



RESOLV DATA MESSENGER

USER MANUAL
Version 10.0

PRESENTED BY
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SAP Business One Integration

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**RESOLV DATA MESSENGER
USER MANUAL**

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Introduction

Resolv Data Messenger is a module that you can utilize to generate and transmit business data to business users based on predefined setups. In system terms, this is called a Message.

There are two types of messages that you can configure by using Resolv Data Messenger:

- Transactional Messages
- Query Based Messages (Scheduled Query Report)

Transaction messages can be sent to multiple recipients on an event in SAP Business One, e.g., when a purchase order is generated by the purchase department, then the system could send a PO copy as an attachment to the vendor via email.

You can configure a query message to transmit the query data either in the body or as an attachment to multiple recipients on a scheduled basis.

These messages can be sent to predefined recipients, e.g., *Business Partner, Contact Person, Sales Employee, Employee, SAP User, SAP Email Group*, etc. The following methods can be selected to transmit data or reports.

- Email
- FTP
- Printer
- SAP
- SMS

You may configure multiple methods to transmit a message, e.g., you may like to send Purchase Orders to Vendors via Email and at the same time you also may like to upload Purchase Order data to FTP in a specific format for a Vendor's system use.

You may configure different recipients and transmit methods based on conditions, e.g., there may be a scenario where you want to send an email to the customer if a provided discount on an AR Invoice is less than 10%, and if the discount is more than 10% then the system shall send an SMS to sales employees as well.

You can send formatted messages through email. Conditional formatting and conditional contents can also be added to the message body or attachment.

You may have additional attachments if needed, e.g., if you want to attach an annexure along with an invoice then you need to choose annexure as an additional attachment

You can allow messages to set the document status 'Printed' once the message is sent.

You can allow the system to create an SAP Activity once the message is processed, e.g., you can to send a copy of a purchase order to a vendor and then can create an SAP Activity in the system.

Setup

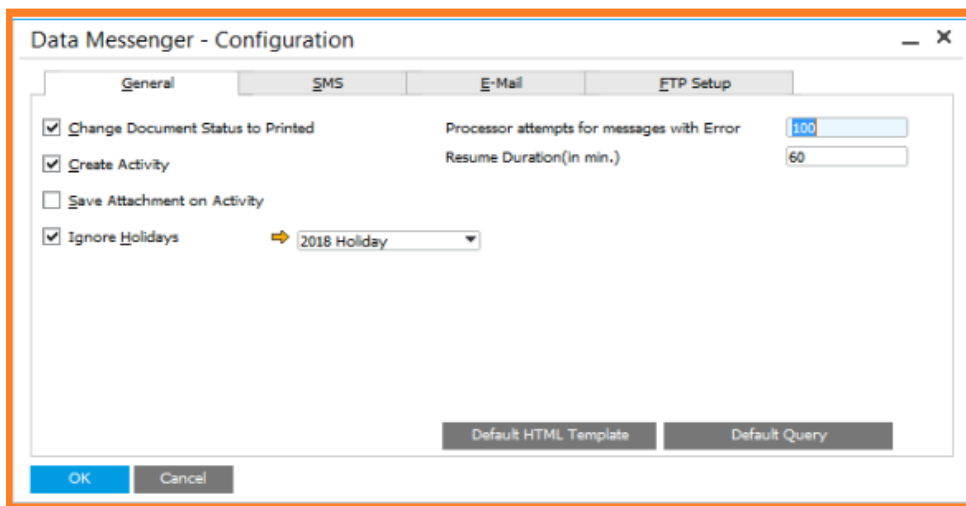
There is some setup involved before Data Messenger can be used. The screens for configuration are located primarily under the *Administration > Resolv Setup > Resolv Data Messenger* menu, however there are some standard SAP screens that require setup as well.

Data Messenger Configuration

Administration > Resolv Setup > Resolv Data Messenger > DM Configuration

There are 4 tabs on this screen: General, SMS, E-Mail and FTP Setup

General Tab



Change Document Status to Printed

Check this box if you want the Status on the Marketing documents to be Printed.

Note, you can also Override this option for a message in the DM Setup Screen.

Create Activity

Check this box if you want to create an Activity for any method.

Note, you can also Override this option for a message in the DM Setup Screen.

Save Attachment on Activity

Check this box if you want to save the document as an attachment on the Activity.

Note, you can also Override this option for a message in DM Setup Screen.

Ignore Holidays

Check this box if you want to ignore message execution on holidays. The current fiscal year holiday calendar is auto populated.

Processor attempts for message with error

This field will set the maximum number of errors that can occur within the DM Processor for a message. After the limit is reached, the DM Processor will not consider that message for a duration.

Note, leave this field blank if you don't want to stop the attempted execution of messages.

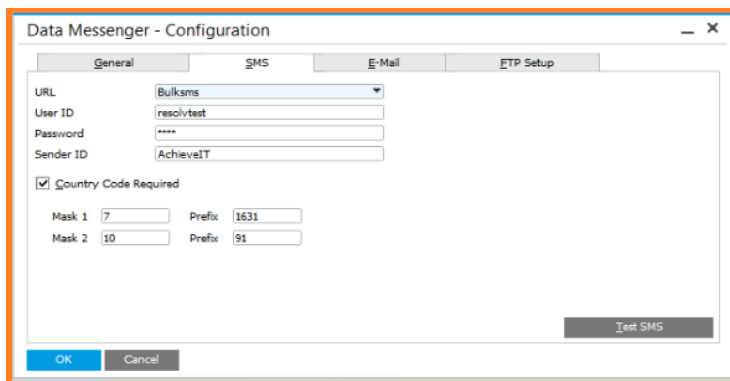
Resume Duration (In min)

This field will set the resume duration (in minutes) for faulty messages.

SMS Tab

The SMS Tab helps to setup SMS gateway details.

Note, you can also override these settings for a message in the DM Setup Screen.



URL

Select the name of Bulk SMS provider. Currently we have two options (BulkSMS and Snowebs).

- User ID** This field will set the SMS provider user ID.

- Password** This field will set the SMS provider password.

- Sender ID** This field will set the SMS provider sender ID.

- Country Code Required** Check this box if a Country code is required by the SMS Provider.

- Mask 1** This field will set the length of Mobile numbers. Mobile numbers may have a different number of digits in a given country.

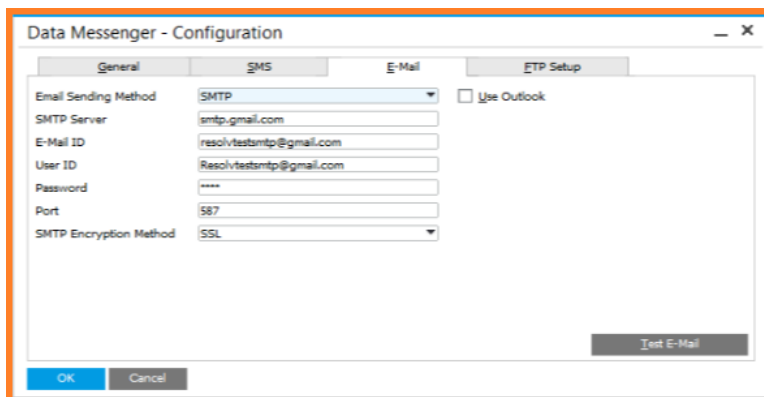
- Prefix** This field will set the Prefix of Mobile numbers. If the chosen number of digits for the Mask 1 field is equal to number of digits in a mobile number, then the system will add the Prefix before the mobile number.

- Mask 2** This field will set the length of Mobile numbers. Mobile numbers may have a different number of digits in a given country.

- Prefix** This field will set the Prefix of Mobile numbers. If the chosen number of digits for the Mask 2 field is equal to number of digits in a mobile number, then the system will add the Prefix before the mobile number.

- Test SMS Button** Test SMS button will ask the mobile number to send an SMS. This option will ensure that the entered credentials are correct.

E-Mail Tab



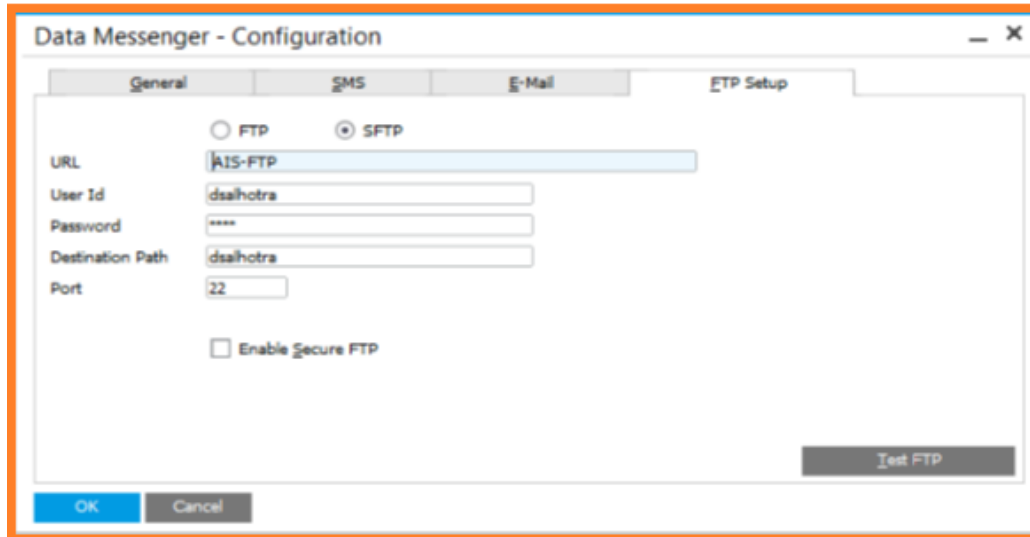
- Email Sending Method** Select either SAP or SMTP as the email sending method.

- Use Outlook** For whichever email sending method you chose, check this box to use Outlook (via Outlook Integration or your SMTP setup).
- SMTP Server** If using SMTP, enter the server address.
- Note, you can also override this option for a message in the DM Setup Screen.
- E-Mail ID** If using SMTP, enter the email ID that shall be used as the sender email account.
- Note, you can also override this option for a message in the DM Setup Screen.
- User ID** If using SMTP, enter the user ID.
- Note, you can also override this option for a message in the DM Setup Screen.
- Password** If using SMTP, enter the password.
- Note, you can also override this option for a message in the DM Setup Screen.
- Port** If using SMTP, enter the TCP port provided by your email administrator.
- Note, you can also override this option for a message in the DM Setup Screen.

FTP Setup Tab

The FTP Setup Tab helps to setup FTP account details.

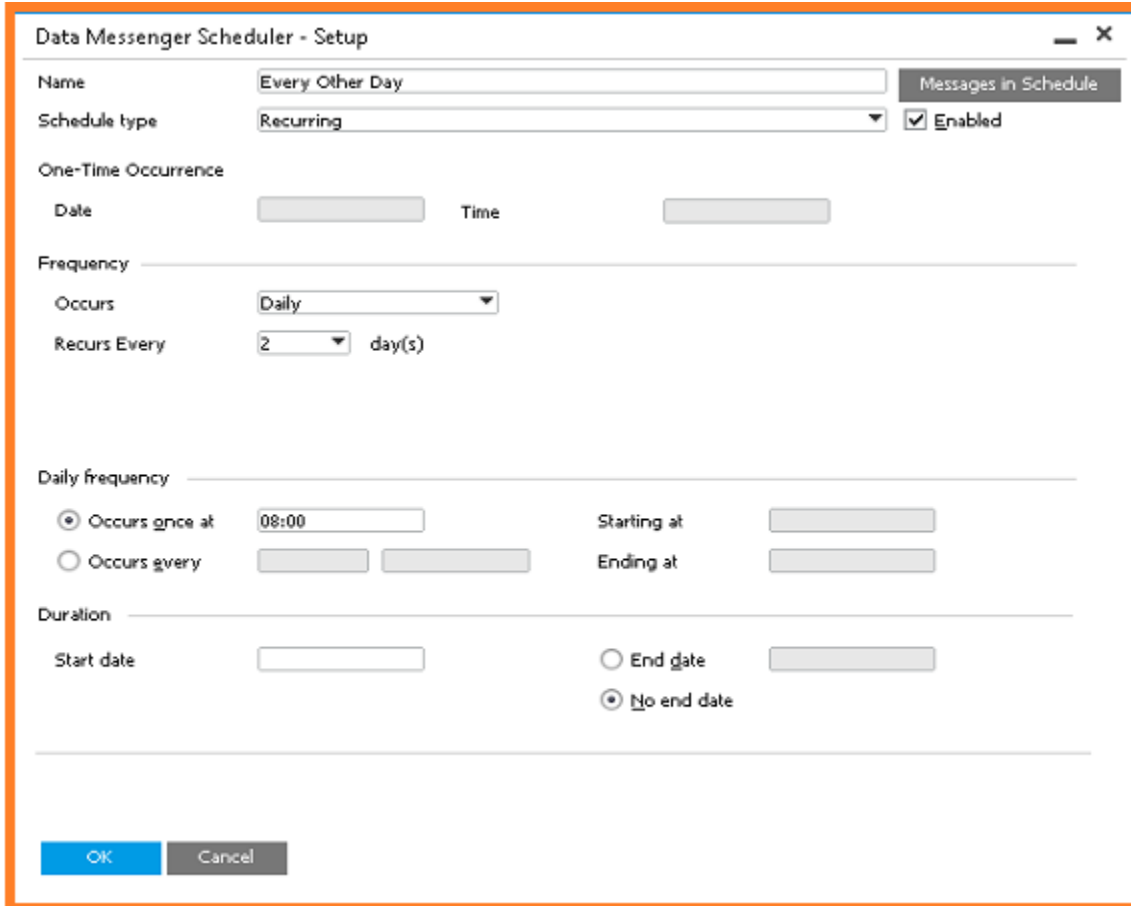
Note, you can also override these settings for a message in the DM Setup Screen.



- | | |
|--------------------------|---|
| FTP / SFTP | Select “FTP” or “SFTP”. This choice depends on your FTP server. |
| URL | Enter the FTP URL. |
| User ID | Enter the user ID of the FTP account. |
| Password | Enter the password of the FTP account. |
| Destination Path | If you are using SFTP, enter the destination path provided by your administrator. |
| Port | If you are using SFTP, enter the SFTP port provided by your administrator. |
| Enable Secure FTP | If you are using FTP, check this box if your FTP server is secured. |
| Test FTP Button | Test FTP button will upload a sample file (TestFTPSetting.txt) on root. This option will ensure that entered credentials are correct. |

DM Service Scheduler

(Administration > Resolv Setup > Resolv Data Messenger > DM Service Scheduler)



- | | |
|-----------------------------|--|
| Name | Define Scheduler Name |
| Messages in Schedule | This button will show the DM Messages that are linked to this schedule. |
| Schedule Type | There are two types of Scheduler: Recurring and One-Time. If a message is required to be sent only once, then select “One-Time”. If a message required to be sent on a repeat basis or a regular interval (Daily, Weekly, Monthly, etc.), then select Recurring. |
| Enable | Check this box if you want to enable the Scheduler. |

One-Time Occurrence

Date If the scheduler type One-Time is selected, then the message execution Date will be defined here in One-Time Occurrence.

Time If the scheduler type One-Time is selected, then the message execution Time will be defined here in One-Time Occurrence.

Daily Frequency

Occurs once at To define the message scheduler for once a day, enter the message execution time.

Occurs every Select a number, then select “Hours” (to define the entered interval in hours), “Minutes” (to define the entered interval in Minutes), or “Seconds” (to define the entered interval in seconds).

Starting at Enter the Start time for message execution.

Ending at Enter the End time for message execution.

Duration

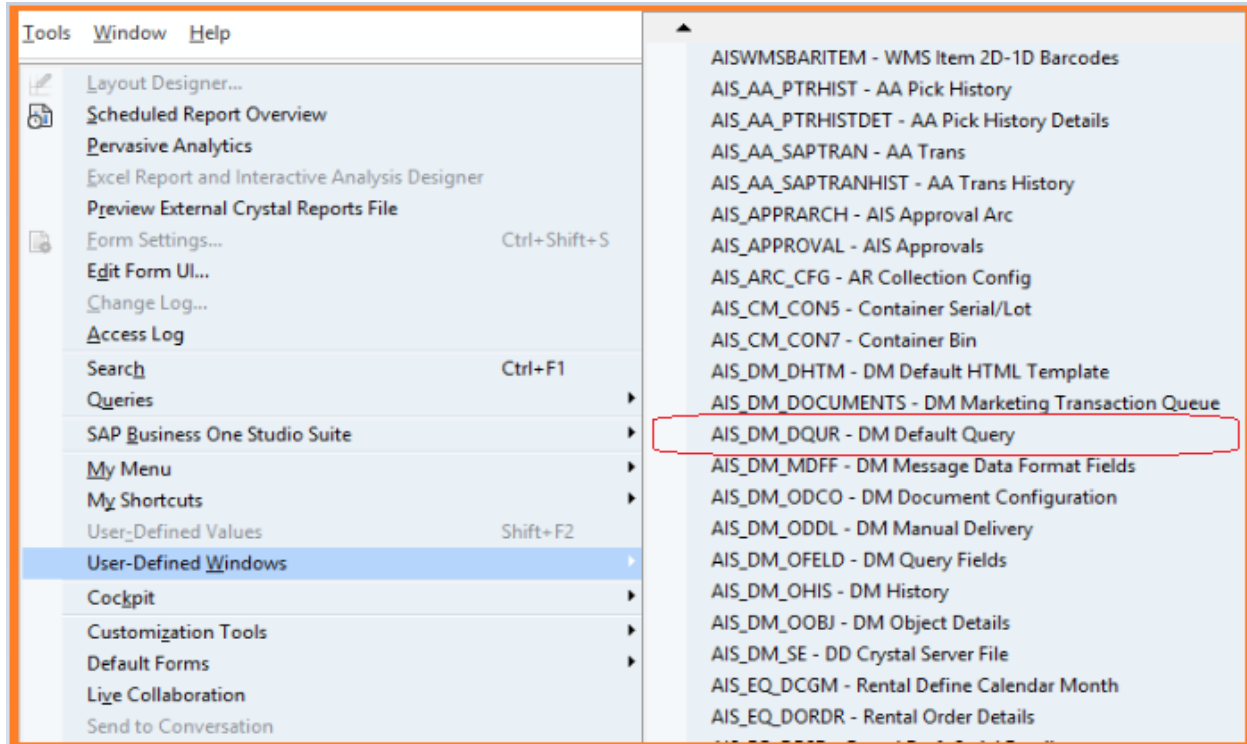
Start date Enter the Start date of message execution.

End date Enter the End date of message execution.

No end date Select this option if the scheduler will remain effective indefinitely.

DM Default Query

Tools > User-Defined Windows > DM Default Query [AIS_DM_DQUR]



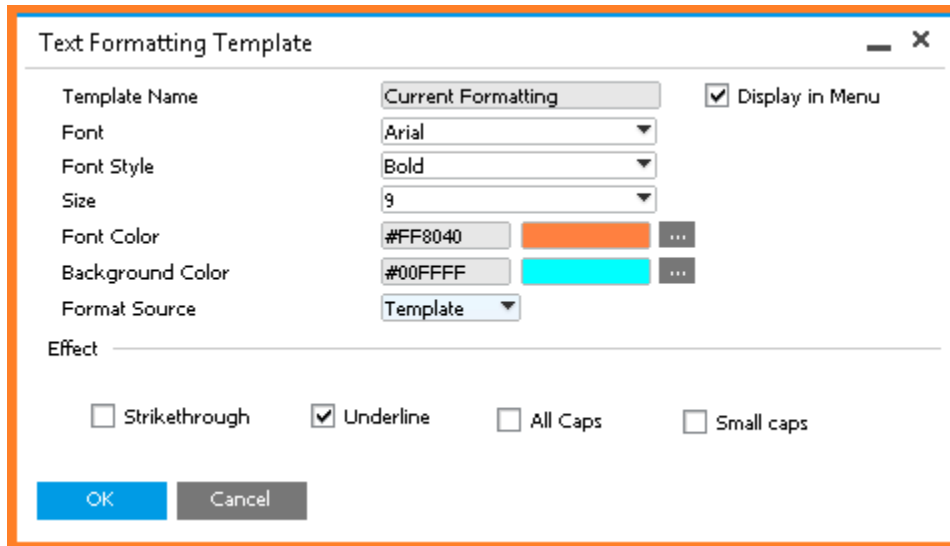
This User-Defined table is used to save queries for SAP standard documents, which will be used in transaction Log messages. You can have multiple queries for an SAP object.

#	Code	Name	Line Num	Object Code	Object Name	Query
1	10001	10001	1	23	Sales Quotation	Select T0."DocEntry" As "DocEntry",T0."DocNum" As "DocumentNumber",T0."DocStatus" As "DocumentStat
2	10002	10002	2	17	Sales Order	Select T0."DocEntry" As "DocEntry",T0."DocNum" As "DocumentNumber",T0."DocStatus" As "DocumentStat
3	10003	10003	3	15	Delivery	Select T0."DocEntry" As "DocEntry",T0."DocNum" As "DocumentNumber",T0."DocStatus" As "DocumentStat
4	10004	10004	4	13	A/R Invoice	Select T0."DocEntry" As "DocEntry",T0."DocNum" As "DocumentNumber",T0."DocStatus" As "DocumentStat
5	10005	10005	5	13	A/R Invoice with item details	SELECT T0."DocEntry" As "DocEntry",T0."DocNum" As "DocumentNumber",T0."DocStatus" As "DocumentStat
6	10006	10006	6	22	Purchase Order	Select T0."DocEntry" As "DocEntry",T0."DocNum" As "DocumentNumber",T0."DocStatus" As "DocumentStat
7	10007	10007	7	90001	A/R Statement	Select OCRD."CardCode" as "Card Code",OCRD."CardName" as "Name",IFNULL(OCPR."CntctCode",'0') as "
8						

<i>Code</i>	Enter a unique default query code
<i>Name</i>	Enter a unique default query name
<i>Line Num</i>	Enter a unique line number
<i>Object Code</i>	Enter a standard SAP document object code, e.g., 13 if the query is made for SAP A/R Invoice documents, 22 if the query is made for SAP Purchase Order documents, etc.
<i>Object Name</i>	Enter a query description, which will be helpful in selecting a query
<i>Query</i>	Paste the query which you want to use for the SAP standard object

Text Formatting Template

Administration > Resolv Setup > Resolv Data Messenger > Text Formatting Template



- Template Name** Name of the Template, which will be added as a Right-click menu on the Email tab of the DM Master Data screen to be selected in the body or HTML report tabs. This will only work for the HTML format.
- Display in Menu** If the Display in Menu box is checked, the system will show the Text Formatting Template option in the Text Formatting list; right-click in the DM Message, then go to Format > Text Formatting.
- Font** A dropdown menu that specifies a text font.
- Font Style** A dropdown menu that specifies a font style, such as Bold or Italic.
- Size** A dropdown menu that specifies a font size in points. To ensure readability for most documents and users, select a size of eight points or larger.
- Font Color** Specifies the color of the selected text. In the box, select a color. The default color selection is black.
- Background Color** Specifies the highlighted text color of the selected text.

<i>Format Source</i>	Specifies the format source. Choose whether the style tag will be statically copied, or in place of a style tag, a style template ID will be used to form the style tag.
<i>Strikethrough</i>	Creates a horizontal line through the center of the text. An example would look like this .
<i>Underline</i>	Creates a horizontal line under the text. An example <u>would look like this</u> .
<i>All Caps</i>	Formats lowercase letters as capitals. All caps formatting does not affect numbers, punctuation, non-alphabetic characters, or uppercase letters. An example WOULD LOOK LIKE THIS.
<i>Small caps</i>	Formats text so that lowercase characters resemble uppercase characters, but with reduced height and dimensions. An example WOULD LOOK LIKE THIS.

DM Message Master Data

Administration > Resolv Setup > Resolv Data Messenger > DM Message Master Data

This Message Master Data screen is used to setup messages.

There are 7 tabs on this screen: General, Recipients, E-Mail, FTP, Printer, SAP, and SMS.

General Tab

The general tab is used to setup basic message information such as message name, message type, message query, message delivery method, etc.

Enter the following information:

Message Number Message identification number. This is a unique, system generated number.

Name Enter a name for the message. A message name is unique.

Message Type You can setup two types of messages:

Transaction Message

Select when a message is to be sent on an SAP transactional event, such as add, update, cancel, etc.

Transactional Messages are for messages that are going to use a transaction as a trigger; things like Sales Orders, Journal Entries, etc. You would use a Transactional Message if you want to use a standard form to trigger a message when the form is added, updated, cancelled, etc.

For example, if you want to send PO details to the vendor via Email or SMS, then you need to select transaction message. Or, if you want to print a form as soon as a document is added or updated. Or, if you want to upload PO details to a specific FTP in a specific format to be used in a 3rd party system.

DM Message Master Data

Message Number: 51 Change Document Status to Printed

Name: Purchase Order With Data Attachment

Message Type: Transactional

General Recipients Email FTP Printer SAP SMS

Standard Document Purchase Order
 Customized Document

Transaction: Update

Default
 Custom
 SAP

Message Delivery Method

Email
 FTP
 Printer
 SAP
 SMS

Message Data Source Query

```
SELECT T0."DocEntry" As "DocEntry",T0."DocNum" As "DocumentNumber",T0."DocStatus" As "DocumentStatus",T0."CardCode" As "BPCode", T0."CardName" As "Doc. BP Name",T0."CntctCode" As "ContactCode",T0."DocDate" As "DocumentDate",T0."DocDueDate" As "DocumentDueDate",T0."DocTotal" As "DocumentTotal",T0."DiscSum" As "Document Discount",T0."VatSum" As "Document Tax Total",T0."TotalExpns" As "Document Total Freight Charges", T0."NumAtCard" As "NumAtCard",T0."SlpCode" As "SlpCode",T3."SlpName" As "Slp Name",T2."CardName" As "BPName",T2."Balance" As "BPBalance",T4."FirstName" As "EmployeeFirstName",T4."lastName" As "EmployeeLastName",T4."jobTitle" As "EmployeeTitle",T4."email" As "EmployeeEmail",T5."Name" As "ContactName",T5."E_Mail" As "ContactEmail", T1."LineNum" As "Row Number",T1."ItemCode" As "Item No.", T1."Description" As "Item Description", T1."Quantity" As "Quantity", T1."ShipDate" As "Row Del. Date", T1."OpenQty" As "Remaining Open Quantity", T1."Price" As "Price after Discount", T1."Currency" As "Currency", T1."Rate" As "Currency Rate", T1."DiscPrcnt" As "Discount % per Row", T1."LineTotal" As "Row Total", T1."OpenSum" As "Open Amount", T1."WhsCode" As "Warehouse Code", T1."PriceBefDI" As "Unit Price", T1."SubCatNum" As "Customer Part No.", T1."CodeBars" As "Barcode", T1."TaxCode" As "Tax Code", T1."UomCode" As "UoM Code",T6."StreetB" As "Bill-to Street", T6."BlockB" As "Bill-to Block", T6."CityB" As "Bill-to City", T6."StateB" As "Bill-to State", T6."ZipCodeB" As "Bill-to Zipcode", T6."CountryB" As "Bill-to Country", T6."Streets" As "Ship-to Street", T6."BlockS" As "Ship-to Block", T6."CityS" As "Ship-to City", T6."StateS" As "Ship-to State", T6."ZipCodeS" As "Ship-to Zipcode", T6."CountryS" As "Ship-to Country", T7."PymntGroup" As "Payment Terms", T8."TrnspName" As "Shipping Type" FROM OPOR TO LEFT JOIN OCRD T2 ON T0."CardCode"= T2."CardCode" LEFT JOIN POR1 T1 ON T0."DocEntry" = T1."DocEntry" LEFT JOIN OSLP T3 ON T0."SlpCode"= T3."SlpCode" LEFT JOIN OHEM T4 ON T0."OwnerCode"= T4."empID" LEFT JOIN OCPR T5 ON T0."CntctCode"= T5."CntctCode" LEFT JOIN POR12 T6 ON T0."DocEntry" = T6."DocEntry" LEFT JOIN OCTG T7 ON T0."GroupNum" = T7."GroupNum" LEFT JOIN OSHP T8 ON T0."TrnspCode" = T8."TrnspCode" WHERE T0."DocEntry" = @DocKey
```

Active
 Inactive

Validate Query Default Query Field Selections

OK Cancel

Change Document Status to Printed

Check if you want to change the document status to printed. This option is available for marketing documents only where it is applicable for SAP documents.

Standard Document

This option is available if the *Message Type* is *Transactional*. If you select this option, then the adjacent dropdown will be filled with all the standard SAP documents.

Customized Document

This option is available if the *Message Type* is *Transactional*. If you select this option, then the adjacent dropdown will be filled with all SAP customized documents (User Define Objects). If you want to add a UDO in the customized object dropdown, then you need to make a UDO entry in UDT [@AIS_DM_OOBJ] – DM Object Details

#	Code	Name	ObjectCode	ObjectName	Set up Screen	Document Delivery Screen	Standard or Customized
24	31	31	46	Outgoing Payments	Y	Y	S
25	32	32	4	Item Master Data	Y	N	S
26	33	33	66	Bill of Materials	Y	N	S
27	34	34	2	Business Partner Master Data	Y	N	S
28	35	35	122	Drafts	Y	N	S
29	36	36	156	Pick List	Y	N	S
30	37	37	A1SCM_CntTyp	Container Type	Y	N	C
31	38	38	A1SCM_CntEnt	Container Entry Processing	Y	N	C
32	4	4	28	Journal Vouchers	Y	N	S
33	5	5	140000009	Outgoing Excise Invoice	Y	N	S
34	6	6	140000010	Incoming Excise Invoice	Y	N	S
35	7	7	1250000025	Blanket Agreement	Y	N	S
36	8	8	23	Sales Quotation	Y	Y	S
37	9	9	17	Sales Order	Y	Y	S
38							

OK Cancel

Transaction

This option is available if the *Message Type* is *Transactional*. The dropdown will list all common SAP events on which the Message can be sent, e.g., Add, Update, Close, Cancel, Remove, etc.

Default

This option is available if the *Message Type* is *Transactional*. Choose this option if you want to use a default query. When you select this option, the *Default Query* button is enabled for selection

Customize

This option is available if the *Message Type* is *Transactional*. Choose this option if you want to manually write or paste a query in the *Message Query* box

SAP

This option is available if the *Message Type* is *Transactional*. Choose this option if you want to use a query which is saved in the *SAP Query Manager*

Query Message

Select this when a message is to be sent on scheduled basis.

For example, if you want the system to send a message to the production manager when the stock has reached the defined minimum inventory level.

The screenshot shows the 'DM Message Master Data' dialog box. It has several input fields at the top: 'Message Number' (47), 'Name' (Minimum Stock Level Report), and 'Message Type' (Query). Below these are tabs for 'General', 'Recipients', 'Email', 'FTP', 'Printer', 'SAP', and 'SMS'. The 'General' tab is active, showing a 'Scheduler' dropdown set to 'Every Other Day' and a 'Use SAP saved query' checkbox. The 'Message Result' section has radio buttons for 'Consolidated' (selected) and 'Separate', and a 'Group by field' dropdown set to 'WhsCode'. The 'Message Delivery Method' section has checkboxes for 'Email' (checked), 'FTP', 'Printer', 'SAP', and 'SMS'. A large text area contains an SQL query: `SELECT T0."WhsCode", T0."ItemCode", T1."ItemName" AS "ItemDescription", T0."OnHand", T0."IsCommitted", T0."OnOrder", T0."MinStock", T0."MinOrder", T0."MaxStock", (T0."OnHand" - T0."MinStock") AS QtyAboveMin FROM OITW T0 INNER JOIN OITM T1 ON T0."ItemCode" = T1."ItemCode" WHERE (T0."OnHand" - T0."MinStock" <= 0) AND (T0."MinStock" > 0)`. At the bottom, there are radio buttons for 'Active' and 'Inactive' (selected), a 'Validate Query' button, and 'OK' and 'Cancel' buttons.

Scheduler

You need to select a scheduler which you might have created using the [DM Service Scheduler](#)

Use SAP saved query

Check when you want to use an SAP query, which you have saved in the SAP query manager

Query Category

Choose a query category under which your query is saved. The Query Category dropdown is visible when you check the Use Saved Query checkbox

Query You can use any of your SAP queries related to the above selected category

Message Result

Consolidated Select when you want to send all the data returned from the message query as an attachment in single email.

Group by Field Data is segregated as per selected group by field, e.g., if you want to send an email containing all open invoices details to a customer, then you need to choose a CardCode as a grouping field in Group by Field dropdown.

Separate Select when you want to send the data returned from the message query in separate emails.

Message Data Source Query Write the query manually if the customize option is selected

Message Delivery Method

Email Check if you want to send data or reports in an Email.

Printer Check if you want to print a report or data from a specific printer.

SAP Check if you want to send SAP messages to specific SAP users.

SMS Check if you want to send SMS to specific recipients' mobile number(s).

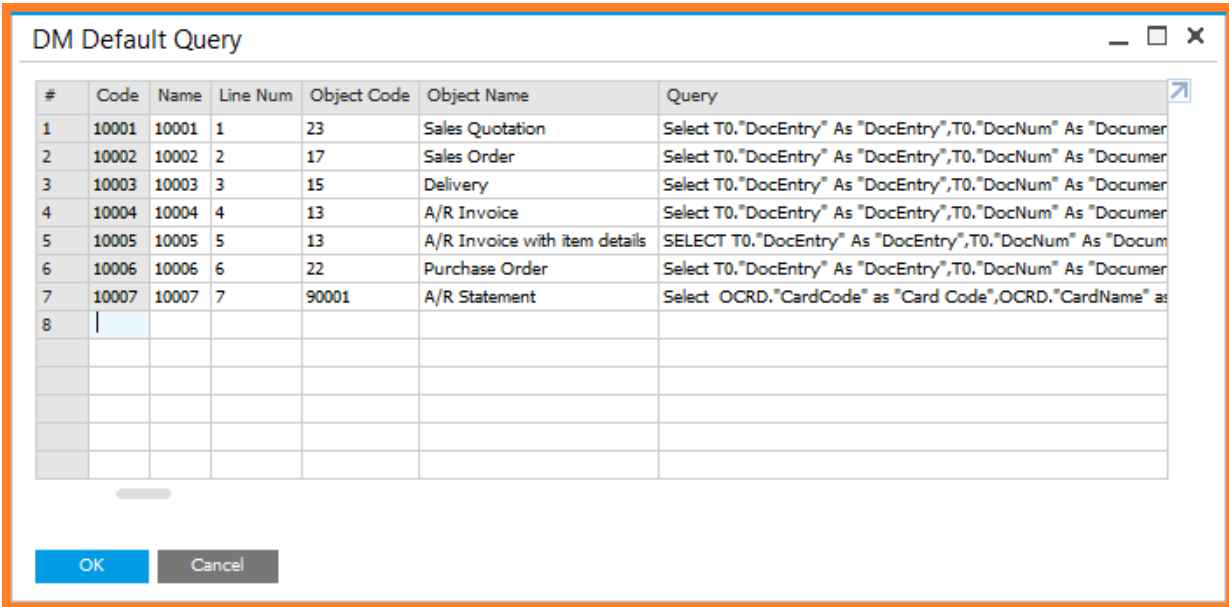
FTP Check if you want to upload specific data in a specific format to FTP.

Active Choose this option when you want the message to be activated.

Inactive Choose this option when you want the message to be deactivated.

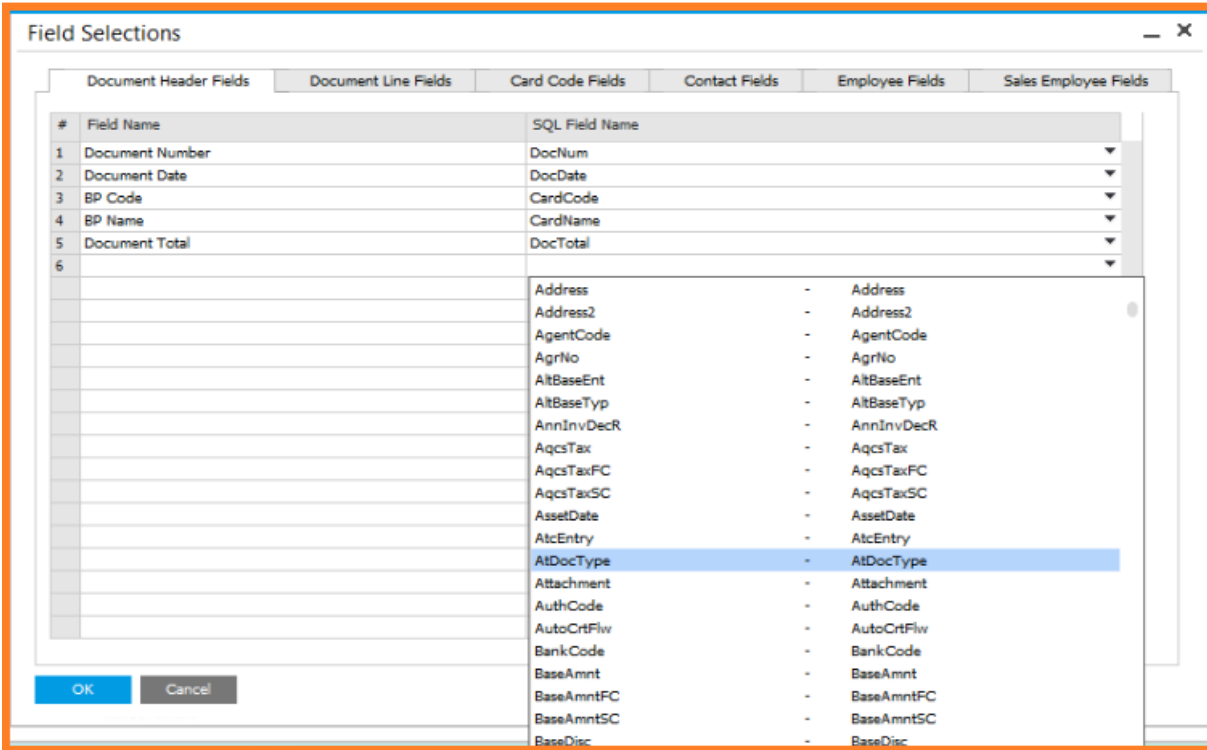
Validate Button You need to click this button to verify the query (whether Default/Custom/SAP). Until the query is verified, other tabs will not be activated.

Default Query If you click the Default Query button, then the Default Query window will open with all queries related to the selected *Transaction*.



To choose a default query, you need to select a row in the default matrix and need to click on *OK* button. Double click on a row if you want to view complete query text.

Field Selection Button Field selection functionality helps you to build a query. This option is only available for Transactional messages, and only if you have selected Custom query option. To create the query, select the appropriate tab, enter a field name, and then select the corresponding SQL field name from the dropdown list. Once you are done with the required field selection, then the system automatically forms the query considering all selected fields and selected *Transactional* objects on the *DM Message Master Data* screen and put it in the *Message Data Source Query* box.



Recipients Tab

The recipient tab is used to configure the recipient of the message. There are 4 sub-tabs in this tab: Recipient, User Tab, E-mail Group, and Terms.

Recipients Sub-Tab

Use this tab to configure possible standard recipients like Business Partner, Contact Person, Sales Employee, Employee, etc., and their source table and field. You can also use the user defined table and user defined field as a source for picking values. For that you need to choose the *Other* option in Message To.

The system automatically selects all possible standard recipients if *Message Datasource Query* has a relevant table used in it.

DM Message Master Data

Message Number: 62
 Name:
 Message Type: Transactional

General Recipients Email FTP Printer SAP SMS

Recipients User E-Mail Group Terms

#	Message To	Key Table	Key Fields	Field Type
1	Business Partner	OINV	BPCode	
2	Contact Person	OCPR	ContactCode	
3	Sales Employee	OSLP	SlpCode	
4				

BP - Business Partner
 U - User
 T - Contact Person
 SE - Sales Employee
 E - Employee
 O - Other

Add Cancel

Message To

List of possible recipients which you can select as per your need, e.g., select the business partner option from the dropdown if you want the system to send the message to the business partner selected on the document.

Key Table

This list will have all the tables which you have used in your message query. This *Key Table* shall be considered as the source table to pick the value.

Key Field

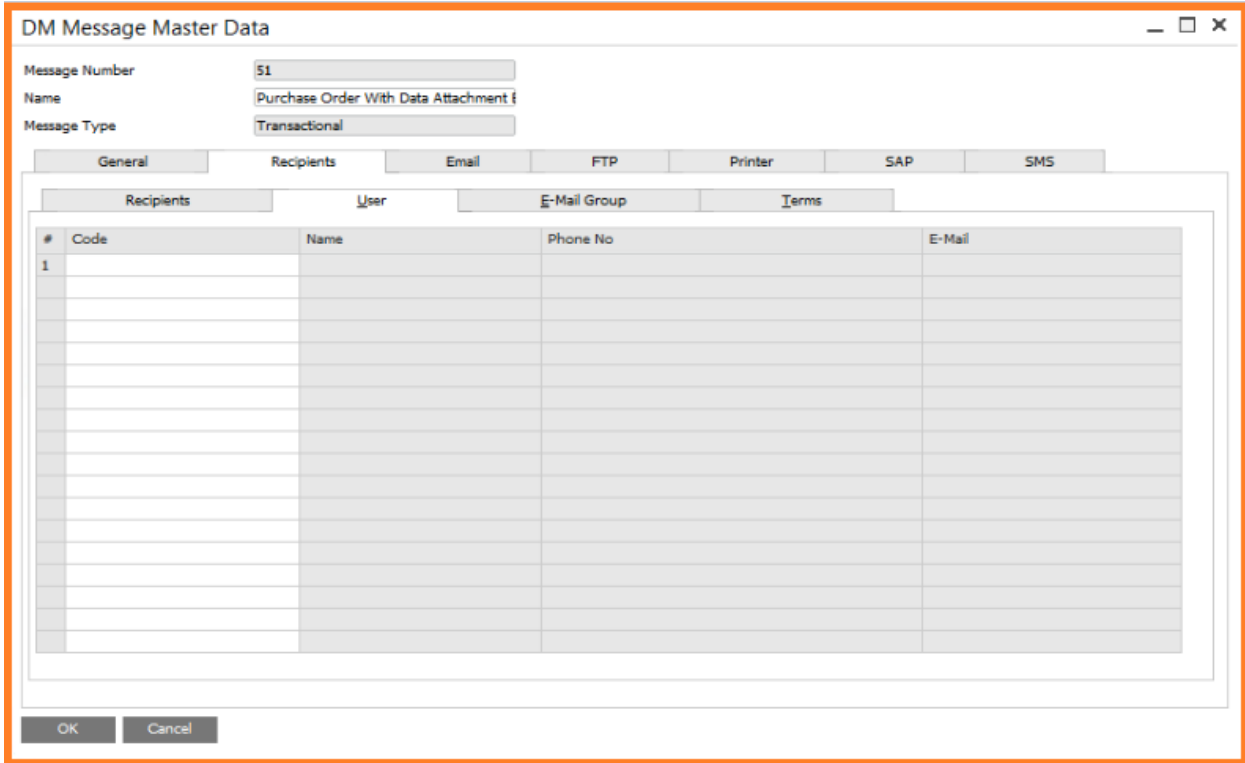
This list will have all the fields which you have used in your message query. This *Key Field* shall be considered as the source field of the selected *Key Table* to pick the value.

Field Type

Data Messenger will give you standard options that will come from the query, but if you have other fields and tables in the query, the system will not show them as options by default. You will have to specify the Field Type (as well as the Key Table and Key Field) if you choose the *Other* option in the *Message To* field.

User Sub-Tab

Use this tab if you want to configure an SAP user as a recipient of your message. You may select multiple SAP users.



The screenshot shows the 'DM Message Master Data' dialog box. At the top, there are three input fields: 'Message Number' with the value '51', 'Name' with the value 'Purchase Order With Data Attachment', and 'Message Type' with the value 'Transactional'. Below these fields are several tabs: 'General', 'Recipients', 'Email', 'FTP', 'Printer', 'SAP', and 'SMS'. The 'Recipients' tab is active, and within it, the 'User' sub-tab is selected. This sub-tab contains a table with the following columns: '#', 'Code', 'Name', 'Phone No', and 'E-Mail'. The table has one row with the number '1' in the '#' column. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Code To pick an SAP user, you need to press Tab to open the user list.

Name The picked *User Name* will automatically be populated from the User Setup.

Phone No The picked *Mobile Phone* is automatically populated from the SAP User Setup. The same Phone Number is used to send SMS if you have selected SMS as the message delivery method in the General Tab.

E-Mail The picked *Email* is automatically populated from the User Setup. The same E-Mail ID is used to send Emails if you have selected Email as the message delivery method in the General Tab

Email Group Sub-Tab

Use this tab if you want to send messages to contacts who belong to a specific SAP *Email Group*. You may select multiple *SAP Email Groups* If needed.

The screenshot shows the 'DM Message Master Data' dialog box. At the top, there are fields for 'Message Number' (51), 'Name' (Purchase Order With Data Attachment), and 'Message Type' (Transactional). Below these are several tabs: 'General', 'Recipients', 'Email', 'FTP', 'Printer', 'SAP', and 'SMS'. The 'Recipients' tab is active, and within it, the 'E-Mail Group' sub-tab is selected. This sub-tab contains a table with two columns: 'E-Mail Group Code' and 'E-Mail Group Name'. The table lists three entries: 'Finance', 'Logistic', and 'Production'. The 'Finance' entry is currently selected. At the bottom of the dialog, there are 'OK' and 'Cancel' buttons.

#	E-Mail Group Code	E-Mail Group Name
1	Finance	Finance
	Logistic	Logistic
	Production	Production

E-Mail Group Code

The system lists down all the *E-Mail Groups* which exist in SAP. The system will send the message to all those contact persons belonging to the select *E-Mail Group*.

E-Mail Group Name

When selecting an *E-Mail Group Code*, the *E-Mail Group Name* will automatically fill in for informational purposes

Terms Sub-Tab

Use this tab to apply the condition(s) for selecting the recipient and for selecting the *Message Delivery Method*, e.g., you want the system to send an E-Mail to a Customer if the user is giving them less than or equal to a 2% discount while billing, and if he is giving more than a 2% discount then immediately notify the Sale Employee through SMS.

DM Message Master Data

Message Number: 39
 Name: Add SO With Conditional Receipts
 Message Type: Transactional

General Recipients Email FTP Printer SAP SMS

Recipients User E-Mail Group Terms

ALL
 Conditions
 Advanced

Key Fields: Approved

#	Key Fields	Operation	Value	To Value	Message To	Other	User	E-Mail Group	SAP	E-Mail	SMS	Printer
1	Approved	=	Y		Business Partner				<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2	Approved	=	N		Sales Employee				<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
3	DocumentNumber								<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

OK Cancel

Key Fields

The dropdown to select the default key field for the matrix key field column.

All

No condition is applied to select a recipient. The system picks up all the recipients configured in Recipient, User, and E-Mail Group

Conditions

DM Message Master Data

Message Number: 13
 Name: TestDMSetup-2
 Message Type: Transactional

General Recipients Email FTP Printer SAP SMS

Recipients User E-Mail Group Terms

ALL
 Conditions
 Advanced

Key Fields: BPCode

#	Key Fields	Operation	Value	To Value	Message To
1	BPCode	=	C00001		Business Partner
2	BPCode				

OK Cancel

Key Fields

Select a Key Field to put the condition.

Condition

Select an operation to use in the condition.

Value

Comparing static value which is used to match the condition.

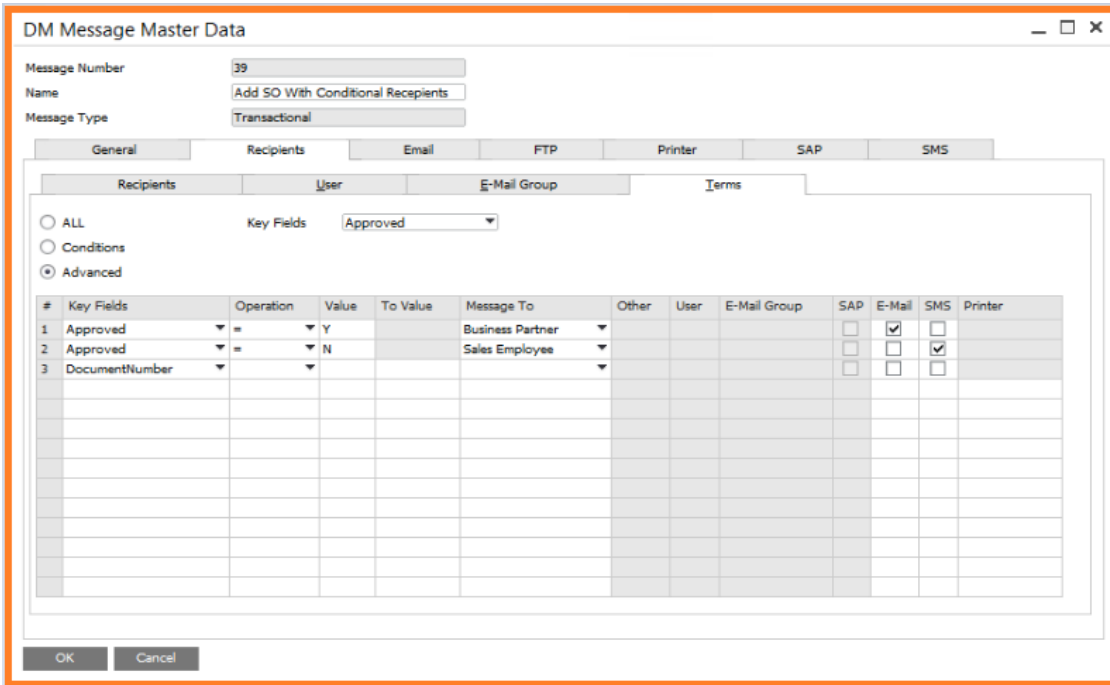
To Value

If you select the Range operation in the Operation column, then you will need two values. First you will enter in the *Value* column, second you will enter in the *To Value* column.

Message To

You need to specify which *Message To* will be used if a given condition is met.

Advanced



DM Message Master Data

Message Number: 39
 Name: Add SO With Conditional Receipts
 Message Type: Transactional

General Recipients Email FTP Printer SAP SMS

Recipients User E-Mail Group Terms

ALL
 Conditions
 Advanced

Key Fields: Approved

#	Key Fields	Operation	Value	To Value	Message To	Other	User	E-Mail Group	SAP	E-Mail	SMS	Printer
1	Approved	=	Y		Business Partner				<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
2	Approved	=	N		Sales Employee				<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
3	DocumentNumber								<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

OK Cancel

Key Fields

Select a Key Field to put the condition.

Operation

Select an operation to use in the condition.

Value

Comparing static value which is used to match the condition.

To Value

If you select the Range operation in the Operation column, then you will need two values. First you will enter in the *Value* column, second you will enter in the *To Value* column.

Message To

You need to specify which *Message To* will be used if a given condition is met. The Advanced Terms cannot be added if they do not have an equivalent recipient in the Recipient tab. (IE, you need to setup a Contact Person in the Recipient tab if you want to add a Contact Person in the Advanced Terms.)

Other

This gets enabled if you have chosen the *Other* option in the *Message To* column. Use this option if you want to send messages either to all contacts which you might have captured in different UDFs, or a specific UDF. This will work when you have selected the *Other* option in the first *Recipient Tab*.

- User** This gets enabled if you have chosen *User* in the *Message To* column. You can choose either the All option or a specific SAP user. This means the message will either be sent to all SAP users, or to the specific SAP user which you might have defined in the *User* tab.
- E-Mail Group** This gets enable if you have chosen *E-Mail Group* in the *Message To* column. You can choose either the All option or a specific *SAP E-Mail Group*. This means the message will either be sent to all *SAP E-Mail Groups*, or to the groups which you might have been defined in the *E-Mail Group* tab.
- SAP** You can choose *SAP* as a delivery method when you want to send an SAP message if the defined condition is met. You can choose either *All* or a specific *User* from the *User* list. User definition is picked from the Recipient > SAP User tab.
- E-Mail** You can choose *E-Mail* as a delivery method when you want to send E-Mail messages if the defined condition is met.
- SMS** You can choose *SMS* as a delivery method when you want to send SMS messages if the defined condition is met.
- Printer** You can choose *Printer* as a delivery method when you want to send messages to a printer if the defined condition is met.

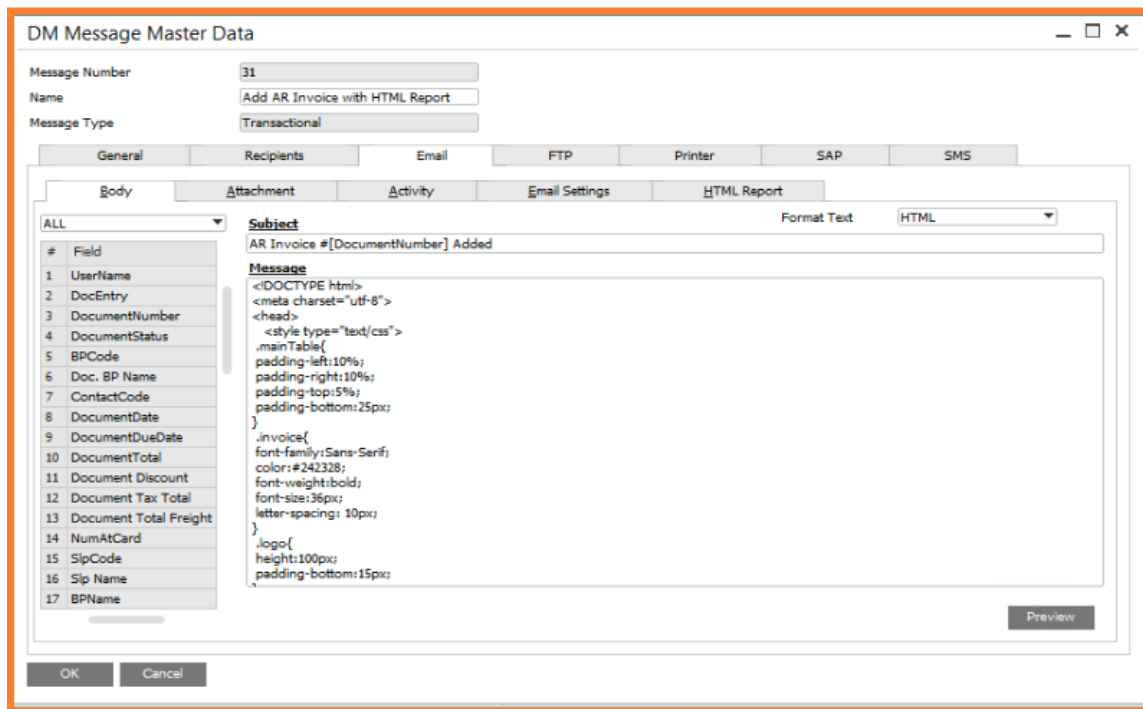
Email Tab

This tab is used to define *Email* Messages, things such as subject, body, attachment, etc.

There are 6 subtabs in the Email tab: Body, Attachment, Activity, Email Settings, HTML Report, and Parameters.

Body Sub-Tab

You need to specify the Subject and Body of the email message.



DM Message Master Data

Message Number: 31
 Name: Add AR Invoice with HTML Report
 Message Type: Transactional

General Recipients Email FTP Printer SAP SMS

Body Attachment Activity Email Settings HTML Report

ALL Subject Format Text HTML

AR Invoice #[DocumentNumber] Added

Message

```
<!DOCTYPE html>
<meta charset="utf-8">
<head>
<style type="text/css">
.mainTable{
padding-left:10%;
padding-right:10%;
padding-top:5%;
padding-bottom:25px;
}
.invoice{
font-family:Sans-Serif;
color:#242328;
font-weight:bold;
font-size:36px;
letter-spacing: 10px;
}
.logo{
height:100px;
padding-bottom:15px;
}
```

Preview

OK Cancel

Subject

You can define email the subject, and you may also have dynamic contents within the subject, e.g., if you are sending Invoice details to the customer in the email you may have the Invoice Number. To do that, you only need to put the document number field, which can be selected by just double clicking on the field list on the left, wherever you want to place the value of that field within the subject.

Message

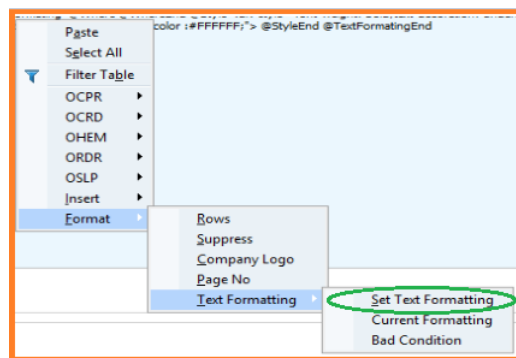
You can describe the email message. Messages can be normal text or html. The message body may also have dynamic contents. To include dynamic content, you need to take the field from the field list available on the left side of the screen, or you

can take the field from the right click menu wherever you need the value to come from the database.

Format Menu

The right click Format menus are used for formatting the email body. There are customized html tags which can be used for different formatting tasks.

- @Row...@EndRow: this tag is used to have repetitive contents, e.g., if you want to print document item details then you have this tag
- @Supress...@EndSupress: this tag is used to suppress text regardless of whether the text is static or dynamic
- @TextFormatting...@TextFormattingEnd: this tag is used as an @Style tag container
- @Style...@EndStyle: this tag is mainly responsible for text formatting. This tag actually works like HTML original Style tag. You can create as many Text Formatting Templates as you want, and these templates can be used wherever needed in email body text.
 - To create Text Formatting templates, just right-click on the body, and follow the menu to Format > Text Formatting > Set Text Formatting or Text Formatting Template DM setup main menu. When you click on this menu then the Text Formatting Template window will open.

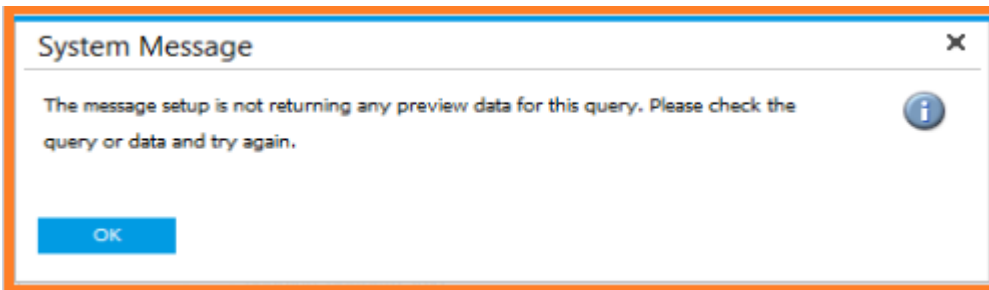


- @Where...@EndWhere: this tag (not available in the right click menu) is used if you want to apply a condition. This tag can be used with the above mentioned all customized HTML tags

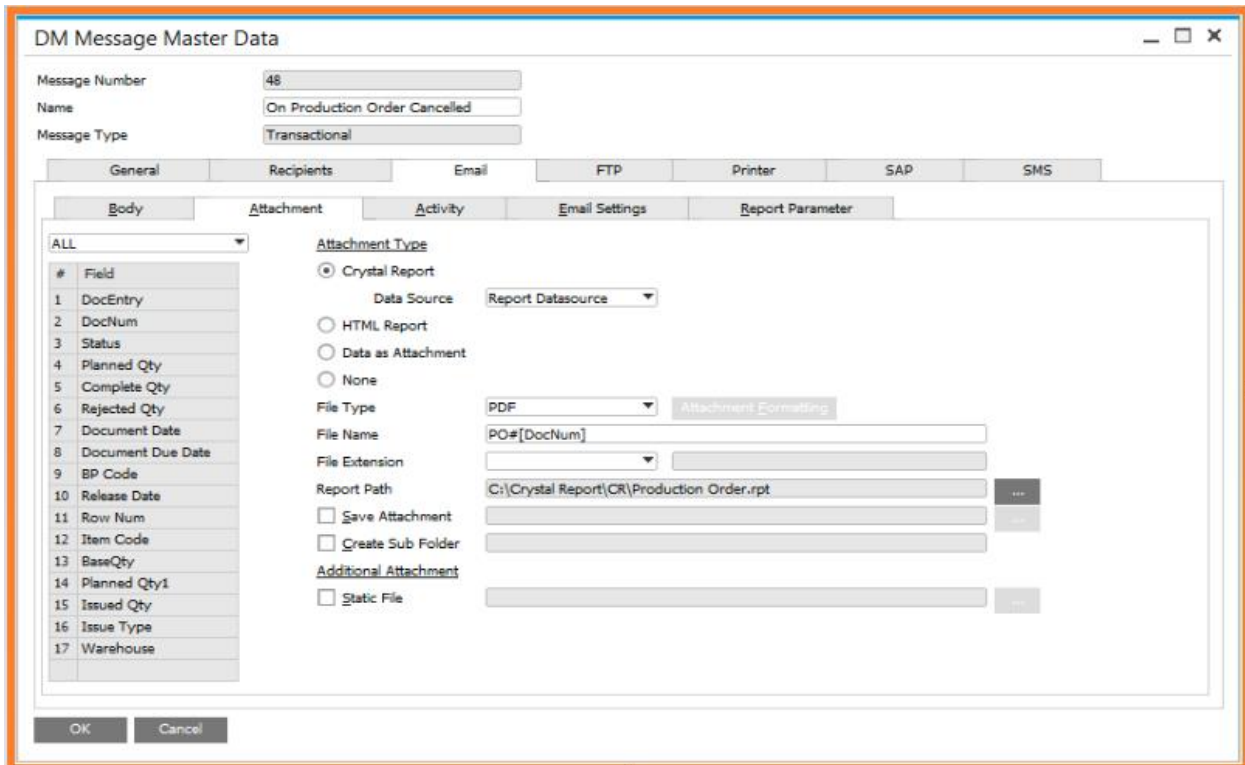
In case of an HTML body, you may also have customized HTML tags to have content be more dynamic.

Preview

Click this button if you want to preview the message. Preview uses your Message Query to show the data in a preview, but in case of a Transactional Message the system uses a hardcoded "DocEntry" column value, e.g., "OPOR"."DocEntry" = 1. If the Message Query doesn't return any record, then instead of a preview you will get the message below



Attachment Sub-Tab



The screenshot shows the 'DM Message Master Data' window with the 'Attachment' sub-tab selected. The message details are as follows:

- Message Number: 48
- Name: On Production Order Cancelled
- Message Type: Transactional

The 'Attachment' sub-tab contains the following configuration options:

- Attachment Type:**
 - Crystal Report
 - Data Source: Report Datasource
 - HTML Report
 - Data as Attachment
 - None
- File Type:** PDF
- File Name:** PO#[DocNum]
- File Extension:** (empty)
- Report Path:** C:\Crystal Report\CR\Production Order.rpt
- Save Attachment
- Create Sub Folder
- Additional Attachment:**
 - Static File

On the left side of the window, there is a table with 17 fields:

#	Field
1	DocEntry
2	DocNum
3	Status
4	Planned Qty
5	Complete Qty
6	Rejected Qty
7	Document Date
8	Document Due Date
9	BP Code
10	Release Date
11	Row Num
12	Item Code
13	BaseQty
14	Planned Qty1
15	Issued Qty
16	Issue Type
17	Warehouse

There are 4 types of attachments that you can select to send in the email.

- Crystal Report – you can choose crystal report as an attachment, and if you choose this option then you need to specify the report datasource. We have the following report datasources available (i.e., the query taken to design the crystal report).
- Report Datasource – you can use this option when you have used crystal report command object (SQL Query). When you use this option then the system passes the report parameter values to crystal reports to make the attachment.
- XML – you should use this option when you have designed a Crystal Report by using an XML file. If you use this option, then you need to generate the same XML file with all required fields by using the Message query, and it is passed to crystal reports to make the attachment.

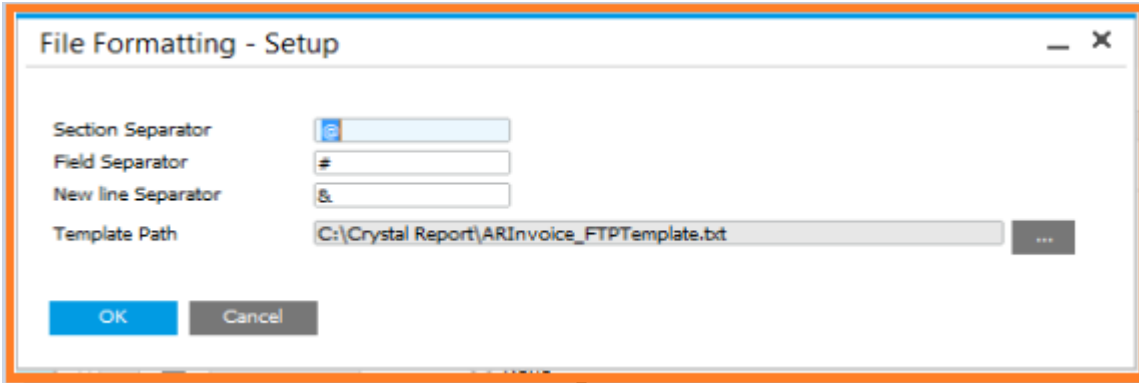
- Message Query – you should use this option when you want to overwrite the Crystal Report datasource with a Message Query. And you must make sure the Message Query has all the required columns which are used in the report.
- HTML Report – use this option when you want to generate a PDF from a given HTML. When you use this option, then the HTML Report tab will be visible, wherein you will define the HTML content, and that HTML content will be used to generate the PDF for email attachment.
 - Data as Attachment – use this option when you want the Message query to be directly used to generate the email attachment in specified format.
 - None – when there is no attachment needed.

File Type

You need to choose the attachment file type. You can have the following file types:

- Word
- Excel
- PDF
- XML
- CSV
- TXT

In case of TXT & CSV, the File Formatting button gets enabled, and when you click on the File Formatting button, the File Formatting - Setup window will open, wherein you need to specify all required file formatting characters, e.g., Section Separator, Field Separator, New Line Separator, etc. You also need to select a file template having the same operation characters used.

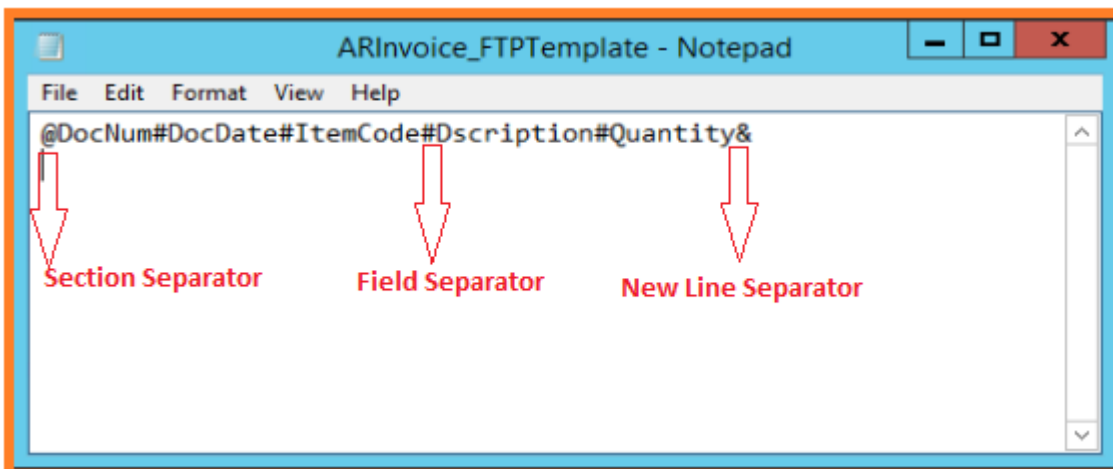


Section Separator Specify the character that will be used to separate the header and the details sections.

Field Separator Specify the character that will be used to separate the fields.

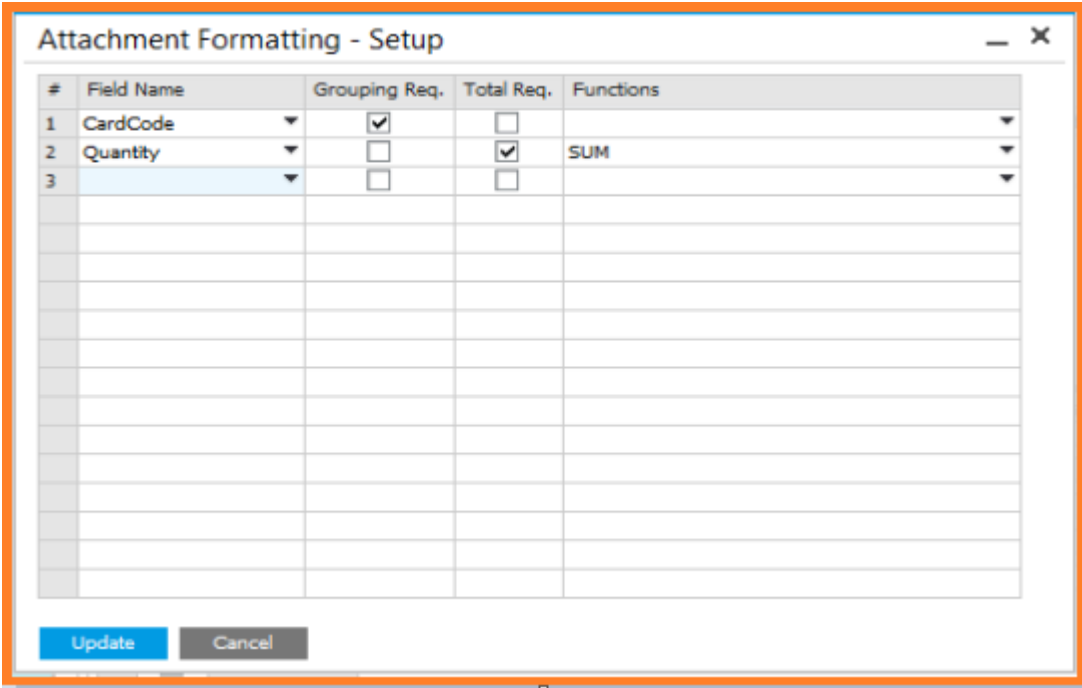
New Line Separator Specify the character that will be used to separate the lines.

Template Path You need to select a template file that will comply with all the characters which you have specified above as per their operation.



In case of Word, Excel & PDF, the Attachment Formatting button gets enabled, and when you click on the Attachment Formatting button, the Attachment Formatting - Setup window will open,

wherein you need to specify a column for which you want to have aggregate functions like SUM, AVG, or COUNT.



Field Name Select the field for which you want either grouping or aggregation to be done.

Grouping Req. Check when you need grouping to be required for the selected column.

Total Req. Check when you need aggregation to be required for the selected column.

Functions Choose an aggregate function (SUM, AVG, or COUNT) from the drop down in cases when you want aggregation.

File Name You can specify the name of the attachment. You can have dynamic file names, e.g., if you are sending an AR Invoice as an attachment in the email, and you want the invoice number to be the attachment name, then just put the [Document No] field

into this box, which can be copied either by double clicking on the field list or using the right click menus to select that field.

File Extension

There are 3 file extension options.

- None – use when there is no file extension needed
- Default – no change in the file extension needed. The system will create the File as selected in File Type
- Custom – choose this option in case you want to have custom extensions, and you will need to enter the extension required in the adjacent box

Report Path

Select the RPT file if the attachment type is crystal report.

Save Attachment

Check this option to save attachment at the selected location.

Create Sub Folder

Check this option if you want to create a sub folder within for keeping attachment files

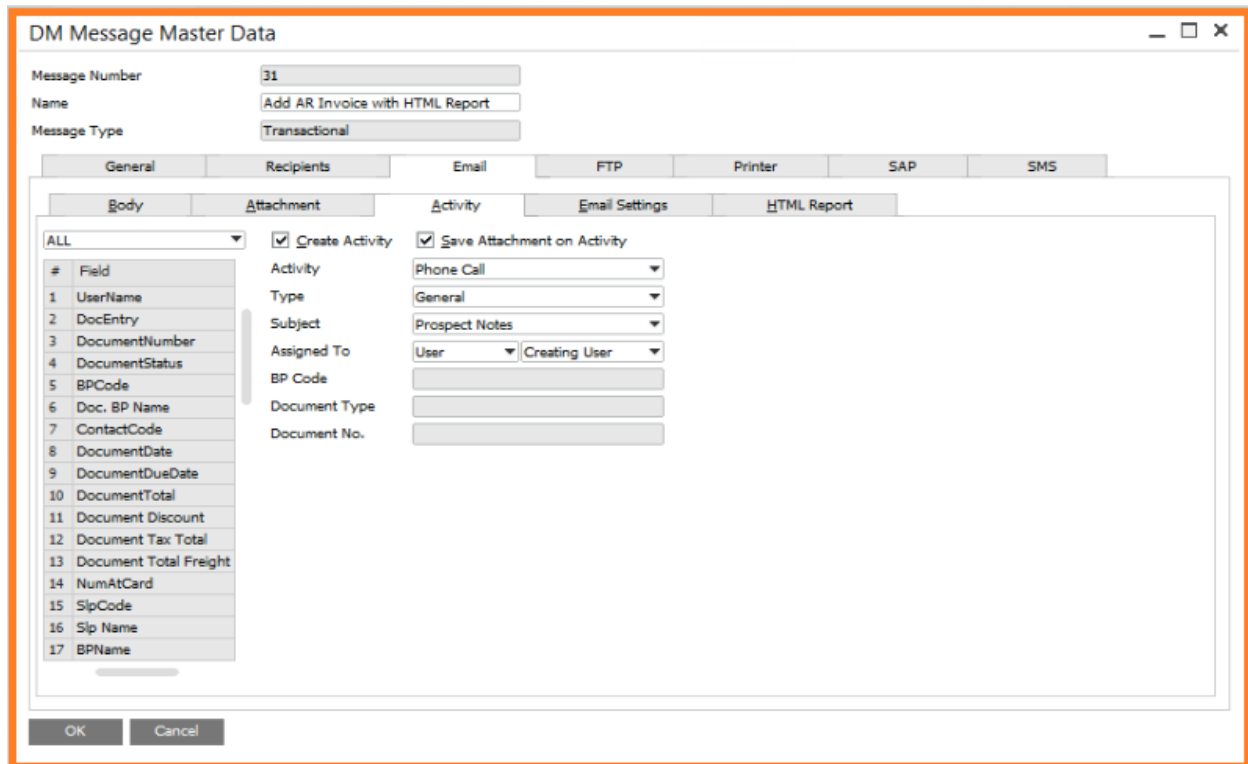
Static File

You can select any static file, e.g., you want to send annexure along with an A/R Invoice, then you will have to choose that annexure document as *Static File*.

Activity Sub-Tab

You use this tab to create SAP Activity if you want system to create an Activity when sending any message.

Note, you may see the Activity sub-tab in other Message Delivery Methods. They all work the same as we will be describing below.



DM Message Master Data

Message Number: 31
 Name: Add AR Invoice with HTML Report
 Message Type: Transactional

General Recipients Email FTP Printer SAP SMS

Body Attachment **Activity** Email Settings HTML Report

ALL

Create Activity Save Attachment on Activity

Field

1 UserName
 2 DocEntry
 3 DocumentNumber
 4 DocumentStatus
 5 BPCode
 6 Doc. BP Name
 7 ContactCode
 8 DocumentDate
 9 DocumentDueDate
 10 DocumentTotal
 11 Document Discount
 12 Document Tax Total
 13 Document Total Freight
 14 NumAtCard
 15 SlipCode
 16 Slip Name
 17 BPName

Activity: Phone Call
 Type: General
 Subject: Prospect Notes
 Assigned To: User Creating User
 BP Code:
 Document Type:
 Document No.:

OK Cancel

Create Activity

Check if you want to allow the system to create an Activity every time when a message is sent. Default will be checked here if you have checked it in the General Tab of [DM Configuration](#)

Save Attachment on Activity

Check if you want to save generated attachment files with activity.

Activity

Specify a suitable type for your activity.

Type

Select a more detailed classification of the activity, e.g., you can classify meeting, presentation, and follow-up.

Subject

Select another detailed classification of the activity, e.g., products, business area, etc.

Assigned To

Select the User or Employee to assign the Activity. The following options can be used to assign the activity to a User or Employee in case of a Transactional Message and Default query.

- Creating User – choose this option when you want to assign the activity to the user (UserSign Field) who is creating the document
- Last Updating User – choose this option when you want to assign the activity to the user (UserSign2 Field) who is updating the document
- Document Owner – choose this option when you want to assign the activity to the Document Owner (OwnerCode Field)
- Salesperson - choose this option when you want to assign the activity to the Salesperson (SlpCode Field)
- Fixed – choose this option when you want to assign the activity to a predefined user or employee

When you have chosen Query Message or Transactional Message with a custom query, you must select the field from the field list in which you are having the User or Employee come from.

BP Code

Choose a field from the field list that will have the BP code. If the Message is Transactional and has a BP Code, this field will be suppressed, and the document's BP Code will be used.

Document Type

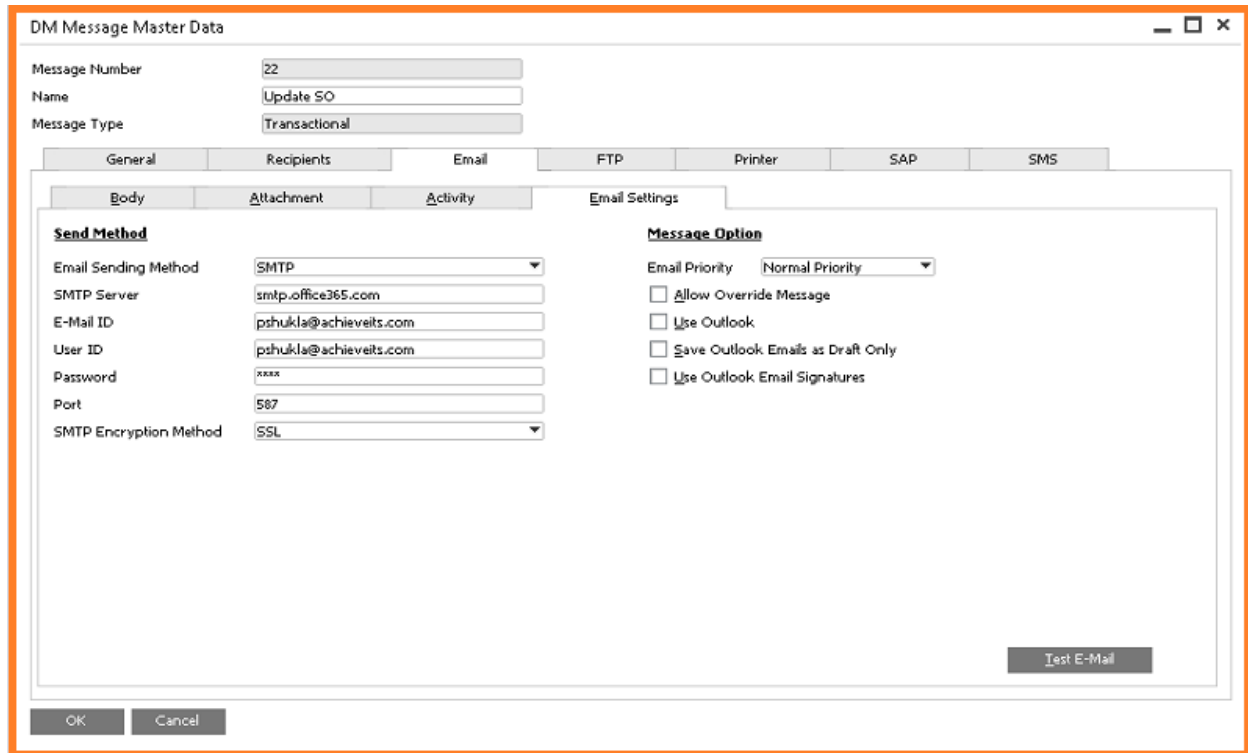
If the message is Transactional, then this field will be suppressed, and the value of this field will be set to match the Transaction. If the message is Query, the user will need to fill the relevant fields in. You can select the relevant fields from the Field List on the left-hand side.

Document No

Select a field from the field list that will have the document number. If the message is Transactional, then this field will be suppressed, and the value of this field will be set to match the Transaction.

Email Settings Sub-Tab

This tab is used to provide SMTP server details and message options.



DM Message Master Data

Message Number: 22
 Name: Update SO
 Message Type: Transactional

General Recipients Email FTP Printer SAP SMS

Body Attachment Activity Email Settings

Send Method

Email Sending Method: SMTP
 SMTP Server: smtp.office365.com
 E-Mail ID: pshukla@achieveits.com
 User ID: pshukla@achieveits.com
 Password: xxxx
 Port: 587
 SMTP Encryption Method: SSL

Message Option

Email Priority: Normal Priority
 Allow Override Message
 Use Outlook
 Save Outlook Emails as Draft Only
 Use Outlook Email Signatures

Test E-Mail

OK Cancel

Send Method

Email Sending Method Option to choose SAP or SMTP.

SMTP Server Enter the SMTP server name.

E-Mail ID Email ID to be used to send email.

User ID Enter the SMTP user ID.

Password Enter the SMTP password.

Port Enter the port to be used for outgoing email.

SMTP Encryption Method Choose the SMTP encryption method.

Message Option

Email Priority You can choose the email priority. By default, it is Normal.

Allow Override Message Check this option if you wish to change message contents when sending messages by using manual delivery.

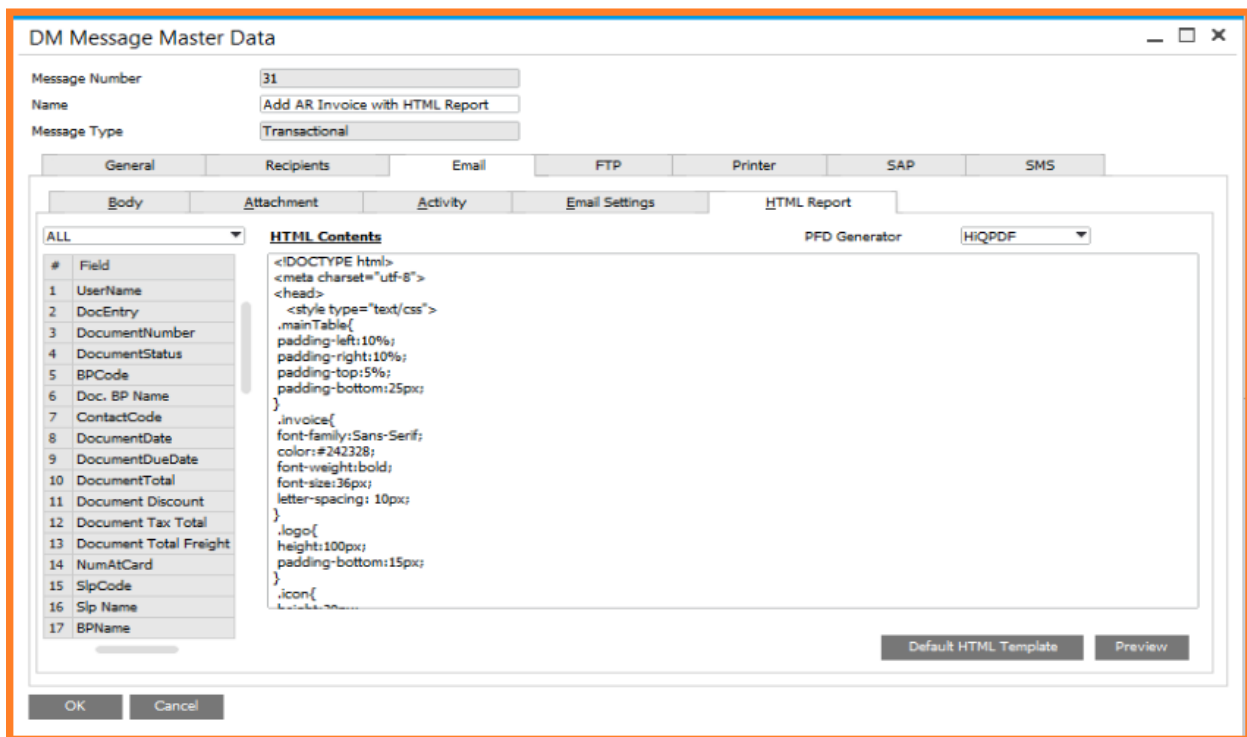
Use Outlook Check this option if you want to use installed MS Outlook to send messages. This will only be applicable for Transactional message.

Save Outlook Email as Draft Only Check this option if you want to save messages in outlook as a draft message.

Email Outlook Email Signature Check if you want messages to use an outlook email signature

HTML Report Sub-Tab

The HTML tab becomes visible when you choose the HTML Report attachment type option in the attachment tab. This tab is used to define HTML content, which the system will use to generate PDFs.



PDF Generator There are two PDF generators available to be used.

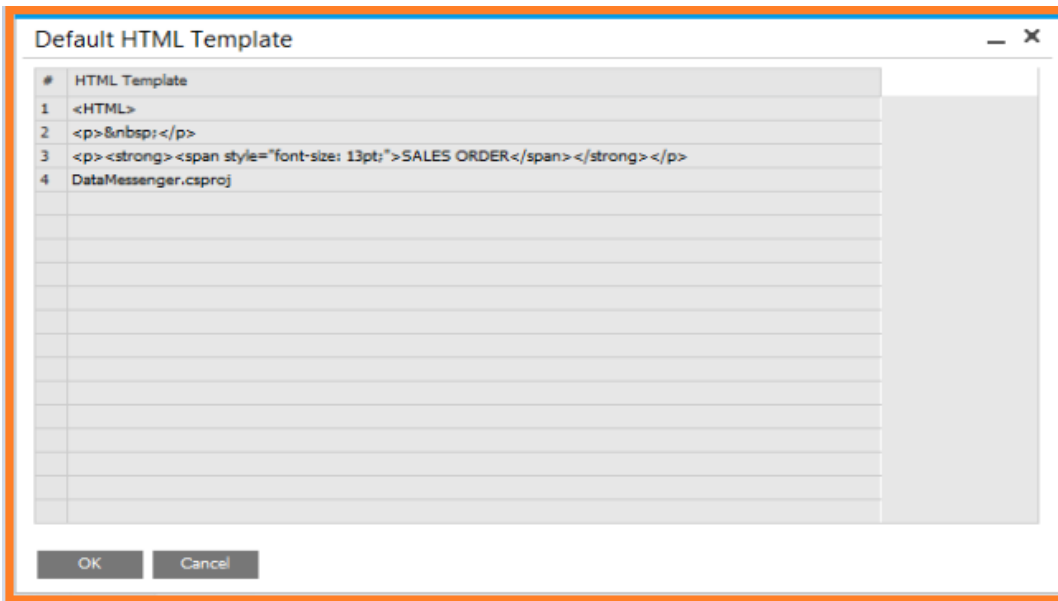
1. iTextSharp – use for simple formatting, e.g., it doesn't support <style> HTML tag
2. HiQPDF – use for when you have more complicated formatting, e.g., it supports <style> HTML tag

HTML Contents

You need to define HTML content. The easy approach is to use an online HTML tool to design the layout and copy the HTML contents from there and paste it in HTML Content box.

Default HTML Template

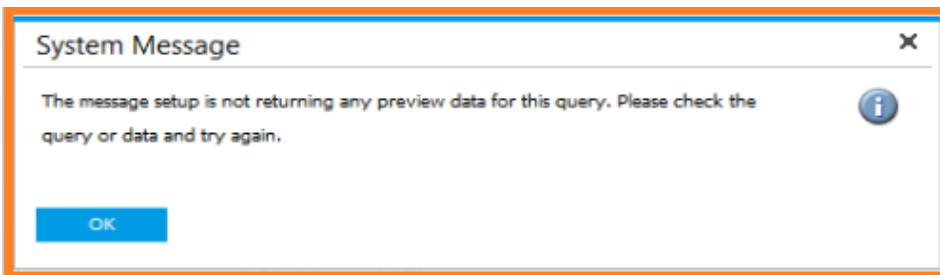
The place where you save your HTML templates to be used in the message as per requirement.



Preview

Click this button if you want to preview the message. Preview uses your Message Query to show the data in a preview, but in case of a Transactional Message, the system uses a hardcoded "DocEntry" column value, e.g., "OPOR"."DocEntry" = 1.

If the Message Query doesn't return any record, then you will get this message.



Report Parameter Sub-Tab

The parameter tab becomes visible when you choose the Crystal Report attachment type option in the attachment tab. All parameters used in the selected crystal report are populated, e.g., DockKey@, ObjectId@, Schema@, etc.

You need to set the value(s) for mandatory parameters here. For DockKey@, ObjectId@, and Schema@, the system automatically assigns values.

#	Optional	RPT Name	Parameter Name	Data Type	Parameter Label	Numeric	Alphanumeric	Date	Time	Float	Memo
1	<input type="checkbox"/>	Production C	DockKey@	Numeric	DockKey@					0.000	
2	<input type="checkbox"/>	Production C	ObjectId@	String	ObjectId@					0.000	
3	<input type="checkbox"/>	Production C	Schema@	String	Schema@					0.000	

Optional

The system will show this as checked if the Crystal Report parameter is optional.

RPT Name

The system will populate the selected Crystal Report file name, which you have selected in the Attachment tab.

Parameter Name

The system will automatically populate the parameter name, which is used in select Crystal Reports.

Data Type

The system will automatically populate the parameter data type, which is used in select Crystal Reports.

Parameter Label

The system will automatically populate the parameter label, which is used in select Crystal Reports.

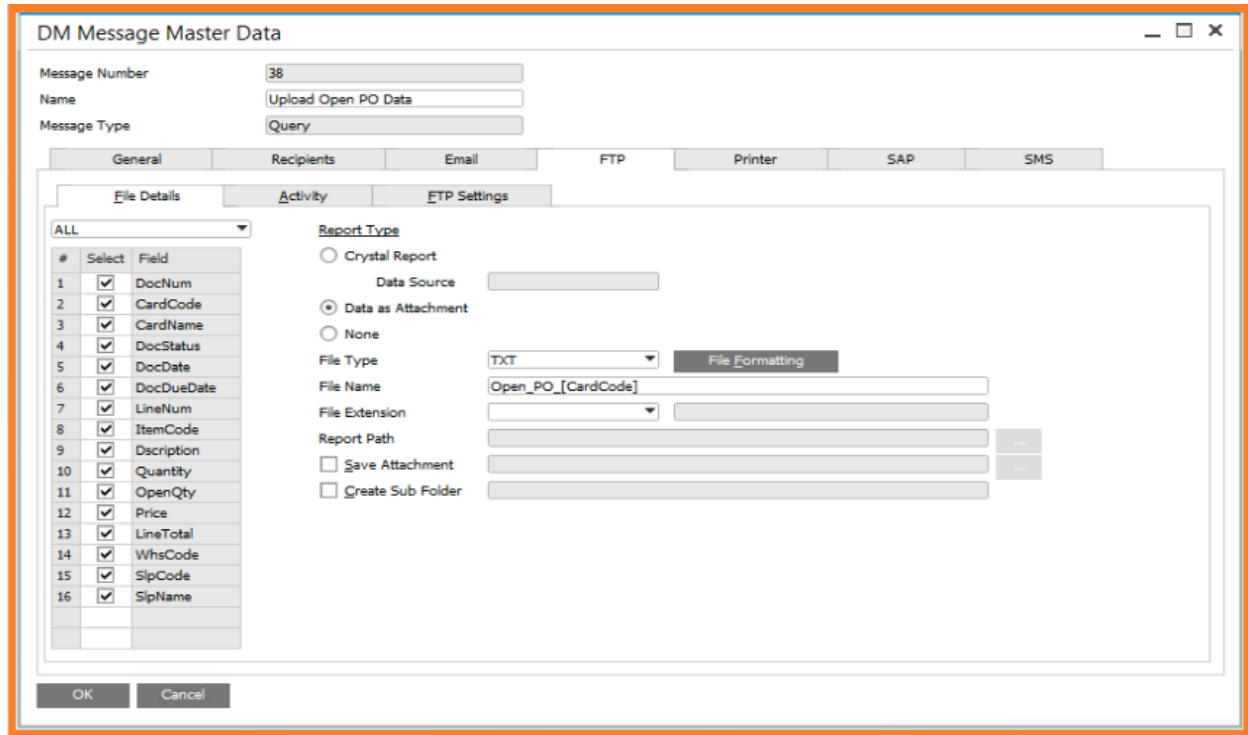
<i>Numeric</i>	You enter the parameter value in this column if the selected parameter is Numeric.
<i>Alphanumeric</i>	You enter the parameter value in this column if the selected parameter is Alphanumeric.
<i>Date</i>	You enter the parameter value in this column if the selected parameter is Date.
<i>Time</i>	You enter the parameter value in this column if the selected parameter is Time.
<i>Float</i>	You enter the parameter value in this column if the selected parameter is Float.
<i>Memo</i>	You enter the parameter value in this column if the selected parameter is Memo.

FTP Tab

This tab is used to define the *FTP details*, e.g., FTP login, File format, etc.

There are 3 subtabs in the FTP tab: File Details, Activity, and FTP Settings.

File Details Sub-Tab



DM Message Master Data

Message Number: 38
 Name: Upload Open PO Data
 Message Type: Query

General Recipients Email FTP Printer SAP SMS

File Details Activity FTP Settings

ALL

#	Select	Field
1	<input checked="" type="checkbox"/>	DocNum
2	<input checked="" type="checkbox"/>	CardCode
3	<input checked="" type="checkbox"/>	CardName
4	<input checked="" type="checkbox"/>	DocStatus
5	<input checked="" type="checkbox"/>	DocDate
6	<input checked="" type="checkbox"/>	DocDueDate
7	<input checked="" type="checkbox"/>	LineNum
8	<input checked="" type="checkbox"/>	ItemCode
9	<input checked="" type="checkbox"/>	Description
10	<input checked="" type="checkbox"/>	Quantity
11	<input checked="" type="checkbox"/>	OpenQty
12	<input checked="" type="checkbox"/>	Price
13	<input checked="" type="checkbox"/>	LineTotal
14	<input checked="" type="checkbox"/>	WhsCode
15	<input checked="" type="checkbox"/>	SlipCode
16	<input checked="" type="checkbox"/>	SlipName

Report Type

Crystal Report
 Data Source: _____

Data as Attachment

None

File Type: TXT File Formatting

File Name: Open_PO_[CardCode]

File Extension: _____

Report Path: _____

Save Attachment

Create Sub Folder

OK Cancel

File Details

There are 3 types of attachments which you can select to be placed in the FTP.

- Crystal Report – you can choose crystal report as an attachment. If you choose this option, then you need to specify the report datasource.
- Report Datasource – you should use this option when you have used a crystal report command object (SQL Query). When you use this option then the system passes the report parameter values to the crystal report to make the attachment.

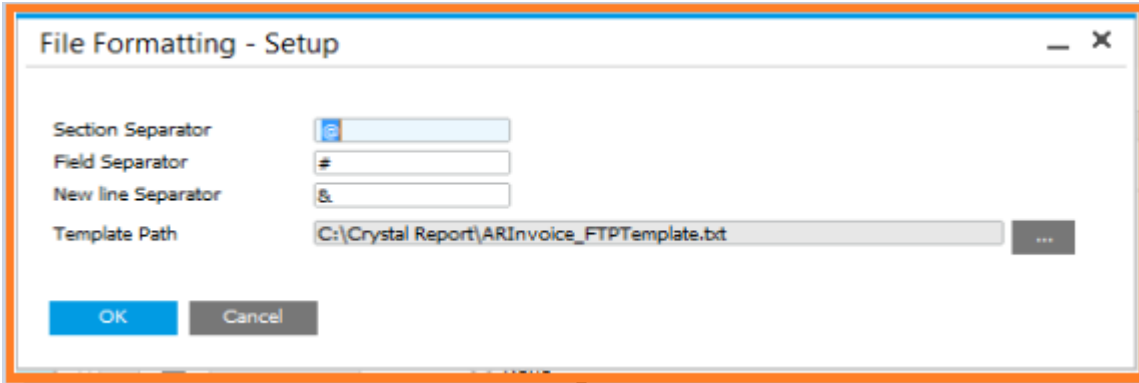
- XML – you should use this option when you have designed a Crystal Report by using an XML file. When you use this option then the system generates an XML file by using the Message query, and it is passed to crystal reports to make the attachment.
- Message Query – you should use this option when you want to overwrite the Crystal Report datasource with the Message Query. You must make sure the Message Query has all the columns which are used in the report.
- Data as Attachment – use this option when you want the Message query to be directly used to generate the email attachment in the specified format.
- None – when there is no attachment needed

File Type

You need to choose the attachment file type. You can have following file types:

- Word
- Excel
- PDF
- XML
- CSV
- TXT

In case of TXT & CSV, the File Formatting button gets enabled, and when you click on the File Formatting button, the File Formatting - Setup window will open, wherein you need to specify all required file formatting characters, e.g., Section Separator, Field Separator, New Line Separator, etc. You also need to select the file template having same operation characters used.

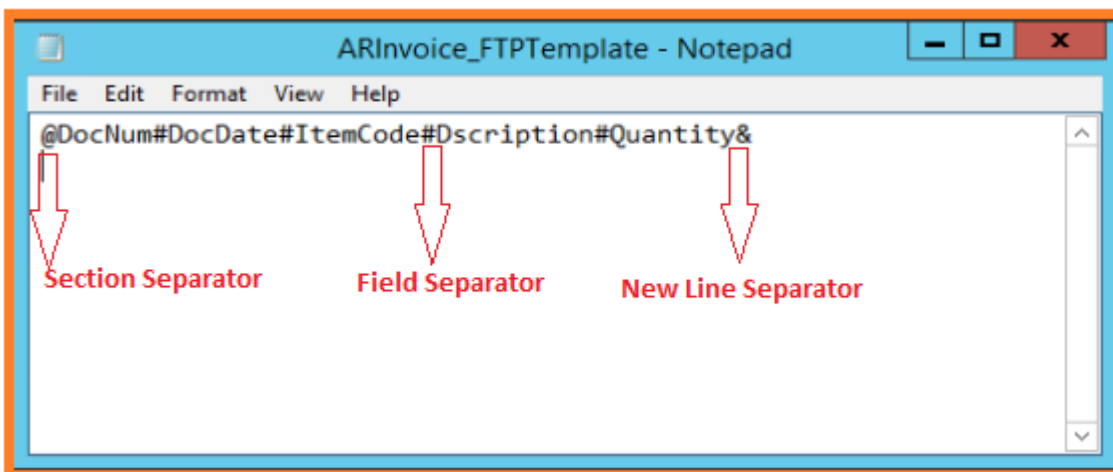


Section Separator Specify the character that will be used to separate the header and details sections.

Field Separator Specify the character that will be used to separate fields.

New Line Separator Specify the character that will be used to separate lines.

Template Path You need to select a template file, which will comply with all the characters that you have specified above as per their operation.



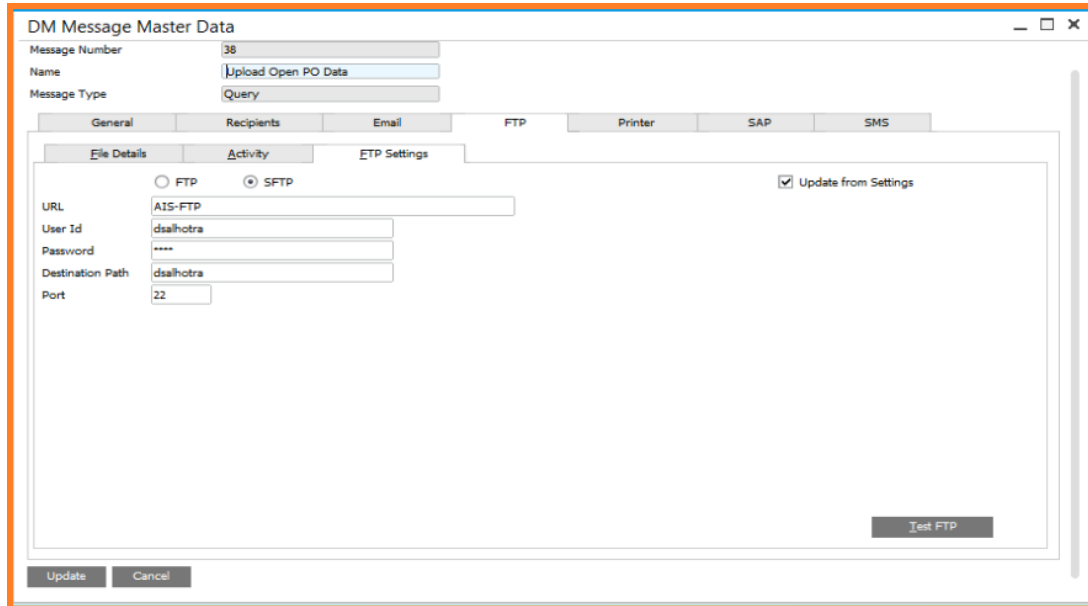
In case of Word, Excel & PDF, the Attachment Formatting button gets enabled, and when you click on the Attachment Formatting button, the Attachment Formatting - Setup window will open, wherein you need to specify a column for which you want to have aggregate functions like SUM, AVG, or COUNT.

- Default – use when no change in the file extension is needed. The system will create the File as selected in the File Type.
- Custom – use in cases where you want to have a custom extension. You will need to enter the extension required in the adjacent box

<i>Report Path</i>	Select the RPT file if the attachment type is crystal report.
<i>Save Attachment</i>	Check this option to save the attachment in the selected location.
<i>Create Sub Folder</i>	Check this option if you want to create a sub folder within for keeping attachment files.
<i>Static File</i>	You can select any static file, e.g., you want to send annexure along with an A/R Invoice, then you will have to choose that annexure document here.

FTP Settings Sub-Tab

By default, the system pastes the FTP settings from DM Configuration. However, you can change it if needed for the message.



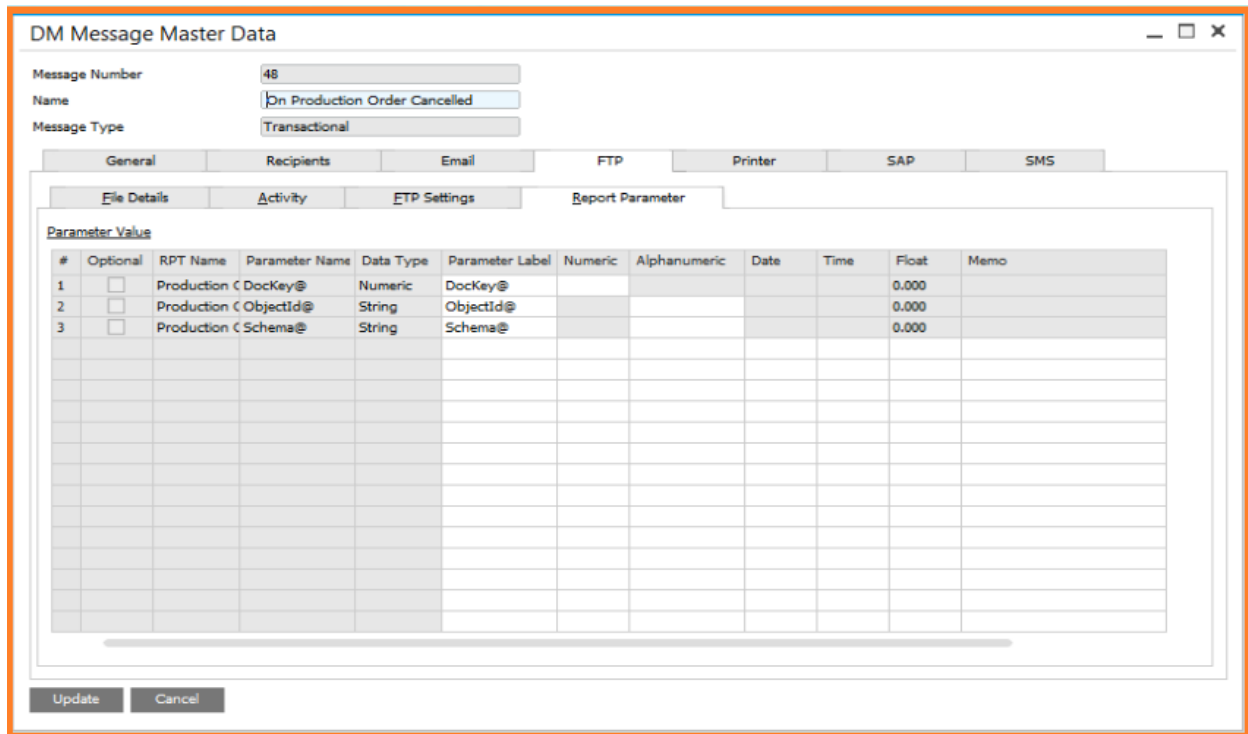
- | | |
|-----------------------------|--|
| FTP / SFTP | Select “FTP” or “SFTP”. It depends upon your FTP server. |
| URL | Enter the FTP URL. |
| User Id | Enter the user ID of the FTP account. |
| Password | Enter the password of the FTP account. |
| Destination Path | If using SFTP, enter the Destination path provided by your administrator. |
| Port | If using SFTP, enter the SFTP port provided by your administrator. |
| Enable Secure FTP | If using FTP, check this box if your FTP server is secured. |
| Test FTP Button | The test FTP button will upload a sample file (TestFTPSetting.txt) on root.

This option will ensure that the entered credentials are correct. |
| Update from Settings | When you check this checkbox, the system populates FTP details from DM Configuration. |

Report Parameter Sub-Tab

The parameter tab becomes visible when you choose the Crystal Report attachment type option in the attachment tab. All parameters used in the selected crystal report are populated, e.g., DocKey@, ObjectId@, Schema@, etc.

You need to set the value(s) for mandatory parameters here. For DocKey@, ObjectId@, and Schema@, the system automatically assigns values.



#	Optional	RPT Name	Parameter Name	Data Type	Parameter Label	Numeric	Alphanumeric	Date	Time	Float	Memo
1	<input type="checkbox"/>	Production C	DocKey@	Numeric	DocKey@					0.000	
2	<input type="checkbox"/>	Production C	ObjectId@	String	ObjectId@					0.000	
3	<input type="checkbox"/>	Production C	Schema@	String	Schema@					0.000	

Optional

The system will show this checked if the Crystal Report parameter is optional.

RPT Name

The system will populate the selected Crystal Report file name, which you have selected in the Attachment tab.

Parameter Name

The system will automatically populate the parameter name, which is used in select Crystal Reports.

Data Type

The system will automatically populate the parameter data type, which is used in select Crystal Reports.

Parameter Label

The system will automatically populate the parameter label, which is used in select Crystal Reports.

<i>Numeric</i>	You enter the parameter value in this column if the selected parameter is Numeric.
<i>Alphanumeric</i>	You enter the parameter value in this column if the selected parameter is Alphanumeric.
<i>Date</i>	You enter the parameter value in this column if the selected parameter is Date.
<i>Time</i>	You enter the parameter value in this column if the selected parameter is Time.
<i>Float</i>	You enter the parameter value in this column if the selected parameter is Float.
<i>Memo</i>	You enter the parameter value in this column if the selected parameter is Memo.

Printer Tab

You use this tab to configure Printers if you want to print a document either on a transactional event or on scheduled basis. You need to configure it when you have checked Printer as a Message Delivery Method in the [General Tab](#).

There are two subtabs under the Printer tab: Printer Information and Parameters.

Printer Information Sub-Tab

DM Message Master Data

Message Number: 48
 Name: On Production Order Cancelled
 Message Type: Transactional

General Recipients Email FTP Printer SAP SMS

Printer Information

ALL

#	Select	Field
1	<input checked="" type="checkbox"/>	DocEntry
2	<input checked="" type="checkbox"/>	DocNum
3	<input checked="" type="checkbox"/>	Status
4	<input checked="" type="checkbox"/>	Planned Qty
5	<input checked="" type="checkbox"/>	Complete Qty
6	<input checked="" type="checkbox"/>	Rejected Qty
7	<input checked="" type="checkbox"/>	Document Date
8	<input checked="" type="checkbox"/>	Document Due Date
9	<input checked="" type="checkbox"/>	BP Code
10	<input checked="" type="checkbox"/>	Release Date
11	<input checked="" type="checkbox"/>	Row Num
12	<input checked="" type="checkbox"/>	Item Code
13	<input checked="" type="checkbox"/>	BaseQty
14	<input checked="" type="checkbox"/>	Planned Qty1
15	<input checked="" type="checkbox"/>	Issued Qty
16	<input checked="" type="checkbox"/>	Issue Type
17	<input checked="" type="checkbox"/>	Warehouse

Attachment Type: Crystal Report
 Data Source:
 Data as Printout
 None
 File Type: Excel
 Attachment Formatting:
 File Name: PO#[DocNum]
 Report Path:
 Available Printers: \\PRI-ADSYNC.premierresults.com\HPM401

OK Cancel

File Details

There are 3 types of attachments that you can select to send to print

- Crystal Report – you can choose a crystal report as an attachment. If you choose this option, you will then need to specify the report Data Source. The available Report Data Sources are Report Datasource, XML, and Message Query. They are described below.
- Report Datasource – you should use this option when you have used a crystal report command object (SQL Query). If you use this option, then

the system passes the report parameter values to the crystal report to make the attachment.

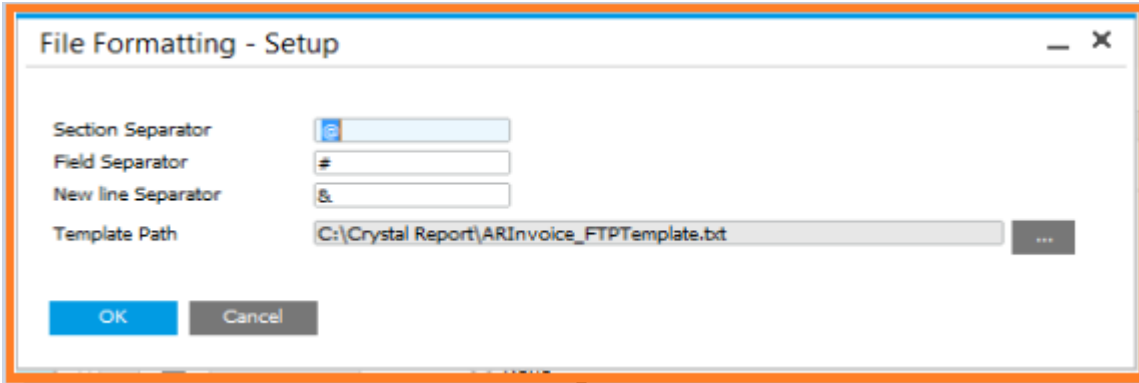
- XML – you should use this option when you have designed a Crystal Report by using an XML file. If you use this option, then the system generates an XML file by using the Message query and is passed to crystal report to make the attachment.
- Message Query – you should use this option when you want to overwrite the Crystal Report datasource with a Message Query. You must make sure the Message Query has all the columns which are used in the report.
- Data as Printout – use this option when you want the Message query to be directly used to generate the printout in the specified format.
- None – when there is no attachment needed

File Type

You need to choose the attachment file type. You can have following types:

- Word
- Excel
- PDF
- XML
- CSV
- TXT

In case of TXT & CSV, the File Formatting button is enable, and when you click on the File Formatting button, the File Formatting - Setup window will open, wherein you need to specify all the required file formatting characters, e.g., Section Separator, Field Separator, New Line Separator, etc. You also need to select a file template that has the same operation characters used.

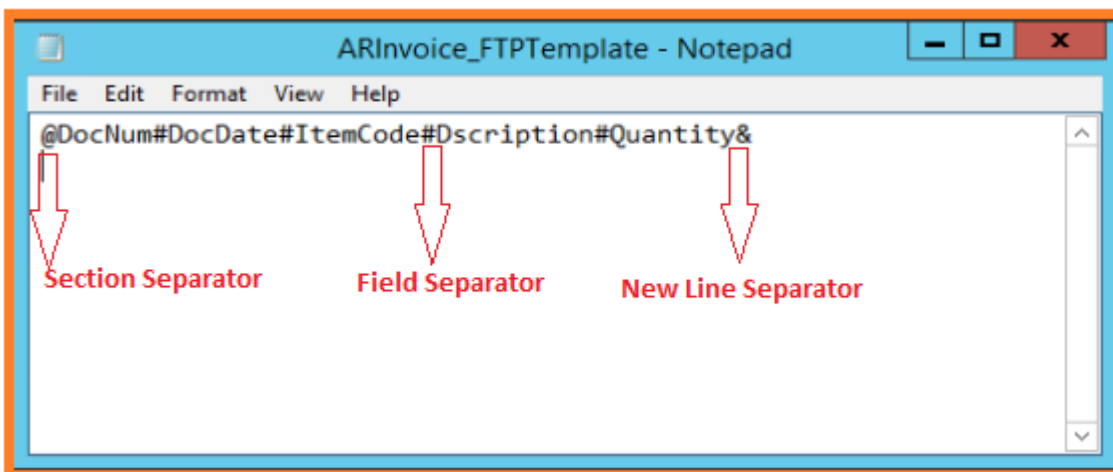


Section Separator Specify the character that will be used to separate the header and details sections.

Field Separator Specify the character that will be used to separate fields.

New Line Separator Specify the character that will be used to separate lines.

Template Path You need to select a template file that will comply with all the characters that you have specified above per their operation.



In case of Word, Excel & PDF, the Attachment Formatting button is enabled, and when you click on the Attachment Formatting button, the Attachment Formatting - Setup window will open, wherein you need to specify columns for which you want to have aggregate functions like SUM, AVG, or COUNT.

- None – use when there is no file extension needed
- Default – no change in the file extension. The system will write it as per the selected File Type
- Custom - use when you want to have a custom extension. You will need to enter the extension that is required in the adjacent box

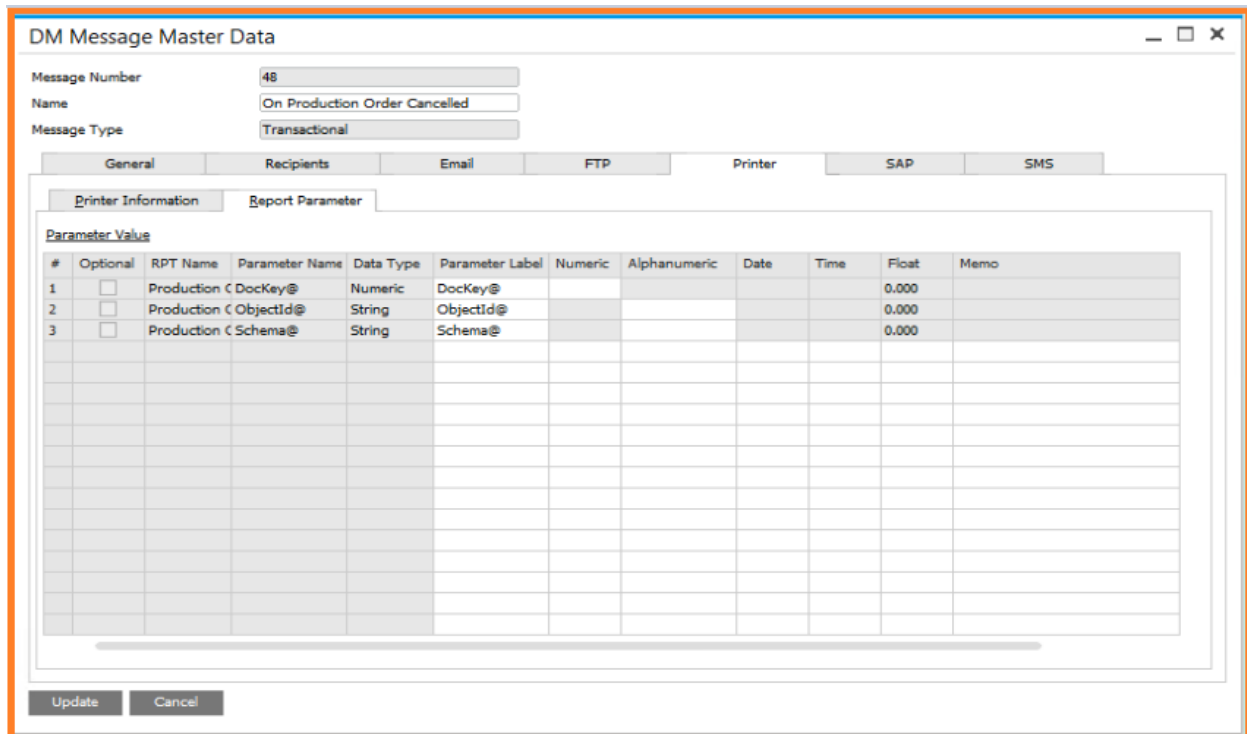
Report Path Select the RPT file if the attachment type is crystal report.

Available Printer You need to choose the preferred printer from the list.

Report Parameter Sub-Tab

The parameter tab is visible when you choose the Crystal Report attachment type option in attachment tab. All parameters used in the selected crystal report are populated, e.g., DockKey@, ObjectId@, Schema@, etc.

You need to set the value(s) for mandatory parameters here. For DockKey@, ObjectId@, and Schema@, the system automatically assigns values.



#	Optional	RPT Name	Parameter Name	Data Type	Parameter Label	Numeric	Alphanumeric	Date	Time	Float	Memo
1	<input type="checkbox"/>	Production C	DockKey@	Numeric	DockKey@					0.000	
2	<input type="checkbox"/>	Production C	ObjectId@	String	ObjectId@					0.000	
3	<input type="checkbox"/>	Production C	Schema@	String	Schema@					0.000	

<i>Optional</i>	The system will show this checked if the Crystal Report parameter is optional.
<i>RPT Name</i>	The system will populate the selected Crystal Report file name, which you have selected in the Attachment tab.
<i>Parameter Name</i>	The system will automatically populate the parameter name, which is used in select Crystal Reports.
<i>Data Type</i>	The system will automatically populate the parameter data type, which is used in select Crystal Reports.
<i>Parameter Label</i>	The system will automatically populate the parameter label, which is used in select Crystal Reports.
<i>Numeric</i>	You enter the parameter value in this column if the selected parameter is Numeric.
<i>Alphanumeric</i>	You enter the parameter value in this column if the selected parameter is Alphanumeric.
<i>Date</i>	You enter the parameter value in this column if the selected parameter is Date.
<i>Time</i>	You enter the parameter value in this column if the selected parameter is Time.
<i>Float</i>	You enter the parameter value in this column if the selected parameter is Float.
<i>Memo</i>	You enter the parameter value in this column if the selected parameter is Memo.

SAP Tab

You use this tab to configure SAP Alerts if you want to have an SAP Alert on a Transactional event or on a scheduled basis. You need to configure it when you have checked SAP as a Message Delivery Method in the [General Tab](#).

There are two subtabs in the SAP tab: Body and Activity.

Body Sub-Tab

Subject

You can define the SAP Alert subject, and you may have dynamic contents in the subject.

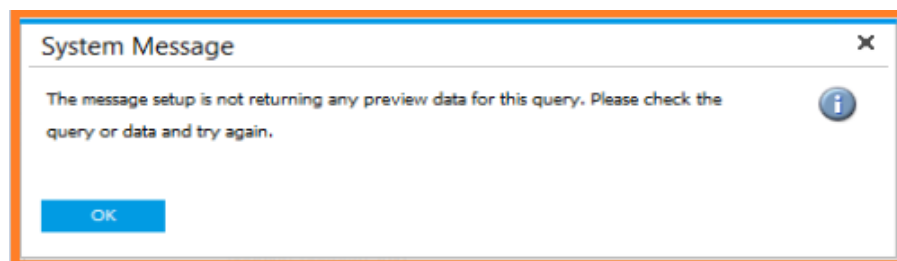
Message

You can describe the SAP Alert message. The message body may also have dynamic contents. To include dynamic content, you need to take a field from the field list available on the left of the screen, or you can take a field from the right click menu wherever you need a value to come from the database.

Preview

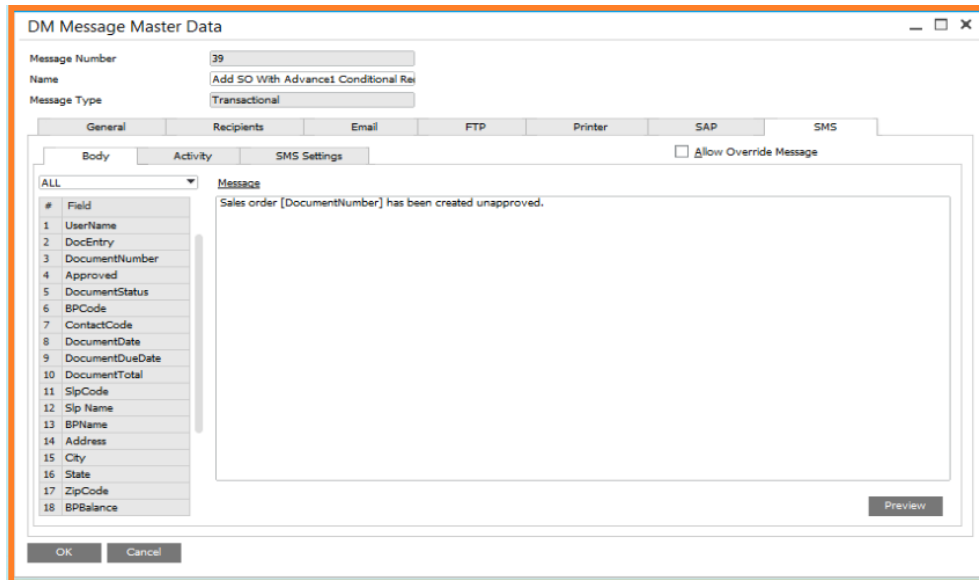
Click this button if you want to preview the message. Preview uses your Message Query to show the data in a preview but in case of a Transactional Message the system uses hardcoded "DocEntry" column value e.g. "OPOR"."DocEntry" = 1.

If the Message Query doesn't return any record, then you will get the following message.



SMS Tab

Body Sub-Tab



Allow Override

Check this option if you wish to change message contents when sending messages by using manual delivery

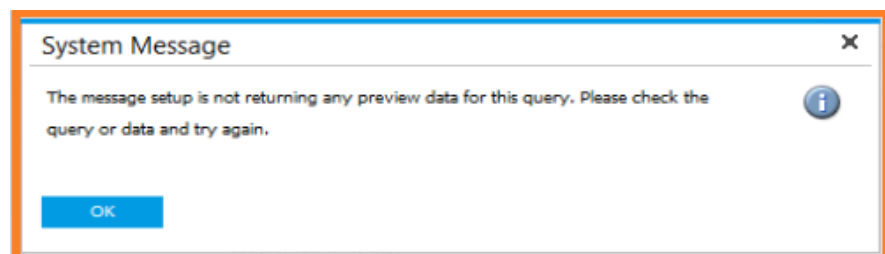
Message

You can describe the SMS message. The message body may also have dynamic contents. To include dynamic content, you need to take a field from the field list available on the left of the screen, or you can take a field from the right click menu wherever you need a value to come from the database.

Preview

Click the button if you want to preview the SMS text. Preview uses your Message Query to show the data in preview but in case of Transaction Message system uses hardcoded "DocEntry" column value e.g. "OPOR"."DocEntry" = 1.

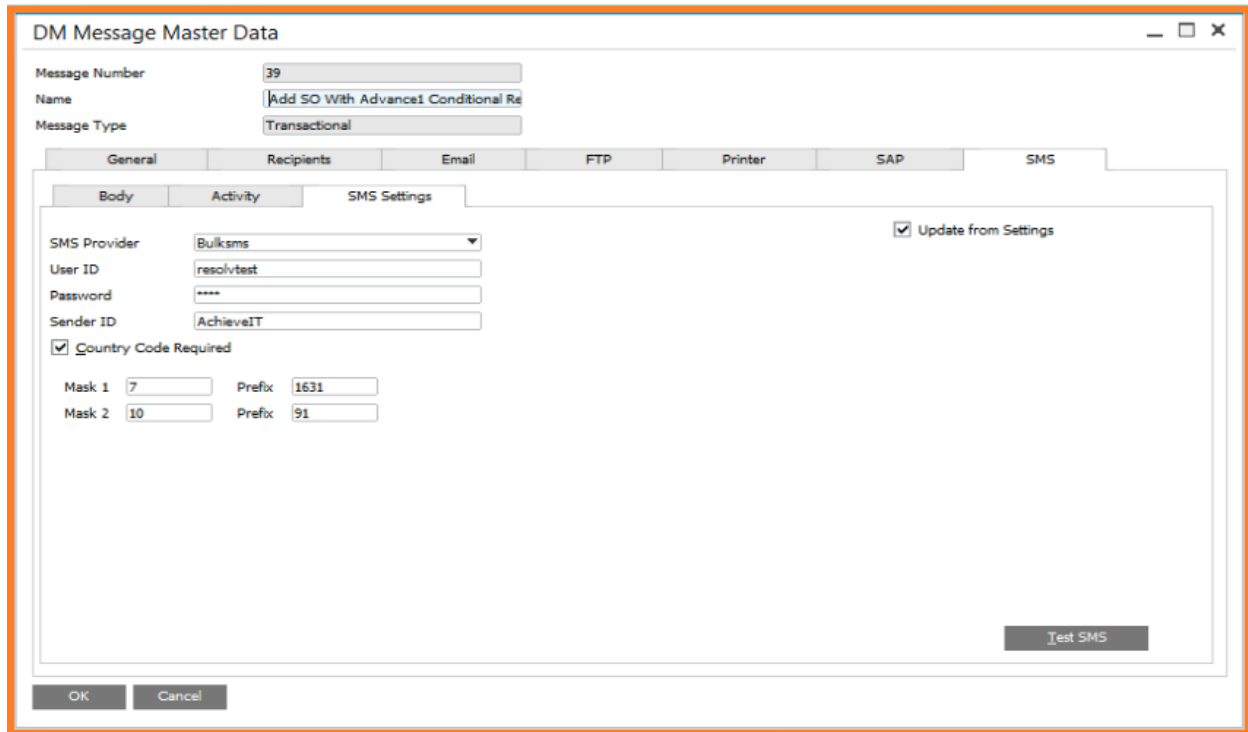
If the Message Query doesn't return any record, then you will get the following message.



SMS Settings Sub-Tab

The SMS Tab helps to setup the SMS gateway details.

Note, you can also override these settings for a message in the DM Setup Screen.



- SMS Provider** Select the name of the Bulk SMS provider. Currently we have two options (Bulksms and Snowebs).
- User ID** This field will set the SMS provider user ID.
- Password** This field will set the SMS provider password.
- Sender ID** This field will set the SMS provider Sender ID.
- Country Code Required** Check this box if a Country code is required by the SMS Provider.
- Mask 1** This field will set the length of Mobile numbers. Mobile numbers may have a different number of digits in a given country.
- Prefix** This field will set the Prefix of Mobile numbers. If the chosen number of digits for the Mask 1 field is equal to number of digits in a mobile number, then the system will add the Prefix before the mobile number.

- Mask 2** This field will set the length of Mobile numbers. Mobile numbers may have a different number of digits in a given country.
- Prefix** This field will set the Prefix of Mobile numbers. If the chosen number of digits for the Mask 2 field is equal to number of digits in a mobile number, then the system will add the Prefix before the mobile number.
- Update from Settings** When you check this checkbox, the system populates SMS details from the DM Configuration.

Manual Delivery

Resolv > Resolv Data Messenger > Manual Delivery

You can use the Manual Delivery screen to process documents in a batch. This screen allows you to process documents based on a Document Type, which is configured in the [DM Message Master Data](#). This is based on active DM Messages. After you select the filters and criteria you want to use in the header, you then click Search, and the system will show you documents related to that filter. Once the data is searched, you'll then need to select all the required documents to be processed.

All document-type screens are identical. The A/R Invoice delivery screen is shown as an example

Manual Delivery
— □ ×

Document Type: AR Invoice

Message: Add AR Invoice with HTML Report

BP Code: Paris

BP Name: Paris S.A.

Contact: [dropdown]

Document Status: All Documents

Posting Date: 02/06/2019 To: 03/06/2019

Document Date: 02/06/2019 To: 03/06/2019

#	Select	Doc Num	BP Code	BP Name	Contact	Created By	Posting Date	Doc Date	Doc Amount	E-Mail	E-Mail Address	SMS	Mobile P...	Printer	Printer Name	Print...
1	<input type="checkbox"/>	606	Paris	Paris S.A.	Christi	Christine Cuadra	02/07/2019	02/07/2019	121.20	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
2	<input type="checkbox"/>	608	Paris	Paris S.A.	Christi	Christine Cuadra	02/07/2019	02/07/2019	359.09	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
3	<input type="checkbox"/>	609	Paris	Paris S.A.		Christine Cuadra	03/05/2019	03/05/2019	44.55	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

Override E-Mail Address

Override Mobile Phone

Override Printer Name

Crystal Report Parameters

Search Cancel

Edit Message Body Send Message

Manual Delivery

Document Type: AR Invoice
 Message: AR Invoice with @Row Tag + HTML Attac...
 BP Code: C50000
 BP Name: ADA Technologies
 Contact:
 Document Status: UnPrinted Documents

Posting Date: 01/01/2017 To: 03/11/2019
 Document Date: To:

#	Select	Doc Num	BP Code	BP Name	Contact	Created By	Posting Date	Doc Date	Doc Amount	E-Mail	E-Mail Address	SMS	Mobile P...	Printer	Printer Name	Print...
1	<input type="checkbox"/>	S72	C50000	ADA Technologies	Mary Brown	Jayson Butler	11/08/2018	11/08/2018	31.80	<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

Override E-Mail Address
 Override Mobile Phone
 Override Printer Name

Crystal Report Parameters

Search Cancel Edit Message Body Send Message

Document Type Select the document type to select related messages. The list only populates those document types for which you have configured Messages, and those messages must be activated.

There is a Query option too, which you can use if you want to process query message manually.

There are a few document types which system doesn't support manual delivery, e.g., Picklists

Message All query messages get populated if you select Query in the above Document Type drop down, otherwise it will populate all transactional messages related to the selected document type, e.g., if you select AR Invoice as the Document Type then all AR Invoice related messages will be listed in this drop down

BP Code If you wish to deliver documents for a single Business Partner only, enter the code for the customer or vendor (depending on the document type). You may use TAB or the Search button to search for the code. If you wish to deliver documents for multiple Business Partners, leave this field blank.

BP Name The customer or vendor name will be displayed.

Contact If a single Business Partner is selected, you may choose from a list of that BP's contacts, or you may choose "All Contacts" to include all of

them. If the Customer or Vendor field is blank, then only the “All Contacts” option is available.

Document Status Select the status of the documents to be displayed:

- All
- Open Documents
- Closed Documents
- Cancelled Documents
- Unprinted Documents
- Open and Unprinted Documents

Posting Dates If desired, enter a range of posting dates to be included.

Document Dates If desired, enter a range of document dates to be included.

Search Button Click on the search button if you are done with selection criteria. The data from the above selected document or query will be filled in the matrix, e.g., AR Invoice data is filled in the matrix when AR Invoice is selected above as the Document Type.

If the above selected message is a Transactional message, then you need to select a data row (Document) from the matrix which you wish to process. The system by default will populate all required recipients as defined in the respective Message, e.g., if you have email configured in a message, then the recipient email checkbox will be checked, and the Email address will automatically be populated if it exists in the system for the configured recipient.

If the above selected message is a query message, then the data returned by the above selected message query will be filled in the matrix. You will not have options to select the row here as you have for Transactional Message. All the data will be processed in one go and the recipient information will be picked from the DM Message Master Data.

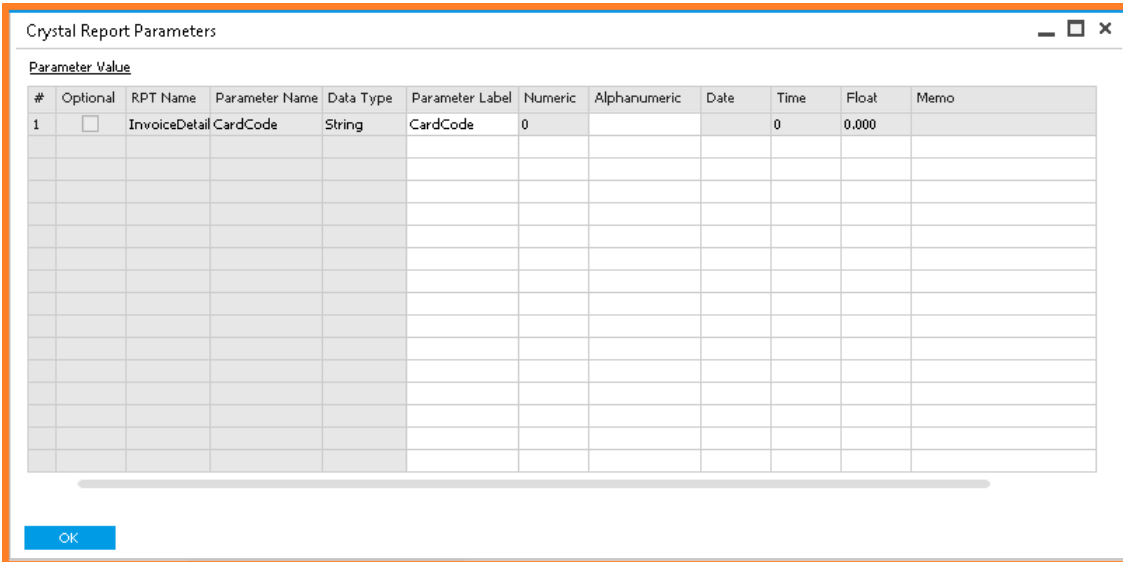
Override Email Address Enter an email address if you want to override retrieved email address(es)

Override Phone Enter a phone number if you want to override retrieved phone number

Override Printer Name Select a printer if you want to override retrieved Printer(s)

Crystal Report Parameters

If you have parameterized crystal report selected in the message, then you can use this window to pass the parameter values. This option is only available for query messages.



#	Optional	RPT Name	Parameter Name	Data Type	Parameter Label	Numeric	Alphanumeric	Date	Time	Float	Memo
1	<input type="checkbox"/>	InvoiceDetail	CardCode	String	CardCode	0		0	0.000		

- Optional** The system will show this checked if the Crystal Report parameter is optional.
- RPT Name** The system will populate the selected Crystal Report file name, which you have selected in the Attachment tab.
- Parameter Name** The system will automatically populate the parameter name, which is used in select Crystal Reports.
- Data Type** Choose an aggregate function from the drop down in cases when you want aggregation.
- Parameter Label** The system will automatically populate the parameter data type, which is used in select Crystal Reports.

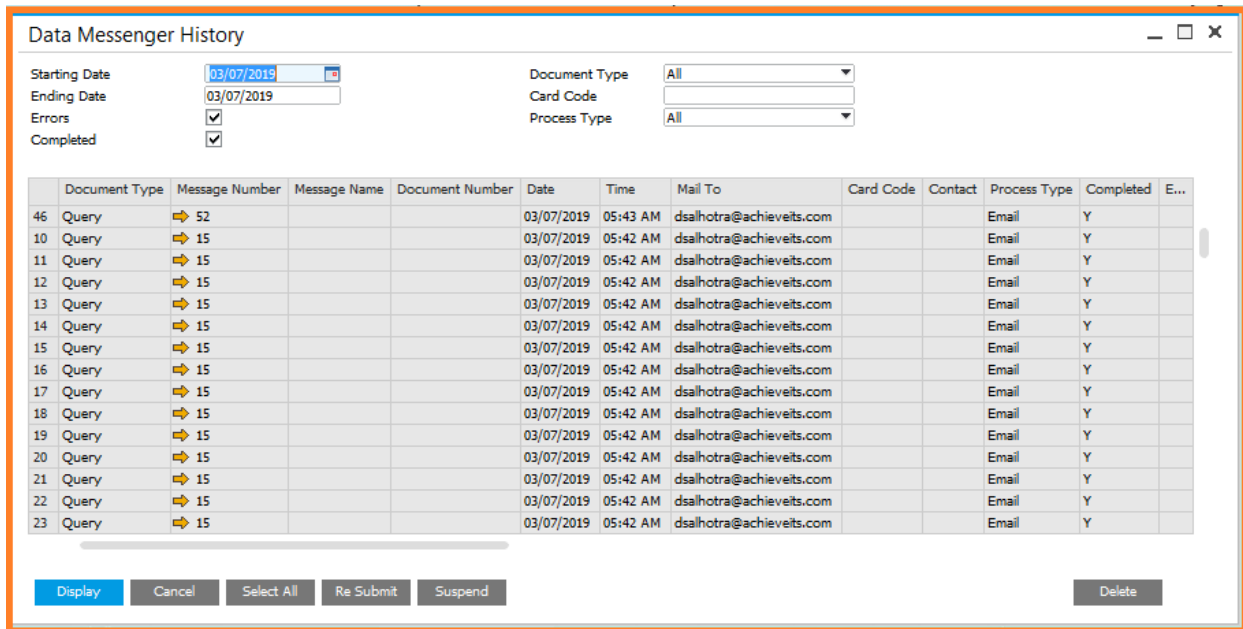
<i>Numeric</i>	You enter the parameter value in this column if the selected parameter is Numeric.
<i>Alphanumeric</i>	You enter the parameter value in this column if the selected parameter is Alphanumeric.
<i>Date</i>	You enter the parameter value in this column if the selected parameter is Date.
<i>Time</i>	You enter the parameter value in this column if the selected parameter is Time.
<i>Float</i>	You enter the parameter value in this column if the selected parameter is Float.
<i>Memo</i>	You enter the parameter value in this column if the selected parameter is Memo.

Edit Message Body Button	If the “Allow Override Message” check box in Email Message Settings or SMS Message Settings is checked, then you can modify the message body while sending it.
Search Button	Click this button to search the data to process based on selection criteria.
Send Message	You need to click this button to send the message. You need to select the document in cases of transactional messages. In case of a query message no selection is needed.

DM History

Resolv > Resolv Data Messenger > Data Messenger History

The DM History allows you to see a log of DM activity within a given date range. You can view messages that were processed, unprocessed, or had errors. You can also use this screen to resubmit or suspend deliveries.



The screenshot shows the 'Data Messenger History' window. At the top, there are search filters: Starting Date (03/07/2019), Ending Date (03/07/2019), Errors (checked), Completed (checked), Document Type (All), Card Code (empty), and Process Type (All). Below the filters is a table with the following columns: Document Type, Message Number, Message Name, Document Number, Date, Time, Mail To, Card Code, Contact, Process Type, Completed, and E... The table contains 18 rows of data, all with Document Type 'Query', Message Number '15', Date '03/07/2019', Time '05:42 AM', Mail To 'dsalhotra@achieveits.com', Process Type 'Email', and Completed 'Y'. At the bottom of the window, there are buttons for 'Display', 'Cancel', 'Select All', 'Re Submit', 'Suspend', and 'Delete'.

Document Type	Message Number	Message Name	Document Number	Date	Time	Mail To	Card Code	Contact	Process Type	Completed	E...
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	
Query	15			03/07/2019	05:42 AM	dsalhotra@achieveits.com			Email	Y	

Enter the starting and ending dates and select the type of history you wish to see. Then click on the “Display” button.

Once the list of documents is displayed, you can select one or more lines and use the “Resubmit” or “Suspend” buttons.

You can use the Delete button to delete the log which is listed in the grid.