

KEY FEATURES

- On-Demand Document Delivery
- By Customer – Contact - Form
- By Vendor – Contact - Form
- Email Options
- Fax Option
- EDI Options
- Template Email Subject & Body per Document
- Default Form by Company and/or Customer
- Activity Created per Document Delivered
- Crystal Report Launcher
- Document Delivery History Log
- Vendor Delivery AP Documents Supported
- Customer Delivery AR Documents Supported

ACHIEVE DOCUMENT DELIVERY ALLOWS SAP BUSINESS ONE USERS TO EASILY DISTRIBUTE KEY DOCUMENTS TO CUSTOMERS AND VENDORS.

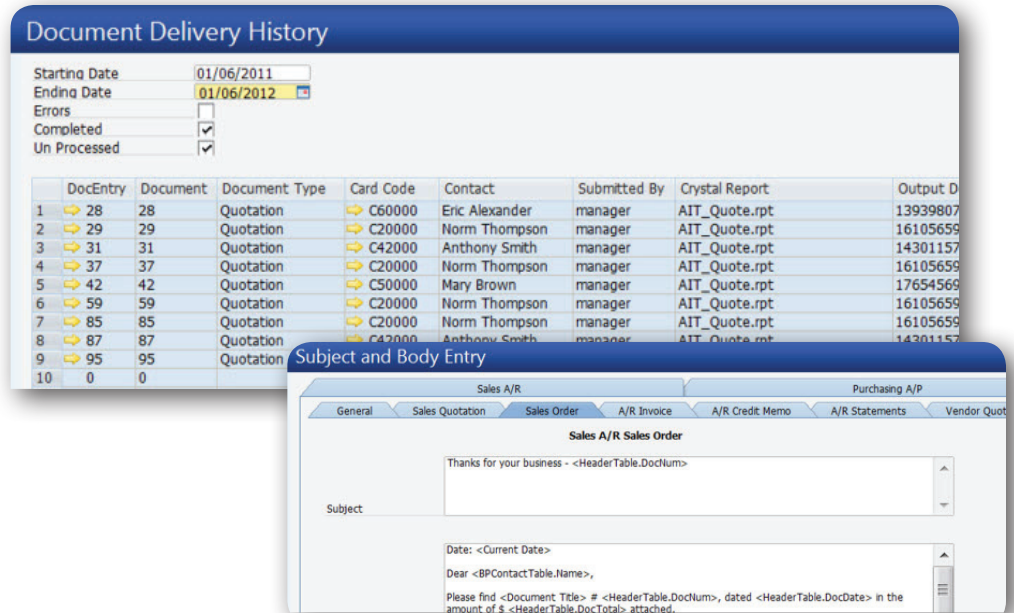
Documents can be distributed via email, fax, EDI or print based on pre-set instructions for each contact and document.

With Achieve Document Delivery, companies utilizing SAP Business One, can

save substantial amounts of time and money, while increasing customer service levels by promptly delivering these business documents.

With Achieve Document Delivery, documents can be distributed in one large batch, individually or based on a user defined filtering option. As with all Achieve One modules, the Achieve Document Delivery is built specifically for SAP Business One, utilizing the advanced technical architecture of the SAP Business One Software Development Kit.

- Email Options
 - » SMTP
 - » Outlook
 - » SAP
- Fax Option
 - » eFax
 - » Visi-Fax
 - » SAP
- EDI Options
 - » Achieve EDI
- Template Email Subject & Body per Document
- Default Form by Company and/or Customer
- Activity Created per Document Delivered
- Crystal Report Launcher
- Document Delivery History Log



Document Delivery History

Starting Date: 01/06/2011
 Ending Date: 01/06/2012
 Errors:
 Completed:
 Un Processed:

DocEntry	Document	Document Type	Card Code	Contact	Submitted By	Crystal Report	Output D
1	28	Quotation	C60000	Eric Alexander	manager	AIT_Quote.rpt	13939807
2	29	Quotation	C20000	Norm Thompson	manager	AIT_Quote.rpt	16105659
3	31	Quotation	C42000	Anthony Smith	manager	AIT_Quote.rpt	14301157
4	37	Quotation	C20000	Norm Thompson	manager	AIT_Quote.rpt	16105659
5	42	Quotation	C50000	Mary Brown	manager	AIT_Quote.rpt	17654569
6	59	Quotation	C20000	Norm Thompson	manager	AIT_Quote.rpt	16105659
7	85	Quotation	C20000	Norm Thompson	manager	AIT_Quote.rpt	16105659
8	87	Quotation	C42000	Anthony Smith	manager	AIT_Quote.rpt	14301157
9	95	Quotation					
10	0	0					

Subject and Body Entry

Sales A/R / Purchasing A/P

General / Sales Quotation / Sales Order / A/R Invoice / A/R Credit Memo / A/R Statements / Vendor Quot

Sales A/R Sales Order

Thanks for your business - <HeaderTable.DocNum>

Subject

Date: <Current Date>

Dear <BPContactTable.Name>,

Please find <Document Title> # <HeaderTable.DocNum>, dated <HeaderTable.DocDate> in the amount of \$ <HeaderTable.DocTotal> attached.

- Vendor Delivery
 - AP Documents Supported
 - » Purchase Order
 - » Purchase Receipt
 - » Purchase Return
 - » Purchase Invoice
 - » Purchase Credit Memo
 - » Purchase Outbound EDI (Requires Achieve EDI)

- Customer Delivery
 - AR Documents Supported
 - » Quote
 - » Sales Order
 - » Confirmation
 - » Sales Delivery
 - » Sales Returns
 - » Sales Invoice
 - » Sales Credit Memo
 - » Sales Statements
 - » Sales Dunning Letters
 - » Sales Outbound EDI (Requires Achieve EDI)

Document Delivery Initialization

Server Name (To Find Crystal Printers)(localhost)

Report Path C:\SAP Install\Achieve IT Sales Demo Directory\Crystal Reports

Internal Store Path C:\SAP Install\Achieve IT Sales Demo Directory\Crystal Reports\Storage

Server Message

Client Prints (not Server Side)

Client Emails (not Server Side) Consolidated Emails

Client FAXs (not Server Side) Consolidated FAXes

Client Internal (not Server Side)

Create Records on BP or Contact Add

Set to Print on Created Records

Create Activity per Document Delivery

Save Attachment on Activity

Send zero total Invoices

Sales A/R		Purchasing A/P		Emailing		FAXing	
Sales Quotation	<input checked="" type="checkbox"/>	Default Crystal Report	AR Sales Quote - Items.rpt	Default Crystal Printer	Adobe PDF		
Sales Order	<input checked="" type="checkbox"/>	Default Crystal Report	AR Sales Order - Items.rpt	Default Crystal Printer	Adobe PDF		
Sales Confirmation	<input type="checkbox"/>	Default Crystal Report	AR Sales Order - Items.rpt	Default Crystal Printer	Adobe PDF		
Delivery	<input type="checkbox"/>	Default Crystal Report	None	Default Crystal Printer	None		
Returns	<input type="checkbox"/>	Default Crystal Report	None	Default Crystal Printer	None		
A/R Invoice	<input checked="" type="checkbox"/>	Default Crystal Report	AR Invoice_SAP_Orig.rpt	Default Crystal Printer	Adobe PDF		
A/R Credit Memo	<input checked="" type="checkbox"/>	Default Crystal Report	AR Credit Memo - Items.rpt	Default Crystal Printer	Adobe PDF		
A/R Statements	<input checked="" type="checkbox"/>	Default Crystal Report	AIS_AR_Statement.rpt	Default Crystal Printer	Adobe PDF		
Freight Control	<input type="checkbox"/>	Default Crystal Report	Pack_List.rpt	Default Crystal Printer	CutePDF Writer		
A/R Down Payment Invoic	<input type="checkbox"/>	Default Crystal Report	None	Default Crystal Printer	None		

OK Cancel

Sales Order

Customer C100

Name Achieve One Industries

Contact Person Timothy Singleton

Customer Ref. No.

Local Currency

No.	Primary	182
Status	Unapproved	
Posting Date	12/20/2011	
Delivery Date	12/20/2011	
Document Date	12/20/2011	
Seasonal Pricing	No	

#	Name	Report	Int.	Email	E-Mail Address	Fax	Fax No.	Print	Printer Name
1	Timothy Singleton	AR Sales Order - Items.rpt	<input type="checkbox"/>	<input checked="" type="checkbox"/>	tsingleton@achieveits.com	<input type="checkbox"/>		<input type="checkbox"/>	None
	Dave Mincy	AR Invoice 88A.rpt	<input type="checkbox"/>	<input checked="" type="checkbox"/>	dmincy@achieveits.com	<input type="checkbox"/>		<input checked="" type="checkbox"/>	Adobe PDF

A/R Statements

Starting Customer

Ending Customer

Aging Date 01/06/2012

Fax Only

Email Only

Include Zero Balance

Include Reconciled Invoic

OverDue Only

OverDue Days 30

Card Code	Name	Contact	Credit Limit	Orders	Deliveries	Account
1	C200333 Tommy Singleton	Norm Thompson	0.00	0.00	0.00	11,766.0
2	C30000 Microchips	Judy Brown	0.00	540.89	63,754.36	8.12
3	C40000 Earthshaker Corporation	Bob McKensy	50,000.00	120,911.70	7,343.88	59,950.0
4	C70000 Aquent Systems	Troy Brown	350,000.00	1,049.97	104,999.99	351,750

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