

KEY FEATURES

- On-Demand Document Delivery
- By Customer – Contact - Form
- By Vendor – Contact - Form
- Email / Fax / Print / EDI
- Consolidate Emails into single PDF
- Consolidate Faxes
- Auto Create SAP Business One Activities
- Template Email Subject & Body per Document
- Default Form by Company and/or Customer
- Activity Created per Document Delivered
- Crystal Report Launcher
- Document Delivery History Log
- Vendor Delivery AP Documents Supported
- Customer Delivery AR Documents Supported

ACHIEVE DOCUMENT DELIVERY ALLOWS SAP BUSINESS ONE USERS TO EASILY DISTRIBUTE KEY DOCUMENTS TO CUSTOMERS AND VENDORS.

Documents can be distributed via email, fax, EDI or print based on pre-set instructions for each contact and document.

With Achieve Document Delivery, companies utilizing SAP Business One, can

save substantial amounts of time and money, while increasing customer service levels by promptly delivering these business documents.

With Achieve Document Delivery, documents can be distributed in one large batch, individually or based on a user defined filtering option. As with all Achieve One modules, the Achieve Document Delivery is built specifically for SAP Business One, utilizing the advanced technical architecture of the SAP Business One Software Development Kit.

- Email Options
 - » SMTP
 - » Outlook
 - » SAP
- Fax Options
 - » eFax
 - » Visi-Fax
 - » SAP
- EDI Options
 - » Achieve EDI
- Template Email Subject & Body per Document
- Default Form by Company and/or Customer
- Activity Created per Document Delivered
- Crystal Report Launcher
- Document Delivery History Log

Document Delivery History

Starting Date: 08/27/2011
 Ending Date: 08/27/2013
 Errors:
 Completed:
 Un Processed:

	DocEntry	Document	Document Type	Card Code	Contact	Submitted By	Crystal Report	Output Device	Output Type	Submitted Date
1	249	249	Quotation	C100	Tim Singleton	manager	AIT_Quote.rpt	tsingleton@achieveits.com	EMAIL	08/22/2012
2	226	226	Invoice	C50000		manager	AR_Invoice_88.rpt	tsingleton@achieveits.com	EMAIL	08/22/2012
3	225	225	Invoice	C40000		manager	AR_Invoice_88.rpt	tsingleton@achieveits.com	EMAIL	08/22/2012

Subject and Body Entry

Sales A/R Purchasing A/P

General Sales Quotation Sales Order Sales Confirmation Delivery Returns A/R Invoice A/R Credit Memo A/R Statements Freig

Sales A/R Sales Quotation

Achieve IT Solutions - Quote # <HeaderTable.DocNum> - Expires <HeaderTable.DocDueDate>

Subject

- Vendor Delivery
 - AP Documents Supported
 - » Purchase Quotations
 - » Blanket Agreements
 - » Container Documents
 - » Purchase Order
 - » Purchase Receipt
 - » Purchase Return
 - » Purchase Invoice
 - » Purchase Credit Memo
 - » Purchase Outbound EDI (Requires Achieve EDI)

- Customer Delivery
 - AR Documents Supported
 - » Quote
 - » Sales Order
 - » Confirmation
 - » Sales Delivery
 - » Sales Returns
 - » Sales Invoice
 - » Sales Credit Memo
 - » Sales Statements
 - » Sales Dunning Letters
 - » Sales Outbound EDI (Requires Achieve EDI)
 - » Freight Forms
 - » Blanket Agreements

Document Delivery Customer Configuration

Customer: C100
 Name: Port Jefferson Ind. Supply
 Contact: BP Default
 Priority: Normal Priority
 Create Activity per Document Delivery
 Save Attachment on Activity

General | Sales Quotation | Sales Order | Sales Confirmation | Delivery | Returns | A/R Invoice | A/R Credit Memo | A/R Statements | Freight Control | Blanket Agreement

#	Name	Int.	Email	E-Mail Address	Fax	Fax No.	Print	Printer Name
1	Tim Singleton	<input type="checkbox"/>	<input checked="" type="checkbox"/>	tsingleton@achieveits.com	<input checked="" type="checkbox"/>	(831) 543-3020	<input checked="" type="checkbox"/>	None

Sales Order

Customer: C20000
 Name: Norm Thompson
 Contact Person: Norm Thompson
 po #
 Local Currency

Contents | Logistics | Accounting | Document Delivery | Attachments

Document Delivery On Demand Sales Order

#	Type	Item No.	Item
1	A000		
2	A000		
3	A000		
4	A000		
5	A000		

Crystal Report: [Dropdown]
 Destination/To: norm.thompson@norm.com (810) 555-5032

Print
 Email
 Fax

A/R Statements

Starting Customer: [Dropdown]
 Ending Customer: [Dropdown]
 Aging Date: 08/27/2013
 Fax Only
 Email Only
 Save as Outlook Draft

Include Zero Balance
 Include Reconciled Invoices
 OverDue Only
 OverDue Days: 0

	Card Code	Name	Contact	Credit Limit	Orders	Deliveries	Account Balance
1	C100	Port Jefferson Ind. Supply	Tim Singleton	50,000.00	33,079.71	4,833.98	-500.00
2	C10011	De Soto Clothing Inc	Emilio De Soto	50,000.00	28.55	0.00	3,263.85
3	C10032	Henry Bros. Electronics, Inc.	James Henry	50,000.00	0.00	0.00	4,144.40
4	C101	Grainger Industrial Supply		50,000.00	1,183.19	0.00	21,150.10
5	C110	Jupiter Industrial	Lucas Duda	50,000.00	6,542.50	0.00	8,275.00
6	C20000	Centerport Components	Norm Thompson	50,000.00	0.00	1,168.85	1,168.85
7	C20017	Adirondack Beverages, Inc	Ralph Crowley	50,000.00	0.00	0.00	11,547.80

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