



## Exercise: Documents Object

Data Interface API

PUBLIC

## INTRODUCTION

Create a Sales Order in Business One. Via the DI create an Invoice based on this Sales Order and later create an Incoming Payment for that Invoice

In this exercise, you will perform the following tasks:

1. Create new buttons in your project for "Order, Invoice and Payment"
2. Create s Sales Order
3. Create a Sales Invoice based on the Sales Order
4. Create an Incoming Payment for the Sales Invoice

## PREREQUISITE:

- Use the **C Sharp** (C#) language during this exercise
- Use Microsoft Visual Studio 2005 or higher version
- Continue to work with the project finalized in previous exercise.
- Use the demo database for SAP Business One, version for SAP HANA or SAP Business One
- Credentials: User code: **manager**

## GUIDELINES:

The screenshots provided here are for your reference only and may differ from the actual screenshots in your system.

## 1. TASK - CREATE NEW BUTTONS IN YOUR PROJECT FOR "ORDER, INVOICE AND PAYMENT"

- 1.1. On your Visual Studio project create new buttons called "Order, Invoice and Payment"

## 2. TASK - CREATE A SALES ORDER

- 2.1. Create a new *Document* object instance for the Sales Order. Then you set the properties of the *Documents* object and the *Documents\_Lines*.
- 2.2. Add the whole document. In the case of success, you should bring up a message box telling the user the number of the newly added Sales Invoice using the method *GetNewObjectCode*. In case of any error, you should display a message box with an error message.



The *Documents* object must be created with the *GetBusinessObject* method of the company object you are connected to. Look in the online help of the *GetBusinessObject* method for the correct object type. Which one must be used?



To access the *Documents\_Lines* object, look at the properties of the *Documents* object.

- 2.3. Finally, you should release the *Document* object variables.

## 3. TASK - CREATE A SALES INVOICE BASED ON THE SALES ORDER

- 3.1. Create a new *Document* object instance for the Sales Invoice. Then you set the properties of the *Documents* object and the *Documents\_Lines*.
- 3.2. To create a document based on a document you need to utilize the properties *BaseEntry* (DocEntry of Base document), *BaseType* (in this case Sales Order), *BaseLine* (line you wish to copy to target document)
- 3.3. Add the whole document. In the case of success, you should bring up a message box telling the user the number of the newly added Sales Invoice using the method *GetNewObjectCode*. In case of any error, you should display a message box with an error message
- 3.4. Finally, you should release the *Document* object variables.

## 4. TASK - CREATE AN INCOMING PAYMENT FOR THE SALES INVOICE

- 4.1. Create a new *Payments* object instance for the Incoming Payment. Then you set the properties for the *CardCode*, *Invoice DocEntry*, and we will pay via cash, so we will use the properties *CashAccount* and *CashSum*.
- 4.2. Add the whole document. In the case of success, you should bring up a message box telling the user the number of the newly added Payment using the method *GetNewObjectCode*. In case of any error, you should display a message box with an error message.
- 4.3. Finally, you should release the *Document* object variables.



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