RESOLV DOCUMENT DELIVERY

USER MANUAL

Version 10.0

PRESENTED BY

VISTAVU SOLUTIONS

SAP® Certified

SAP Business One Integration

Resolv Document Delivery is part of the Resolv Suite, which has been certified by SAP as conforming to SAP's standards for Business One add-on solutions.

SAP® Certified
SAP Business One Integration

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403-263-3435

RESOLV FREIGHT MANAGEMENT
USER GUIDE

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Document Delviery

Resolv Document Delivery is a part of the ***Resolv Data Messenger*** module and refers to the ability to preset destinations for documents that are sent to business partners. You may choose from the following methods of routing documents:

- Fax (requires SBOMailer, VSIFax, or an email to faxing service or software)
- Email
- Internal Message
- Print
    - You may choose more than one method at a time, with different recipients. For example, you may wish to send Purchase Orders by fax to a vendor's main office and by email to the vendor's salesperson at a remote location.
    - You may establish different routings for different types of documents for the same customer or vendor. For example, Sales Quotations might be emailed to a purchasing agent, while A/R Invoices might be faxed to the customer's accounts payable office.
    - You may establish different routings for documents based on the originating contact person on the document. In this way, orders from different contacts may be sent to their individual email addresses, rather than sending all orders from a company to the same destination.
- ***Resolv Document Delivery*** allows you to send batches of documents to multiple business partners simultaneously. For example, you may list all unprinted invoices and send them by Document Delivery with one command. The system will examine each one, determine the correct routing, and send each to its assigned destination. By contrast, the SAP Document Printing program will print multiple documents at one time, but in order to fax or email, you would need to open each document separately, determine how it is to be sent, confirm the fax number or email address, and send it individually.
- After a document has been delivered through Document Delivery, it is marked as "Printed". It may be selected for re-sending at a later time, but it will no longer appear in the list of unprinted documents.

The following documents are available within the Document Delivery system:

Customer Documents:

Sales Quotation

Sales Order

Sale Confirmation

Delivery

Returns

A/R Invoice

A/R Credit Memo

A/R Down Payment Invoice

Customer Statement

Blanket Agreements - Sales

Vendor Documents:

Purchase Quotation

Purchase Order

Goods Receipt PO

Goods Return

A/P Invoice

A/P Down Payment Invoice

A/P Credit Memo

Blanket Agreements - Purchasing

Container Shipment (if using ***Resolv Container Management***)

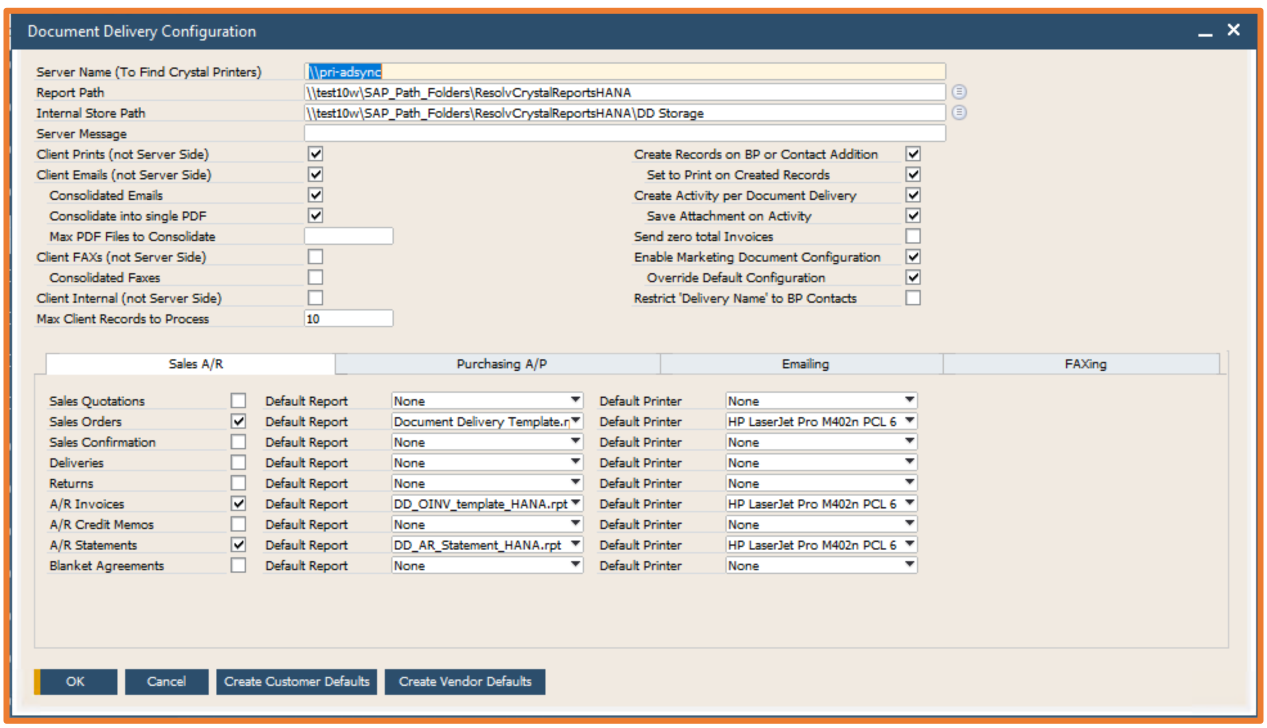
Setup

Document Delivery Configuration

Administration > Resolv Setup > Resolv Document Delivery > DD Configuration

The Document Delivery Configuration screen allows you to set the basic parameters for the system to utilize Document Delivery.

Header



Enter the following information in the header:

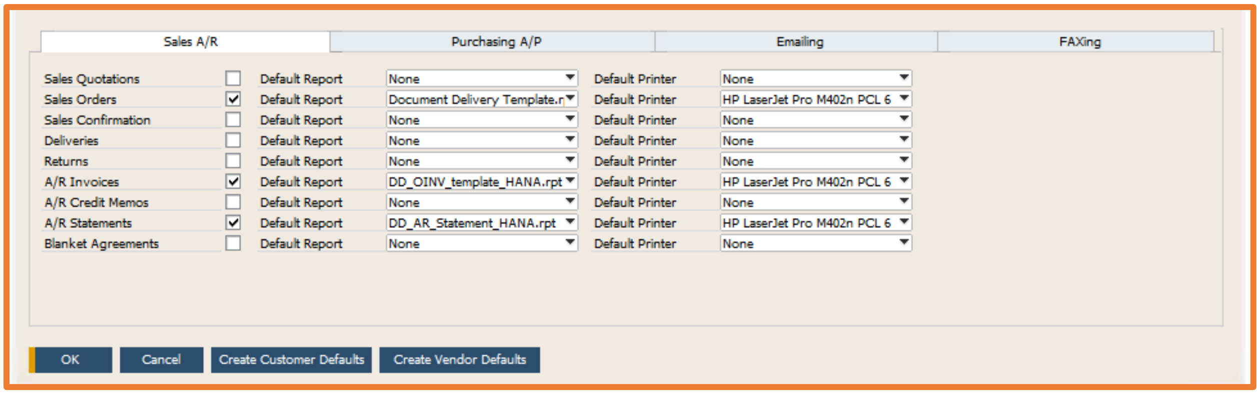
Name (to find Crystal Printers)	Enter the name of a server on which all system printers are defined. This eliminates problems that may arise if the same printer is configured with different names on different PC's. If you're having troubling determining the path to use sometimes "localhost" is a good choice.

Report Path	Enter the path for Crystal Reports report and forms definitions. All users must have access to this path.
Internal Store Path	Enter the path where pdf attachment files are to be stored. This should be different from the Business One attachments folder. All users must have access to this path and permissions to write to the path
Server Message	This field should be left blank unless instructed otherwise by a VistaVu consultant. When the Document Delivery Service is running, this field is automatically populated to prevent a second instance of the processor from running simultaneously.
Client Prints	Check if printing will occur on client PC's rather than the server. It is recommended to uncheck this box to avoid performance problems on the individual workstation.
Client Emails	Check if email processing will occur on client PC's rather than the server. It is recommended to uncheck this box to avoid performance problems on the individual workstation. Note, if you wish to use Outlook as the Email Sending Method, you must use Client-side emailing.
Consolidate Emails	Check if you wish to have multiple documents addressed to the same recipient to be sent on a single email message.
Consolidate into Single PDF	Check if you wish to have multiple attachments combined into a single pdf file.
Max PDF Files to Consolidate	If you want to limit the number of records being consolidated into a single PDF, you can enter in that number here. This can help when sending large numbers of documents so that your email provider does not reject the attachment file size.
Client Faxes	Check if fax processing will occur on client PC's rather than the server. It is recommended to uncheck this box to avoid performance problems on the individual client.
Consolidate Faxes	Check if you wish to have multiple faxes addressed to the same recipient to be sent as a single fax transmission.
Client Internal	Check if you wish to optionally save documents as pdf files without delivering them.
Max Client Records to Process	This field will set the maximum number of documents that can be selected for processing when using Client-side processing. This is to try and prevent large jobs from consuming all the resources on an individual

workstation. If large numbers of records are sent, it is recommended to use Server-Side processing.

Create Records on BP or Contact Addition	Check if you wish the system to automatically create a new Document Delivery Configuration record whenever a new Business Partner or Contact is added to the system. The fax number and/or email address for the BP or Contact will be used in the configuration record. (Note, if there is no fax or email address, the record will not be created).
Set to Print on Created Records	If you have the Create Records options checked, enable this option if you want the automatically created configuration records to also have the Print option selected.
Create Activity per Document Delivery	Check if you want the system to set created contact configuration records to create an Activity each time a document is delivered. The Activity would reference the Business Partner, the delivered document would be a linked document, and the Activity will be set to Closed. This option is just the default for created records and can be set individually per contact configuration record.
Save Attachment on Activity	Check if you want the system to also set created contact configuration records to save the delivered pdf document as an attachment on the Activity. This option is just the default for created records and can be set individually per contact configuration record.
Send Zero Total Invoices	Check if you wish to include invoices with zero balance due in the list of invoices to be delivered.
Enable Marketing Document Configuration	Check if you wish to enable a tab on all marketing documents for Document Delivery configuration. When entering information in this tab, it will append itself to the existing default delivery data set up for the recipient (if applicable).
Override Default Configuration	For use with the Enable Marketing Document Configuration option. If checked, then any data added onto the Marketing Document Doc Delivery tab will replace the default delivery data instead of appending to it.
Restrict "Delivery Name" to BP Contacts	Check if you wish to restrict the name column on the customer configuration screens to only allow existing contact names of the Business Partner.

Sales Tab

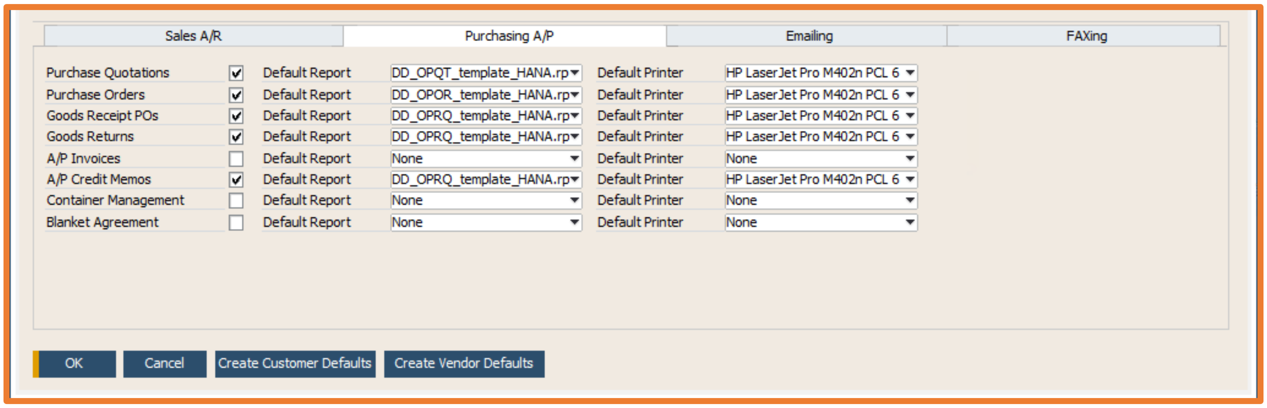


The Sales tab lists the various types of sales documents that may be utilized in the Document Delivery program. For each document type, enter the following information:

Document Type	Check to indicate that this type of document may be delivered by means of ***Resolv Document Delivery***.
Default Crystal Report	Select the file name of the Crystal Report to be printed for this document type. Note that the file must exist in the Report Path indicated in the header section. These reports should also be designed specifically for use in ***Resolv Document Delivery.***
Default Crystal Printer:	Select the name of the printer to be used when printing documents by means of ***Resolv Document Delivery***. Note that the printer must be configured on the server indicated in the Server Name field in the header section.

Note, document types that are not checked will not appear in any of the document configuration screens, menus, or delivery screens.

Purchasing Tab

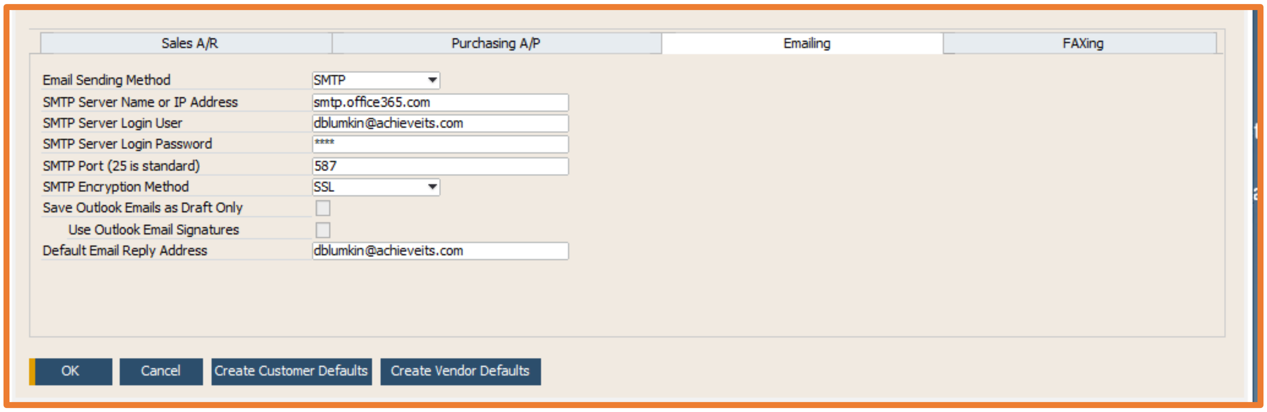


The Purchasing tab lists the various types of purchasing documents that may be utilized in the Document Delivery program. For each document type, enter the following information:

Document Type	Check to indicate that this type of document may be delivered by means of ***Resolv Document Delivery***.
Default Crystal Report	Select the file name of the Crystal Report to be printed for this document type. Note that the file must exist in the Report Path indicated in the header section. These reports should also be designed specifically for use in ***Resolv Document Delivery.***
Default Crystal Printer	Select the name of the printer to be used when printing documents by means of ***Resolv Document Delivery***. Note that the printer must be configured on the server indicated in the Server Name field in the header section.

Note, document types that are not checked will not appear in any of the document configuration screens, menus, or delivery screens.

Emailing Tab



The Emailing tab provides the connection with the email system to be used by ***Resolv Document Delivery***.

Email Sending Method — Select “SAP”, “SMTP” or “Outlook”:

- **SAP -** Uses the SBO Mailer to send email
- **SMTP -** Uses an SMTP server, such as a Microsoft Exchange server. Note, if you are using a subscription email service such as Office 365, the email authorization may be required at the user level. See the appendix at the end of this documentation for further details
- **Outlook -** Uses MS Outlook. Note, Document Delivery Emailing must be set as Client and all users must use Outlook to deliver. If users are running their SAP client as administrator, they will need to run Outlook as administrator as well to avoid errors. They may also need to adjust their Outlook Trust Center settings if they are experiencing issues.

SMTP Server Name or IP Address — If using SMTP, enter the server address.

SMTP Server Login User — If using SMTP, enter the login name.

SMTP Login Password — If using SMTP, enter the password.

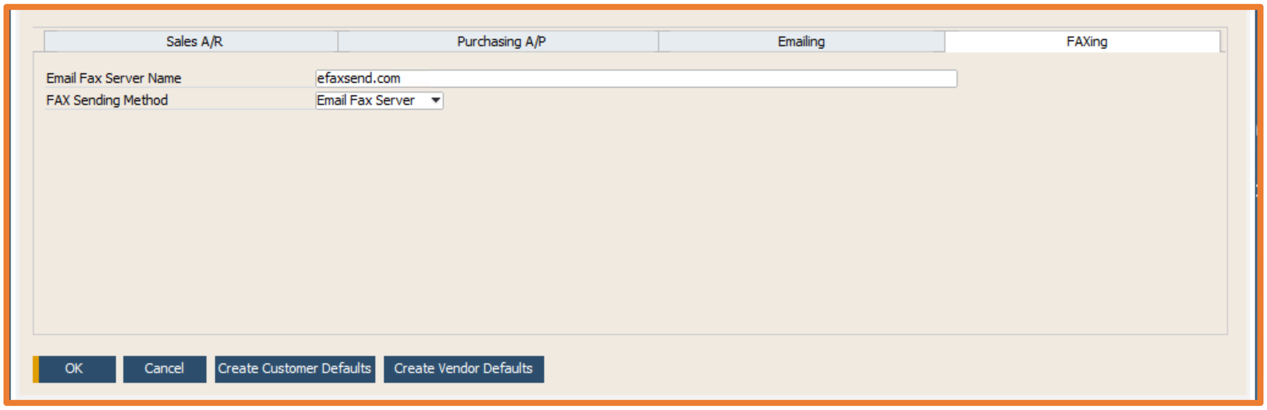
SMTP Port (25 is standard) — If using SMTP, enter the TCP port provided by your email administrator.

SMTP Encryption Method — If using SMTP, select the Encryption Method provided by your email administrator. The options are:

- None
- SSL
- TLS

Send Outlook Emails as Draft Only	If you are using Outlook check this option if you want emails to be saved as Drafts instead of just being delivered right away. Users must then approve each draft and send manually through their Outlook program.
Use Outlook Email Signatures	If you are using Outlook check this if you want emails to use the default email signature of the client Outlook profile.
Default Email Reply Address	Enter an email address to be used as a reply to email address. If using Office365, it is recommended that his matches the above Login User.

Faxing Tab



The Faxing tab provides the connection with the fax system to be used by ***Resolv Document Delivery***.

Email Fax Server Name

Enter the fax server name (faxdomain.com), if applicable. This will be the domain the email will be sent to in the format of faxnumber@faxdomain.com.

Fax Sending Method

Select "SAP" or "Email Fax Server":

- **SAP** Use the SBO Mailer to send faxes
- **Email Fax Server** Use the fax server provided by the email program

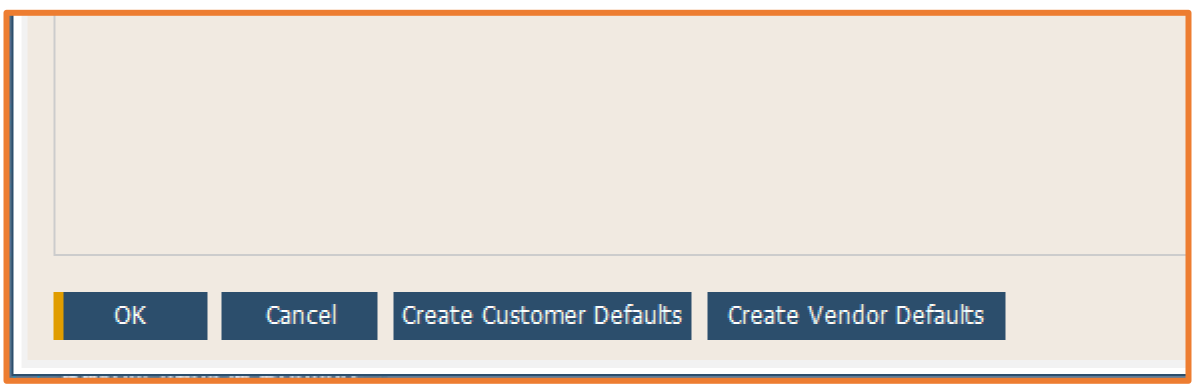
Note, the use of the faxing feature requires that you purchase, install, and configure appropriate fax software and modem. The SBO Mailer currently supports Microsoft Fax® and Symantec WinFax®. You must configure the SBO Mailer and verify that it is functioning correctly. Alternatively, you may use an email fax server as we saw above.

Footer

When you are first beginning to use ***Resolv Document Delivery***, you may have hundreds or thousands of customers, vendors, and contacts already in the database. If you are confident that the contact names, email addresses, and fax numbers are correct and up-to-date, you can use the buttons on the bottom of the configuration screen (there is one button for creating customer records, and one button for vendor records) to have the system scan all of the business partner records, and create configuration records for each one.

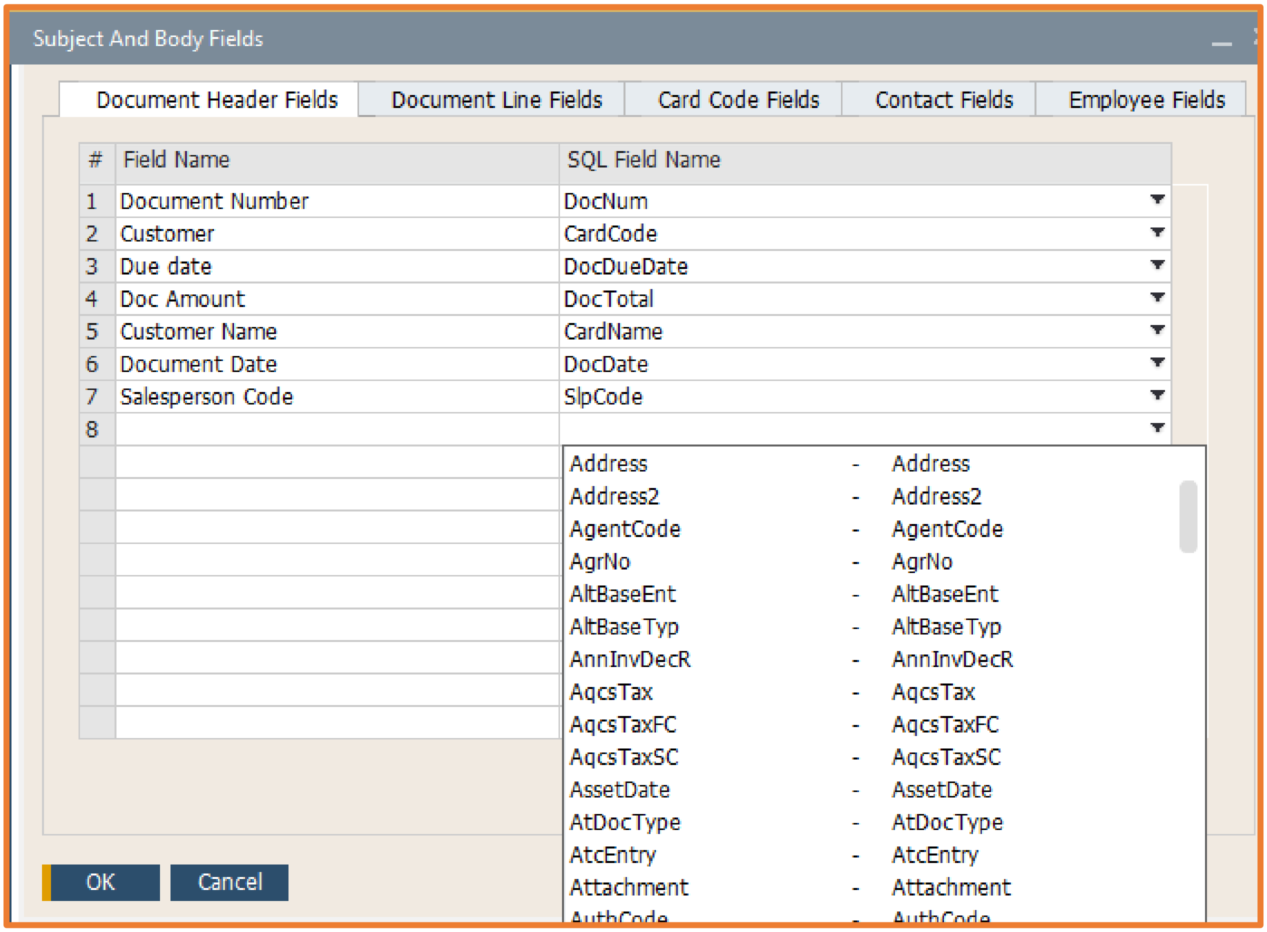
- One BP Default record will be created for each business partner. It will include the email and fax information from the General tab of the BP Master.
- One record will be created for each contact person. It will include the email and fax information from the contact record.
- Only the General tab of the configuration records will be populated.
- If an email address exists, it will be checked. If a fax number exists, it will be checked.

Note, clicking this button will only add new records, and will not affect any existing records. That means you could use these buttons more than once, although it is recommended to just use it during your initial setup of document delivery.



Subject and Body Fields

Administration > Resolv Setup > Resolv Document Delivery > DD Subject and Body Fields

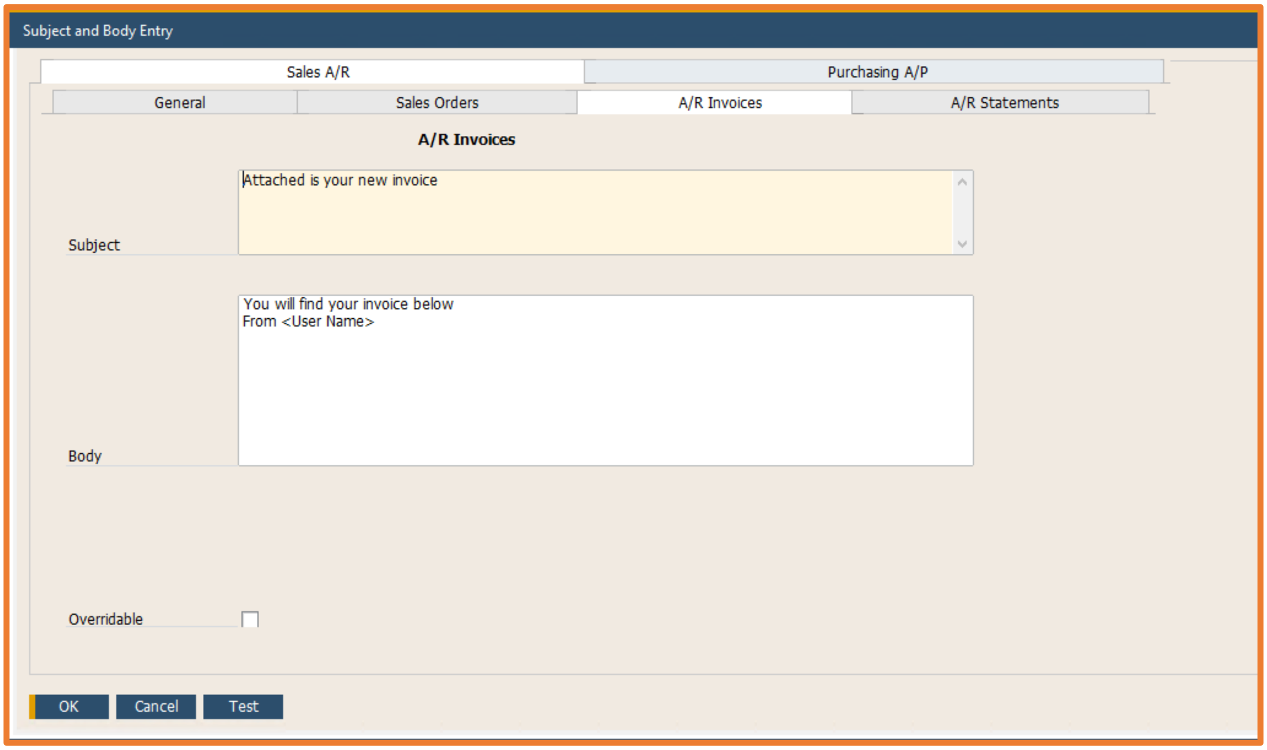


The Subject and Body Fields screens allow you to create printing variables for the subject and body of email deliveries. Any field that needs to be referenced must be defined so that the system can substitute the correct information from the document that is being delivered. See the following section for more information and examples.

In order to create the variables, select the appropriate tab, enter a field name, and then select the corresponding SQL field name from the drop-down list.

Subject and Body Entry

Administration > Resolv Setup > Resolv Document Delivery > DD Subject and Body Entry



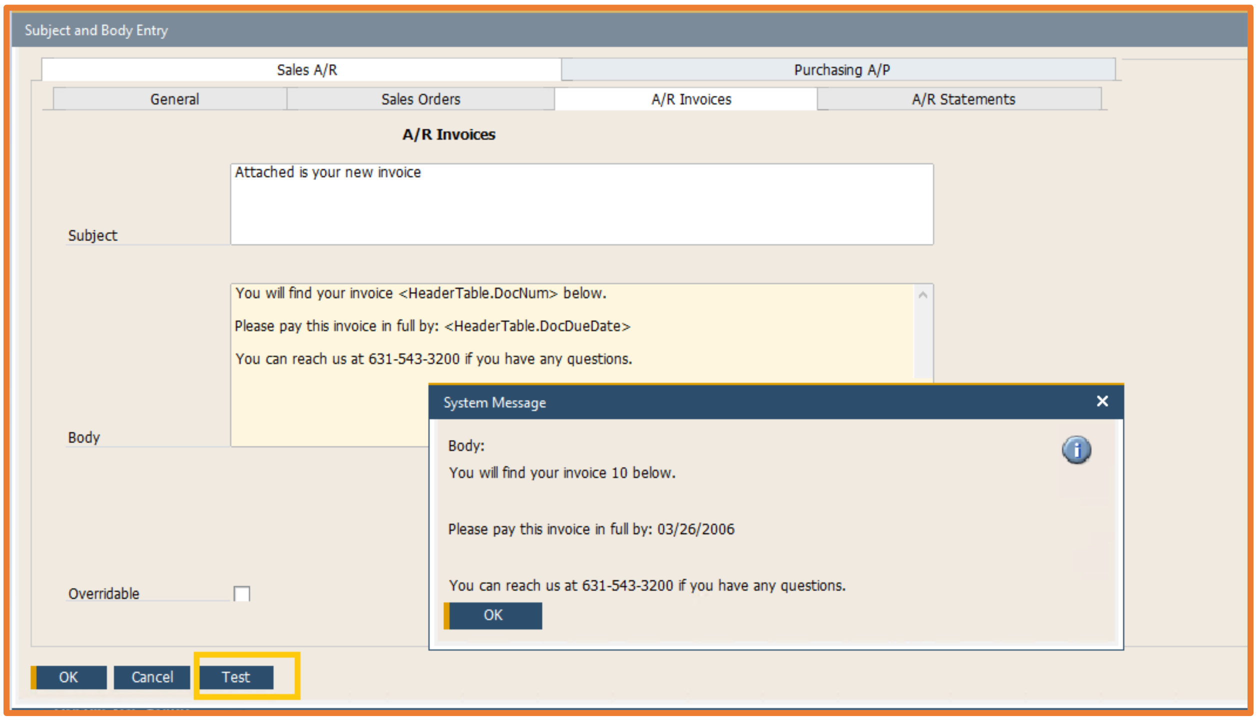
The Subject and Body Entry program allows you to create standard text that will print in the subject and body of emails, or on the cover sheet of faxes. You may type any text you wish, up to 256,000 characters in the subject (if using SBO Mailer, restrict to 50 characters) and 256,000 characters in the body. If you want to include information that is specific to the Business Partner or the document that is being delivered, you may use the variables that were defined in the Subject and Body Fields screens described above. Each variable must be enclosed in < > brackets. See the example above. (Note that you may use a right-click to bring up a list of available fields). It is recommended you use the right-click option to select the fields you want

Check the “Overridable” box if the user may change the text at the time the document is delivered.

When delivering documents, the system will check first to see if text exists for the document type being delivered. If it does not find any, it will use the text on the “General” tab. When delivering invoices, the system will first check the “A/R Invoices” tab. If any entry is found here it will use settings from this tab otherwise it will use the settings in the General” tab.

Note, there are separate tab sets for Sales and Purchasing documents. Only document types that were checked on the Document Delivery Initialization will be shown.

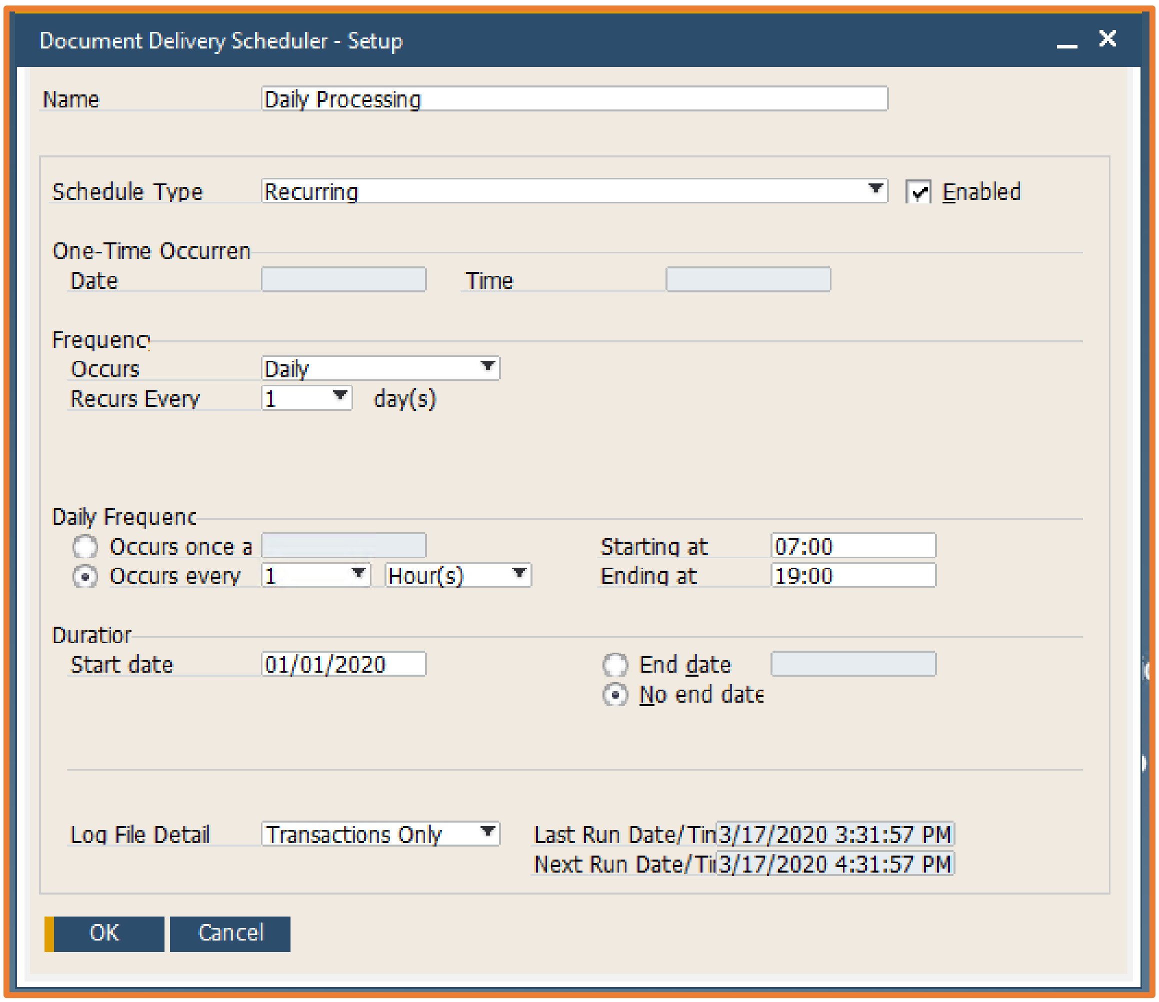
If you want to see a preview of what the message will look like, just click on the Test button on the bottom left of the screen.



Document Delivery Scheduler Setup

Administration > Resolv Setup > Resolv Document Delivery > DD Service Scheduler

If you are using any server-side processing, then you will need to install the Resolv Processor (see the ***Resolv 10.0 Installation and Setup Guide*** to learn how to set the processor up). Once the server is installed you will need to setup a scheduler to let the service know how often to run. Utilizing the DD Service Scheduler, along with the Resolv Processor the system will deliver your server side documents.



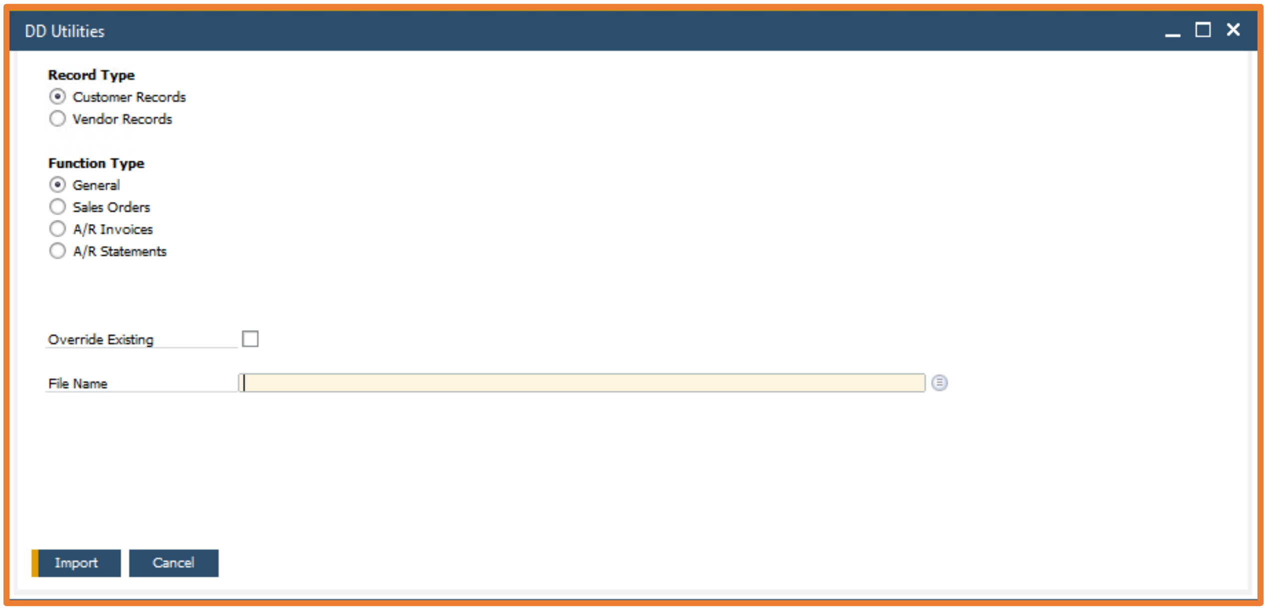
Give your scheduler setup a name, then choose the appropriate options for how often you would like the processor to run for and save your options. This will dictate to the Resolv Processor when to execute the DD service.

You should also choose what level of detail you want write out to the processor log. Your choices are All (which shows every bit of detail from the processor run; this is designed mostly for troubleshooting), Schedule and Transactions (which will show entries in the log each time the processor runs whether there are transactions or not) and Transactions Only (which will only show entries in the log when it has something to process). The recommendation is to choose “Transactions Only”.

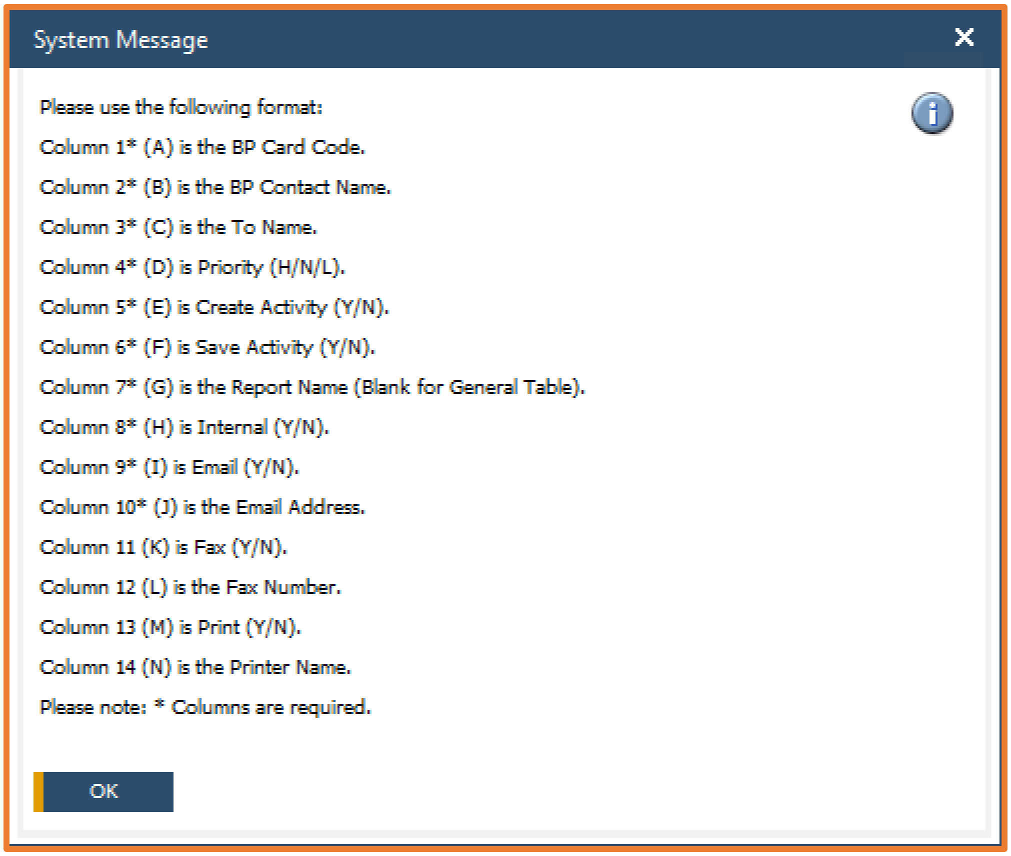
DD Utilities

Administration > Resolv Setup > Resolv Document Delivery > DD Utilities

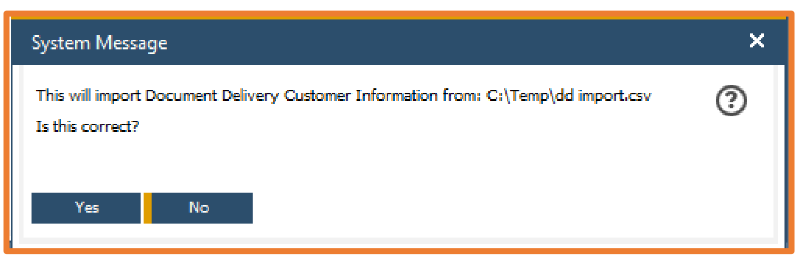
This utility provides another way to load Document Delivery Customer/Vendor configuration records into the module. Using an Excel spreadsheet data can be populated quickly and accurately. This import can be run as often as you want.



- Select the Record type – Update for either Customer or Vendor Business Partners
- Function Type – This determines which tab on the DD Configuration screen will be populated. Only 1 tab at a time can be populated
- Override Existing – If this is checked then if the contact from the spreadsheet already exists, the data from the spreadsheet will overwrite the existing data. Otherwise the record will be skipped.
- File Name – Enter the full path name of the Excel file to be used for importing. (It must use the exact format found a little further in this document). Choosing the lookup button on the right will first display the file structure for the spreadsheet. See below.



When you select the "Import" button the following message will appear.

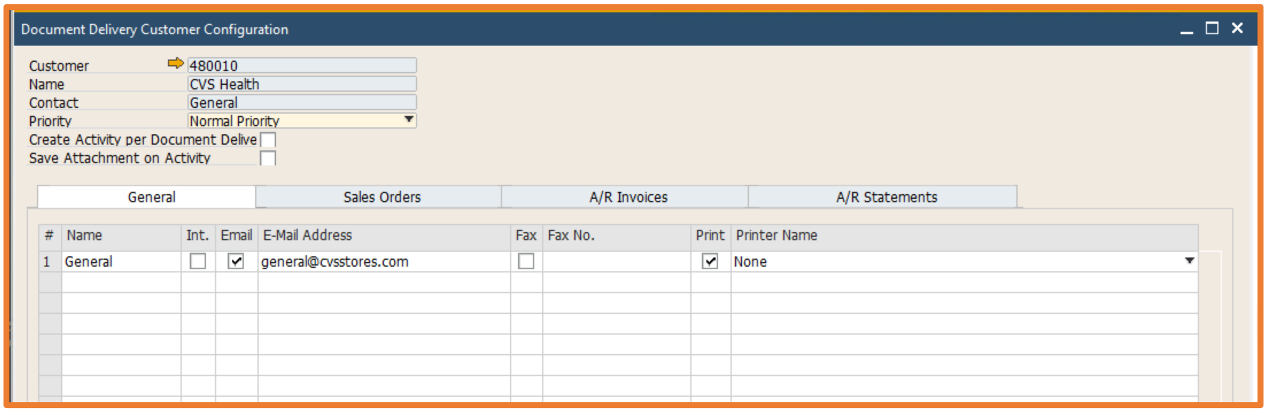


If you answer "Yes" to the import question the process with begin. When complete a message will appear indicating the if the import was successful or not and a scroll bar will appear showing the progress. The results of the import will be documented in a .txt file that has the same name as the file used for importing but with '_Log' added to it.

It is strongly recommended you review the results of your import. If necessary, you can make corrections and run the import again.

Customer Configuration

Resolv > Resolv Document Delivery > Customer Delivery > Customer Configuration



This screen allows you to enter standard document delivery methods for each customer. All the tabs are identical.

The General tab provides default settings for the customer. It will be used for all documents, unless overridden by a specific document type tab. Information on all tabs is entered in the same way. Note that only the General tab is required; use other tabs only if they are exceptions to the routing on the General tab.

Having the different tabs allows you to send different documents (invoices, statements, etc.) to different people for a given customer. This is especially useful if using the BP Default option and not a specific contact person.

In the header section, enter the following:

Customer: Enter the customer code.

Name: The customer name is automatically shown.

Contact: Select one of the contacts for the customer or select “BP Default” to create a default record that will apply to all contacts of that customer.

Priority: Select Low, Normal, or High priority.

Create Activity Per Document Delivery: Check to create an Activity for each document delivery transaction.

Save Attachment on Activity: Check to save the delivered document as an attachment.

Enter one or more rows to determine the delivery destinations.

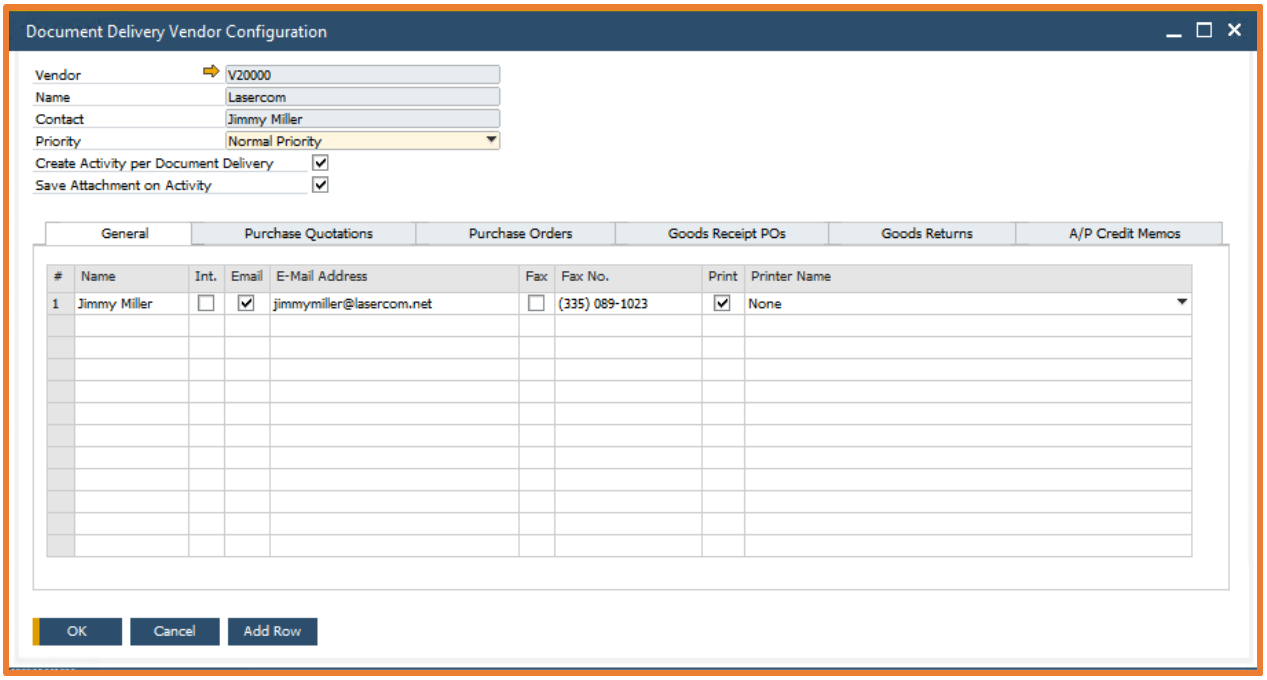
Enter the contact name for the document transmission. Then check one or more of the routing options and enter the appropriate information.

- Name – Used to describe the row. Informational only and optional
- Report – available only on the document specific tabs (not on "General" tab). Select a report from the pull-down list. If left blank the report used will be determined from the Document Delivery configuration screen for the specific document tab you have selected.
- Internal: suitable only for employees of the company – provides a system alert
- Email: enter an email address for the document to be sent as an attachment
- Fax: enter a fax number for the document to be sent (***Note**: this requires faxing software*)
- Print: select a system printer. If left blank and the printer check box is active the printer selected will be determined from the Document Delivery configuration screen for the specific document tab you have selected.

On the document specific tabs, there is an extra field called Report. If filled in, this contact will be sent this specific report instead of the default report in the DD configuration.

Vendor Configuration

Resolv > Resolv Document Delivery > Vendor Delivery > Vendor Configuration



This screen allows you to enter standard document delivery methods for each vendor. All the tabs are identical.

The General tab provides default settings for the vendor. It will be used for all documents, unless overridden for a specific document type by one of the other tabs. Information on all tabs is entered in the same way. Note that only the General tab is required; use other tabs only if they are exceptions to the routing on the General tab.

In the header section, enter the following:

Vendor: Enter the vendor code.

Name: The vendor name is automatically shown.

Contact: Select one of the contacts for the vendor or select “BP Default” to create a default record that will apply to all contacts of that vendor.

Priority: Select Low, Normal, or High priority.

Create Activity Per Document Delivery: Check to create an Activity for each document delivery transaction.

Save Attachment on Activity: Check to save the delivered document as an attachment.

Enter one or more rows to determine the delivery destinations.

Enter the contact name for the document transmission. Then check one or more of the routing options and enter the appropriate information.

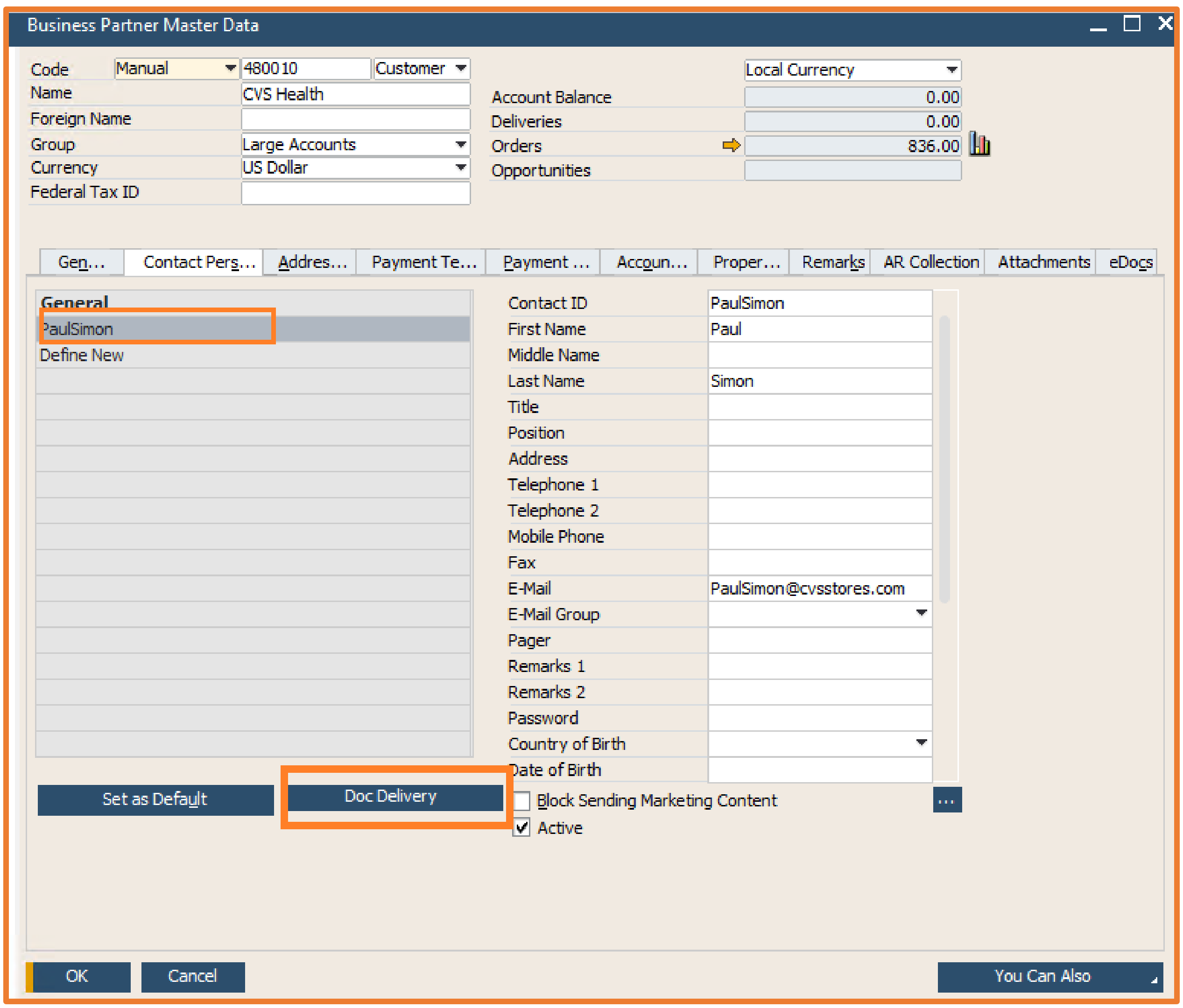
- Name – Used to describe the row. Informational only and optional
- Report – available only on the document specific tabs (not on "General" tab). Select a report from the pull-down list. If left blank the report used will be determined from the Document Delivery configuration screen for the specific document tab you have selected
- Internal: suitable only for employees of the company – provides a system alert
- Email: enter an email address for the document to be sent as an attachment
- Fax: enter a fax number for the document to be sent (note: this requires faxing software)
- Print: select a system printer

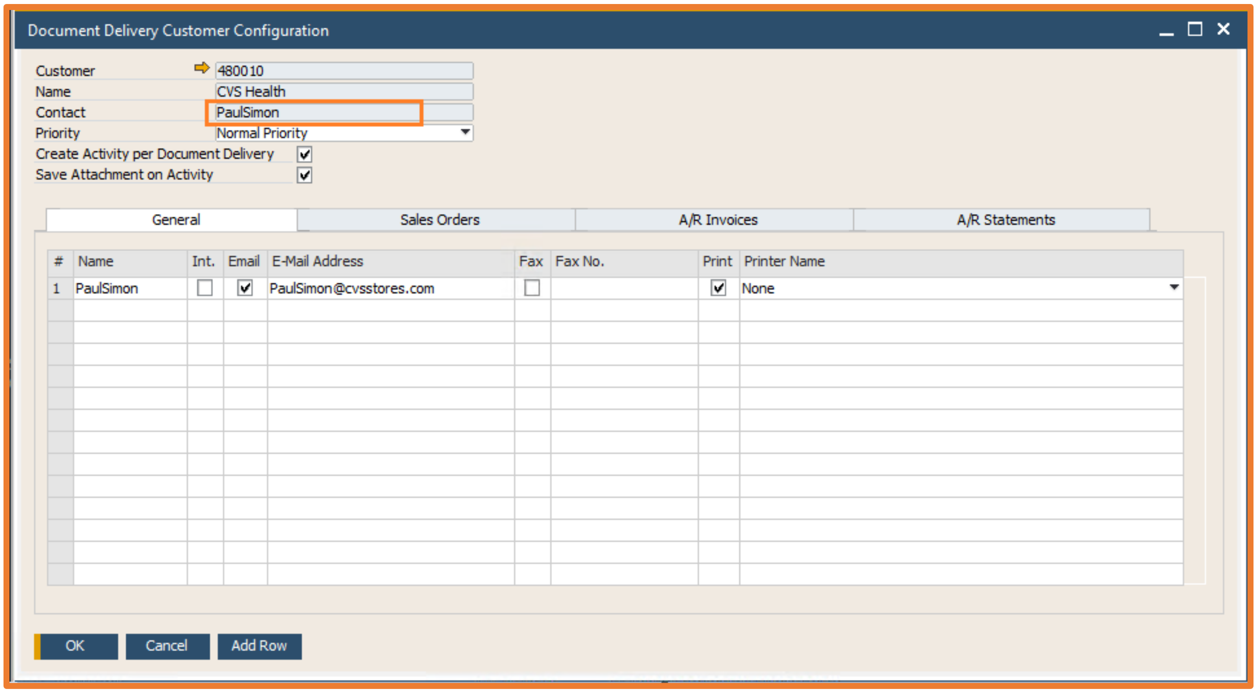
On the document specific tabs, there is an extra field called Report. If filled in, this contact will be sent this specific report instead of the default report in the DD configuration.

Business Partner Master Data

As indicated in the preceding sections, customer and vendor configuration records may be entered manually, by using the configuration screens. However, it is also possible to create the records from the SAP Business Partner Master Data screen.

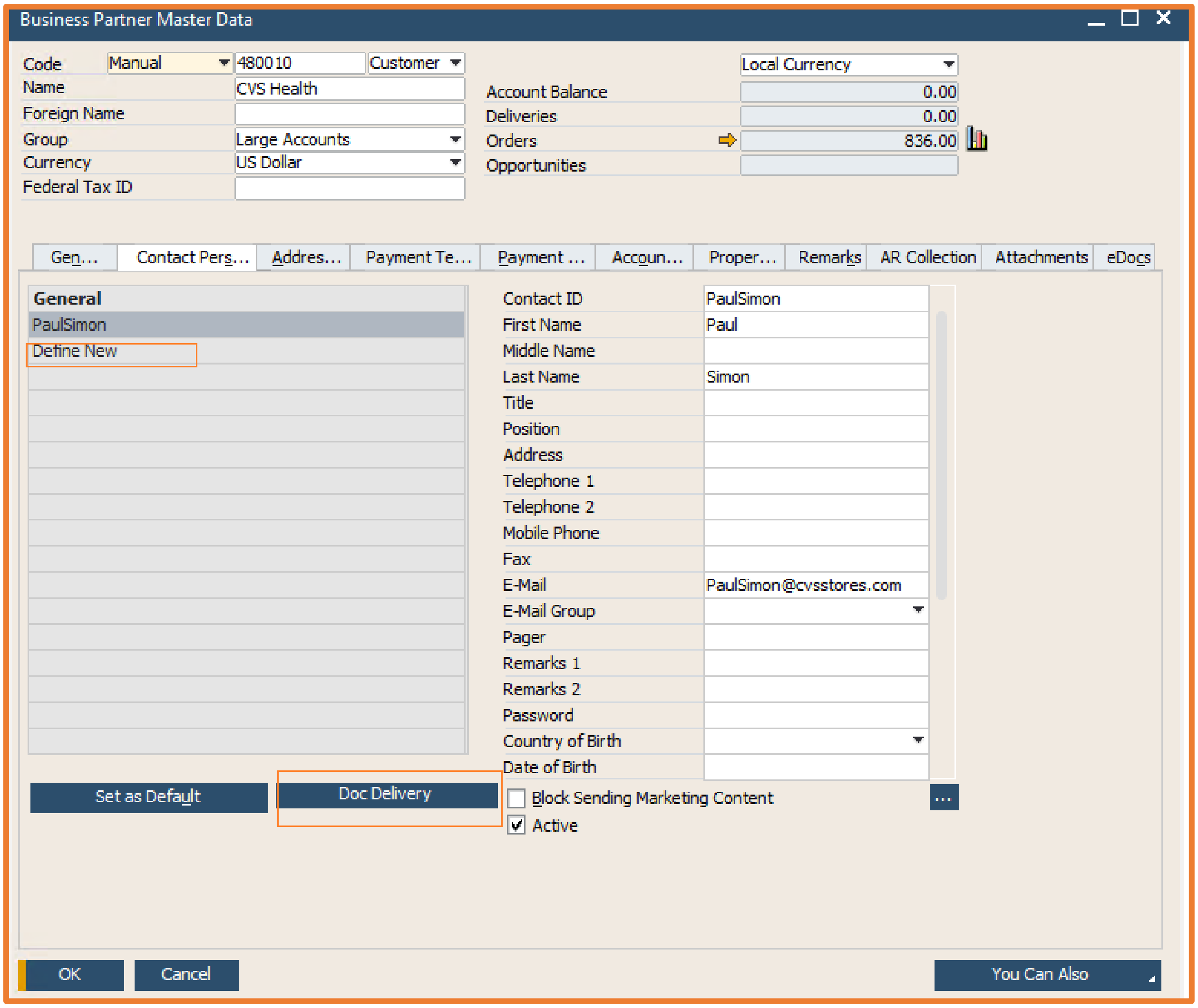
On the Contact Person tab, highlight one of the contacts. Then click on the “Doc Delivery” button. The Document Delivery customer or vendor configuration screen will open. If a record already exists for the selected contact person, it will be displayed. If a record for that person does not exist, it will automatically be added, using the email address and/or fax number from the contact record. Note, only the General tab is entered by default, but you can edit the data as necessary.

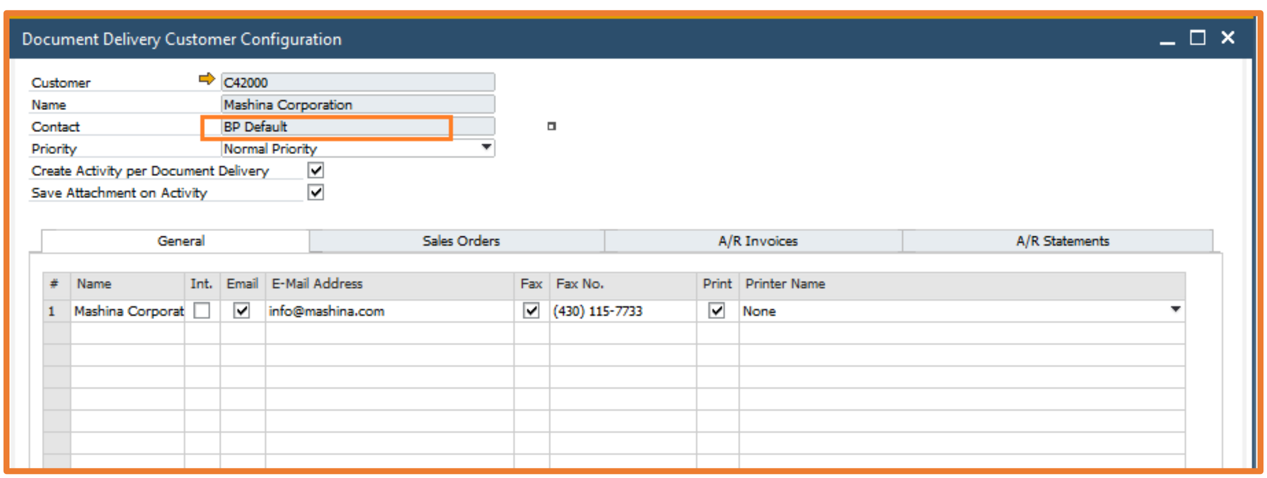




When you create a new contact in the BP Master and there and there is no “BP Default” contact in the Document Delivery Configuration screen a “BP Default” record will be created (if it doesn’t already exist) using the email from the General tab of the BP Master.

If you change an existing contact in the BP Master and there is not a contact in the Document Delivery Configuration screen for that contact a “BP Default” record will be created (if it doesn’t already exist) using the email from the General tab of the BP Master. The specific contact record will be created also

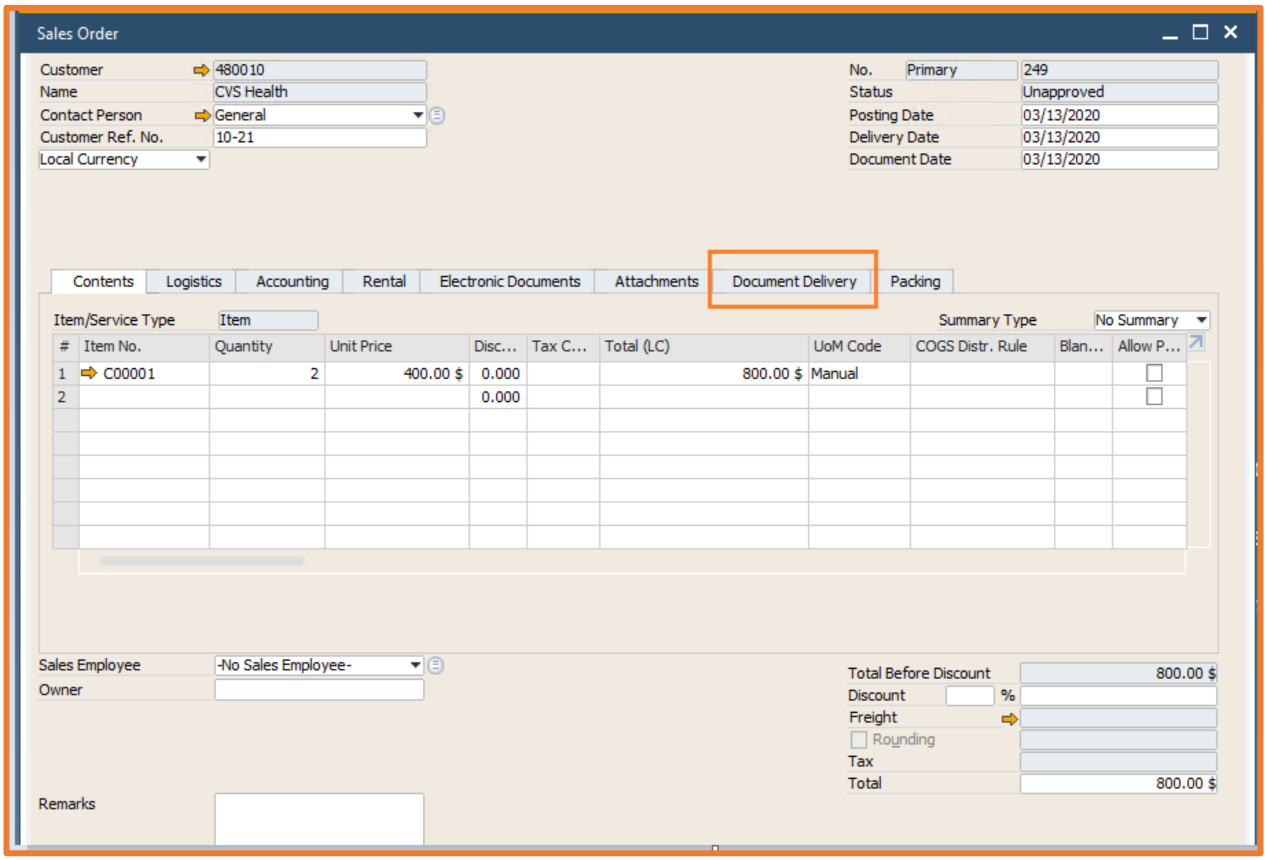

Business Partner Master Data
Code Manual 480010 Customer
Name CVS Health
Foreign Name
Group Large Accounts
Currency US Dollar
Federal Tax ID
Local Currency
Account Balance 0.00
Deliveries 0.00
Orders 836.00
Opportunities
Gen... Contact Pers... Addres... Payment Te... Payment ... Accoun... Proper... Remarks AR Collection Attachments eDocs
General
PaulSimon
Define New
Contact ID PaulSimon
First Name Paul
Middle Name
Last Name Simon
Title
Position
Address
Telephone 1
Telephone 2
Mobile Phone
Fax
E-Mail PaulSimon@cvsstores.com
E-Mail Group
Pager
Remarks 1
Remarks 2
Password
Country of Birth
Date of Birth
Set as Default
Doc Delivery
Block Sending Marketing Content
Active
OK
Cancel
You Can Also


Document Delivery Customer Configuration
Customer C42000
Name Mashina Corporation
Contact BP Default
Priority Normal Priority
Create Activity per Document Delivery
Save Attachment on Activity
General
Sales Orders
A/R Invoices
A/R Statements
Name Int. Email E-Mail Address Fax Fax No. Print Printer Name
1 Mashina Corporat info@mashina.com (430) 115-7733 None

Procedures

Marketing Document Configuration

If you have checked "Enable Marketing Document Configuration" in the Document Delivery Initialization, then all marketing documents (i.e., sales and purchasing documents) will contain an additional tab. You may enter recipient information on this tab, relevant to this document only. This is optional, leaving the tab blank uses the BP or Contact defaults. Completing this tab will either append or override the defaults (depending on your configuration settings we saw above).



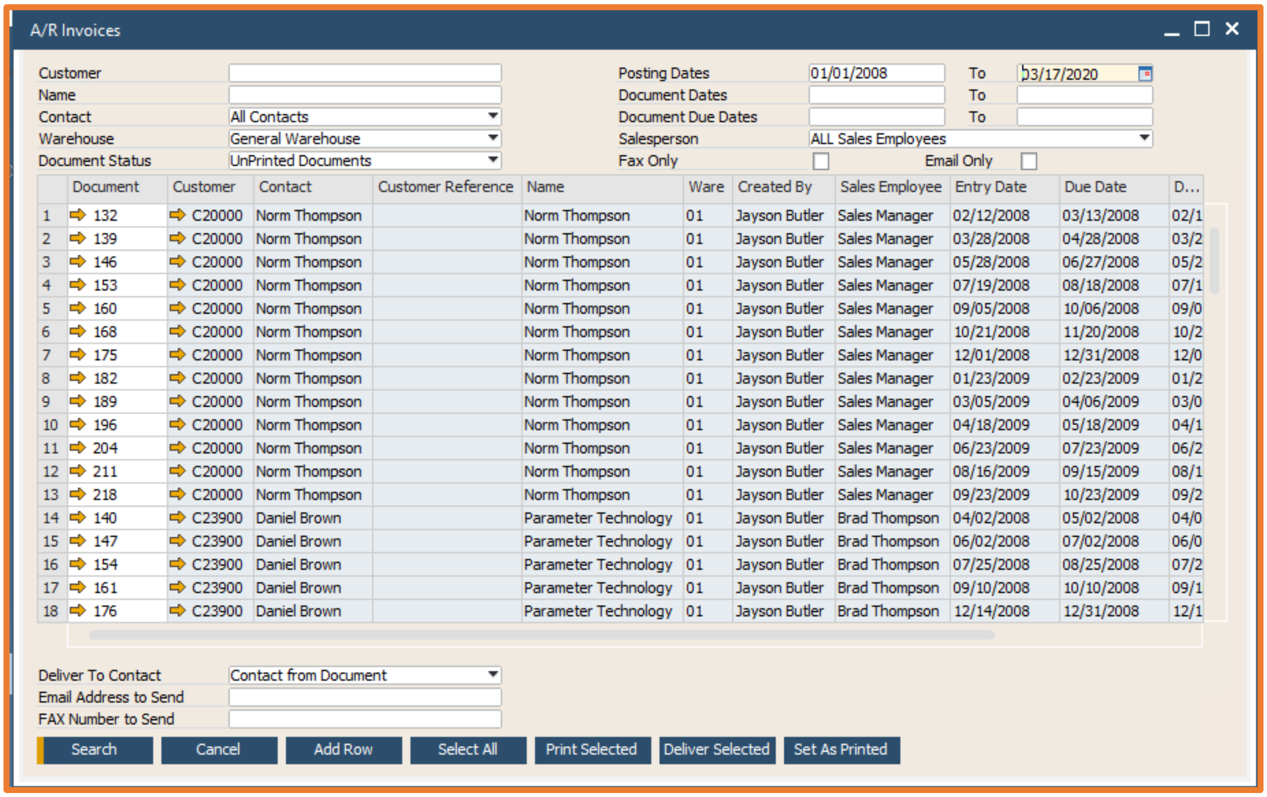
Note, once entries are made on a marketing document, they will be copied to any target documents that are created. For example, if a recipient is entered on a Sales Order, it will also appear on the Delivery and A/R Invoice that may be copied from the Sales Order. If you do not want the same recipient on a target document, you must remove or change it after the target is created.

Target documents created by means of the Document Generation Wizard will also carry the Document Delivery configuration from their base documents.

Batch Delivery

Each document type is delivered from a separate screen. See the menu selections for *Resolv > Resolv Document Delivery > Customer Delivery* or *Vendor Delivery.*

All document-type screens are identical. The A/R Invoice delivery screen is shown for illustration.



	Document	Customer	Contact	Customer Reference	Name	Ware	Created By	Sales Employee	Entry Date	Due Date	D...
1	132	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	02/12/2008	03/13/2008	02/1
2	139	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	03/28/2008	04/28/2008	03/2
3	146	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	05/28/2008	06/27/2008	05/2
4	153	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	07/19/2008	08/18/2008	07/1
5	160	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	09/05/2008	10/06/2008	09/0
6	168	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	10/21/2008	11/20/2008	10/2
7	175	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	12/01/2008	12/31/2008	12/0
8	182	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	01/23/2009	02/23/2009	01/2
9	189	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	03/05/2009	04/06/2009	03/0
10	196	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	04/18/2009	05/18/2009	04/1
11	204	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	06/23/2009	07/23/2009	06/2
12	211	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	08/16/2009	09/15/2009	08/1
13	218	C20000	Norm Thompson		Norm Thompson	01	Jayson Butler	Sales Manager	09/23/2009	10/23/2009	09/2
14	140	C23900	Daniel Brown		Parameter Technology	01	Jayson Butler	Brad Thompson	04/02/2008	05/02/2008	04/0
15	147	C23900	Daniel Brown		Parameter Technology	01	Jayson Butler	Brad Thompson	06/02/2008	07/02/2008	06/0
16	154	C23900	Daniel Brown		Parameter Technology	01	Jayson Butler	Brad Thompson	07/25/2008	08/25/2008	07/2
17	161	C23900	Daniel Brown		Parameter Technology	01	Jayson Butler	Brad Thompson	09/10/2008	10/10/2008	09/1
18	176	C23900	Daniel Brown		Parameter Technology	01	Jayson Butler	Brad Thompson	12/14/2008	12/31/2008	12/1

In the header section, enter any relevant criteria for the documents you wish to deliver.

Customer/Vendor: 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.

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.

Warehouse: Select a single warehouse or "All Warehouses". Note that service-type documents do not have a warehouse designation and therefore cannot be included when a specific warehouse is selected.

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

- All
- Closed
- Open
- Unprinted
- Open and Unprinted

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.

Salesperson: The default will be "All Sales Employees". You can also select an individual salesperson. If a specific salesperson is entered only documents for this salesperson will appear in the selection grid.

Fax Only: Check if you wish to include only documents where there is a fax option.

Email Only: Check if you wish to include only documents where there is an email option.

Make the following selections in the fields at the bottom of the screen:

Deliver to Contact: Select the document delivery record to deliver to. The options are either Contact from Document or BP Default. Note, different contacts may have different delivery configurations.

When deciding which one to choose you can use the following information to help.

You may specify recipients according to the contact person on each document – in other words, if a customer has three different contact people who all receive Sales Quotations, each one may require that they receive their own quotations at their own email addresses. If this is the case, you must have a separate Customer Configuration record for each contact, specifying each contact's information for receiving quotations. You should select "Contact from Document" when sending a batch of documents.

Alternatively, it may be that all documents of a particular type should go to the same recipient, regardless of who the contact is on each document; for instance, all invoices might go to the same Accounts Payable department, even if they result from quotations and orders by different contacts. If this is the case, you must have a Customer

Configuration set as "BP Default" for the customer which provides the generic delivery information for the customer's company. You should select "BP Default" when sending a batch of documents.

The screen will remember the choice made here and will use it the next time the screen is accessed. The settings will be saved by user.

Email Address to Send: If you wish to override the email addresses in the configuration for the Business Partners or Contacts, enter the desired email address in this field.

Fax Number to Send: If you wish to override the fax numbers in the configuration for the Business Partners or Contacts, enter the desired fax number in this field.

Once the criteria have been entered, click on the "Search" button. The screen will display all documents that meet the criteria.

Click on one row to highlight it or use the Shift or Control key to select multiple rows. You may also use the "Select All" button. You may then do any of the following:

1. Use the "Print Selected" button to make printed copies of the selected documents. The documents will be sent to the user's default printer.

2. Use the "Deliver Selected" button to utilize the Document Delivery setups to send each document to its preset destination. The system will perform the following functions for each document:
    a. Determine the Business Partner
    b. Determine the Contact
    c. Determine if there is a Document Delivery Configuration record for the BP and Contact
    d. Determine if there is a Document Delivery setup for the specific document type
    e. If there is a specific routing for the document type, the system will use those instructions to email, fax, and/or print the document
    f. If there is no specific routing but there is a general routing, the system will use the general instructions to email, fax, and/or print the document
    g. If the selection "Deliver to Contact" is set to "Contact from Document", then the above steps will apply to the configuration for the contact of the document; otherwise they will apply to the configuration for BP Default contact for the Business Partner.
    h. If there is no Document Delivery record, or if there is no routing that applies to this document type and/or contact, then the system will print the document to the user's default printer.

3. If it is not desired to send or print the selected documents, but you do not wish them to keep appearing on the Unprinted list, use the "Set as Printed" button to mark them as printed without printing or delivering them.

4. If you wish to re-send a document that has already been marked as printed, do not select the "Unprinted" option. You may use the "Open", "Closed", or "All" Document Status, or you may designate one or more specific document numbers:

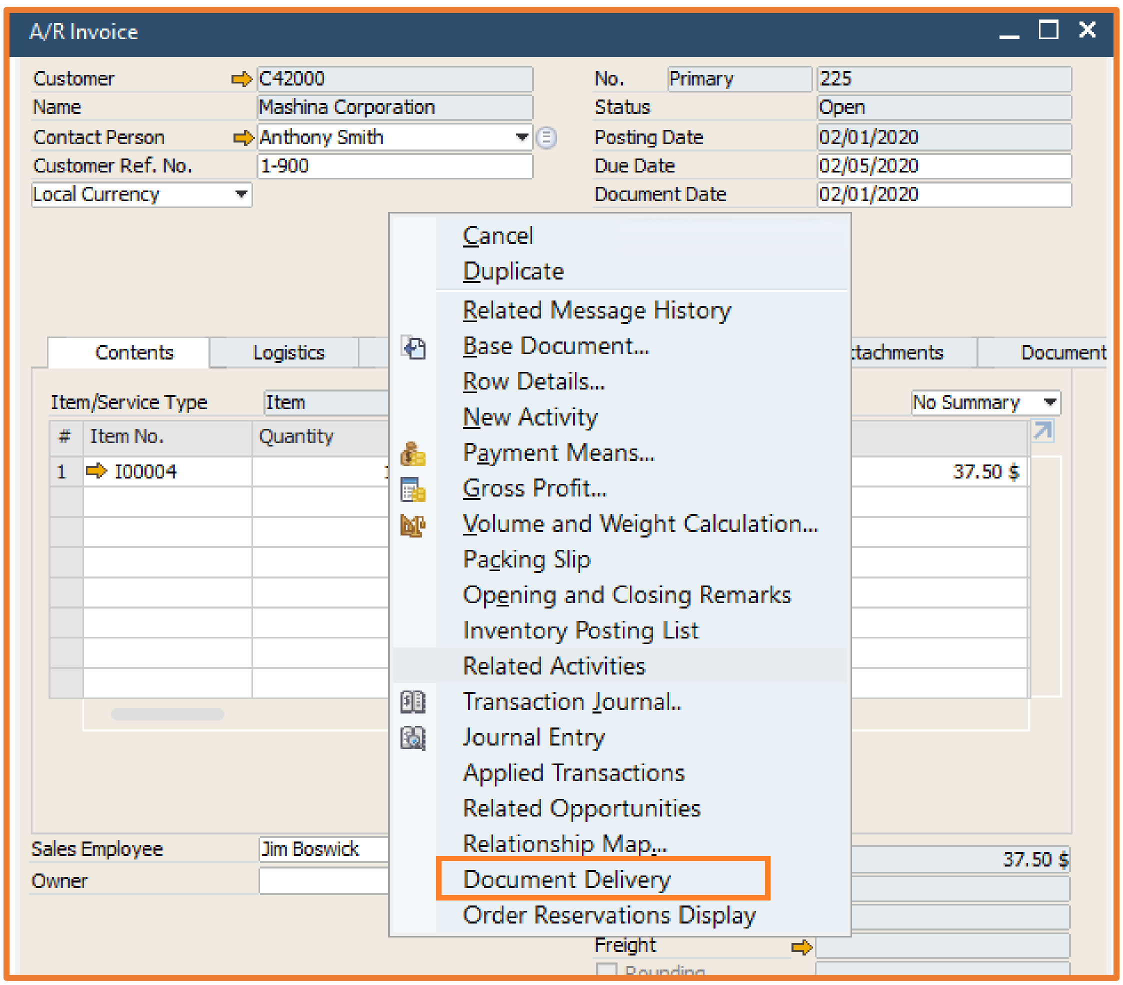
- After entering the business partner and warehouse in the header, click on the "Add Entry Row" button. The cursor will appear in the first row of the matrix.
- Enter the document number in the second column or press TAB to see a list of documents for the business partner.
- You may enter as many documents as you wish, then select them and follow the procedures above.

Individual Delivery on Marketing Docs

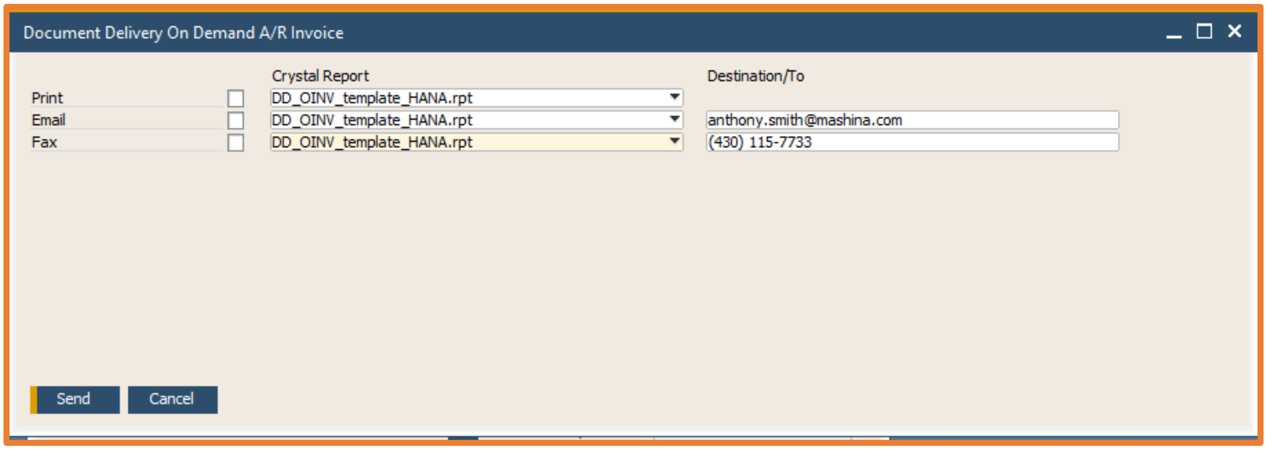
Resolv Document Delivery may be used to deliver individual documents, as well as batches. To do so, follow these steps:

1. Open the document on the screen. Note that the document may be open or closed, printed or unprinted.

2. Right-click on the document. The right-click menu includes an option for Document Delivery.



3. When Document Deliver is selected, the system performs the procedures described for batch delivery, to determine the appropriate email and/or fax destinations. The following screen is displayed.



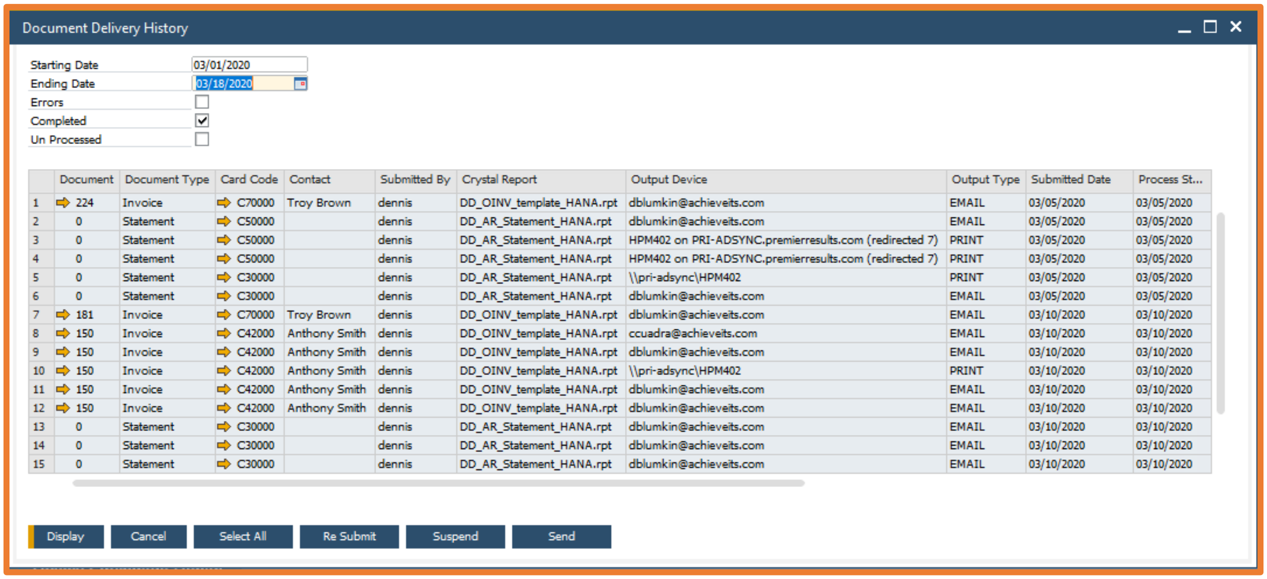
4. You may check one or more of the delivery options to indicate the delivery method. You may also change the report definition, email address, and/or fax number. You may use the default text for subject and body or enter an override text.

5. When all options are correct, click on “Send” to deliver the document.

Document Delivery History

Resolv > Resolv Document Delivery > Document Delivery History

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



Document Delivery History

Starting Date 03/01/2020
Ending Date 03/18/2020
Errors
Completed
Un Processed

	Document	Document Type	Card Code	Contact	Submitted By	Crystal Report	Output Device	Output Type	Submitted Date	Process St...
1	224	Invoice	C70000	Troy Brown	dennis	DD_OINV_template_HANA.rpt	dblumkin@achieveits.com	EMAIL	03/05/2020	03/05/2020
2	0	Statement	C50000		dennis	DD_AR_Statement_HANA.rpt	dblumkin@achieveits.com	EMAIL	03/05/2020	03/05/2020
3	0	Statement	C50000		dennis	DD_AR_Statement_HANA.rpt	HPM402 on PRI-ADSYNC.premierresults.com (redirected 7)	PRINT	03/05/2020	03/05/2020
4	0	Statement	C50000		dennis	DD_AR_Statement_HANA.rpt	HPM402 on PRI-ADSYNC.premierresults.com (redirected 7)	PRINT	03/05/2020	03/05/2020
5	0	Statement	C30000		dennis	DD_AR_Statement_HANA.rpt	\\pri-adsync\HPM402	PRINT	03/05/2020	03/05/2020
6	0	Statement	C30000		dennis	DD_AR_Statement_HANA.rpt	dblumkin@achieveits.com	EMAIL	03/05/2020	03/05/2020
7	181	Invoice	C70000	Troy Brown	dennis	DD_OINV_template_HANA.rpt	dblumkin@achieveits.com	EMAIL	03/10/2020	03/10/2020
8	150	Invoice	C42000	Anthony Smith	dennis	DD_OINV_template_HANA.rpt	ccuadra@achieveits.com	EMAIL	03/10/2020	03/10/2020
9	150	Invoice	C42000	Anthony Smith	dennis	DD_OINV_template_HANA.rpt	dblumkin@achieveits.com	EMAIL	03/10/2020	03/10/2020
10	150	Invoice	C42000	Anthony Smith	dennis	DD_OINV_template_HANA.rpt	\\pri-adsync\HPM402	PRINT	03/10/2020	03/10/2020
11	150	Invoice	C42000	Anthony Smith	dennis	DD_OINV_template_HANA.rpt	dblumkin@achieveits.com	EMAIL	03/10/2020	03/10/2020
12	150	Invoice	C42000	Anthony Smith	dennis	DD_OINV_template_HANA.rpt	dblumkin@achieveits.com	EMAIL	03/10/2020	03/10/2020
13	0	Statement	C30000		dennis	DD_AR_Statement_HANA.rpt	dblumkin@achieveits.com	EMAIL	03/10/2020	03/10/2020
14	0	Statement	C30000		dennis	DD_AR_Statement_HANA.rpt	dblumkin@achieveits.com	EMAIL	03/10/2020	03/10/2020
15	0	Statement	C30000		dennis	DD_AR_Statement_HANA.rpt	dblumkin@achieveits.com	EMAIL	03/10/2020	03/10/2020

Display Cancel Select All Re Submit Suspend Send

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

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

If you are using Client-Side processing, then selecting the Resubmit option will try redelivering your document immediately. If you are using Server-Side processing, then selecting the Resubmit option will reset the Document Delivery dates and put your documents back in an Un-Processed state. Once there it will wait for the processor's next scheduled run, where it will try and re-send.

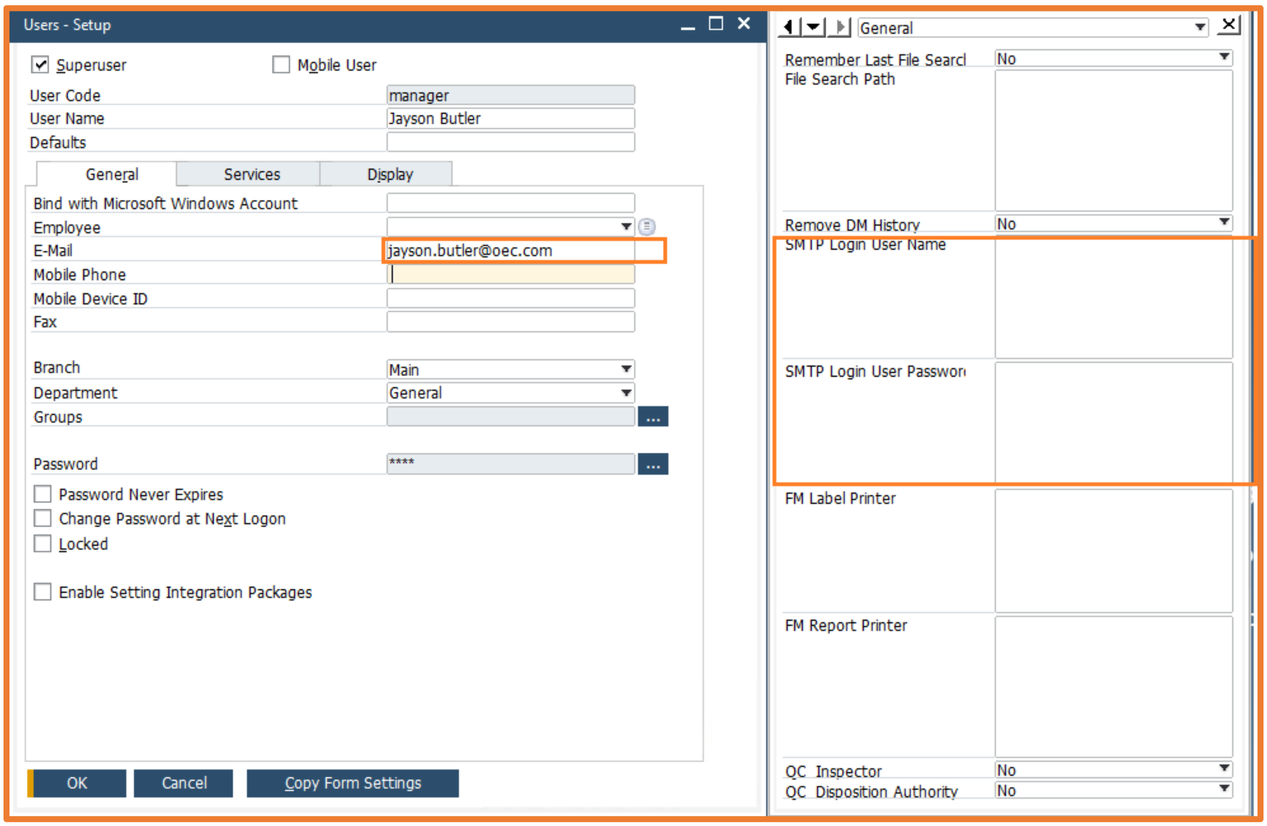
If you are using Server Side processing and you do not want to use the Resubmit button and wait for the processor (or perhaps the processor is not working at the moment), you can just use the Send button and it will try delivering your documents using Client Side processing for this specific instance.

Note that during a submission to server-side processing, once the server processor picks up the document it will be in the Errors queue until it is successfully completed, or the message cannot be sent, and the Process Error is updated.

Appendix: Setting up Users for Office 365

When working with a subscription email service such as Office 365, the email authorization may be required at the user level. This will authenticate each email address and avoids having to create an account that must send on behalf of the permissions for each and every email address.

To configure a user to be able to send via SMTP when user level credentials are required, you will need to use the User Defined Fields below, found on the SAP Users Setup screen.



The SMTP setup in the Document Delivery Configuration is still required so that the system knows the SMTP Server, Encryption Method and Port. However, the Username and Password from the configuration will be overridden by the SMTP Login User Name and SMTP Login User Password fields from these UDFs for the corresponding user. Note, the email address on the user should also match to avoid any email server issues.

Note, when using server-side processing, the UDFs on the SAP user that is set up in the Resolv Processor to run the service (Manager in most cases) will be checked when eFaxing or Emailing. If there is data in these fields, it will be used as the from address. If there is no data in these fields, it will just use the defaults set up in the DD configuration screen.