

Single Letter Merge

Summary	
Module	Letter Merge
Level	Easy
Requirements	B1UP 2.9.1.0 or higher

Scenario

The customer wants to make a standard letter to a business partner, based on a Word template.

Needed Configuration

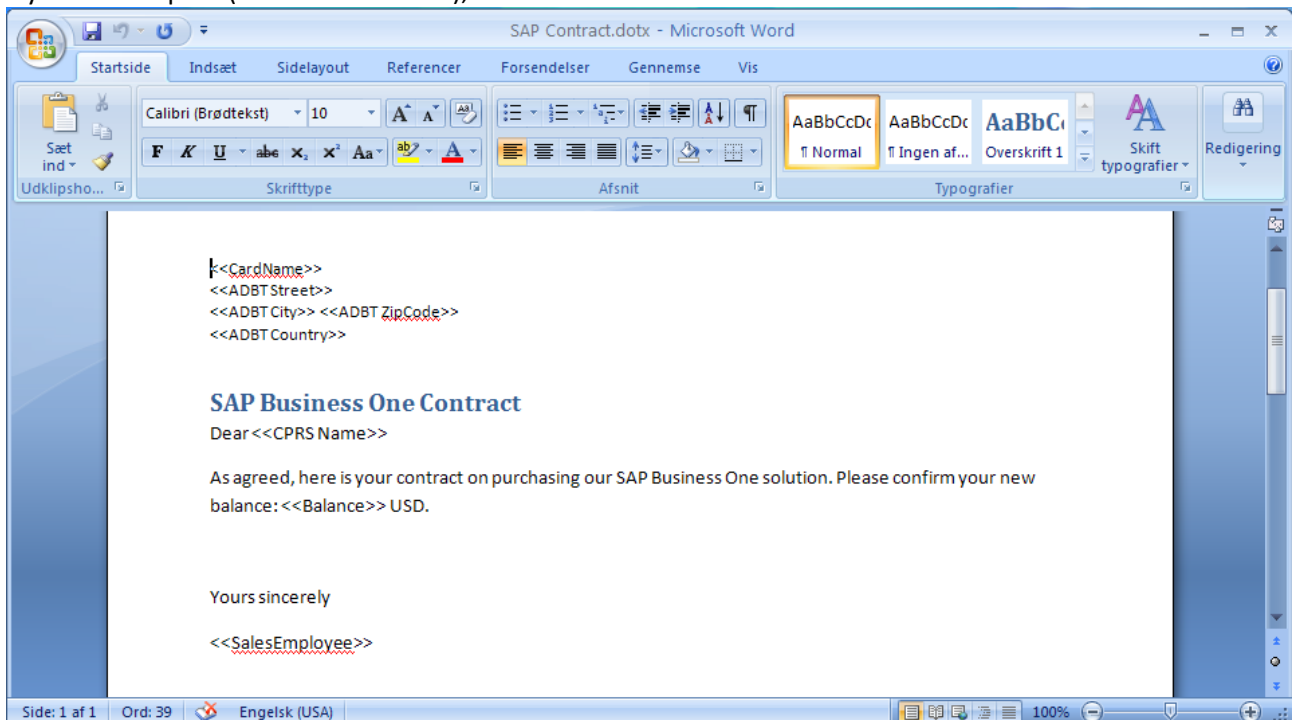
You will need to have created a Word template to use in advance. The following document types are valid:

- .doc – Standard Word 2003 document.
- .docx – Standard Word 2007/2010 document.
- .docm – Word 2007/2010 document with macros enabled.
- .dot – Word 2003 template.
- .dotx – Word 2007/2010 template.
- .dotm – Word 2007/2010 template with macros enabled.

Templates contain key words which can be found in the table BOY_20_BFMT. This table can be accessed from within SAP B1 through Tools > User Tables > BOY_20_BFMT. Below is a screenshot that shows what it looks like:

#	Code	Name	Document value	Pre BP value	BP Value	Post BP value	Replace method
1	00000000	00000000	<<CardCode>>		CardCode		Always
2	00000001	00000001	<<LicTradNum>>		FederalTaxID		Leave blank if BP value is empty
3	00000002	00000002	<<CardName>>		CardName		Always
4	00000003	00000003	<<CardName>>		CardName		Always
5	00000004	00000004	<<GroupCode>>		GroupCode		Always
6	00000005	00000005	<<GroupName>>		GroupName		Always
7	00000006	00000006	<<CardTypeCode>>		CardTypeCode		Always
8	00000007	00000007	<<CardType>>		CardType		Always
9	00000008	00000008	<<Currency>>		Currency		Always
10	00000009	00000009	<<Phone1>>		Phone1		Leave blank if BP value is empty
11	00000010	00000010	<<Phone2>>		Phone2		Leave blank if BP value is empty
12	00000011	00000011	<<Cellular>>		Cellular		Leave blank if BP value is empty
13	00000012	00000012	<<Fax>>		Fax		Leave blank if BP value is empty
14	00000013	00000013	<<E_Mail>>		E_Mail		Leave blank if BP value is empty
15	00000014	00000014	<<IntrntSite>>		IntrntSite		Leave blank if BP value is empty
16	00000015	00000015	<<ShipType>>		ShipType		Leave blank if BP value is empty
17	00000016	00000016	<<ShipTypeCode>>		ShipTypeCode		Leave blank if BP value is empty
18	00000017	00000017	<<SalesEmployee>>		SalesEmployee		Leave blank if BP value is empty
19	00000018	00000018	<<SalesEmployeeCode>>		SalesEmployeeCode		Leave blank if BP value is empty
20	00000019	00000019	<<IndicatorCode>>		IndicatorCode		Leave blank if BP value is empty
21	00000020	00000020	<<Indicator>>		Indicator		Leave blank if BP value is empty
22	00000021	00000021	<<ProjectCode>>		ProjectCode		Leave blank if BP value is empty
23	00000022	00000022	<<Project>>		Project		Leave blank if BP value is empty

As you can see the keyword <<CardName>> is marked, to show you that this is one of the keywords I use in my Word template(SAP Contract.dotx), as shown below:



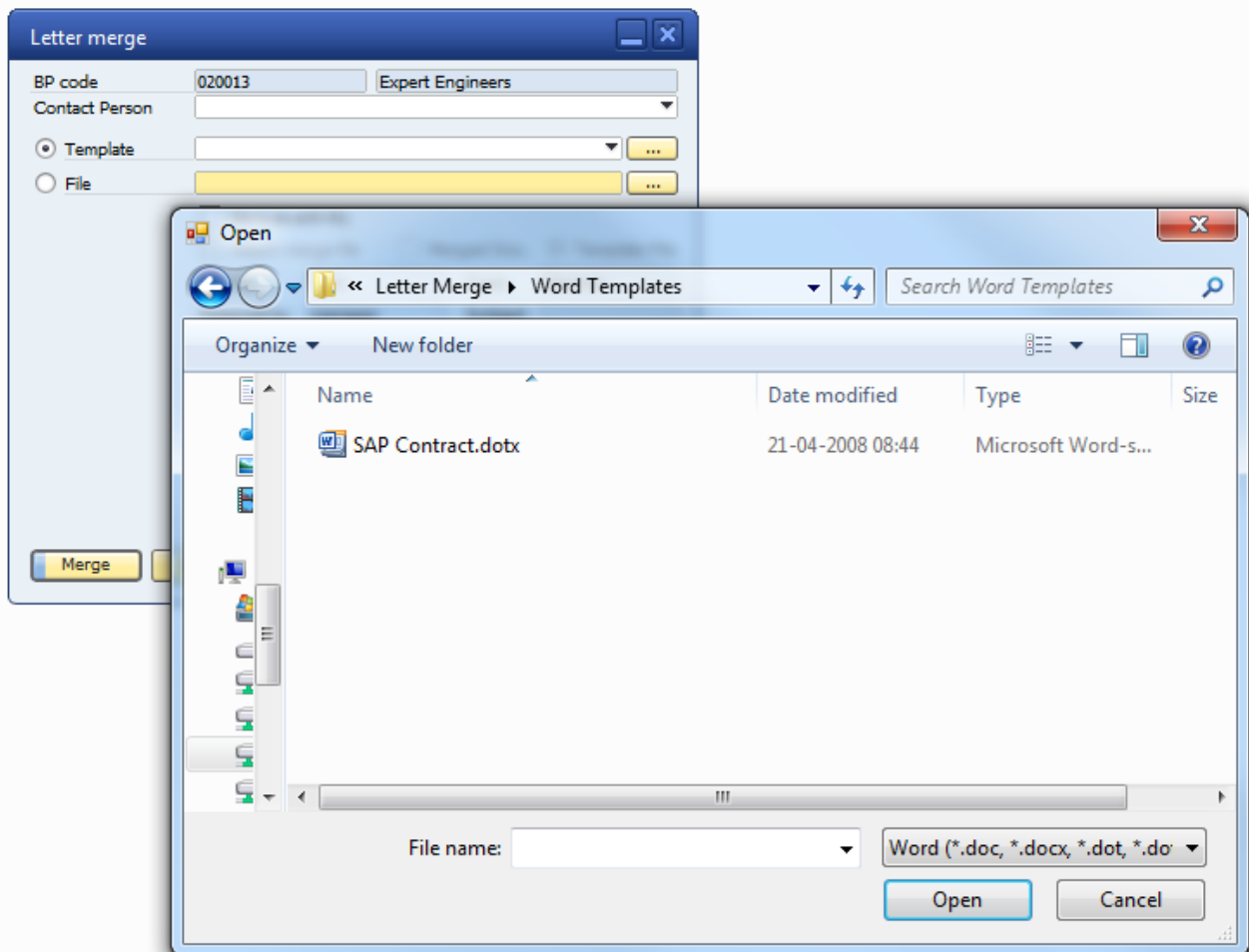
Use of functionality

The customer opens the Business Partner Master Date window, and finds the business partner he wants to send a letter to.

Business Partner Master Data

Code: 020013 Customer
Name: Expert Engineers
Foreign Name:
Group: Construction
Currency: US Dollar
Federal Tax ID:
Account Balance: 0.00
Deliveries: 0.00
Orders: 0.00
Opportunities:
Local Currency:
General Contact Persons Addresses Payment Terms Payment System Accounting Properties Remarks
Tel 1:
Tel 2:
Mobile Phone:
Fax:
E-Mail:
Web Site:
Shipping Type:
Password:
Factoring Indicator:
Project:
Industry:
Business Partner Type: Company
Contact Person:
ID No. 2:
Remarks:
Sales Employee: Mette Mortensen
User-Defined Commission: 0.000
BP Channel Code:
Technician:
Territory:
Language: English
El. Doc. Export Format:
Alias Name:
Active Inactive Advanced
From: To: Remarks:
OK Cancel Letter merge Related Service Calls Activity Related Activities

In this case it's the customer with CardCode 020013. He then clicks the Letter merge button to open the Letter Merge window, as shown on the screenshot below:



The customer has different ways of choosing the Word template he wants to use to create his merge, but chooses to use the open file dialog button (the one labeled "...").

The customer wants to use the file called "SAP Contract.dotx", so he selects it from the open file dialog box, and clicks Open. The customer doesn't want any activities created when merging, so he keeps the "Save as activity" checkbox unchecked.

Now when the customer is ready to create the merge, he just clicks the Merge button to execute the operation, which opens the Word application to show you this result:

