

## Make it mandatory to have a contact person

Summary	
Module	B1 Validation System and Universal Function
Level	Medium
Requirements	2.7.3.0 or higher

### Scenario

Customer wish to never add a business partner without having at least one contact person

### Needed Configuration

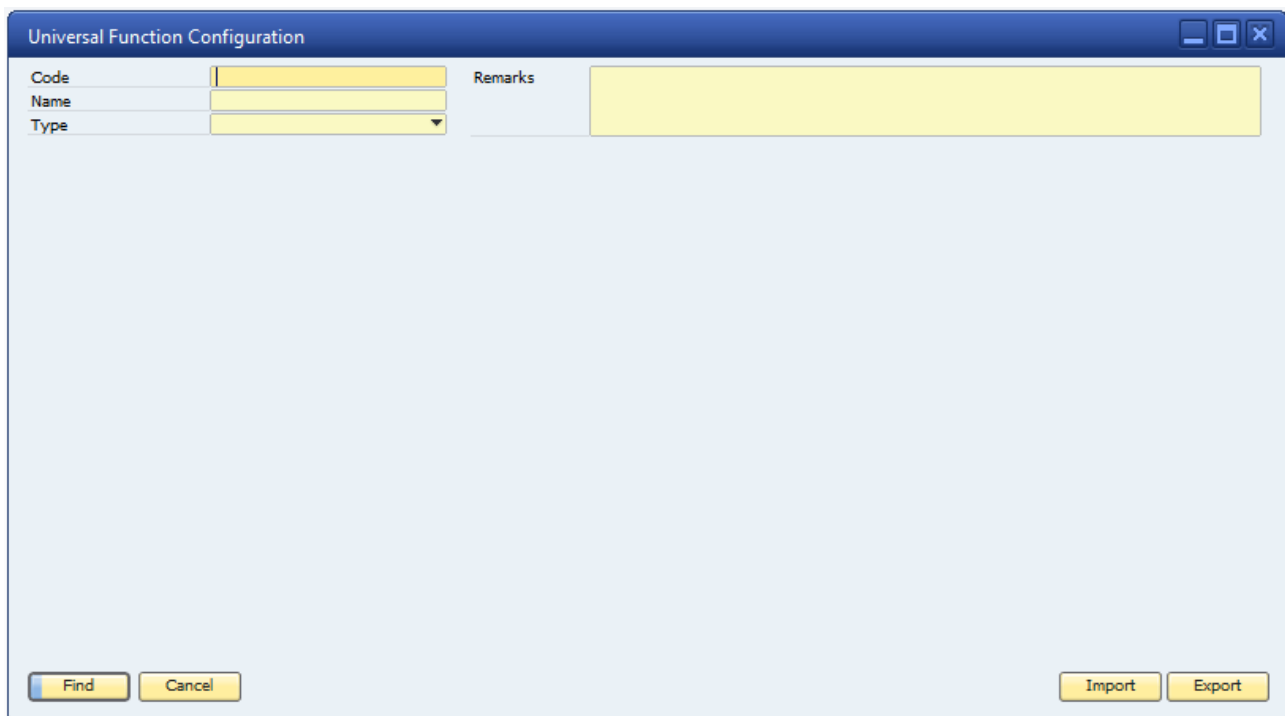
We need the following configurations

1. A Universal Function of type Message what holds the error-message to the user
2. A B1 Validation System to do the check when the user are trying to add the business partner.

### Step 1: Universal function – Message

The first thing we need is to create the message that we should show the user if we find the entered customer reference number invalid. This is done using a universal function.

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



Universal Function Configuration

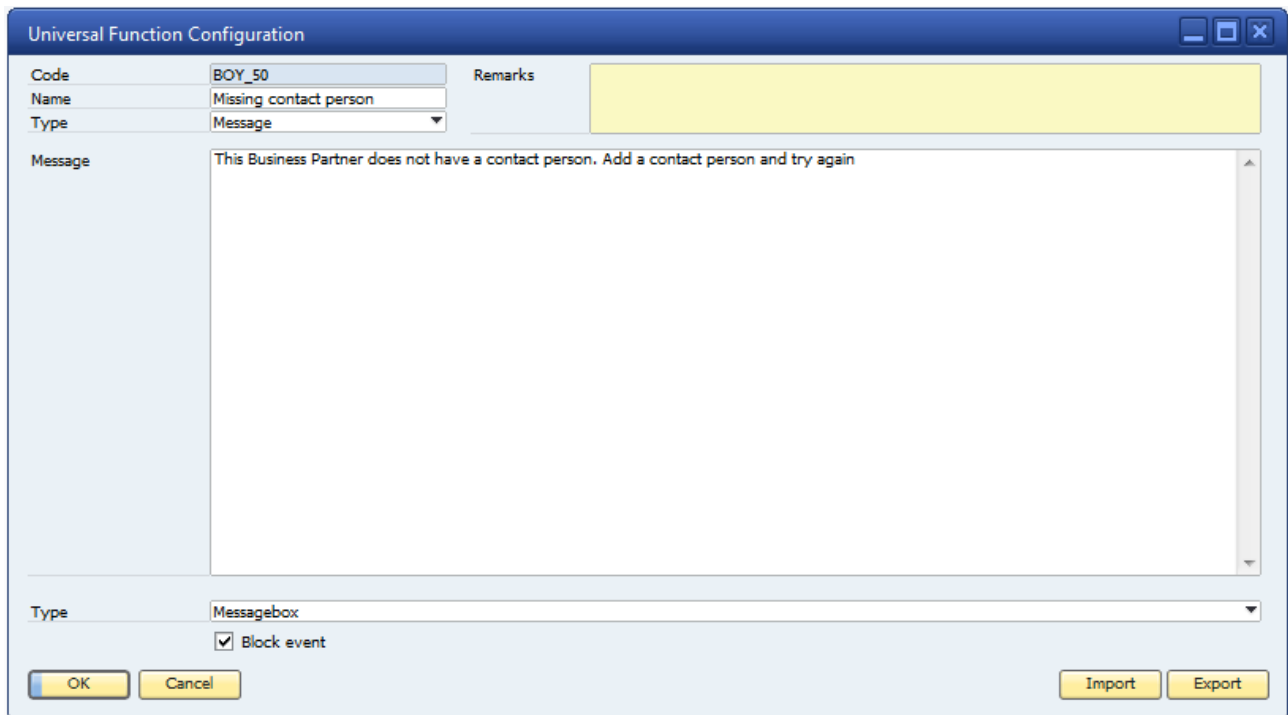
Code  Remarks

Name

Type

Find Cancel Import Export

Start by switching to add-mode and choose the Universal Function type called Message and enter the message.



The screenshot shows a window titled "Universal Function Configuration". It contains several fields and buttons:

- Code:** A text box containing "BOY\_50".
- Name:** A text box containing "Missing contact person".
- Type:** A dropdown menu currently showing "Message".
- Remarks:** A large yellow rectangular area.
- Message:** A large text area containing the text "This Business Partner does not have a contact person. Add a contact person and try again".
- Type (bottom):** A dropdown menu currently showing "MessageBox".
- Block event:** A checkbox that is checked.
- Buttons:** "OK", "Cancel", "Import", and "Export" are located at the bottom of the window.

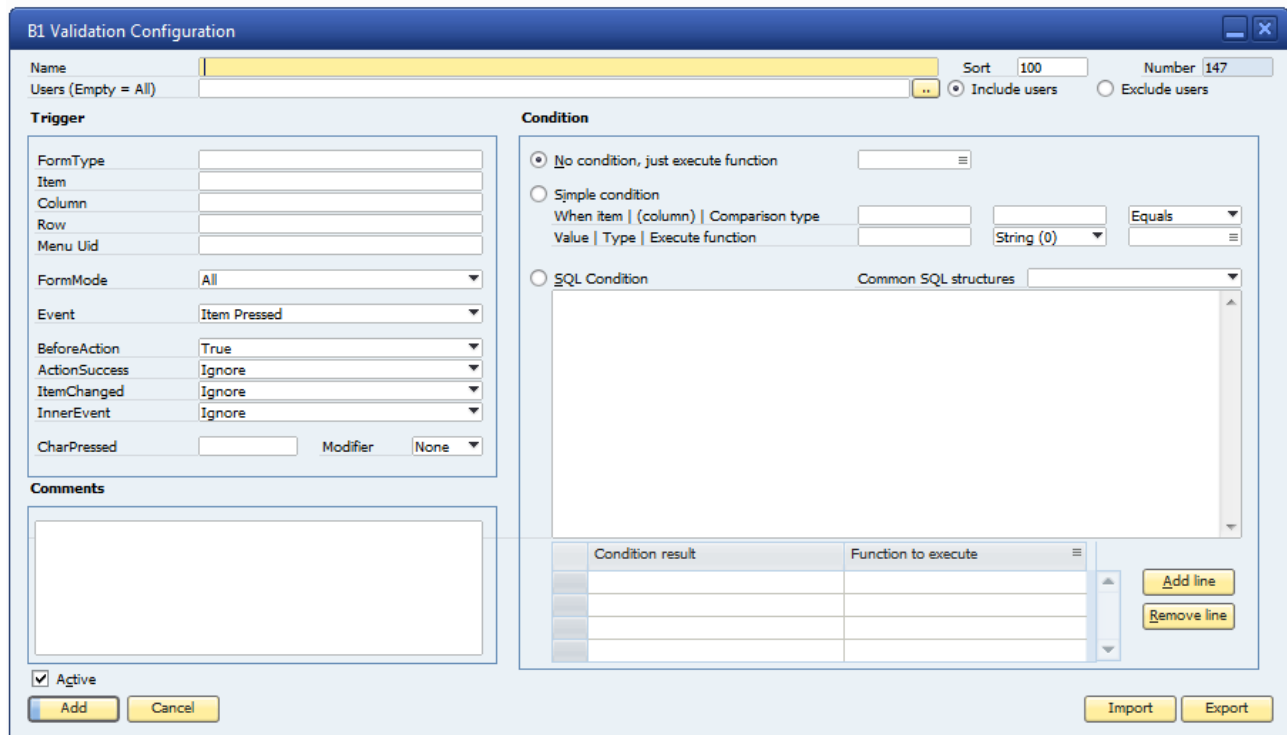
In the message type we choose the "MessageBox" since we would like to show the error as a message that the user can't avoid to see and we choose Block Event since we will not adding the business partner before at least one contact person is entered.

In the sample we give the configuration the code BOY\_50 and save the configuration.

### Step 2. B1 Validation System

We now have your message that we will show so now we need to create a B1 Validation system Configuration to trigger the message on the correct user activity (adding the business partner) and that we have a certain condition (the in the first row it still says "Define New").

To create a new B1 Validation Configuration please navigate to Administration > Add-Ons > B1 Usability Package > Module Configurations > B1 Validation Configuration



**B1 Validation Configuration**

Name:  Sort: 100 Number: 147

Users (Empty = All):  ☒ Include users ☐ Exclude users

**Trigger**

FormType:   
 Item:   
 Column:   
 Row:   
 Menu Uid:   
 FormMode: All  
 Event: Item Pressed  
 BeforeAction: True  
 ActionSuccess: Ignore  
 ItemChanged: Ignore  
 InnerEvent: Ignore  
 CharPressed:  Modifier: None

**Condition**

☒ No condition, just execute function

☐ Simple condition  
 When item | (column) | Comparison type | Value | Type | Execute function  
 |  |  |  | String (0) |

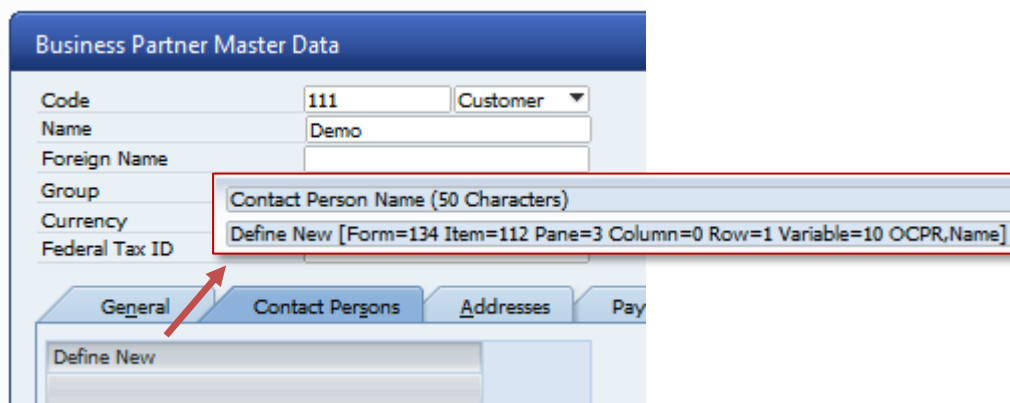
☐ SQL Condition  
 Common SQL structures:

Condition result	Function to execute

☒ Active

**NB: IF YOU DON'T HAVE THIS OPTION YOU WILL NEED TO ACTIVATE B1 VALIDATION SYSTEM IN THE MAIN CONFIGURATION (ADMINISTRATION > ADD-ONS > B1 USABILITY PACKAGE > B1 USABILITY CONFIG)**

First thing we need to do is find the formtype of the Business Partner the itemUID of the matrix holding the contact persons. We do this by activating the System Information and hover the mouse over the matrix



**Business Partner Master Data**

Code: 111 Customer  
 Name: Demo  
 Foreign Name:   
 Group:   
 Currency:   
 Federal Tax ID:

Define New [Form=134 Item=112 Pane=3 Column=0 Row=1 Variable=10 OCPR,Name]

General Contact Persons Addresses Pay

Define New

Here we can see that we are on formtype "134" and the contact person matrix is item "112". Also we need to know the Uid of the add-button which we find in the same way to be "1".

We can now enter our configuration.

First we enter the trigger, which is quite easy since we just want to check our condition each time we press the add-button.

- Formtype = 134 (the correct window)
- Item = 1 (the Add-button)
- FormMode= That the window is either in Add or Update
  - o since we don't want user to be able to add the business partner with a dummy contact person and remove it afterward again
- Event = Item Pressed since it should happen when the user press the button
- Before Action = True (since we need to do your check before SAP saves its data)

Second thing we need to do is to set up our condition that check the data of item 112 (the contact person matrix) and if the current value is "Define New", then we should show the message. We do this by the following SQL:

```
IF(SELECT ${112.0.0}) = 'Define New '
BEGIN
SELECT ' MISSING ' FOR BROWSE
END
```

NB: THE WORDING 'DEFINE NEW' MIGHT VARY DEPENDING ON WHAT LANGUAGE YOU ARE RUNNING.

Final thing we need to set is the Condition result and set the result 'MISSING' to show our Message that we chose using the TAB-key.

Our functionality is now ready to be added and used.

## Use of functionality

Test of the functionality is very simple. All we need to do is go to a Business Partner, switch to add-mode, enter a code and name and press add.

The screenshot displays the 'Business Partner Master Data' form. The 'General' tab is active, showing fields for Code (111), Name (Demo), Foreign Name, Group (Construction), Currency (US Dollar), and Federal Tax ID. Below these fields are tabs for 'Contact Persons', 'Addresses', 'Payment Terms', 'Payment System', and 'Accounts'. A 'Define New' button is visible. A 'System Message' dialog box is overlaid on the form, stating: 'This Business Partner does not have a contact person. Add a contact person and try again'. The dialog has an 'OK' button. At the bottom of the form, there are 'Add' and 'Cancel' buttons, and a 'Related Service Calls' button. A 'Set as Default' button is also present. On the right side, there are fields for 'Fax', 'E-Mail', and a checked 'Active' checkbox.

When add is pressed our trigger is activated and in this case our condition is met (since we did not provide a contact person). Therefore our message will appear and we are not allowed to add the business partner before we have provided a contact person.