SBO Mailer to send email			
	• SMTP Use a SMTP server, such as a Microsoft			
	Exchange server			
	 Outlook Use MS Outlook – all users must use Outlook 			
SMTP Server Name or	If using SMTP, enter the server information.			
IP Address				
SMTP Server Login	If using SMTP, enter the login name.			
User				
SMTP Login Password	If using SMTP, enter the password.			
SMTP Port (25 is	If using SMTP, enter the TCP port provided by your email			
standard)	administrator.			
SMTP Encryption	If using SMTP, select the Encryption Method provided by your email			
Method	administrator.			
Send Outlook Emails	Check if you wish documents delivered by means of Outlook to be			
as Draft Only	saved as drafts before being sent to their recipients. Users must			
	then approve each draft and send it individually.			
Use Outlook Email	Check if you which emails created by means of Outlook to use the			
Signatures	default email signature of the Outlook profile.			
Default Email Reply	Enter an email address to be used as a reply to email address.			
Address				



Faxing Tab

Sales A/R	Purchasing A/P	Emailing	FAXing
Email Fax Server Name	efaxsend.com		
FAX Sending Method	Email Fax Server 💌		
VSIFAX Auto Send Path			3
VSIFAX Process Count			
VSIFAX Cover Page Name			
OK Creat			
OK Cancel			

The Faxing tab provides the connection with the fax system to be used by *Achieve Document Delivery*.

Email Fax Server Name	Enter the fax server name, if applicable. If using an Email Fax Server, this will be the domain the email will be sent to in the format of <u>faxnumber@faxdomain.com</u>
Fax Sending Method	 Select "SAP", "VsiFax", or "Email Fax Server" SAP Use the SBO Mailer to send faxes VsiFax Use the VsiFax program to send faxes Email Fax Server Use the fax server provided by the email program
VsiFax Auto Send Path VsiFax Process Count VsiFax Cover Page Name	If using VsiFax, enter the path for sending documents If using VsiFax, enter the starting count number If using VsiFax, enter the name of the cover page to use

Note: The use of the faxing feature requires that you purchase, install, and configure appropriate fax software and modem. The SBO Mailer currently supports Microsoft Fax[®] and Symantec WinFax[®]. You must configure the SBO Mailer and verify that it is functioning correctly. Alternatively, you may use VsiFax[®] or an email fax server.



Subject and Body Fields

			Y								
	Document Header Fields	Document Line Fields	Card Code Fields	Co	ntact Fields	Employee Field	2				
#	Field Name	S	iQL Field Name								
1	Doc Number	D	ocNum			•					
2	BP Name	c	ardCode								
3	Reference Number	N	umAtCard			*					
4	Document Total	D	ocTotal								
5	Posting Date	D	DocDate								
6	User Defined Field Route	U	_AIS_Route			*					
7						•					
		F	Address	-	Address						
		A	\ddress2	-	Address2		33				
		A	AgentCode	-	AgentCode						
		A	\grNo	-	AgrNo						
		A	AltBaseEnt	-	AltBaseEnt						
		A	AltBaseTyp	-	AltBaseTyp						
		/	\nnInvDecR	-	AnnInvDecR						
		P	\qcsTax	-	AgesTax						
		/	AgesTaxFC	-	AgesTaxFC						
			\qcsTaxSC	-	AgesTaxSC						
		/	AssetDate	-	AssetDate						
			AtcEntry	-	AtcEntry						
			\tDocType	-	AlDocType						
			Attachment	-	Attachment						
			AuthCode	-	AuthCode						
			AutoCrtFlw	-	AutoCrtFlw						
_	OK Cancel	E	3ankCode	-	BankCode						

Administration > Achieve One > Achieve Document Delivery > Subject and Body Fields

The Subject and Body Fields screens allow you to create printing variables for the subject and body of email deliveries. Any field that needs to be referenced must be defined so that the system can substitute the correct information from the document that is being delivered. See the following section for more information and examples.

In order to create the variables, select the appropriate tab, enter a field name, and then select the corresponding SQL field name from the drop-down list.

See the Appendix to this manual for examples of settings on these tabs.



Subject and Body Entry

		Sales A	A/R			Purchasing A/P							
General S	ales Quotation	Sales Order	Sales Confirmation	Delivery	Returns	A/R Invoice	A/R Credit Memo	A/R Statements	Freight Control	Blanket Agreement			
Sales A/R A/R Invoice													
<company name=""> Invoice <headertable.docnum></headertable.docnum></company>													
Subject													
Body			invoice Number «Head «HeaderTable.NumAt										
Overridable		V											

Administration > Achieve One > Achieve Document Delivery > Subject and Body Entry

The Subject and Body Entry program allows you to create standard text that will print in the subject and body of emails, or on the cover sheet of faxes. You may type any text you wish, up to 256,000 characters in the subject (if using SBO Mailer, restrict to 50 characters) and 256,000 characters in the body. If you want to include information that is specific to the Business Partner or the document that is being delivered, you may use the variables that were defined in the Subject and Body Fields screens described above. Each variable must be enclosed in < > brackets. See the example above. (Note that you may use a right-click to bring up a list of available fields.)

Check the "Overridable" box if the user may change the text at the time of delivery.

When delivering documents, the system will check first to see if text exists for the document type being delivered. If it does not find any, it will use the text on the "General" tab.



Note: There are separate tab sets for Sales and Purchasing documents. Only document types that were checked on the Document Delivery Initialization will be shown.

Achieve One System Message	×
Body: Dear Def Contact ID,	1
Please find the Invoice Number 10000 attached, in the amount of 6.50. This is in reference to your document . Please note that the Due Date for this Invoice is Dec 8 2014.	
Thank you for your business!	
Sincerely,	
Manager OK	



Customer Configuration

Achieve One > Achieve Document Delivery > Customer Delivery > Document Delivery Customer	
Configuration	

cun	nent Deli	very Cu	stor	ner C	onfigurat	ion				_				_]
usto	mer		⇒	465500											
ame				John D	eere										
onta	ict			BP Def											
riorit					Priority										
	e Activity p			Delivery											
ave /	Attachmen	on Activi	ity		✓										
	ieneral	Sales Quo		- 1	ales Order	Sales Confirmation	Delivery	Returns	A/R Invoice	1.00	t Credit Memo	A/R Statements	Freight Control	Blanket Agreement	
		Sales Quo	otatio	n 54	ales Order	Sales Confirmation	Delivery	Returns	A/K Invoice	×ρ	Credit Memo	A/K Statements	Freight Control	Blanket Agreement	¢
#	Name		Int.	Email	E-Mail Ad	dress	Fa	Fax No		Print	Printer Name				
1	John Deer	re		~	BPEmail@e	email.com		555-555	-5555		None				,
								_							
								_							
								_							
								_							
0	ж	Cancel		Add	Row	Create Defaults									

This screen allows you to enter standard document delivery methods for each customer. All of the tabs are identical.

The General tab provides default settings for the customer. It will be used for all documents, unless overridden for a specific document type by one of the other tabs. Information on all tabs is entered in the same way. Note that only the General tab is required; use other tabs only if they are exceptions to the routing on the General tab.

In the header section, enter the following:

Customer:	Enter the customer code
Name:	The customer name is automatically shown
Contact:	Select one of the contacts for the customer, or select "BP Default" to create a default record that will apply to all contacts of that customer
Priority:	Select Low, Normal, or High priority



Create Activity Per Document Delivery: Check if you wish to create an Activity for each delivery.

Save Attachment on Activity: Check if you will create Activities and wish to save the delivered document as an attachment

Enter one or more rows to determine the delivery destinations:

Enter the contact name for the document transmission. Then check one or more of the routing options, and enter the appropriate information.

- Internal: suitable only for employees of the company provides a system alert
- Email: enter an email address for the document to be sent as an attachment
- Fax: enter a fax number for the document to be sent (*Note: this requires faxing software*)
- Print: select a system printer

Other settings may be entered for the specific document types that were checked in the Document Delivery Initialization.



Vendor Configuration

Achieve One > Achieve Document Delivery > Customer Delivery > Document Delivery Vendor	
Configuration	

	nent Delivery V			îguration						
endo			N1010							
ame				Sot What You Need Inc.						
onta iorit			BP Def							
	y e Activity per Docu			FHORKy						
	Attachment on Act		Deliver	V						
1007	Action and a second second	vity								
	General Pu	irchas	e Order	Goods Receipt PO Good	ds Return	A/P Invoice	AÆ	Credit Memo	Container Management	Blanket Agreement
						• • • •			-	-
#	Name	Int.	Email	E-Mail Address	Fax	Fax No.	Print	Printer Name		
1	N We Got What Y		~	BPEmail@wgwyn.com			~	None		•
C	OK Cane	el	Add	Row Create Defaults						
_										

This screen allows you to enter standard document delivery methods for each vendor. All of the tabs are identical.

The General tab provides default settings for the vendor. It will be used for all documents, unless overridden for a specific document type by one of the other tabs. Information on all tabs is entered in the same way. Note that only the General tab is required; use other tabs only if they are exceptions to the routing on the General tab.

In the header section, enter the following:

Vendor:	Enter the vendor code
Name:	The vendor name is automatically shown
Contact:	Select one of the contacts for the vendor, or select "BP Default" to create a default record that will apply to all contacts of that vendor
Priority:	Select Low, Normal, or High priority



Create Activity Per Document Delivery: Check if you wish to create an Activity for each delivery.

Save Attachment on Activity: Check if you will create Activities and wish to save the delivered document as a attachment

Enter one or more rows to determine the delivery destinations:

Enter the contact name for the document transmission. Then check one or more of the routing options, and enter the appropriate information.

- Internal: suitable only for employees of the company provides a system alert
- Email: enter an email address for the document to be sent as an attachment
- Fax: enter a fax number for the document to be sent (note: this requires faxing software)
- Print: select a system printer

Other settings may be entered for the specific document types that were checked in the Document Delivery Initialization.



Creating Configuration Records

As indicated in the preceding sections, customer and vendor configuration records may be entered manually, by using the ADD mode in the configuration screen. However, it is also possible to create the records in a more automated way.

Individual Record Creation

You can create customer or vendor configuration records from the BP Master screen.

ode Manual	c2000	0	ustomer 🔻			Local Curren		*	
ame	Cente	rport Compon	ents	Account Balance	=			1.25 🚹	
oreign Name				Deliveries	=			19.80 🌆	
roup	Custo			Orders	5	>	8,70	06,45 🌆	
urrency	US Do			Opportunities					
ederal Tax ID	FedTy	ID1		Rental Orders				0.00	
Ge <u>n</u> eral Con	tact Per <u>s</u> ons	<u>A</u> ddresses	Payment Term	s <u>P</u> ayment Run	Accounting	Properties	Remar <u>k</u> s	AR Collection	Attachments
John Smith				Contact ID	Su	isan Jones	ĝ	•	
Susan Jones				First Name					
Define New				Middle Name					
				Last Name					
				Title					
				Position					
				Address					
				Telephone 1					
				Telephone 2				33	
				Mobile Phone					
				Fax					
				E-Mail	sjo	nes@gmail.cor			
				E-Mail Group					
				Pager					
				Remarks 1					
				Remarks 2					
				Password					
				Portal Login ID				*	

Note: On the Contact Person tab, highlight one of the contacts. Then click on the "Doc Delivery" button. The Document Delivery customer or vendor configuration screen will open. If a record already exists for the selected contact person, it will be displayed. If a record for that person does not exist, it will be created, using the email address and/or fax number from the contact record. Only the General tab is entered.



Sustor	ner	-	c20000										
lame			Center	port Comp	onents								
onta	=t		Susan	Jones									
riorit	y		Norma	l Priority		*							
	Activity per Do Attachment on A		eliver;	· V									
ave A	Attachment on A	ctivity		V									
G	eneral Sales	Quotatio	n Sa	ales Order	Sales Confirmation	Delivery	Returns	A/R Invoice	A/R	t Credit Memo	A/R Statements	Freight Control	Blanket Agreement
#	Name	Int.	Email	E-Mail Ad	dress	Fax	Fax No.		Print	Printer Name			
1	Susan Jones		~	sjones@gr	nail.com					None			•

Note: The record is added automatically, but you may edit it as needed.

Create records for all Business Partners

When you are first beginning to use **Achieve Document Delivery**, you may have hundreds or thousands of customers, vendors, and contacts already in the database. If you are confident that the contact names, email addresses, and fax numbers are correct and up-to-date, you may perform a one-time mass creation of Document Delivery customer and vendor configuration records.

On the customer or vendor configuration screen, click on the "Create Defaults" button. The system will scan all of the business partner records, and create configuration records for each one.

- One BP Default record will be created for each business partner. It will include the email and fax information from the General tab of the BP Master.
- One record will be created for each contact person. It will include the email and fax information from the contact record.
- Only the General tab of the configuration records will be populated.
- If an email address exists, it will be checked. If a fax number exists, it will be checked.

Note: Running this program will remove any existing BP configuration records. Do not run it if valid records already exist, unless you want them to be replaced by the default records.



Create Records for New Business Partners and Contacts

If you have selected "Create Records on BP or Contact Addition" in the Document Delivery Configuration, the system will automatically create a customer or vendor configuration record whenever a new business partner or contact is added to the system. As in the Create Defaults procedure, only the General tab will be populated.

If you have selected "Set to print on created records", then the Print option will be checked on the records that are automatically created.

Marketing Document Configuration

If you have checked "Enable Marketing Document Configuration" in the Document Delivery Initialization, then all marketing documents (i.e., sales and purchasing documents) will contain an additional tab. You may enter recipient information on this tab, relevant to this document only. This is optional, leaving the tab blank uses the BP or Contact defaults. Completing this tab overrides the defaults. *Recipients listed here will receive the document in place of the recipients on the customer or vendor configuration.*

A/R I	nvoic	e											
Custor Name Conta Custor Local (Branch	ct Pers mer Re Currer	son 🖕	 ▶ 465500 John Deere ▶ Def Contact II test-121015-11 ▼ 							Due D Docur Ship F	ig Date	10011 Open 12/10/15 12/15/15 12/10/15 22222	
	Cor	ntents	Logistics	Ĭ	Accoun	ting	Documer	t Deliver	/	Attachment	z		
	#	Name	Report	Int.	Email	E-Mail Ad	dress	Fax	Fax No.	Print	Printer Name		
1			None	▼ □ 							None		
Sales E Owner		/ee	Ian							Total I Discou	Before Discount	%	\$ 23.00
Pa Remarl		: Order Run	Sased On Sal Based On Del			-				Total I Freigh Ro Tax Total	Down Payment		\$ 23.00 \$ 1.50 \$ 21.50
C	ж	Cance	4								Copy F	rom Copy	То 🖌



Note: Once entries are made on a marketing document, they will be copied to any target documents that are created. For example, if a recipient is entered on a Sales Order, it will also appear on the Delivery and A/R Invoice that may be copied from the Sales Order. If you do not want the same recipient on a target document, you must remove or change it after the target is created.

Target documents created by means of the Document Generation Wizard will also carry the Document Delivery configuration from their base documents.



Procedures

Batch Delivery

Each document type is delivered from a separate screen. See the menu selections for Achieve One > Achieve Document Delivery > Customer Delivery or Vendor Delivery.

All document-type screens are identical. The A/R Invoice delivery screen is shown for illustration.

	tomer							ng Dates		То		
Nar								iment Dates		То		
	ntact		P Default		•		Fax					
	rehouse		ort Jefferson,		•		Emai	Only				
Do	cument Status	Ur	nPrinted Docu		•							
	Document	Custom	er Cont	act	Name		Ware	Created By	Entry Date	Document Date	Document Amount	
1	-> 10006	📫 c200	00 John	Smith	Centerport Compon	ents	01	ian	Nov 11 2015	Nov 11 2015	6.50	-
2	-> 10007	📫 c200	00 John	Smith	Centerport Compon	ents	01	ian	Nov 11 2015	Nov 11 2015	6.50	
3	-> 10008	📫 c200	00 John	Smith	Centerport Compon	ents	01	ian	Nov 13 2015	Nov 13 2015	13.00	
4	-> 10009	📫 c200	00 John	Smith	Centerport Compon	ents	01	ian	Nov 16 2015	Nov 16 2015	6.50	
Del	iver To Contact	Co	ontact from D	ocument								
Em	ail Address to Send											
FA:	Number to Send											

In the header section, enter any relevant criteria for the documents you wish to deliver.

Customer/Vendor: If you wish to deliver documents for a single Business Partner only, enter the code for the customer or vendor (depending on the document type). You may use TAB or the Search button to search for the code. If you wish to deliver documents for multiple Business Partners, leave this field blank.

Name: The customer or vendor name will be displayed.



Contact:	If a single Business Partner is selected, you may choose from a list of that BP's contacts, or you may choose "BP Default" to include all contacts. If the Customer or Vendor field is blank, then only the "BP Default" selection is available.
Warehouse:	Select a single warehouse or "All Warehouses". Note that service- type documents do not have a warehouse designation and therefore cannot be included when a specific warehouse is selected.
Document Status:	 Select the status of the documents to be displayed: All Closed Open Unprinted Open and Unprinted
Posting Dates:	If desired, enter a range of posting dates to be included.
Document Dates:	If desired, enter a range of document dates to be included.
Fax Only:	Check if you wish to include only documents where there is a fax option.
Email Only:	Check if you wish to include only documents where there is an email option.
Make the following selection	ns in the fields at the bottom of the screen:
Deliver to Contact:	 Select the contact to deliver to. Note that different contacts may have different delivery configurations (*see note below). BP Default Contact from Document
Email Address to Send:	If you wish to override the email addresses in the configuration for the Business Partners or Contacts, enter the desired email address in this field.
Fax Number to Send:	If you wish to override the fax numbers in the configuration for the Business Partners or Contacts, enter the desired fax number in this field.



*Note: "Deliver to Contact": Achieve Document Delivery allows two different methods of setting delivery criteria.

- You may specify recipients according to the contact person on each document in other words, if a customer has three different contact people who all receive Sales Quotations, each one may require that they receive their own quotations at their own email addresses. If this is the case, you must have a separate Customer Configuration record for each contact, specifying each contact's information for receiving quotations. You should select "Contact from Document" when sending a batch of documents.
- Alternatively, it may be that all documents of a particular type should go to the same recipient, regardless of who the contact is on each document; for instance, all invoices might go to the same Accounts Payable department, even if they result from quotations and orders by different contacts. If this is the case, you must have a Customer Configuration set as "BP Default" for the customer which provides the generic delivery information for the customer's company. You should select "BP Default" when sending a batch of documents.



Once the criteria have been entered, click on the "Search" button. The screen will display all documents that meet the criteria.

Click on one row to highlight it, or use the Shift or Control key to select multiple rows. You may also use the "Select All" button. You may then do any of the following:

- 1. Use the "Print Selected" button to make printed copies of the selected documents. The documents will be sent to the user's default printer.
- 2. Use the "Deliver Selected" button to utilize the Document Delivery setups to send each document to its preset destination. The system will perform the following functions for each document
 - a. Determine the Business Partner
 - b. Determine the Contact
 - c. Determine if there is a Document Delivery Configuration record for the BP and Contact
 - d. Determine if there is a Document Delivery setup for the specific document type
 - e. If there is a specific routing for the document type, the system will use those instructions to email, fax, and/or print the document
 - f. If there is no specific routing but there is a general routing, the system will use the general instructions to email, fax, and/or print the document
 - g. If the selection "Deliver to Contact" is set to "Contact from Document", then the above steps will apply to the configuration for the contact of the document; otherwise they will apply to the configuration for BP Default contact for the Business Partner.
 - h. If there is no Document Delivery record, or if there is no routing that applies to this document type and/or contact, then the system will print the document to the user's default printer.
- 3. If it is not desired to send or print the selected documents, but you do not wish them to keep appearing on the Unprinted list, use the "Set as Printed" button to mark them as printed without actually printing or delivering them.
- 4. If you wish to re-send a document that has already been marked as printed, do not select the "Unprinted" option. You may use the "Open" status, or you may designate one or more specific document numbers.
 - After entering the business partner and warehouse in the header, click on the "Add Entry Row" button. The cursor will appear in the first row of the matrix.
 - Enter the document number in the second column, or press TAB to see a list of documents for the business partner.
 - You may enter as many documents as you wish, then select them and follow the procedures above.



Individual Delivery

Achieve Document Delivery may be used to deliver individual documents, as well as batches. To do so, follow these steps:

- 1. Open the document on the screen. Note that the document may be open or closed, printed or unprinted.
- 2. Right-click on the document. The right-click menu includes an option for Document Delivery.

A/R Invoice							
Name	465500 John Deere Def Contact ID test-121015-11:12	▼ ≘ 2				Status Posting Date Due Date	10011 Open 12/10/15 12/15/15 12/10/15
Branch	North				_	Cancel Duplicate Duplicate To External Serial Numbers	. 222
Contents	Logistics	Accounting	D	ocument l		Document Delivery	
Item/Service Type # Item No. 1 Item/No2	Item Quantity 1	Unit Price \$ 23.00	Disc 0.000	Tax ⊂ ➡ EX	P	EQ Rental Invoice Serial Number Report Invoice Log Report Base Document Row Details	Summary COGS Dimensi
▲ 					∂ ■ •	<u>New Activity</u> Payment Means Gross Profit Yolume and Weight Calculation Pa <u>c</u> king Slip Op <u>e</u> ning and Closing Remarks	
Sales Employee Owner	Ian					Inventory Posting List Related Activities Transaction Journal Journal Entry Applied Transactions	\$ 23.00
Payment Order Run Remarks	¦≯ased On Sales Based On Delive					Related Opportunities Relationship Map <u>a</u> <u>Appres random</u> Balance Due	\$ 23.00 \$ 1.50 \$ 21.50
OK Cancel						Copy From	n Copy To 🖌



3. When Document Deliver is selected, the system performs the procedures described for batch delivery, to determine the appropriate email and/or fax destinations. The following screen is displayed.

Document Delivery On De	emand A/R Invoice	
Print Email Fax Message Subject	Crystal Report Destination/To AR Invoice(calibri) - Items.rpt AR Invoice(calibri) - Items.rpt AR Invoice(calibri) - Items.rpt AR Invoice(calibri) - Items.rpt	
Message Body		
Send Cancel		

- 4. You may check one or more of the delivery options to indicate the delivery method. You may also change the report definition, email address, and/or fax number. You may use the default text for subject and body or enter an override text.
- 5. When all options are correct, click on "Send" to deliver the document.



Document Delivery History

Achieve One > Achieve Document Delivery > Document Delivery History

The Document Delivery History allows you to see a log of Document Delivery activity within a given date range. You can view deliveries that were completed, unprocessed, or had errors. You can also use this screen to send, resubmit, or suspend deliveries.

Ending Date		12/01/15															
Errors																	
Completed		v															
Un Processed																	
DocEntry	Document	Document Type	Card Code	Contact	Submitted By	Crystal Report	Output Device	Output Type	Submitted Date	Process Started	Started Time	Process Completed	Completed Time	Process Error	Subject	Consolid	ated
217 📫 109	20004	Invoice	465500		dennis	AR Invoice(calbri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20004		
218 📫 110	20005	Invoice	465500		dennis	AR Invoice(calibri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20005		
219 📫 111	20006	Invoice	465500		dennis	AR Invoice(calibri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20006		
220 📫 112	20007	Invoice	465500		dennis	AR Invoice(calbri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20007		
221 📫 115	20010	Invoice	465500		dennis	AR Invoice(calibri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20010		
222 📫 116	20011	Invoice	-> 465500		dennis	AR Invoice(calbri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20011		
223 📫 117	20012	Invoice	465500		dennis	AR Invoice(calbri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20012		
224 📫 118	20013	Invoice	465500		dennis	AR Invoice(calibri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20013		
225 📫 119	20014	Invoice	465500		dennis	AR Invoice(calbri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20014		
226 📫 122	20017	Invoice	465500		dennis	AR Invoice(calibri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20017		
227 📫 126	20020	Invoice	465500		dennis	AR Invoice(calibri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20020		
228 📫 44	10043	Invoice	470000		dennis	AR Invoice(calbri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 10043		
229 📫 121	20016	Invoice	C00012		dennis	AR Invoice(calibri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20016		
230 📫 124	20018	Invoice	C00012		dennis	AR Invoice(calbri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20018		
231 📫 125	20019	Invoice	C00012		dennis	AR Invoice(calibri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20019		
232 📫 137	20031	Invoice	C00012		dennis	AR Invoice(calibri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 20031		
233 📫 80	10079	Invoice	C009		dennis	AR Invoice(calbri) - Items.rpt	dblumkin@achieveits.com	EMAIL	12/01/15	12/01/15	11:02AM	12/01/15	11:02AM		A1 91 Test No WMS USA Invoice 10079		

Enter the starting and ending dates, and select the type of history you wish to see. Then click on "Display".

Once the list of documents is displayed, you can select one or more lines and use the "Resubmit", "Suspend", or "Send" buttons.

Note that during a submission to server side processing, once the server processor picks up the document it will be in the Errors queue until it is successfully completed or the message cannot be sent and the Process Error is updated.



Appendix: Subject and Body Fields

The following illustrations provide examples of Subject and Body field setups. You may select additional or alternative fields, if you wish.

Document Header Fields

	Document Header Fields	Document Line Fields	: T	Card Code Fields	Contact Fields	Employee Fields
#	Field Name		SQL P	Field Name		
	Customer Name		Cardℕ	lame		•
	Customer Code		CardO	Iode		*
	Date Entered		DocDa	ate		
	Due Date		DocDu	ueDate		•
	Document Number		DocNe	um		
	Document Total		DocTo	otal		*
	Salesperson Code		SlpCo	de		*
	DK Cancel					

Document Line Fields

	Document Header Fields	Document Line Field	ds Card Code Fields	Contact Fields	Employee Fields
#	Field Name		SQL Field Name		
	Item Number		ItemCode		▼ ▲
2	Qty Ordered		OrderedQty		*
8	Unit Price		Price		*
ŧ					•



Card Code Fields (Business Partners)

_	Document Header Fields	Document Line Field	2	Card Code Fields	Contact Fields	Employee Fields
ŧ,	Field Name		SQL Fi	eld Name		
	Company		CardNa	ime		▼ ▲
	Address		Addres	2		•
	City		City			•
ŀ	State		State1			•
	Zip		ZipCod	e		•
	Customer Code		CardCo	ode		*
	Balance		Balance	1		•
						•
						-
						-

Contact Fields

Document Header Fields	Document Line Fields	Card Code Fields	Contact Fields	Employee Fields
# Field Name	SQL	Field Name		
1 First Name	First	Name		▼ ▲
2 Last Name	Lasth	łame		•
3 Name	Nam	e		•
4 E-mail	E_M	ailL		*
5				*
5				•
				~



Employee Fields

	Document Header Fields	Document Line Fields	Card Code Fields	Contact Fields	Employee Fields
•	Field Name	sq	. Field Name		
	Phone Extension	offi	eExt		• • • • • • • • • • • • • • • • • • •
					•



Appendix: Setting up Users for Office 365

When working with a subscription email service such as Office 365 the email authorization is often required at the user level. This authenticates to each email address and avoids having to create an account that has the send on behalf of permissions for each and every email address.

To configure a user to be able to send via SMTP when user level credentials are required, you will use the User Defined field on the Users – Setup

Users - Setup		▲ ▼ ► General	* <u>×</u>
✓ <u>Superuser</u> <u>Mo</u> bile User		SMTP Login User Name	
User Code	manager		
Bind with Microsoft Windows Account			
User Name	manager		
Employee	T		
E-Mail	pshukla@achieveits.com		
mobile Priorie		SMTP Login User Password	
Mobile Device ID			
Fax			
Defaults			
Branch	Main		
Department	General		
Authorization Groups		Edit Gate Entry	Yes 🔻
		QC Inspector	Yes 🔻
Language		QC Disposition Authority	Yes 🔻
Password	****	Store User	•
Password Never Expires		Can Run Confidential Payroll	•
☐ ⊆hange Password at Next Logon		Limit Shipping Requests	No
		Remember Last File Search Path	Yes 🔻
Engble Setting Integration Packages		File Search Path	C:\temp
OK Cancel Copy Form S	Settings		

Complete the SMTP setup in the Document Delivery Configuration such that the system knows the SMTP Server, Encryption Method and Port. The Username and password will be overwritten by the SMTP Login User Name and SMTP Login User Password field from the signed in SAP user record. Note that the email address on the user should also match to avoid any email server issues.