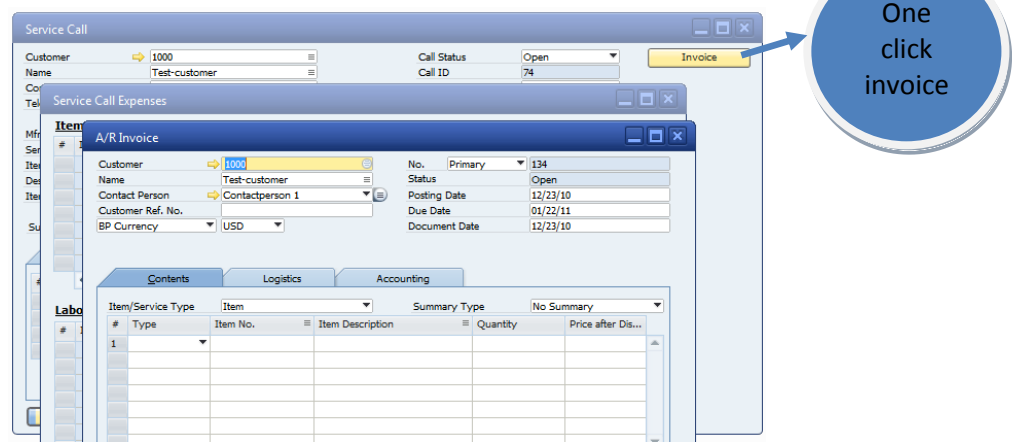


Create a button on service call that create a an invoice

Summary	
Module	Function Buttons + Universal Functions
Level	Advanced
Requirements	B1UP 2.7.4.0 or higher

Scenario

The customer uses service calls, and create invoices tied to the call, but is tired of the long process before invoice is ready (Expenses tab > Expense Details > New Document > Invoice > Ok = 5 clicks).



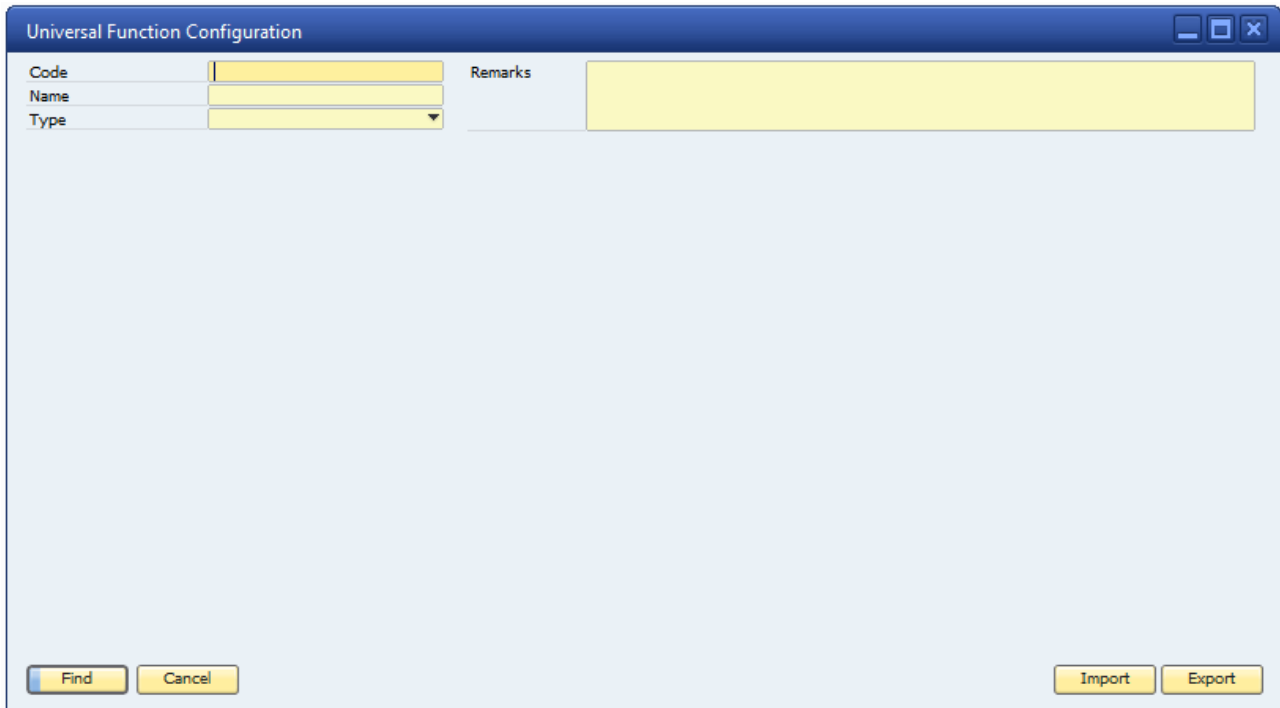
Needed configuration

You will need two things to do this:

1. The universal function that will provide the functionality
2. A function button configuration that set a button and link it to the universal function.

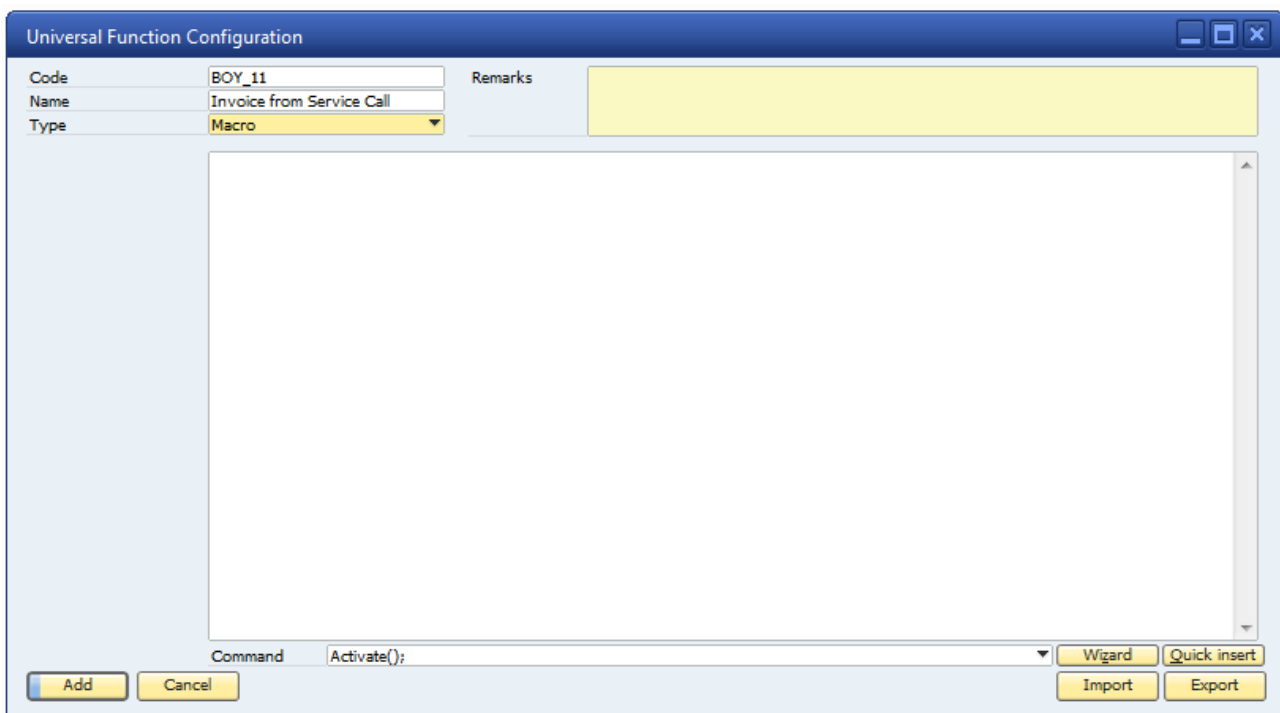
Step 1. Universal Function

To create universal functions please navigate to Administration > Add-Ons > B1 Usability Package > Module configuration > Universal Function configuration



The image shows a 'Universal Function Configuration' dialog box. It has a blue title bar with standard window controls. The main area is light blue. At the top, there are three input fields: 'Code' (a text box), 'Name' (a text box), and 'Type' (a dropdown menu). To the right of these is a large 'Remarks' text area. At the bottom, there are four buttons: 'Find', 'Cancel', 'Import', and 'Export'.

Start by switching to add-mode and choose the Universal Function type called Macro



The image shows the same 'Universal Function Configuration' dialog box, but now it contains data. The 'Code' field is filled with 'BOY_11', the 'Name' field with 'Invoice from Service Call', and the 'Type' dropdown is set to 'Macro'. The 'Remarks' area is empty. At the bottom, there is a 'Command' dropdown menu showing 'Activate();'. There are also buttons for 'Add', 'Cancel', 'Wizard', 'Quick insert', 'Import', and 'Export'.

First thing we need to do is to provide a code and a name for your configuration and optional some remarks to keep track of what the function does.

It is you that decide the code, name it just have to be unique and the code can max. be up to 8 characters long.

In this sample set the Code to BOY_11 and the name and add the remarks

Next we need to provide the data for the macro (scripting of the 5 steps). What we want to do is to

1. Click on the 'Expenses' tab
2. Click on the 'Expenses Details' button
3. On the new window that appear we wish to press the 'New document' button
4. On the new window that appear we wish to choose the Invoice option and press the OK button on order to get to our result which is an empty invoice ready to be added.

The steps above can be translated into the following macro

Universal Function Configuration

Code: BOY_11 Remarks:

Name: Invoice from Service Call

Type: Macro

Click(\$[64.0.0]); //Click on the expenses tab
Click(\$[75.0.0]); //Click on expenses Details
Activate(); //Tell the system that a new window is now the active
Click(\$[3.0.0]); //Click on the new document button
Activate(); //Tell the system that a new window is now the active
Click(\$[5.0.0]); //Mark invoice as selected
Click(\$[6.0.0]); //Click OK

Command: Activate();

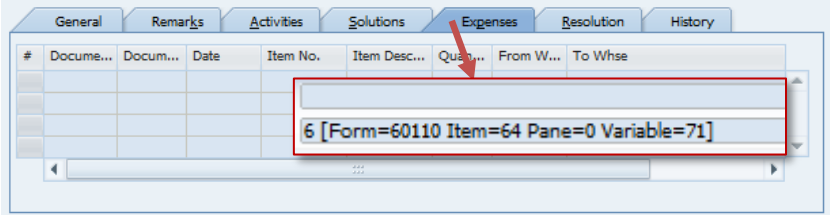
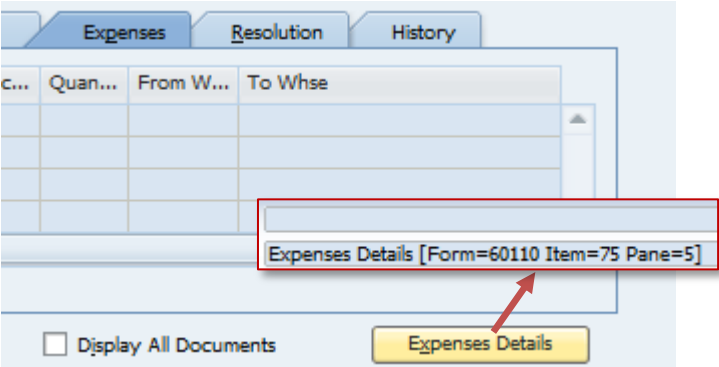
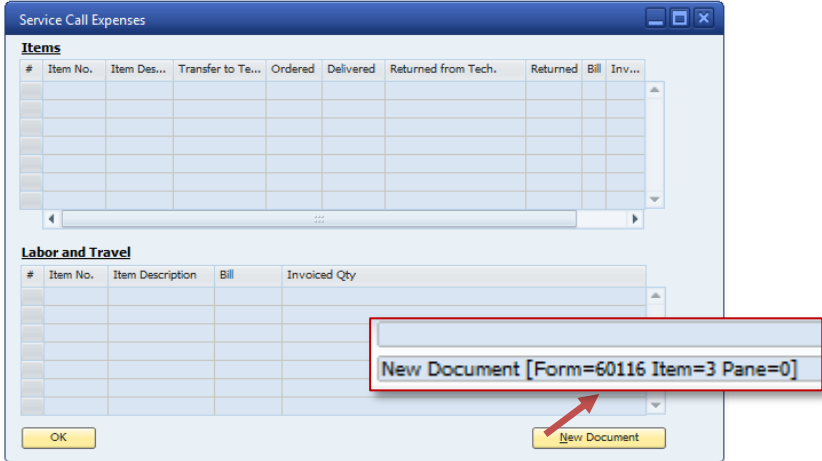
OK Cancel Wizard Quick insert Import Export

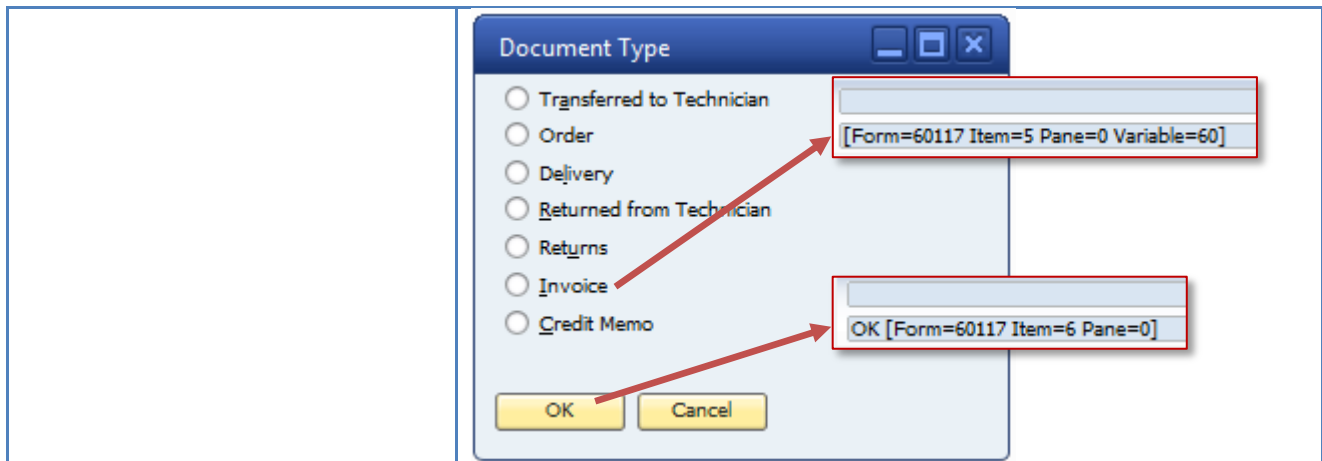
Macro for copy/paste:

```
Click($[64.0.0]); //Click on expenses tab
Click($[75.0.0]); //Click Expenses Details
Activate(); //Tell the system that a new window is now the active
Click($[3.0.0]); //Click on the new document button
Activate(); //Tell the system that a new window is now the active
Click($[5.0.0]); //Mark invoice as selected
Click($[6.0.0]); //Click OK
```

Let's take a closer look at what happens:

Step	Macro
Click on the 'Expenses' tab	We activate system information and discover that the Expenses tab

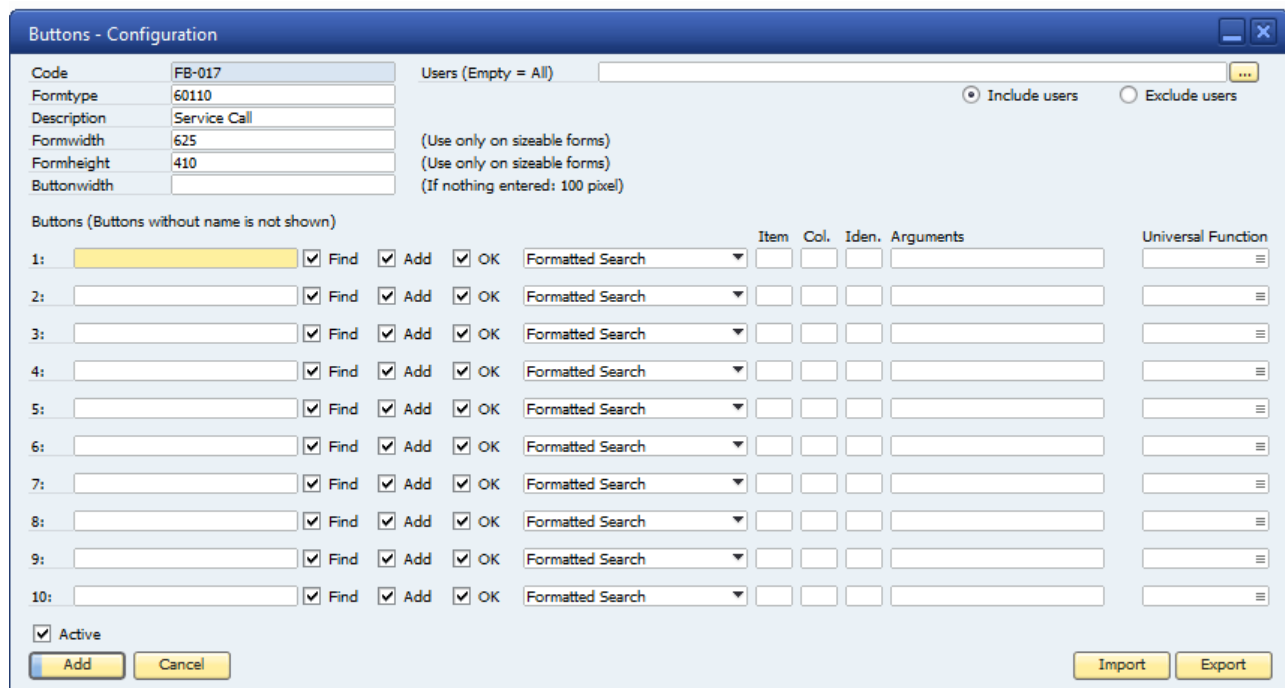
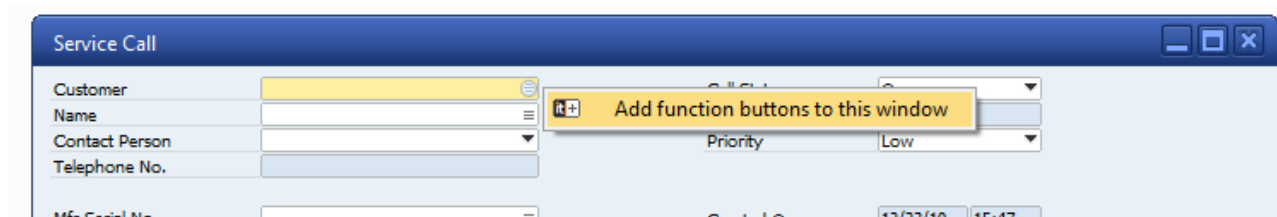
	<p>have item id = 64 and using the macros click command simulate a click on it</p> 
<p>Click on the 'Expenses Details' button</p>	<p>Next we find the id of the Expenses Detail button which is 75. Again we use a click-command</p> 
<p>On the new window that appear we wish to press the 'New document' button</p>	<p>Before we are able to click the button on the new window we need to tell the macro that it should work on this new window. This is done by calling the Activate(); command</p> <p>Now all we need to do on the Expenses details window is to find the id of the new document button which is 3</p> 
<p>On the new window that appears we wish to choose the Invoice option and press the OK button on order to get to our result which is an empty invoice ready to be added.</p>	<p>Again a new window opens and we'll need to call the Activate(); command again so the macro knows that we are now working on this window.</p> <p>Last two things to do is identify the Invoice option (Id: 5) and the Ok-button (Id: 6) and click both in that order</p>



We are now ready to add the configuration and tie it the Function buttons

Step 2. Function Button Configuration

The function button we are planning for this should be located on the business Partner Master, so the first thing we need to do is to it, right click and choose “Add function Buttons on to this window”



Now we need to define the buttons we would like on the business partner window. This is done by simply adding the wanted name of the button and set the type to Universal Function.

Buttons - Configuration

Code: FB-017
 Formtype: 60110
 Description: Service Call
 Formwidth: 625 (Use only on sizeable forms)
 Formheight: 410 (Use only on sizeable forms)
 Buttonwidth: (If nothing entered: 100 pixel)

Buttons (Buttons without name is not shown)

Item	Col	Iden	Arguments	Universal Function
1: Invoice	<input checked="" type="checkbox"/> Find	<input checked="" type="checkbox"/> Add	<input checked="" type="checkbox"/> OK	Universal Function

Universal Function: BOY_11

For the button go to the Universal function field, press tab and choose the BOY_11 universal function.

For this sample we do not need more configuration so simply press add to save the configuration.

Use of functionality

Now when we open a Service Call window we already see the button.

Service Call

Customer: [Field]
 Name: [Field]
 Contact Person: [Field]
 Telephone No.: [Field]
 Mfr Serial No.: [Field]
 Serial Number: [Field]
 Item: [Field]
 Description: [Field]
 Item Group: [Field]

Call Status: Open
 Call ID: [Field]
 Priority: [Field]
 Created On: [Field]
 Closed On: [Field]
 Contract No.: No Contract
 End Date: [Field]

Subject: [Field]

General | Remarks | Activities | Solutions | Expenses | Resolution | History

Origin: [Field]
 Problem Type: [Field]
 Call Type: [Field]
 Technician: [Field]

Handled by: [Field]
 Queue: [Field]

Response
 By: [Field]
 On: [Field]

Resolution
 By: [Field]
 On: [Field]

Find Cancel

If we navigate to a service call and press our button, the macro will initiate and the normal 5 steps will feel as one.

