E-Mail Options are Wide Open

Take your business flow a big step forward and send your documents via SAP Business One mailer or Microsoft Outlook with pre-defined subject line and body text.

New options are introduced in Administration > System Initialization > Print Preferences > Per Document tab. For each document type you can define that the document will be sent by e-mail when it is added. When selected, the document is sent as PDF attachment to the e-mail address of the default contact person defined for the business partner for whom the document was created.

In addition, for each document type, you can enter a text to appear in the subject line and a text that will be embedded automatically in the e-mail body.
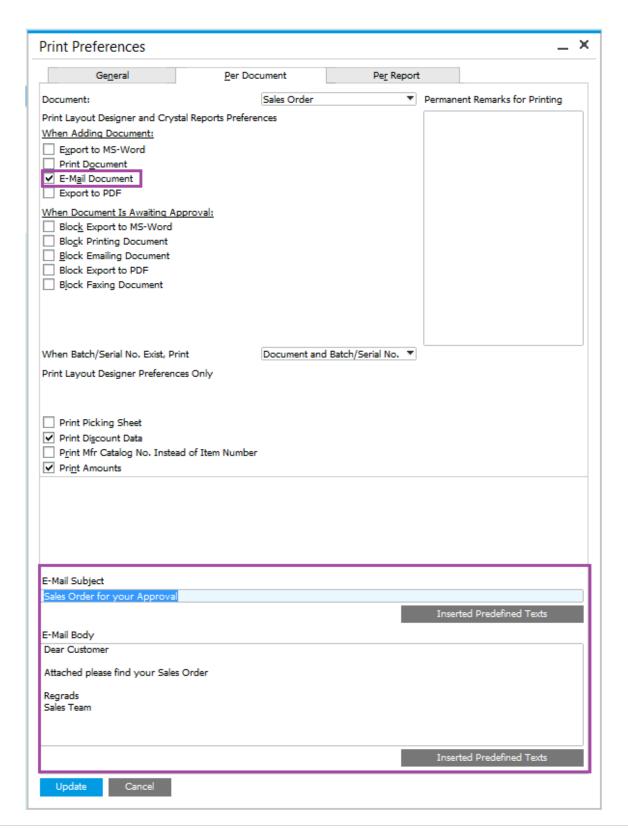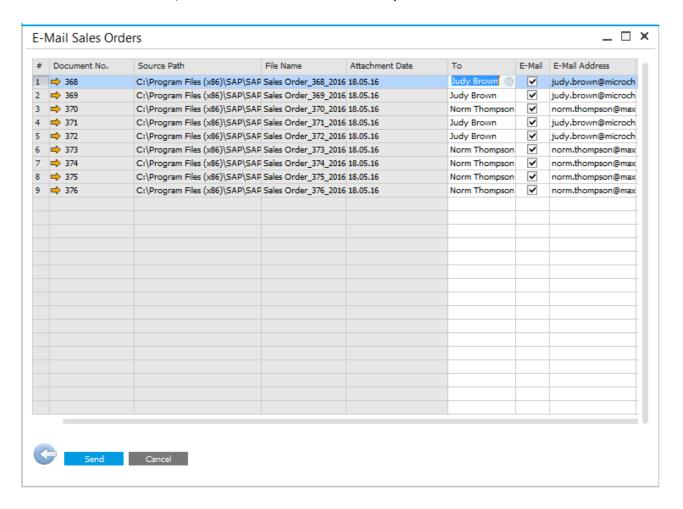
Print Preferences _ ✕

| General | Per Document | Per Report |

Document: [Sales Order ▼]   Permanent Remarks for Printing

Print Layout Designer and Crystal Reports Preferences

When Adding Document:
- ☐ Export to MS-Word
- ☐ Print Document
- ☑ E-Mail Document
- ☐ Export to PDF

When Document Is Awaiting Approval:
- ☐ Block Export to MS-Word
- ☐ Block Printing Document
- ☐ Block Emailing Document
- ☐ Block Export to PDF
- ☐ Block Faxing Document

When Batch/Serial No. Exist, Print   [Document and Batch/Serial No. ▼]

Print Layout Designer Preferences Only

- ☐ Print Picking Sheet
- ☑ Print Discount Data
- ☐ Print Mfr Catalog No. Instead of Item Number
- ☑ Print Amounts

E-Mail Subject

Sales Order for your Approval

[Inserted Predefined Texts]

E-Mail Body

Dear Customer

Attached please find your Sales Order

Regrads
Sales Team

[Inserted Predefined Texts]

[Update] [Cancel]

In addition, you can send by e-mail multiple documents to various recipients through the "Print Documents" window. Select the documents you want to send and choose your preferred e-mail option from the File > Send menu.

The list of selected documents with the e-mail addresses of the respective recipients appears. All you have to do is just choose the "Send" button, and the documents are on their way!

Available since SAP Business One 9.1, version for SAP HANA and SAP Business One 9.1.