

Mass Letter Merge

Summary	
Module	Letter Merge
Level	Medium
Requirements	B1UP 2.9.1.0 or higher

Scenario

The customer wants to make the same standard letter to several business partners, selected by the BP selection window, and have activities created for each one.

Needed Configuration

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

- a. .doc – Standard Word 2003 document.
- b. .docx – Standard Word 2007/2010 document.
- c. .docm – Word 2007/2010 document with macros enabled.
- d. .dot – Word 2003 template.
- e. .dotx – Word 2007/2010 template.
- f. .dotm – Word 2007/2010 template with macros enabled.

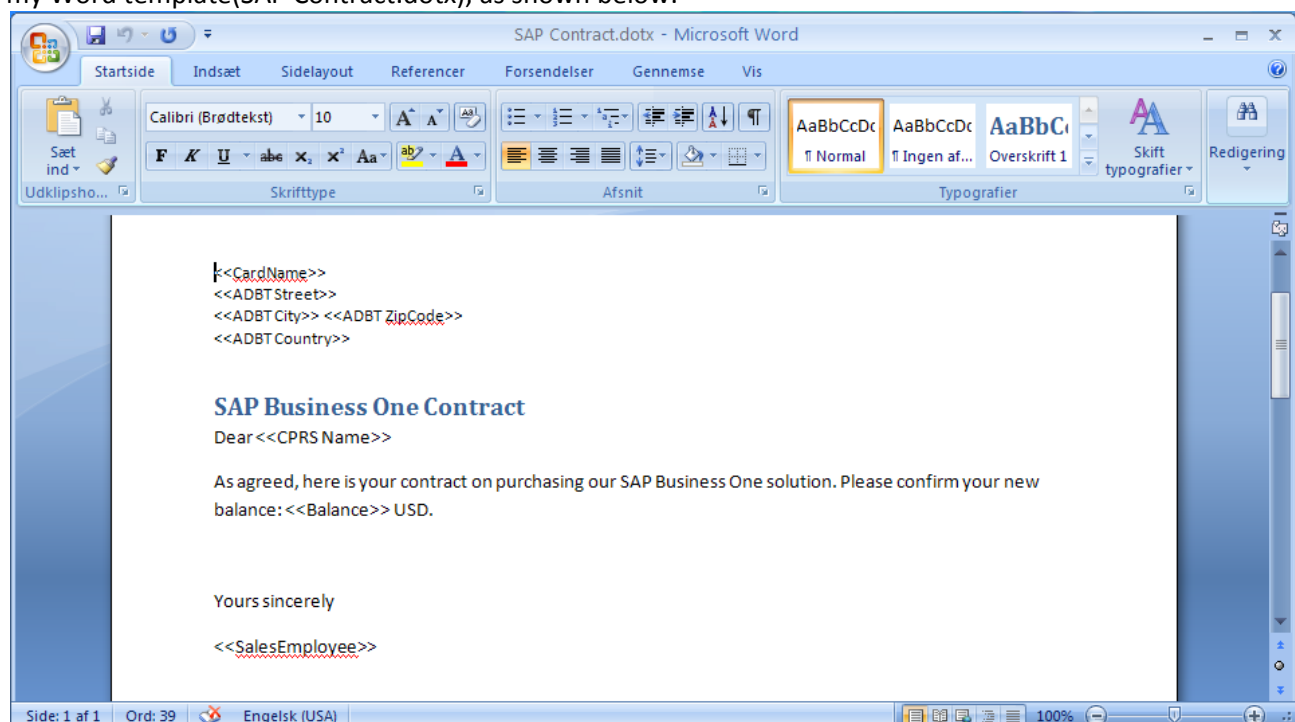
Templates contain key words which can be found in the table BOY_20_BFMT. This table can be accessed from within SAP B1 through Tools > User Tables > BOY_20_BFMT. Below is a screenshot that shows what it looks like:

Letter merge table

#	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	<<CardFName>>		CardFName		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

OKCancel

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 Mass Letter Merge window which can be found at: Main Menu > Business Partners > Mass Letter Merge. Then he opens the BP selection window by clicking the Advanced button. The screenshot below shows the window:

[illegible]

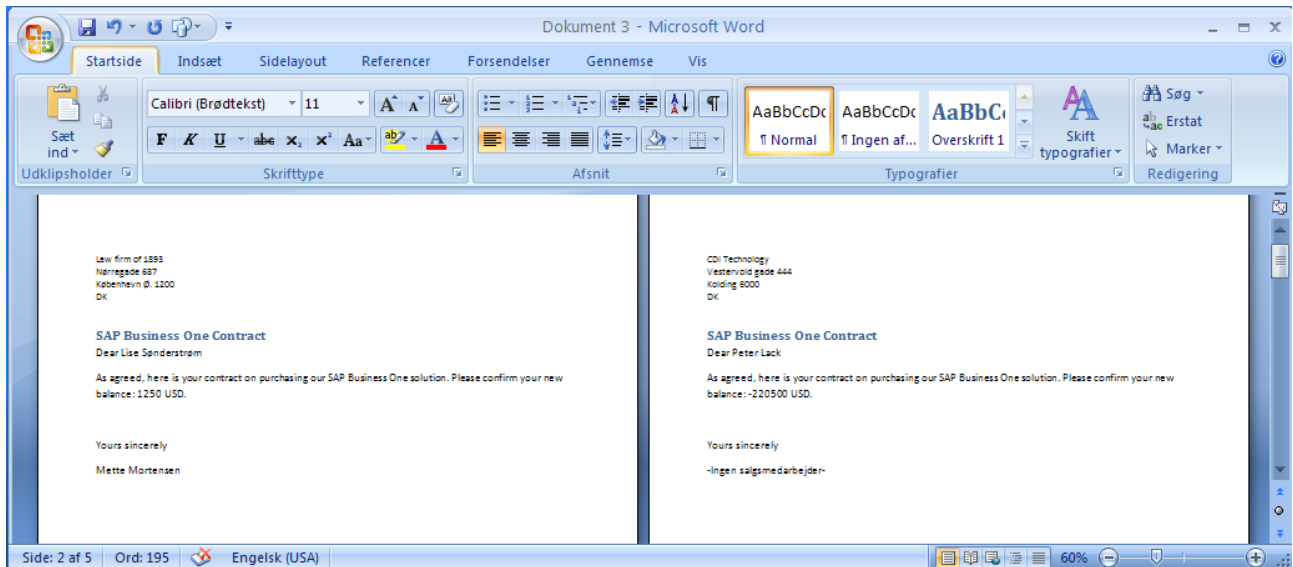
In this window it is possible to make selections, save them, or have them transferred to the Mass Letter Merge window. The customer unchecks the Ignore properties checkbox and checks the first property. He then clicks the Preview button to populate the grid to the left, to get all BP's that have the property checked. The customer is happy with the 5 results returned, and decides to save this selection as a BP selection template. He types in a name in the Template manager section of the window, and clicks the Add button to save it. When he is done, he closes this window, and returns to the Mass Letter Merge window.

The customer selects the newly created BP selection template from the upper combobox in the Mass Letter Merge window. Doing so populates the grid with the same business partners as show in the BP selection window:

[illegible]

After the customer has chosen the targets of the letter he wants to send out, he chooses the Word template he wants to use. In this case he wants to use the one called contact template, which refers to the file named “SAP Contract.dotx”. The customer checks the Save as activity checkbox, because he wants to have activities generated to Donna Brown. Notice that the customer has also checked the Attach merge file checkbox, which will attach the file used for creating the letter merge, to the activities created. For enabling this feature in Mass Letter Merge it is important to have an attachment folder path defined in SAP B1. This is done from Main Menu > Administration > System Initialization > General Settings > Path > Attachments Folder.

None of the three other checkboxes are checked, as none of them are appropriate for this letter merge. When the customer has made the right selection, the letter merge + the creation of activities is started by clicking the Merge button. Doing so will create a new Word document looking something like this:



This document contains 5 pages, one for each business partner selected for the letter merge. The activities created now contain the attached merge file:

Activity

Activity

Task

Number

34

Type

General

BP Code

C40000

Customer

Subject

BP Name

Earthshaker Corporation

Assigned To

Donna Brown

Contact Person

Daniel Brown

Telephone No.

(800)654-7657

☐ Personal

General

Content

Linked Document

Attachments

Remarks

remember to call after this is sent out

Start Date

01/05/11

Priority

Normal

Due Date

01/05/11

Meeting Location

Status

Not Started

☐ Inactive

☐ Closed

Follow Up

OK

Cancel

General

Content

Linked Document

Attachments

#	Path	File Name	Attachment Date
1	C:	SAP Contract	01/05/11

Browse

Display

Delete

OK

Cancel