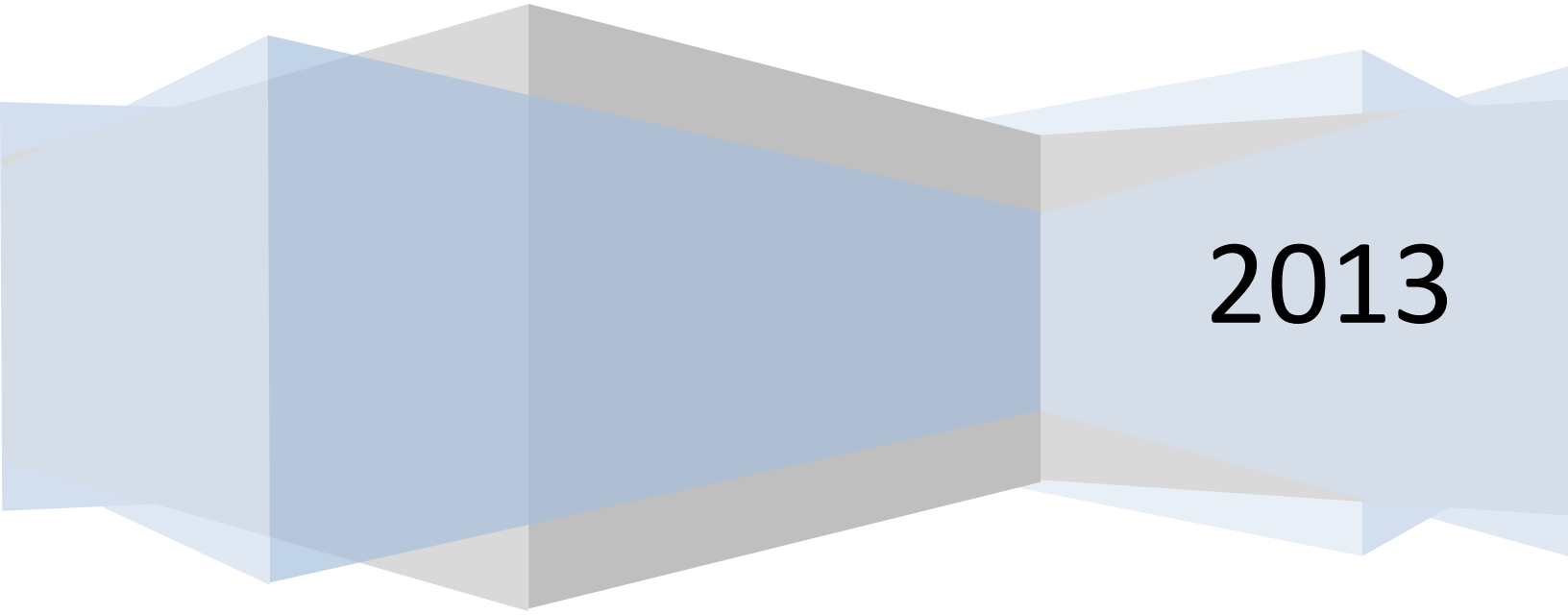
b2Mail-Merge 8.5

Implementation Guide – Baan IVc

NAZDAQ – Nazareth Data Quest



2013

Contents

1 Introduction 4

2 Quick Start 8

3 Document Settings 14

3.1 Introduction 14

3.2 Maintain *B2Email* Company Header and Footer Logo 16

3.3 Defining Background 18

4 E-mailing, Faxing, Printing and Archiving 22

4.1 Introduction 22

4.2 Emailing 23

4.2.1 Sending Modes 23

4.2.2 HTML Message 27

4.3 Faxing 29

4.3.1 Integration with fax servers 29

4.3.2 Cover page 30

4.4 Printing 31

4.5 Archiving 32

4.6 Append files 34

4.7 Logging 34

4.8 Send mode 36

4.9 Running *b2Mail-Merge* with Different Parameters 39

4.10 Running b2Mail-Merge in NT Mode 42

5 Keys and Addresses 43

5.1 Introduction 43

5.2 Customer Books, Supplier Books 43

5.3 Sending to Groups 45

5.4 Maintain b2Mail-Merge Addresses 46

5.4.1 Introduction 46

5.4.2 General Address Book 46

5.4.3 Supplier Address Books 47
5.4.4 Customer Address Books 49
5.4.5 Warehouse Address Books 50
5.4.6 Postal and Delivery Address Books 51
5.4.7 Customer and Supplier Table for E-mail and Fax – Address Books 100, 101 and 102 51
5.4.8 Maintain Description for Address Books 53
5.4.9 Filtering E-mails 53
6 Attachments 54
6.1 External Attachments 54
6.2 Extended Attachment Functionality 56
6.3 Concatenate PDF Files to the report 58
7 Variables 59
8 File-Name 60
8.1 Define Meta Data File 61
9 Purchase Order Approval Module 62
9.1 Introduction 62
9.2 Amount/Currency 63
9.3 Purchase Approval Process Settings 64
10 General Options 65
10.1 File Management 65
10.1.1 Defining Local Temp Directory 65
10.1.2 Managing the Temporary Directory on the Server 65
10.1.3 How often files are copied from the server to the client 65
10.2 Online Help 66
10.3 b2email.ini file 66
11 Legal Notice – Warning 71
Trade Marks 71

1 Introduction

b2Mail-Merge allows companies to automatically e-mail, fax, print and archive documents (i.e. Purchase Orders or Invoices). This powerful engine can handle any output coming from Baan and ERP Ln by performing the following:

- ***Parse*** it to individual documents
- ***Recognize*** supplier/customer for each document
- ***Match*** it with supplier/customer e-mail/fax
- ***Deliver*** each document according to preferences (e-mail, fax, print, or archive)

Parsing of output is done through **Keys**. In the *b2Mail-Merge* broker we need to define the key type (like "Purchase Order", "Invoice") and the value of this key. As an example, if we are running a Purchase Order run, then our key to be defined in the broker is "Purchase Order" and we need to mark the six digit purchase order number (like 203456). The way *b2Mail-Merge* works is that it needs to know the location of the key (what line and what column) in the report. In standard Baan reports, the key is always located in the same exact location in the first page, and has the same location in the page two and higher. Defining the exact location of the key is the first and most important step for the product to begin to parse the output properly. For more details about different keys that can be used, check the ***Keys and Addresses*** chapter.

Once the key is properly defined, and the supplier or the customer recognized, then certain **variables** are defined. Such examples of variables are <DOCTYPE> (generates "Purchase Order", "Invoice" and so on) and <DOCUMENT>, which generates the order number (203456 as in the above example). These variables can be concatenated and used with other free text for the purpose of producing meaningful message bodies, fax cover pages and populating unique file names. For a full list of variables available check the **Variables** Chapter

Once the key is picked, *b2Mail-Merge* has an inner logic to recognize the customer, supplier, employee or other entity to look-up the E-mail addresses. The system automatically knows that key "Purchase Order" is connected to a supplier, and key "Invoice" is connected to a customer. There now needs to be a *Merge* supports up to 100 address books maintained in its sub-system (using ASCII files and not Baan tables), in addition to support working with existing customer and supplier tables (customized to have e-mail fields). There is also the possibility to use groups and special key words for mailing. For a complete list of possibilities, check the **Keys and Addresses** chapter, definition of a customer book and supplier book, where the E-mails can be picked.

b2Mail-Merge works in a one-by-one mode where the user is prompted for every order before it is sent. Alternatively, it works in a full-automatic mode where all orders are e-mailed, faxed, printed and archived based on pre-defined logic.

How to use this guide

With the chapter **Quick Start**, we lay-down all the very essential definitions for *b2Mail-Merge* to begin to work: defining a user, integrating with the e-mail system, and defining a report with a proper "key" (Purchase Order is used for the quick start). After this quick procedure, you can begin to "see" how *b2Mail-Merge* really works.

The other chapters describe in much more details the different modules to maximize the use of the application .

In the chapter **Document Settings** you will define the format of the files produced as the output of *b2Mail-Merge*. In case you choose to use PDF files, you will learn how to fine-tune the margins, add a logo and footer, a background image like pre-printed paper, signatures, secure PDF options and different paper types.

The chapter about **E-mailing, Faxing, Printing, Archiving** explains how to enable and manage each one of these delivery option.

b2Mail-Merge can send the **e-mail** through different applications such as MS- Outlook, Lotus Notes, UNIX sendmail and SMTP. MS-Outlook and Lotus Notes can work in two modes: Auto Mode, where the e-mail will be sent in the background through the application, and Open Mode, the application will open a new e-mail message ready with the attachment. We can also define what happens when the system does not find the mail recipient, and the different e-mail options to automatically apply for merged documents, like compressing and priority.

The **E-mail message body** can also be personalized to include basic information about the order/document being sent.

b2Mail-Merge allows you to **fax** documents while integrating with one of few fax servers that integrate with the e-mail capability of the product. This means that fax servers must have a possibility to receive e-mails with PDF attachments and have the capability to process them and turn them to fax transmissions. The cover page of the fax transmission can also be configured.

b2Mail-Merge can be programmed to **print** documents in more than one copy, on multiple printers, in certain scenarios. Printing is possible on Windows printers and possibly on UNIX printers.

Archiving is another feature that can be enabled to make hard copies of documents on a certain file system, with no need to actually send it out or print it.

There is an entry for every document sent in the system log. There is a possibility to e-mail the log for every run to the person running the session, and there is a possibility for the user to view his/her log at any point in time. The chapter about **Logs** describes this

There are different ways to run *Baan-Mail-Merge*. One option is One-By-One mode where the user is prompted for every document and address. Before deciding to move to full-automatic mode, the user can try test-mode where e-mails are picked and documents produced, but all documents are sent to the administrator for final testing. When *b2Mail-Merge* is working in Auto-mode, it can be put in batch and cron. There is also a possibility to run it with a slightly different set of parameters each time, based on definitions in an outside file. All these options are discussed in the chapter **Run Modes**.

There is a chapter about **Addresses**. *b2Mail-Merge* supports working with existing addresses in Baan (in Baan 5 and ERP Ln) and supports a 100 address book structure for suppliers and customers in Baan 4. The system also supports adapting existing fields to work as e-mail addresses (like the telx field in Supplier or Customer Data). A possibility to send to groups is also supported.

b2Mail-Merge allows you to include additional **attachments**, in addition to every document being produced by the system. One possible application is the terms and conditions document in Purchase Orders. Another possibility is to attach multiple attachments form your Document Management System (***Baan Hot Link***, for example) to every document. As an example, you can attach photos & Excel sheets for all items in a purchase order to the Purchase Order being sent. All this can be configured in the Attachments chapter.

In the chapter **Variables and File-name**, you can learn how to define and use different variables from the *b2Mail-Merge* run. These variables will be used in the customized mail-body and mail-subject, and in populating file-names of the merged document.

b2Mail-Merge has the capability to run an **External Application** for every document produced. One example is to secure PDF files after they have been produced by the system.

The **Purchase Order Approval extension** (not part of the standard package) covers the area where *b2Mail-Merge* is used for purchase orders, and more than one person must sign certain orders, based on the amount.

Purchase orders below the threshold amount are automatically signed by the buyer and sent out, while all other purchase orders are routed to the responsible manager for approval within Baan.

The manager assigned to sign the purchase order (or his/her assistant or backup) will be notified with an e-mail and will be directed to an approval session. If the purchase order is approved or denied, an e-mail will be sent to notify the buyer about the status of each order.

Approved Purchase Orders are now signed with two signatures, one for the buyer and one for the manger and is ready to be released. Releasing purchase orders can be performed automatically by a batch job that will release all approved orders – or the buyer can check all approved orders and manually release them, while adding some additional remarks or attachments.

(Refer to *b2Mail-Merge Approval* Manual for more details).

b2Mail-Merge works with multiple temporary files, both on the server and on the client. The **File Management** section explains how to best configure the system so that these files are managed properly.

If you are using **B2Diz – The PDF Report Designer**, you can produce PDF files with different font size, type and color, and can change and move text from the original layout. This is performed using a friendly wizard that makes report customization an easy and quick task. You must license the *NAZDAQ Report Designer* for this.

There is a new add-on for this new version of b2Mail-Merge 8.1 the **Report Customizer**, you can produce PDF files with different font size, type and color, and can change and move text from the original layout. This is performed using a friendly wizard that makes report customization an easy and quick task. You must license the *NAZDAQ Report Designer* for this.

b2Mail-Merge supports a set of different languages. To define these languages, refer to **Languages** for more information.

Partial tuning of the *B2Mail-Merge* application can be performed through changing values of variables in the *b2email.ini* file, which is located in ***$BSE/nazdaq8/settings/adm***. When this guide refers to a variable like *Email_Footer* – this is usually a *b2email.ini* variable.

2 Quick Start

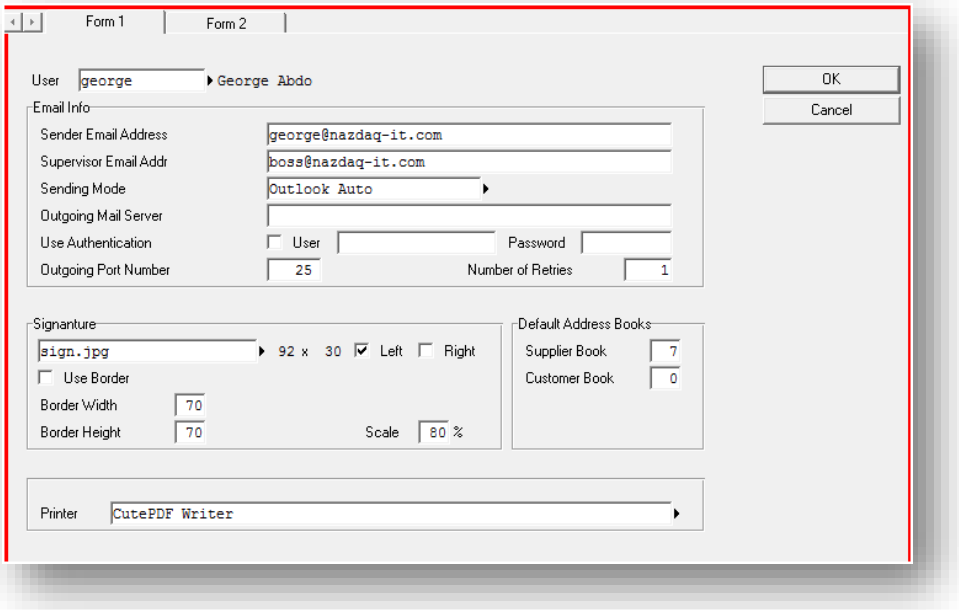
The following is an example of setting the essential definitions for *B2Mail-Merge* to start working.

We will be defining the user (User) in Maintain User Profile and then printing a Purchase Order report (with Purchase Order as a Key). The format of the produced document will be PDF and it will be e-mailed to the related supplier (defined in Supplier Address Book 0).

2.1 Maintain User Profile

The first step needed is defining the basic user profile parameters in ***tccom2conf8*** session which are:

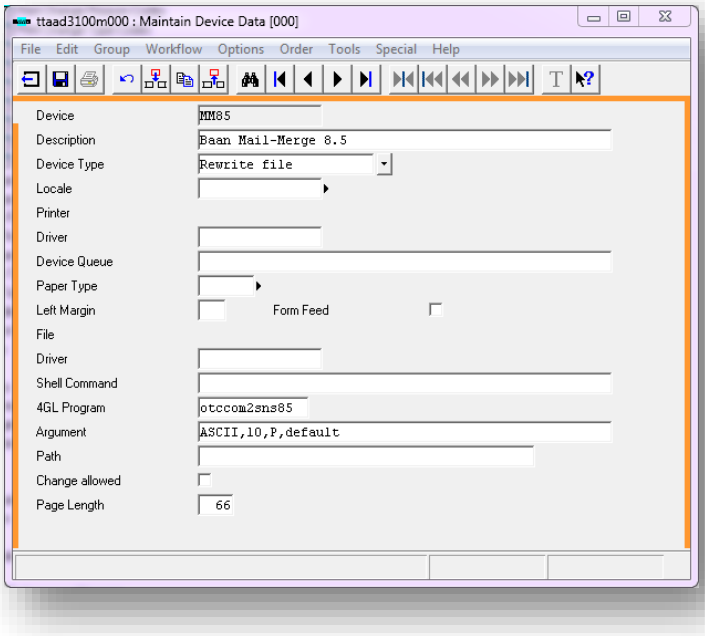
- E-mail address
- Sending mode (SMTP/Outlook/Lotus)
- Outgoing Mail-Server if the sending mode picked was SMTP

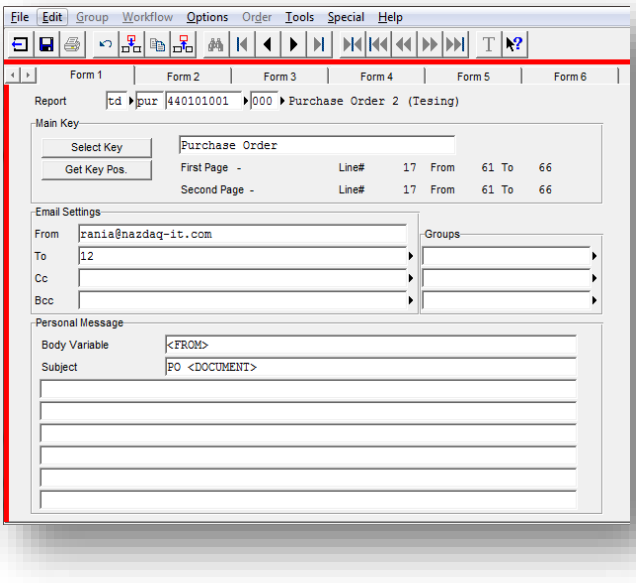


2.2 Maintain Baan Broker

After defining the basic parameters for the user, you will need to define the basic parameters for the Baan report you are wishing to send in *B2Mail-Merge* broker (***tccom2mergc8*** session).

Print your Baan report to ***MERGC8*** device:



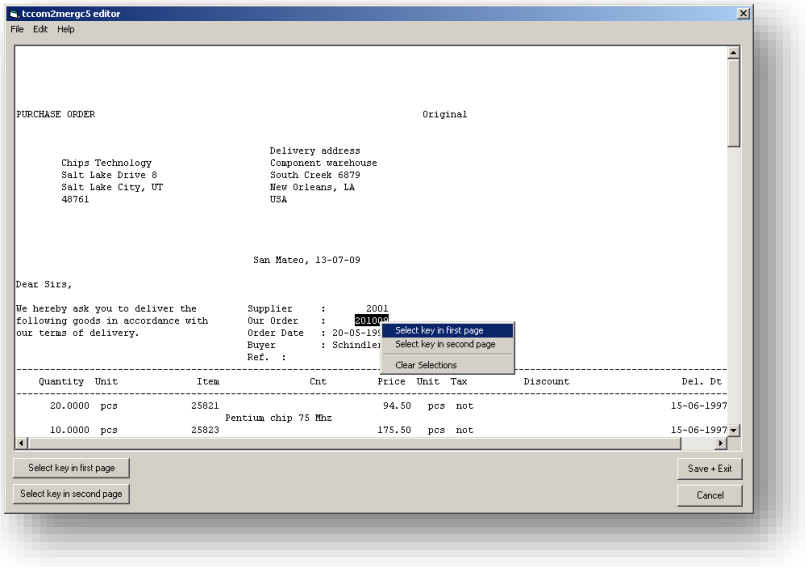


In *b2Mail-Merge* broker, you can define the settings/definitions that *b2Mail-Merge* will be working according to.

In this chapter we will be defining only few parameters so that *b2Mail-Merge* will start to work:

- Define the Key that *b2Mail-Merge* will parse the Baan report. In the example above, the key selected is Purchase Order meaning that *b2Mail-Merge* will cut whole range of Purchase Orders run into individual orders.

- Define the key position: you will have to print the Baan report to MERGC8 device and then click on the "Get Key Pos.", highlight the order number and click on "Select Key" in first page:

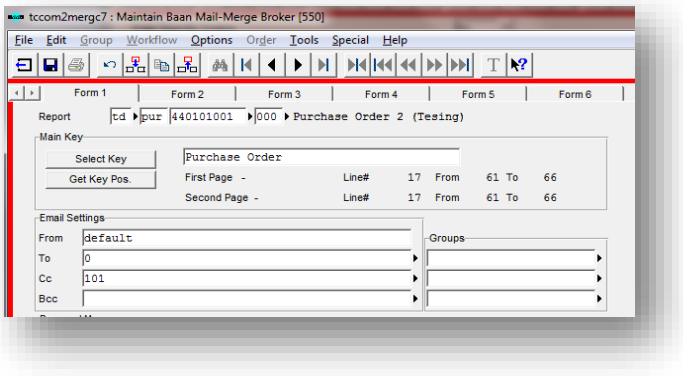


If the position of the order number is different in the second/rest of the pages, you will have to scroll down, highlight it in the second page and then click on ""Select Key Type" in second page.

After defining the key, we will define the address that we will be reading the e-mail from.

In the "From" field the sender address can be specified where the following values are possible:
- Default: uses the email of the current logged username
- Baan user: uses email address in Baan user profile defined in session tcom2conf8
- Fixed email address
- "Rep": uses buyer or sales representative email

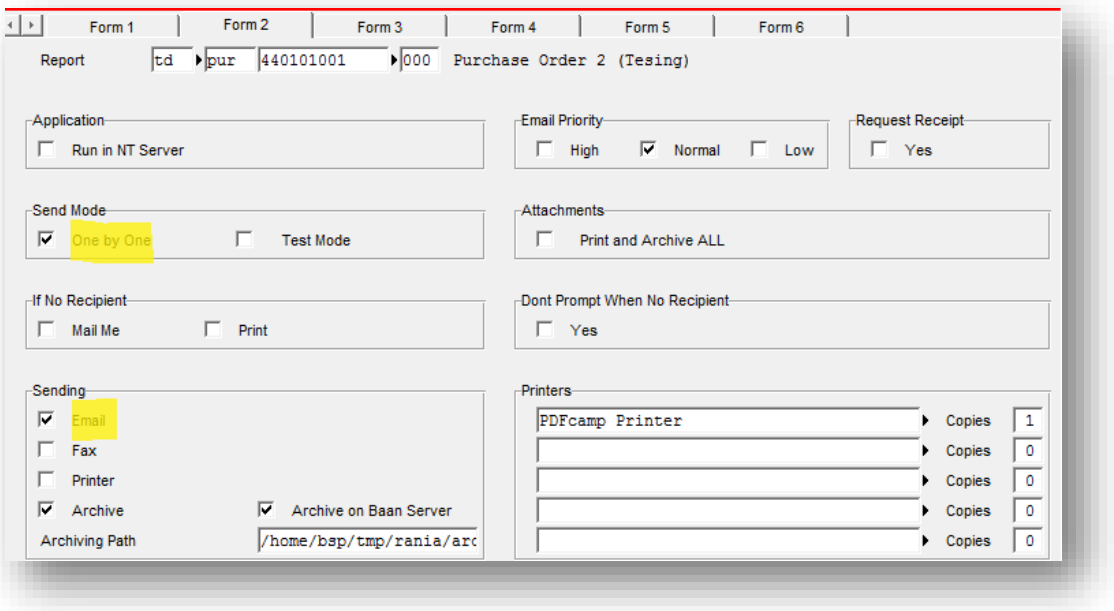
In Address Books section, define "0" for "To" field:



This means that the e-mail address will be picked from Address Book number 0 as you can see in the session ***tccom2mains8*** (see following).

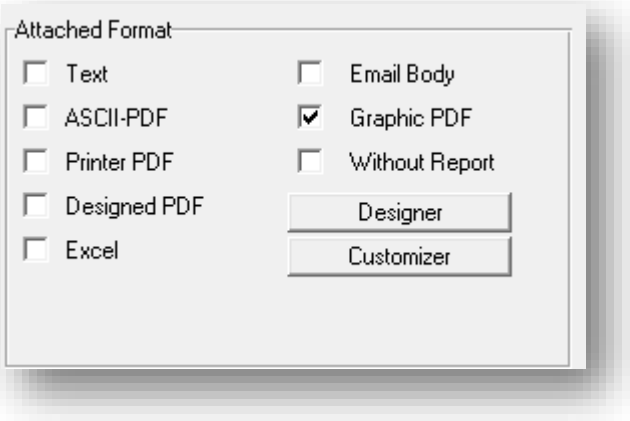
Next step would be defining the run mode settings, Form 2 of tccom2mergc8:

- Under "Send Mode" – check "One by One" option so that *b2Mail-Merge* will prompt and pop up *b2Mail-Merge* interface before sending each order
- Under "Sending" define the action needed: "Email"

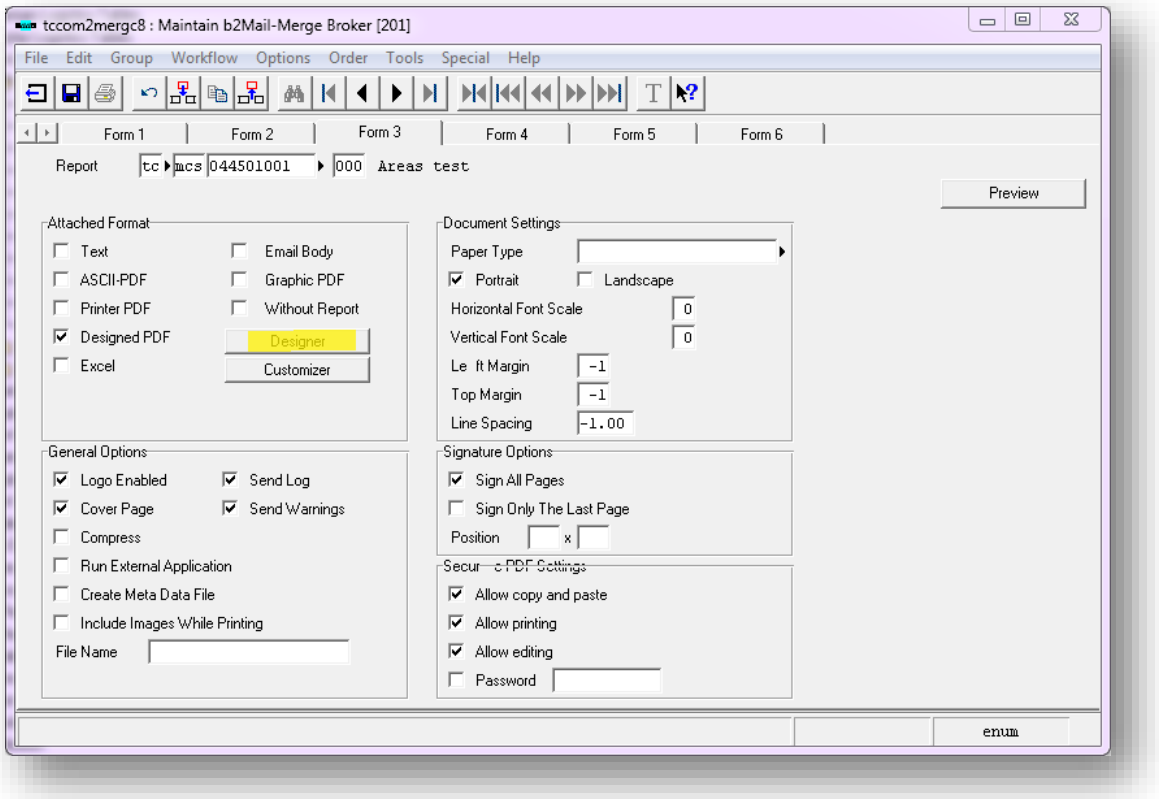


Next step is defining the "Format" of the sent document, Form 3 of tccom2mergc8:

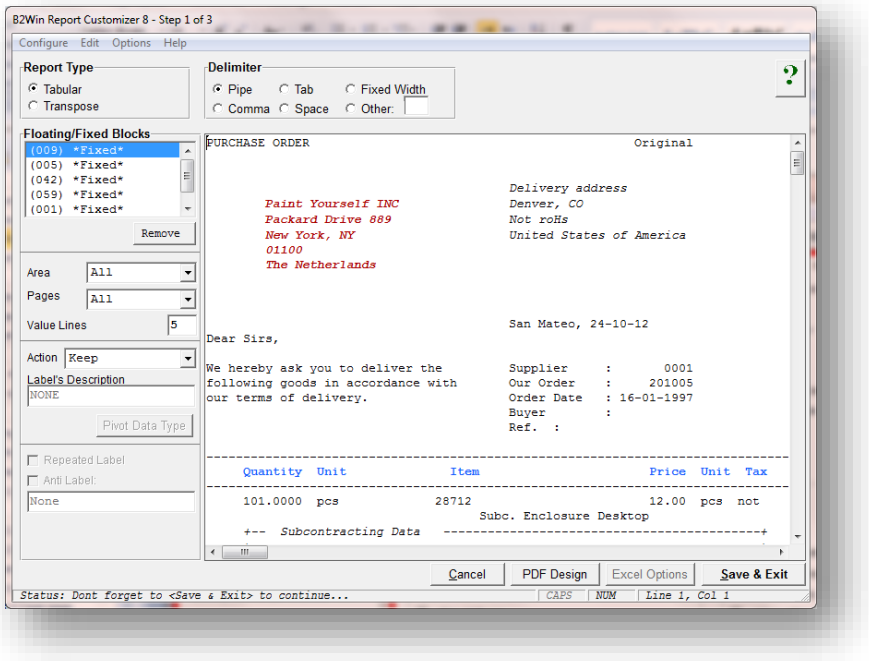
Check "Graphic PDF" option



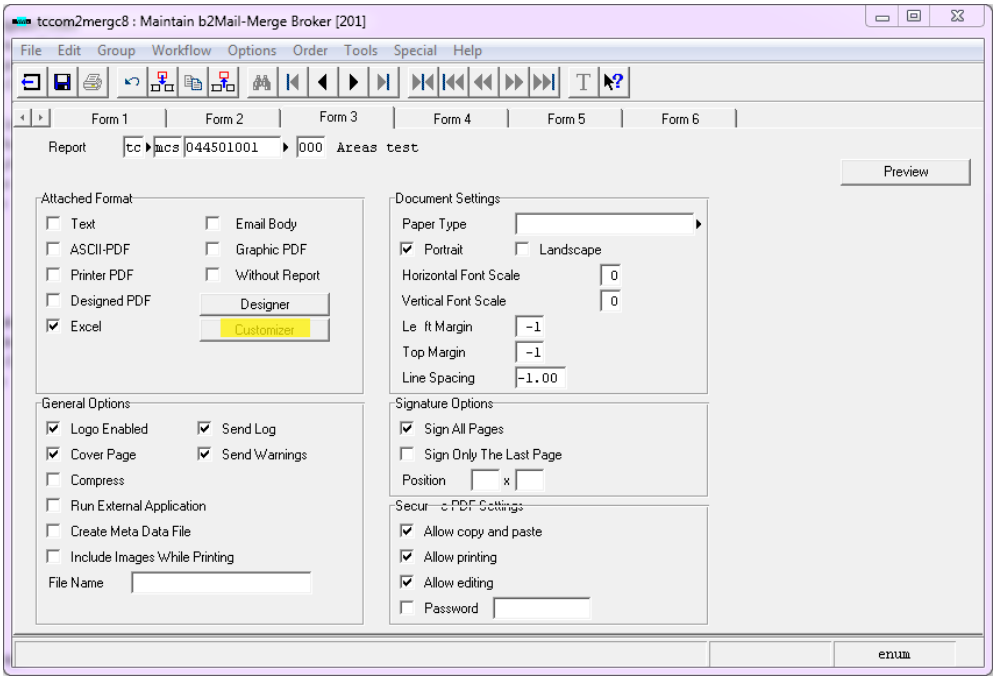
Choosing "Designer" option launches the Report Designer add-on (If it was licensed):



The **b2Diz - Report Designer** is launched for PDF design for that specific report:



Choosing "Customizer" option launches the Report Customizer add-on (If it was licensed):



Save and Exit. *b2Mail-Merge* is now ready for your first and basic run.

3 Document Settings

3.1 Introduction

A nice feature in *b2Mail-Merge* is the ability to parse output from Baan and generate documents in different graphic levels.

The following chapter will discuss the different graphic options and the methods to fine-tune it to best fit your needs.

The available formats in *b2Mail-Merge* are:

Text: The attachment is a text file

E-mail Body: The order/document produced becomes the mail-body of the e-mail being sent and is not sent as an attachment

ASCII-PDF: All characters in the PDF file are in the same size and type. Used for quick generation of PDF files.

Graphic PDF: If the document includes graphic information that come from Baan, like bold, italic and different font character size, you need to use this option. Fonts defined in Baan are picked and the PDF file generated looks very much like the printed file

Printer PDF: The PDF produced by this option is exactly the same as it comes from Baan. This is needed when the report has barcodes and special graphics, such as very large fonts or special characters. This extension uses a special printer that works through centralized installation on each Windows client using the product. You must license the *Barcode and Special Graphics Extension* for this.

Without Report: By choosing this option you will be able to send the email message without the report attached to it.

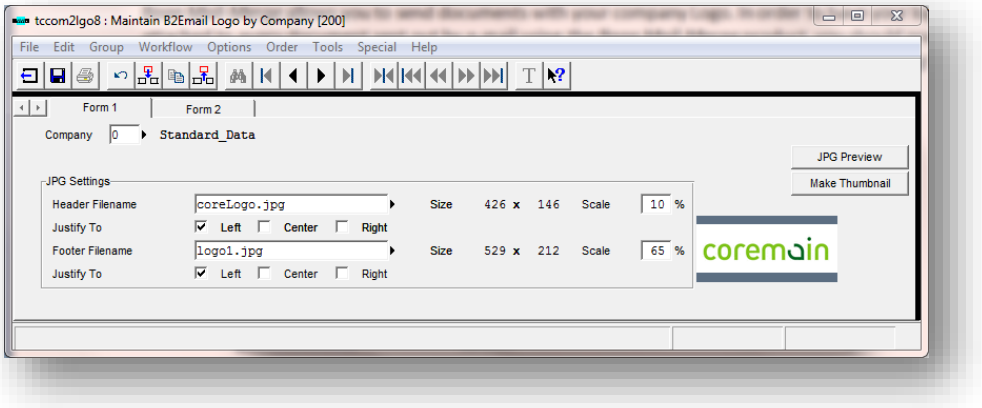
Designed PDF: If you are using the *NAZDAQ Report Designer*, you can produce PDF files with different font size, type and color, and can change and move text from the original layout. This is performed using a friendly wizard that makes report customization an easy and quick task. You must license the *NAZDAQ Report Designer* for this.

Excel: If you are using the Report Customizer, you can produce Excel sheet files, this is performed using a friendly wizard that makes report customization an easy and quick task. You must license the Report Customizer for this.

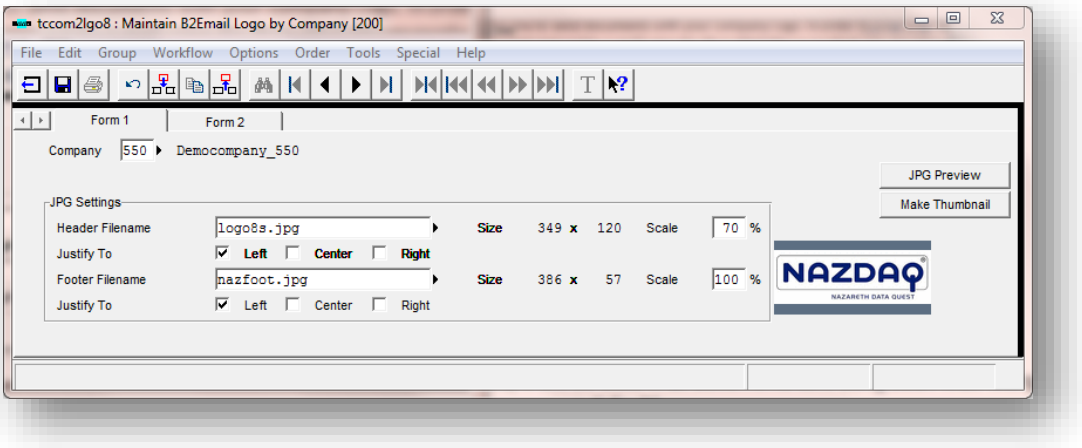
For all PDF options, you can include company logo, footer information, background image and signatures.
You can choose the format of the report from the *b2Mail-Merge* Broker (Form 3).

3.2 Maintain *B2Email* Company Header and Footer Logo

b2Mail-Merge allows you to send documents with your company Logo. In order to have your logo attached to every document sent out by e-mail using the *b2Mail-Merge* product, you should prepare two picture files in JPG format or **PDF** files .You can define them for use by *b2Mail-Merge* using the session *tccom2lgo8* as in the following example



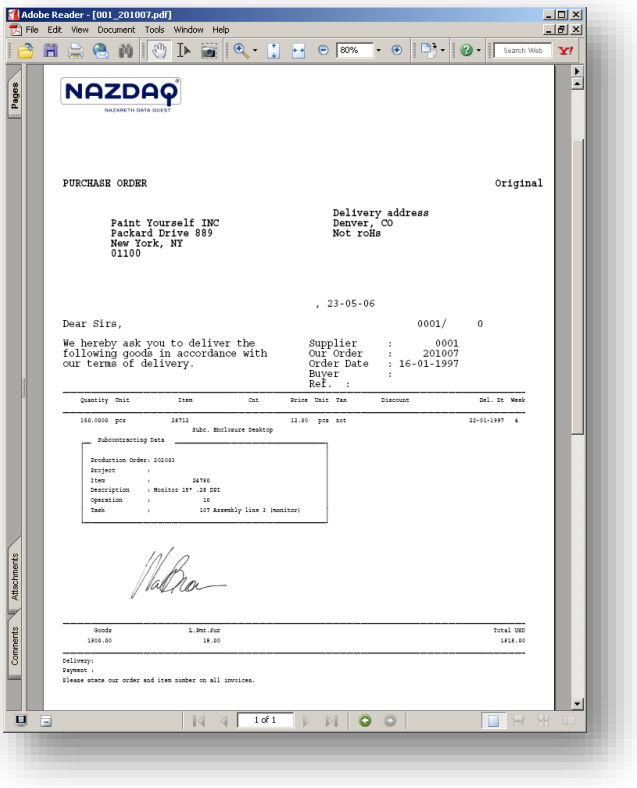
If you define the logo for company 000, it will be used in all documents sent using *b2Mail-Merge* (as a default).
If you want to define a different logo for each company, you must define an entry for each company in *tccom2lgo8* and create different picture:



In this session, you can define a virtual company that doesn't really exist, which starts with a letter (**GEO**, for example) for the sake of picking additional logos in *b2Mail-Merge* .

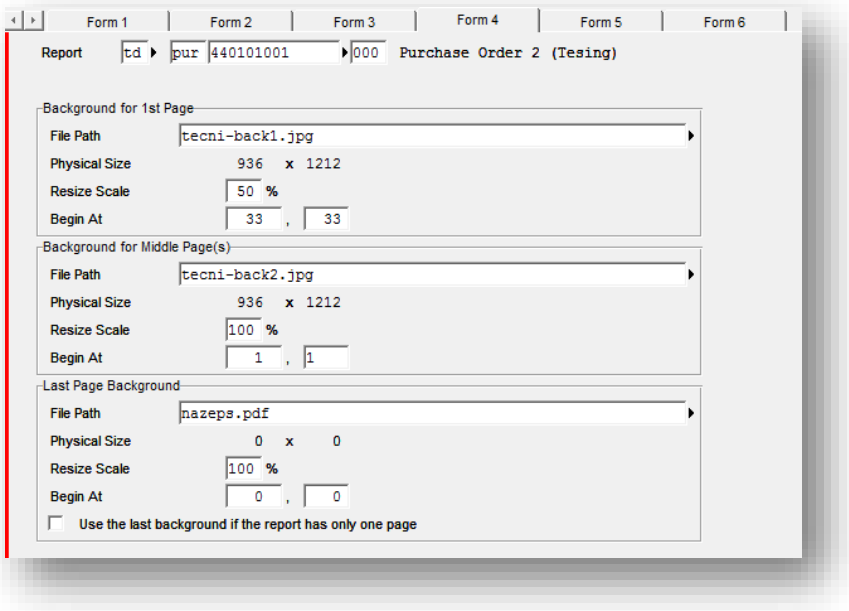
Logos per user are defined in *tccom2conf8* (Form 2)

The following is an example of using a header logo.



3.3 Defining Background

If you wish to use background forms to make your documents look more professional, you can design a form for the first page and another for the middle pages, and for the last page. You can use this session to define it, so that every document produced will have these pictures (JPG or PDF files) as a background



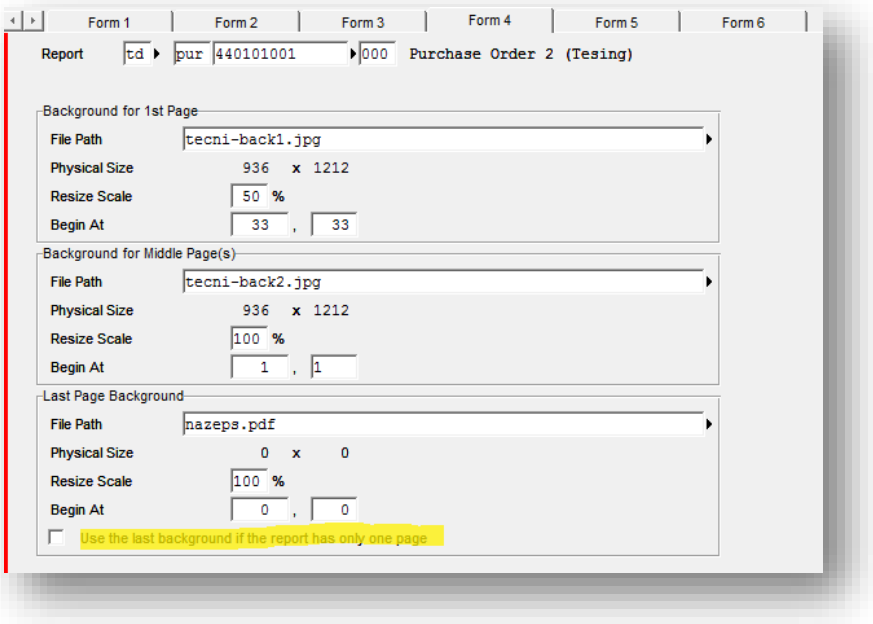
File Path
Use the zoom option to choose the file from your PC.

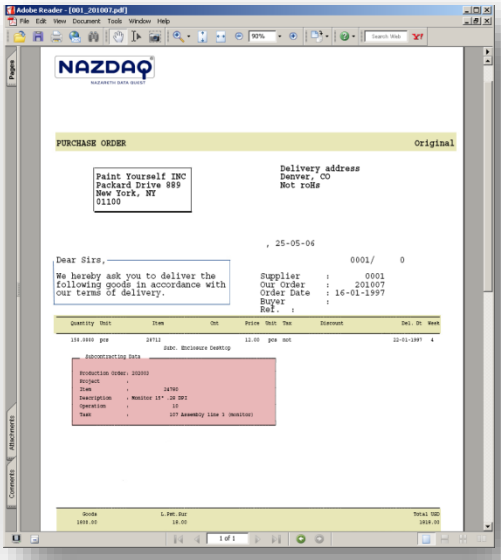
Physical Size
The actual size of the background file (in Pixels) using a Photo Editing package, you can check the physical X and Y values.

Resize Scale
This is the actual size of the produced pages.

Begin At
The location (in points) where we wish the background file to start.

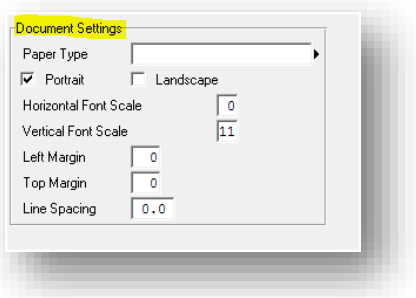
If you wish to choose the last page background as your primary background for your report first page, you can do this by checking the following check box:





Fonts, Orientation and Line Spacing:

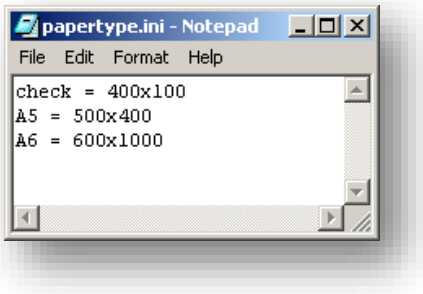
The vertical and horizontal font size and orientation are defined per report in the b2Mail-Merge Broker, form 3.



Font size: possible popular values are 7, 8, 9, 10, 12, and 14.
You can set the font and orientation for each report in the b2Mail-Merge broker (Form 3).
"1.0" is the default line spacing. "1.5" will increase the line spacing by 50%

Custom Paper Types:

You can define any paper type you want type besides the default (A4, A6. small checks, etc.)
Maintain all your paper types in $BSE/nazdaq8/settings/adm/papertype.ini



The default paper type for the *b2Mail-Merge* device is defined in the "Paper_Type" variable in b2Email.ini

You can set a paper type for each report in Form 7 of the b2Mail-Merge broker.

Margins (Applicable for PDF)

Fine-tune the top/left margins for a portrait document by changing "P_Top" and "P_Left" variables in b2email.ini.

Fine-tune the top/left margins for a landscape document by changing the "*L_Top*" and "*L_Left*" variables in b2email.ini.

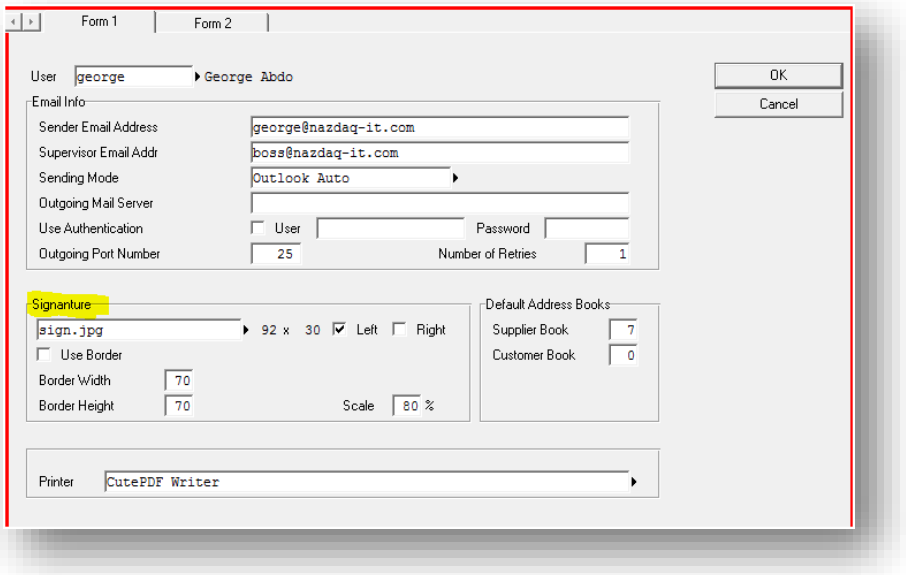
Fine-tune the header distance between the logo and the top of the page by changing "*Header_Dist*" variables in b2email.ini

Additional PDF Settings

There are additional PDF settings are available in *b2Mail-Merge* .

Signature Options (Form 7 of the *b2Mail-Merge* broker)**:**

Every user can set his signature from within tccom2conf8. Use the zoom option to select a JPG or PDF file from your PC. You can then scale the size of the image and set the location of the signature:



You can scale the signature file as you want, or, you can set a border for the signature to be in. For example, if you have a specific place for the signature to be in your report, the border will help you to resize your image signature according to the wanted size.

- Use Signature to sign documents.
- Sign only the last page of the document
- Define a specific position for the signature. The default is taken from ***tccom2conf8*** (Left/Right)

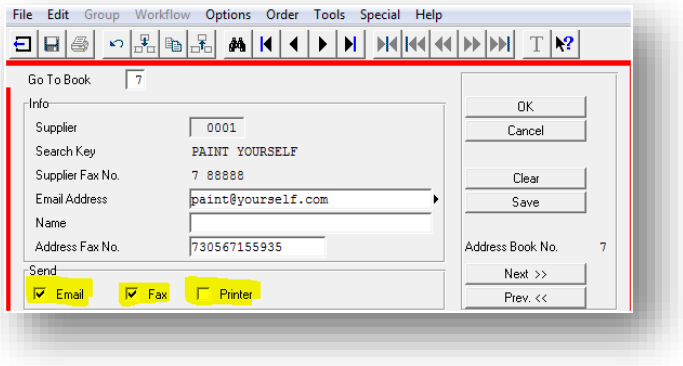
Secure PDF settings (Form 7 of the *b2Mail-Merge* broker)**:**

- You can forbid copy and paste text from the PDF
- You can forbid printing the PDF file
- You can forbid editing the PDF file even with Acrobat Writer
- You can lock the PDF file with a password

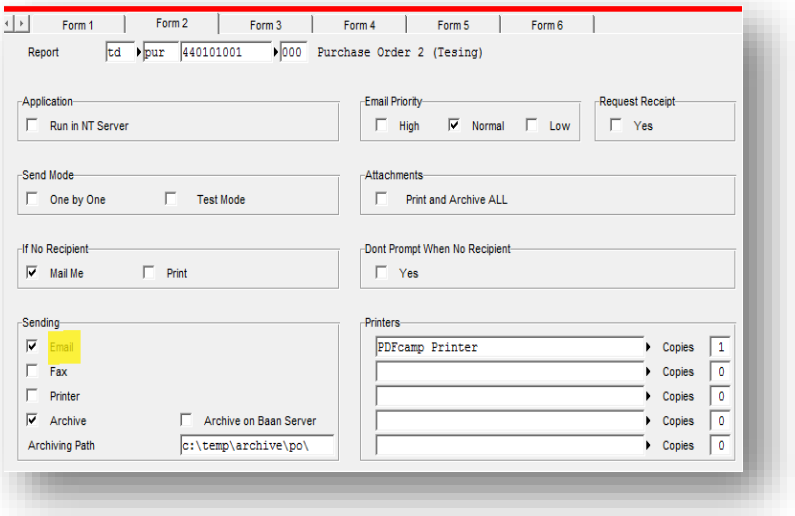
4 E-mailing, Faxing, Printing and Archiving

4.1 Introduction

You can send Baan documents to e-mail addresses, fax numbers, print or archive them. You can define your preference for each customer or supplier using *tccom2mains8* and *tccom2mainc8* sessions.



In the broker session *tccom2mergc8*, you define your world. When you check any option under "Sending", *b2Mail-Merge* device will pick what is defined in *tccom2mains8* or *tccom2mainc8* for this option. If you **do not check it**, *b2Mail-Merge* will totally ignore whatever is defined for the specific customer or supplier. As an example, if the “Fax” option is **unchecked** for the report in the broker, *b2Mail-Merge* will not send any faxes at all, even if certain business partners have the “Fax” option chosen.



Archiving is global and is defined per report and not for every customer or supplier. In this form, you can define the specific “Archiving Path” for this report. Subfolders will be created in case the path doesn’t exist.

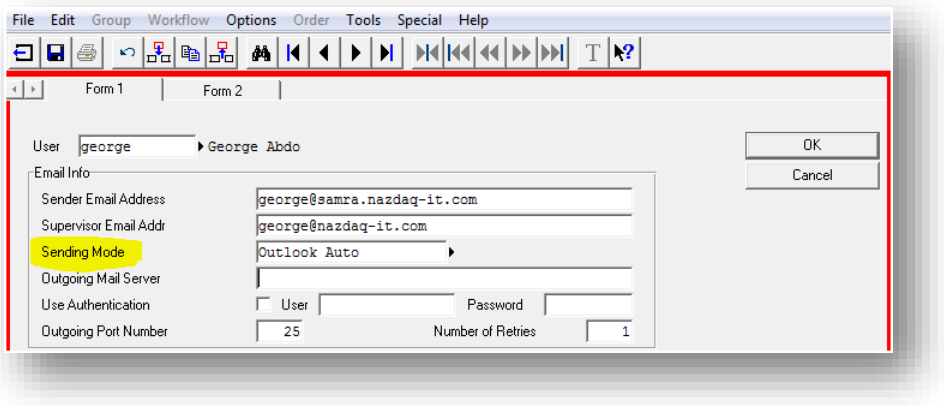
4.2 Emailing

There are several ways to send an e-mail via *b2Mail-Merge.*

4.2.1 Sending Modes

1) **SMTP**: SMTP freeware mailers "blat" from the local PC or a windows server
2) **Outlook Auto**: E-mail sent with MS Outlook API using MS Outlook
3) **Outlook Open**: MS Outlook is launched with all information coming from Baan, and the user can interactively choose more e-mail options and then send the e-mail message from within MS Outlook
4) **Lotus Auto**: E-mail sent with Lotus Notes using Lotus API
5) **Lotus Open**: Lotus Notes is launched with all information coming from Baan, and the user can interactively choose more e-mail options and then send the e-mail message from within Lotus Notes

You can set the default way by setting the b2email.ini *Default_Sending_Mode* variable. You can set the sending mode for each user by using the *tccom2conf8* session:



Supervisor E-mail Address:
This is the e-mail address that the output will be sent to when you press on "Mail My Boss" button in the *b2Mail-Merge* user interface

If you are using SMTP, you should fill the following fields:

Sender E-mail Address
This is the e-mail address that will appear in the "From Field" for e-mails sent out of *b2Mail-Merge .*

Outgoing Mail Server
Outgoing server is needed if you are using SMTP. It is the SMTP server in your organization that allows e-mails to be sent to the outside world. If you are using Exchange, use the IP address of the exchange server.

If your mail server requires authentication, add the user/password information as in the above example.

Outgoing Port Number:
This is the port that your mail server uses in order to send e-mails. The most common port is 25. It applies for SMTP mode only.

Number of Retries:
This is the number of times you want *b2Mail-Merge* to try to send an e-mail if it fails in the first time. If you have a good connection to the Internet or your exchange server, the recommended number is 1

Additional e-mail options are available such as “E-mail Priority” and “Request Receipt” that can be defined from the *b2Mail-Merge* Broker (form 2).

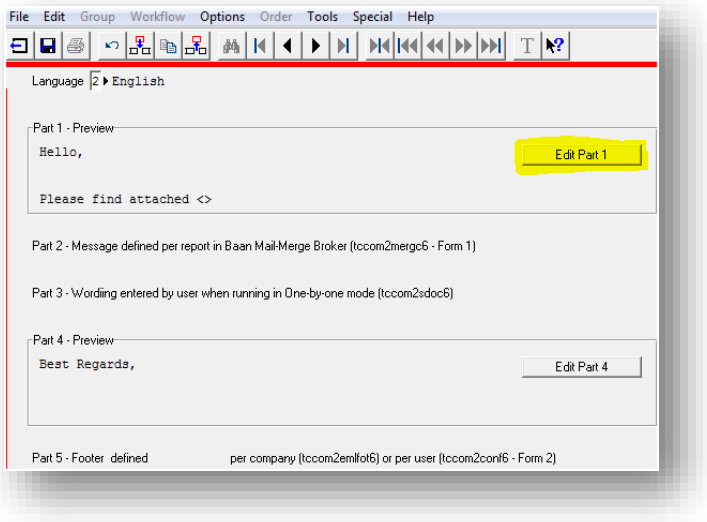
The e-mail attachments can be compressed (zipped) and sent as one file. You can do so by checking the compress option in the *b2Mail-Merge* Broker (Form 3).

If *b2Mail-Merge* did not find an e-mail address, you can choose to print or e-mail the report to yourself, by checking the “If no recipient” check boxes in the *b2Mail-Merge* Broker (Form 2). You can also choose to auto run this specific document (Ex: order) in one by one mode, and go to the next one by clicking “Don’t Prompt When No Recipient” in Form 2 of the broker.

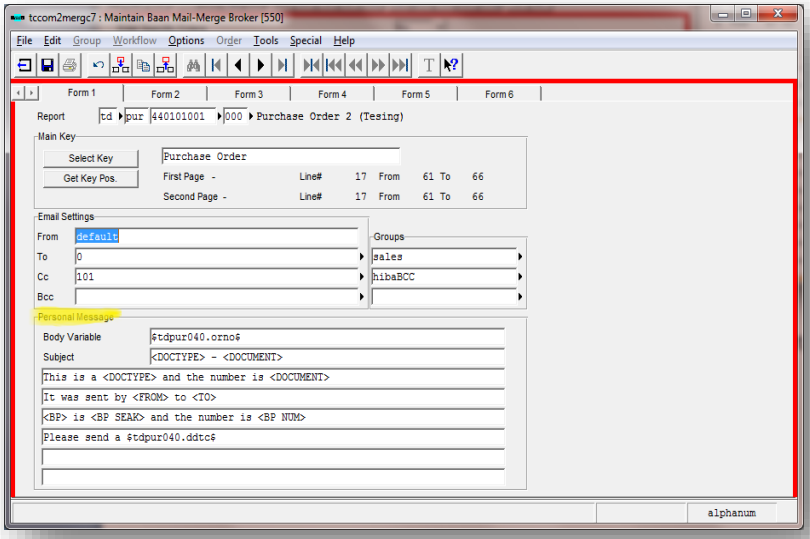
Email Message

An easier interface for handling the *b2Mail-Merge* e-mail body is now available. The e-mail message is compromised from five parts:

Part 1: Handled by new session *tccom2mmmsg8* and is defined per Baan language



Part 2: Defined in *b2Mail-Merge* broker (Form 1).



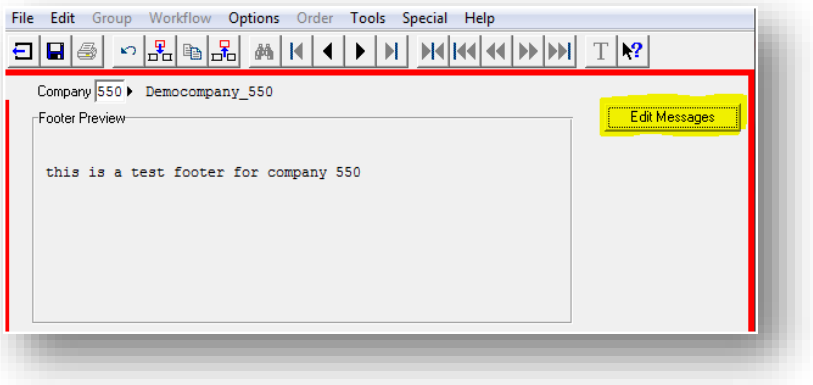
The subject is defined per report. If you did not define a subject, it will take the report description and use it as a subject.
You can use the predefined variables in the personal message. For more information please read the **Variables** chapter.

The “Body Variable” field will replace the “<>” signs in tccom2mmmsg8 text.
Baan Labels can also be used in the message. You need to put them between “$” signs

Part 3: Written by the user while running in One-By-One mode

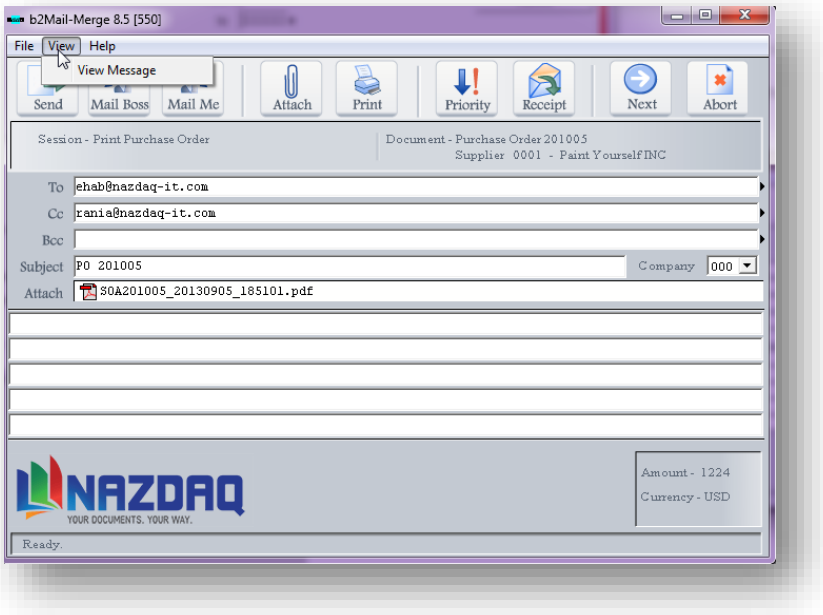
Part 4: Handled by new session tccom2mmmsg8 – the same as in part 1

Part 5: Footer - Defined per company (tccom2emlfot8) or per user (tccom2conf8 – Form 2):



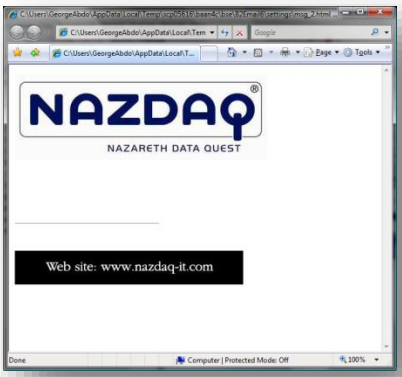
If you want to remove the footer totally, you can set the “*Email_Footer*” ini variable to “No”.

You can preview message after definition of the 5 parts before sending it in the email by using the option view message here:



4.2.2 HTML Message

The e-mail can be sent as HTML along with formatting and images that you define. In order to do so, you will have to prepare an HTML file and name it msg_<language>.html, design it as you like and save it under $BSE/nazdaq8/settings/msg.



In the HTML file you can use the following tags that will be replaced by text from *b2Mail-Merge* :

<nazpart1> - Text from part 1 (tccom2mmmsg8)
<nazpart2> - Text from part 2 (The *b2Mail-Merge* Broker – tccom2mergc8 - message)
<nazpart3> - Text from part 3 the user interface
<nazpart4> - Text from part 4 (tccom2mmmsg8)
<nazpart5> - Text from part 5 (tccom2emlfot8)
<nazbody> - If the format chosen for this report was “body”, then this will be the text in the report itself.
Example of HTML code using the message tags:

```
<HTML>
<BODY>
<img src="http://www.nazdaq-it.com/embed/nazlogo.jpg" border="0" alt="NAZDAQ LTD.">
<b>
<FONT FACE="arial">
<BR>
<BR>
<nazpart1>
<BR>
<nazpart2>
<BR>
<nazpart3>
<BR>
<nazpart4>
<BR>
<HR align=left width="40%" SIZE=2>
<BR>
<nazpart5>
```

```
<BR>
</FONT>
</b>
<img src="http://www.nazdaq-it.com/embed/nazfoot.jpg" border="0" alt="NAZDAQ LTD.">
</BODY></HTML>
```

4.3 Faxing

4.3.1 Integration with fax servers

b2Mail-Merge allows you to fax documents out of Baan while integrating with one of the following fax servers.

1. Internet Faxing
2. RightFax - www.captaris.com
3. Fax Maker - www.gfi.com
4. Ferrari-Fax - www.ferrari-electronic.de
5. Zeta-Fax - www.equisys.com
6. Mrs-System – www.cycos.com

Following is an example on how to setup your fax with Internet Fax.

You do not need to have a fax server installed in order to send faxes from *b2Mail-Merge.* You get an account with one of the ASP companies that turn e-mails to faxes.

Therefore, when they send an e-mail to 123456789@faxaspcompany.com a fax will be sent to 123456789

The domain of the fax company should be defined in the variable "*Fax_ASP*" in b2email.ini as the following:

Fax_ASP = @fax.tc

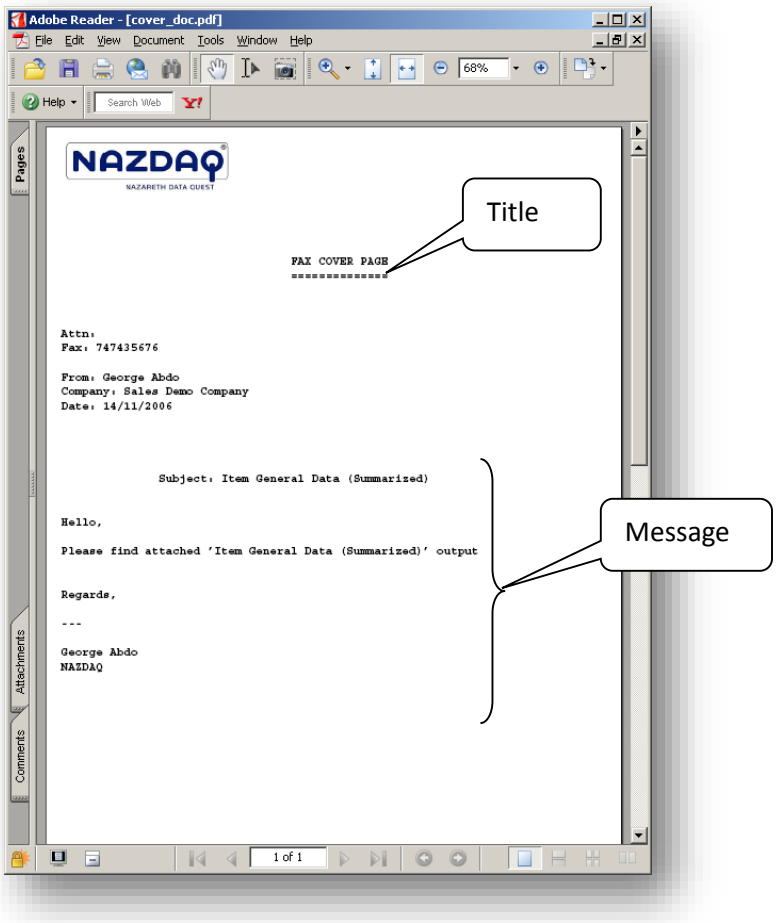
If your fax server needs a prefix you can use the *Inter_Prefix* ini variable to set you prefix which will come before the actual fax number.

If you are interested in Internet faxing, please contact NAZDAQ to receive good rates for you.

You can send the faxes without including the email message. To do so, you will have to set the "*No_Fax_Msg*" b2email.ini variable to "yes". Then email and fax will be sent separately.

4.3.2 Cover page

b2Mail-Merge can generate a cover page for the fax. It looks like this:



You can customize it for your language or remove some of the details on it.

To do so you will have to edit the file: **words_<language>.dat** that is saved under:
$BSE/nazdaq8/settings/adm

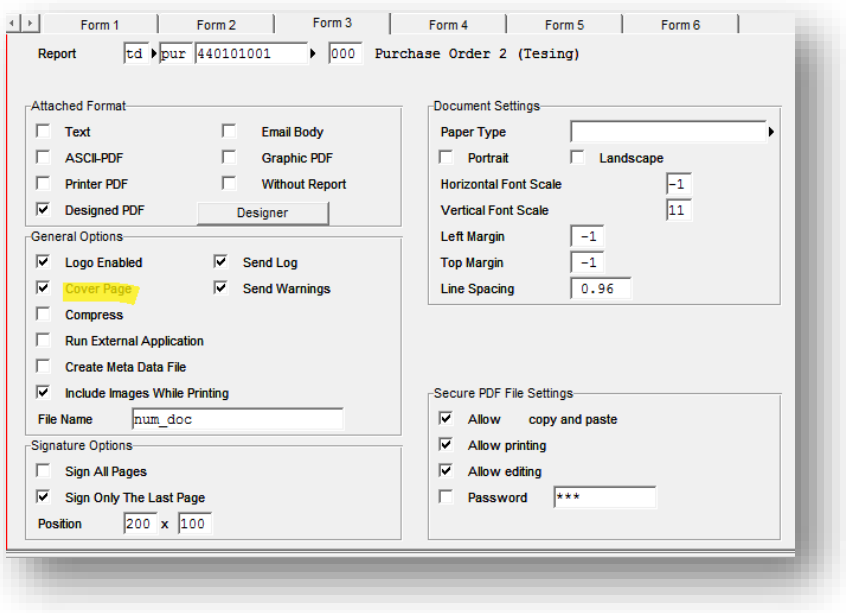
This file should contain the original words in English; you can translate it to your language or remove the line from the cover page.

Here is an example:

Title = MY FAX COVER PAGE
Attn = My Attn
Fax = None
Subject = My Subject
From = My From
Company = My Company
Date = My Date
Message = Yes/No

If any of the above variables had "**None**" then the line will be removed from the Cover Page

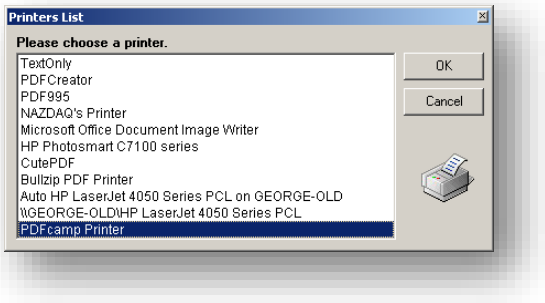
If you want to add a cover page check that option in Form 3 in the *b2Mail-Merge* broker.



4.4 Printing

b2Mail-Merge can print on the windows default printer. Moreover, every user can have their own "*b2Mail-Merge"* Default Printer" (defined in *tccom2conf8*).

In the One-By-One interface you can also choose a printer interactively from the list of printers.



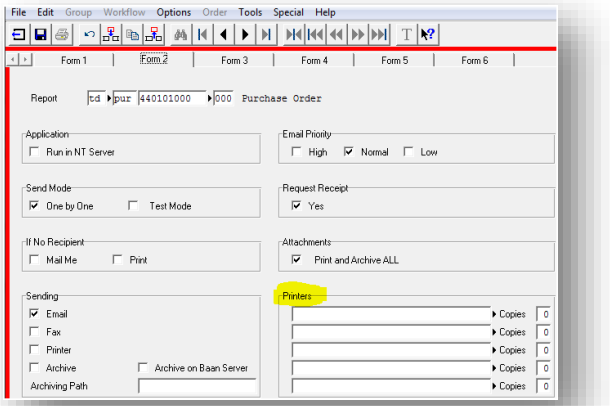
UNIX Printing

b2Mail-Merge (sendmail mode) can print to a UNIX printer. By default, it will print on the UNIX default printer. If you have set the *b2Mail-Merge* default printer as another UNIX printer, *b2Mail-Merge* will print to it.

In order to print in sendmail mode, you will have to define your PS converter. Write the full path in the tag *PDF2PS* b2mail.ini variable

Printer per Report

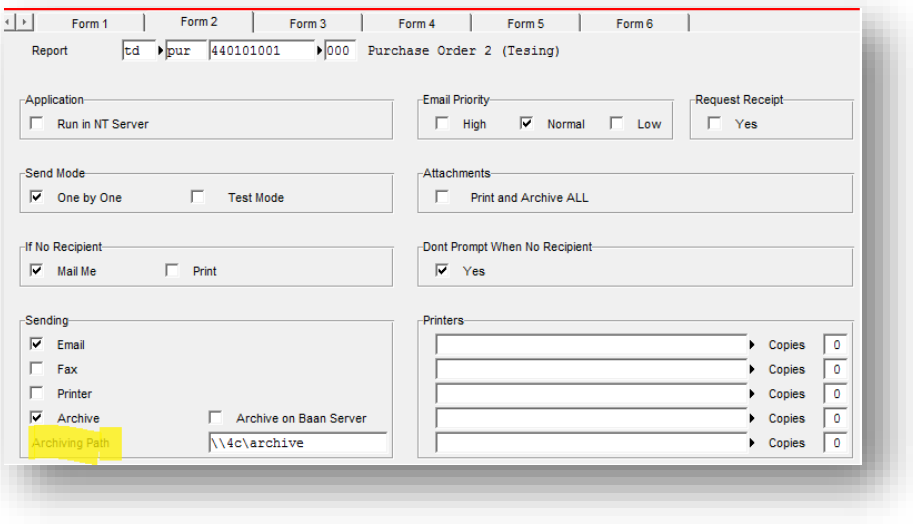
You can zoom and choose the printer you want a specific report to be printed on with the number of copies in the *b2Mail-Merge* broker (Form 2). If you did not specify any printer name in tccom2mergc8 then the printer will be taken from tccom2conf8 for the user. If it is not specified in tccom2conf8 then it will print on the system's default printer.



If you are printing on a watermarked paper, you can remove the images that *b2Mail-Merge* added to the e-mail and archived file by un-checking the "Include images while printing" in the *b2Mail-Merge* broker (Form3).

4.5 Archiving

b2Mail-Merge will send a copy of the PDF file (Purchase Order, Sale Order…) to the archiving directory that will be created under the "Archiving Path" as defined in the broker (Form 2).



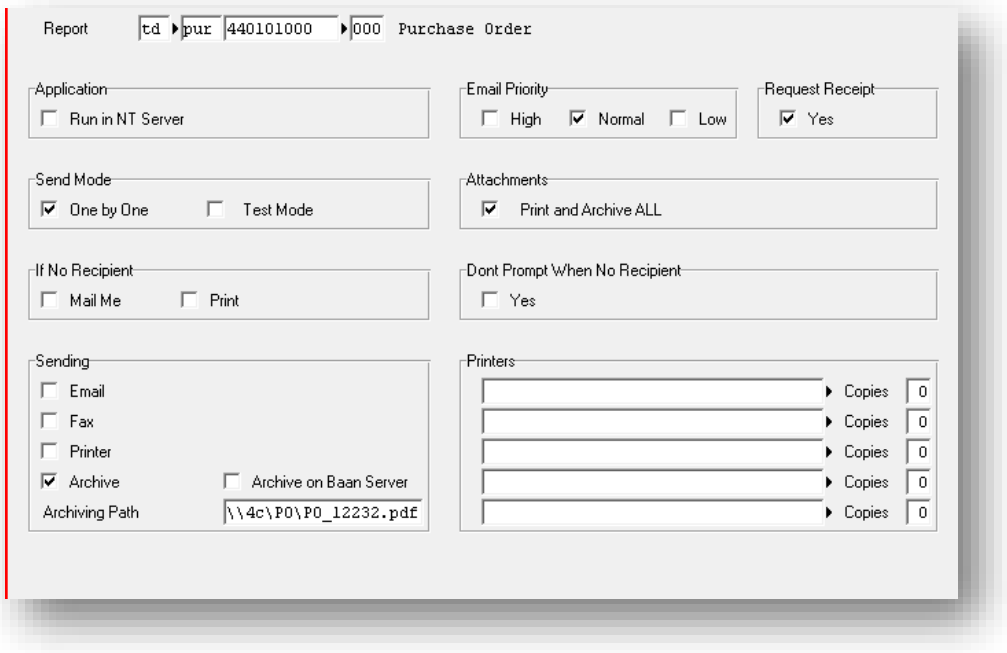
For example if you are merging Purchase Orders, all sent purchase orders will be copied to <path>\PurchaseOrder. All subfolder that don't exist in the archive path will be created automatically.

This is useful for making a data warehouse for the purchase Orders. You can use NAZDAQ's "*Baan Hot Link*" to access files in this data warehouse from within any Baan session. Refer to www.nazdaq-it.com for details about this product.

You can use pre-defined variables in the path name. Please review the **Variables** chapter for more information about variables that can be used.

4.6 Append files

b2Mail-Merge will append all of the PDF files (Purchase Order, Sale Order…) to one PDF file. Once the PDF filename with full path defined under "Archiving Path" as defined in the broker (*tccom2mergc8*).



4.7 Logging

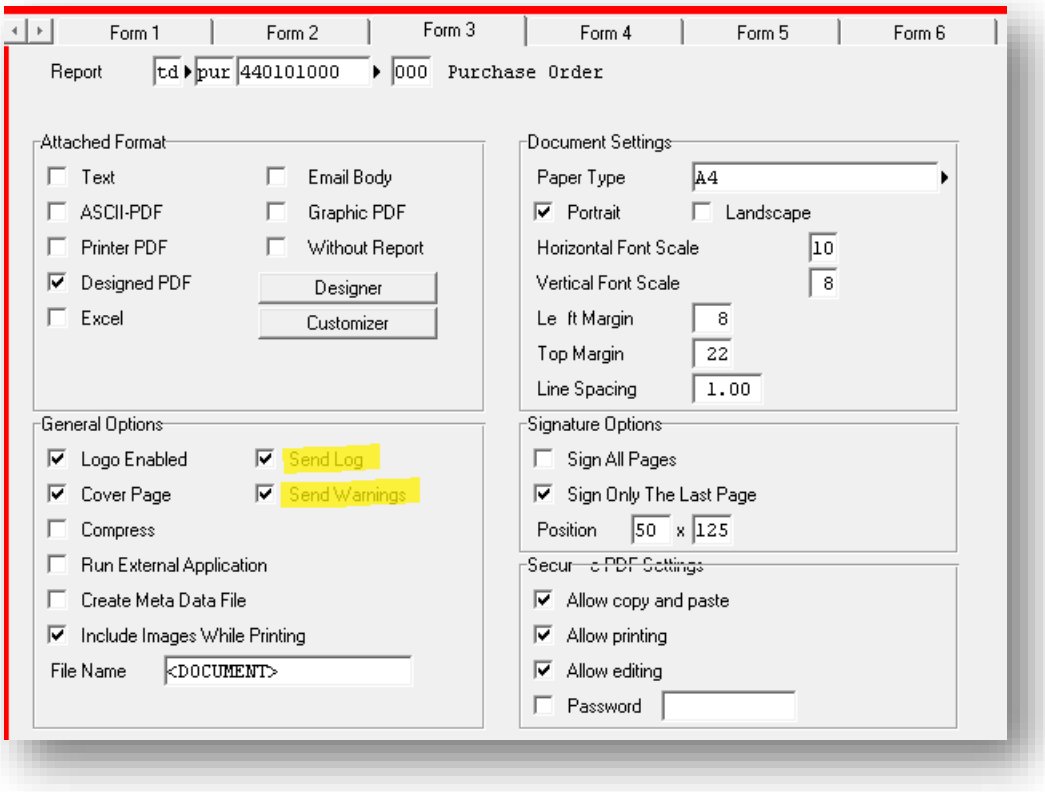
$BSE/nazdaq8/settings/adm/B2Email.log is the file that stores messages sent from b2Mail-Merge *in all runs (can be trimmed from time to time).*

tccom2dislog8

This session allows users to view e-mails they sent using *b2Mail-Merge* sorted from the last e-mail sent and back.
It is helpful to have this session available for users, so they can review e-mails they sent. It serves like checking the sent_items folder.

Sending the Log via E-mail

An e-mail can be sent to the sender after each *b2Mail-Merge* run with the full log of that run by checking the send log check box in the *b2Mail-Merge* Broker:

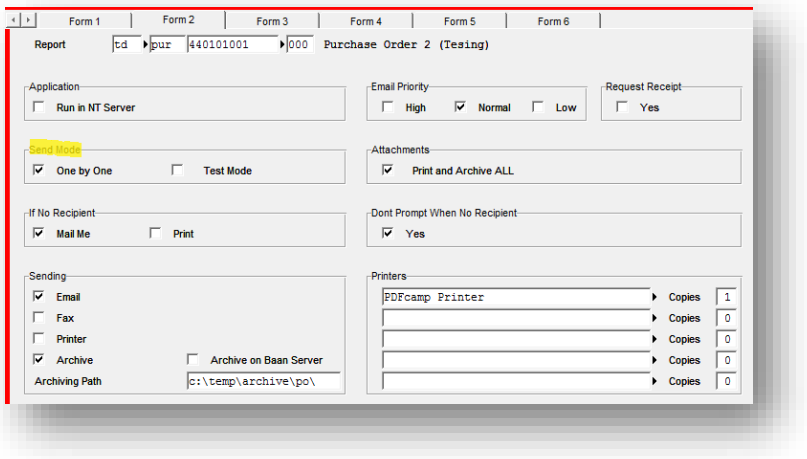


Warnings about attachments that were supposed to be in the email and were not found can also be sent in the log by checking the “send warning” check box.

If you do not wish to see the path of the attachments in the log, you can hide them by changing the value of *Hide_Path_in_Log* b2email.ini variable to Yes**.**

Run Mode

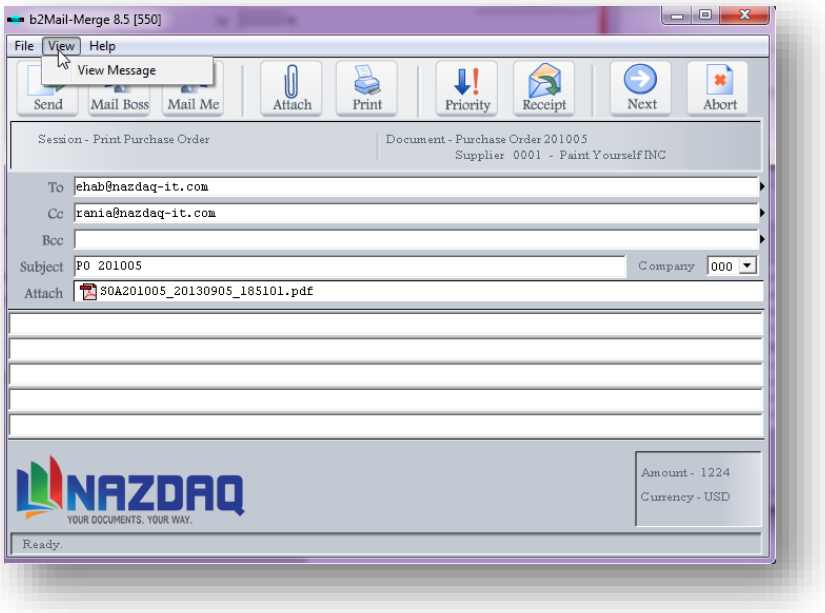
b2Mail-Merge can run in different modes. You can set the mode in the *b2Mail-Merge* Broker (Form 2).



4.8 Send mode

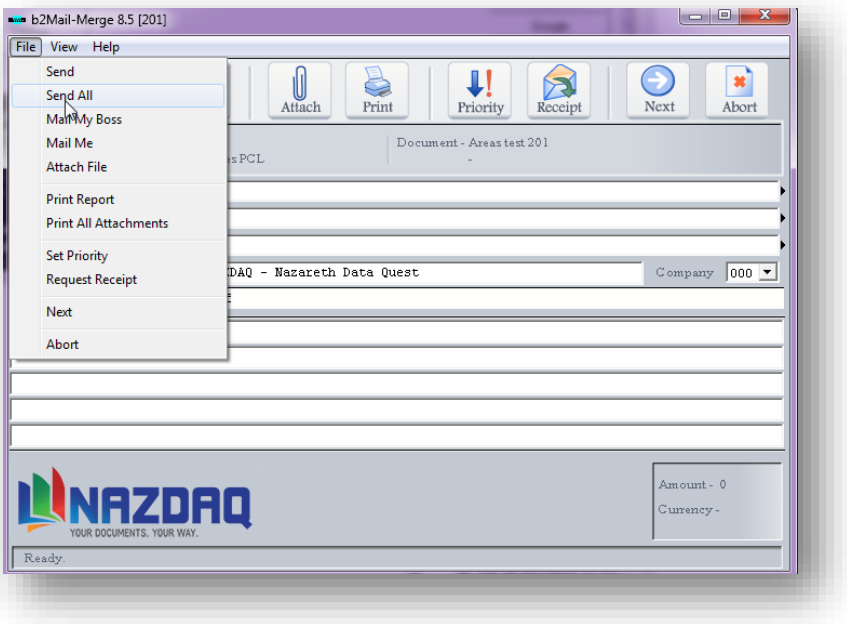
- Run in “Test Mode” if you want documents to be sent to the user that is defined in tccom2conf8 instead of sending it to the e-mail addresses defined in the system. This is good when you are still in the test-drive mode.

- If the “One-By-One” option is **NOT** checked, all documents will be automatically e-mailed/faxed or printed. If the “One-by-One” option **IS** checked, you will get the following screen before sending each document.

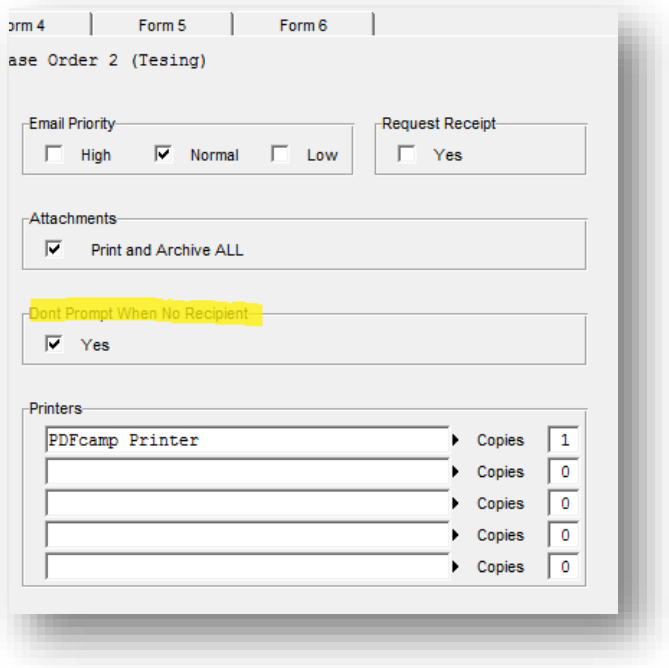


- You can manually change the e-mail address or fax number that the system found for you
- You can also use CC or BCC to send the document to additional people
- A customized e-mail body can be sent in addition to the standard email message. In case you send a fax, the customized message will appear as the cover page
- If you choose “Next”, document won’t be sent, and the system will continue to the next document.
- You can send the document to yourself by clicking “Mail Me”
- You can send the document to your Supervisor (e-mail address defined in tccom2conf8
- You can print the document before you send it
- You can “Preview” the document before you send it by double clicking the attachment
- You can attach documents manually (Does not cancel the fact that some documents may be attached automatically as per the definition in tccom2mergc8)
- You can “abort” the run and no more documents will be sent in this run
- Amount and Currency appear so that the buyer can see it before sending (defined in tccom2mergc8 session – Form4)
- You can change the priority of the e-mail
- You can ask for an e-mail receipt
- You can print the report with/without the attachments
- You can choose any company logo. If the company was not defined company 000 logo will be used

- You can send all remaining messages automatically instead of one by one mode

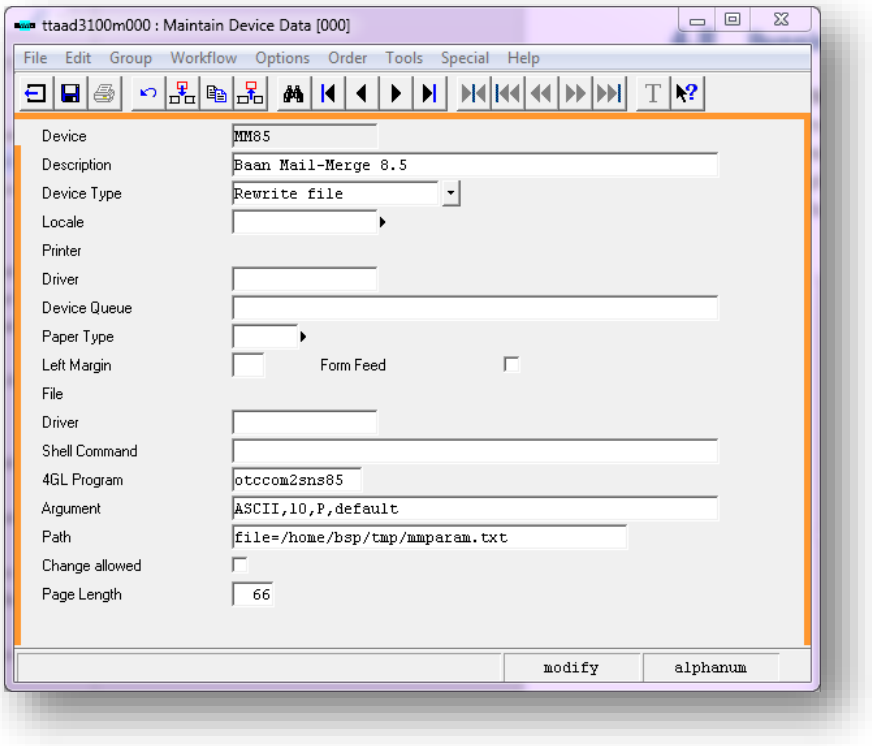


- You can send the email without a report attached
- You can run all actions automatically (those were pre-defined) when you press on send button (in one by one mode) even when no recipient specified
- “Don’t prompt when no recipient” is an option to prevent one by one prompting for those messages that has no recipient in them specified



4.9 Running *b2Mail-Merge* with Different Parameters

You can run *b2Mail-Merge* with different parameters than the ones defined in tccom2mergc8 (Form 2-3). These parameters should be written in a file (saved on the Baan server) and the file path should be given to the device after the language argument (if you are not using any special language put “default” as in the example). The parameters defined in the device will **overwrite** settings in *tccom2mergc8*.
The following is an example:



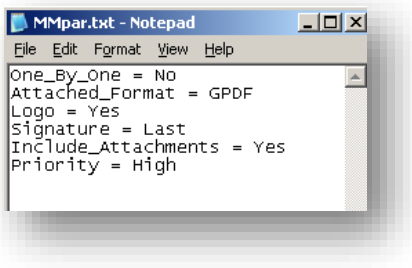
Here is the list of the possible parameters that should be in the parameters file. If one or more parameters were not mentioned in this file the default value will be taken from *tccom2mergc8*.

Encoding = <The encoding of the Baan output>
Company = <Company number>
You can also run a report to the *b2Mail-Merge* device with parameters and definitions from a different company
User_Name = <User ID>
b2Mail-Merge allows the user to run the program using all the properties of a different user. This can be useful when running jobs using a special user designated for nightly jobs, while we need the properties of a real user for logo, background, signature and also sending in their name.
The rest o the parameters are the same as the ones in the b2Mail-Merge Broker.

NT_Mode = Yes\No
One_By_One = Yes\No
Attached_Format = APDF\GPDF\TXT
Logo = Yes\No
Cover_Page = Yes\No
Run_External_App = Yes\No
Send_Log = Yes\No

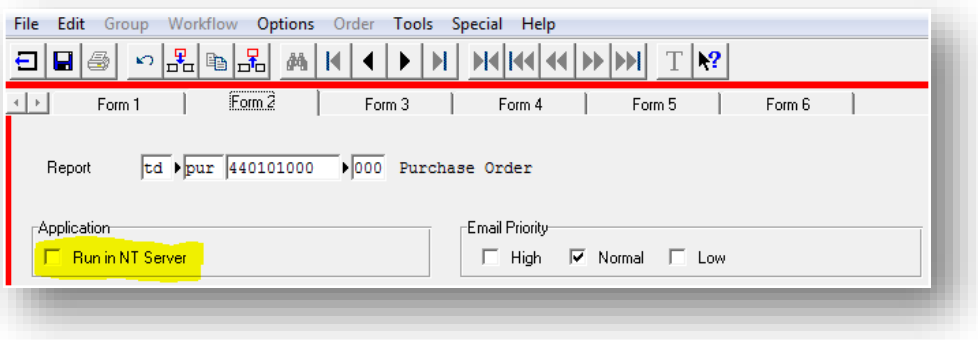
Zipped = Yes\No
File_Name =
Enable_Email = Yes\No
Enable_Fax = Yes\No
Enable_Print = Yes\No
Enable_Archiving = Yes\No
Archiving_Path =
Mail_Me_If_No_Recipient = Yes\No
Print_If_No_Recipient = Yes\No
Signature = All\Last\No
Sign1_Position = 100x150
Allow_Copy_Paste = Yes\No
Allow_Edit = Yes\No
Allow_Print = Yes\No
Allow_Password = Yes\No
PDFPassword =
Allow_Staging = Yes\No
Staging_Dir =
Sign2_Position = 100x150
Include_Attachments = Yes\No
Priority = Low\High\Normal
RequestReceipt = Yes\No
Run_In_Cron = Yes\No
Orientation = Portrait / Landscape
Horizontal_Font_Scale =
Vertical_Font_Scale =

Example:



4.10 Running b2Mail-Merge in NT Mode

If your Baan is on Windows, you can send the e-mail through the Baan server itself and not through the user's PC. You can do so by checking the "Run in NT Server" option in the *b2Mail-Merge* Broker (Form 2)



b2Mail-Merge will copy only the necessary files to the user's PC and will perform most of the merging on the Baan server, which is much faster.

If you are sending through Outlook/Lotus you will have to make sure that:

1) The e-mail application (Outlook/Lotus) is installed on the server.
2) You are sending in "Auto" mode and not in "Open" mode. For more information review the e-mailing chapter.

Do not check the "Run in NT Server" option if your Baan is on UNIX.

5 Keys and Addresses

5.1 Introduction

b2Mail-Merge *Keys and **Address books** are the basis for getting the* b2Mail-Merge *product to function. Keys are needed for parsing the output into individual documents, recognizing the business partners and the address book is needed in order to match each business partner with an E-mail or Fax number.*

Possible Values for the key are:

Purchase Order (Used in Purchase Order output or other Purchasing Reports)
Purchase Inquiry (Used in Purchase Inquiry output and others)
Sales Order (Used in Sales Order Acknowledgement and other Sales Reports)
Sales Invoice with Tran Type (Combination of Transaction Type/Sales Invoice)
Sales Invoice without Tran Type (Invoice number only. No Transaction Type)
Service Invoice with Tran Type (Combination of Transaction Type/Service Invoice)
Service Invoice without Tran Type (Invoice number only. No Transaction Type)
Replenishment Order (E-mail/Fax will be sent to the associated warehouse)
Sales Quotation (Sales Quotation)
Packing Slip (Packing Slip Document)
Customer (Any customer related output)
Supplier (Any Supplier Related output)
Employee (Any Employee Related output)
Email (This value is used when the explicit e-mail address itself is in the report)
General (This will merge the reports according to the selected value but won't send e-mails)

Note: Other values can be added. Please contact NAZDAQ if you wish to Mail-Merge a different document.

5.2 Customer Books, Supplier Books

Reports are linked with Supplier or Customer Address Books. If you like output from a certain report to go to more than one address book (As an example, to send purchase orders to the supplier and the buyer address books), use a comma to separate between the address books needed (Like in the example below).

Possible options for address books are 0-102, u, m, r, s, b.

- "u" will pick the address book defined in tccom2conf8. This enables a different address book per user.

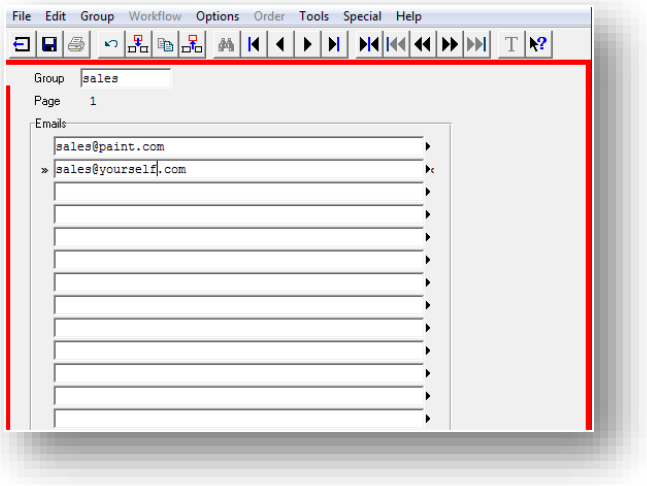
- *"m" will send the e-mail to the user himself. It brings it from tccom2conf8.*
- "r" is for Representative. You can send Sales Rep (for Sales) or Buyer (for Purchase). It brings the e-mail address from the employee table.
- "s" is for Supervisor. It brings it from tccom2conf8.
- "w" is for bringing the address from the warehouse session (tccom2mainw8)
- Other values "100","101"and"102" that will be explained in the Addresses Chapter.

All the above can be zoomed to from tccom2mergc8. The zoom session reads a file called mergcadrsbooks.dat that is saved under $BSE/nazdaq8/settings/abk. You can edit that file to add, edit or remove address book from the zoom session.

Also there is an option to define additional fixed people & groups to send or BCC/CC e-mail.

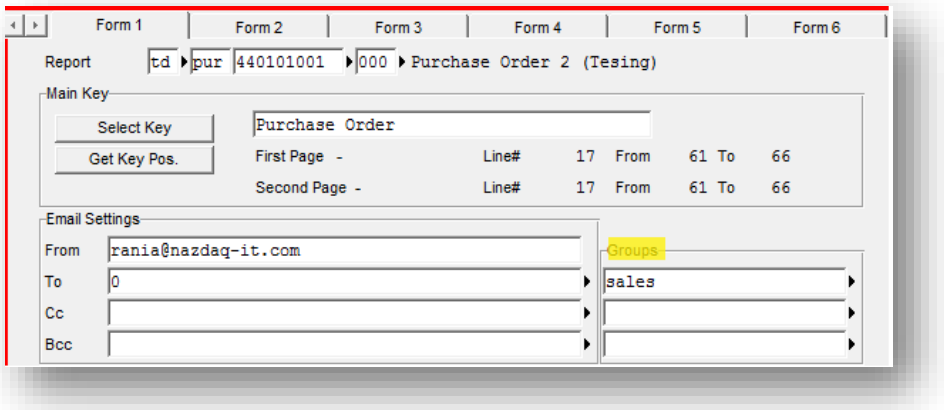
5.3 Sending to Groups

b2Mail-Merge allows you to send documents to a group of people. Insert a new group in tccom2group6 and fill the e-mails



Use the standard Baan toolbar to insert/delete e-mails to a group, Browse between pages in the same group or browse between groups. In order to delete a group you will have to delete all the e-mails in it then click on the delete button.

When the groups are saved you can send the report to that group by defining it in the group fields as in the following example:

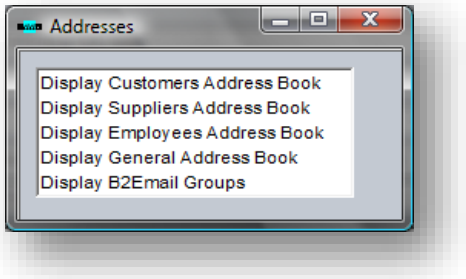


However, if you wish to use your Outlook groups, you should set the “Use_B2E_Groups” b2email.ini variable to “No”.

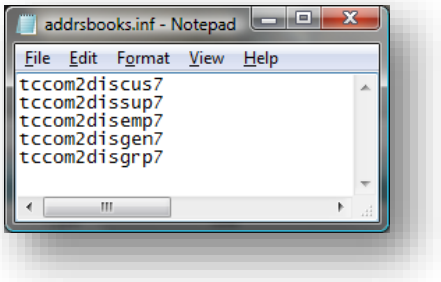
5.4 Maintain b2Mail-Merge Addresses

5.4.1 Introduction

From within *b2Mail-Merge* user interface, you can zoom to get an e-mail from up to 10 sessions:

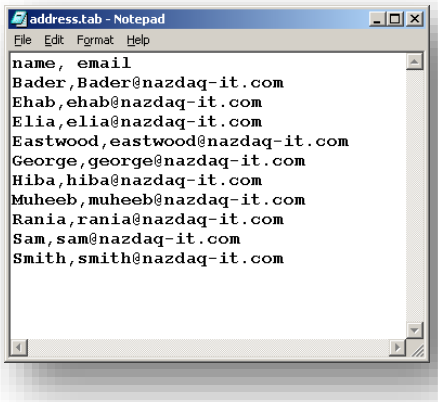


You can maintain the session names you want to zoom to in addrsbooks.inf - saved under $BSE/nazdaq8/settings/abk:

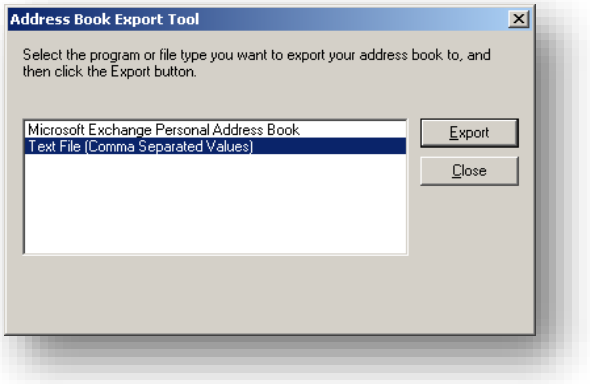


5.4.2 General Address Book

In order to create a global address book for *b2Mail-Merge* , a comma delimited address book with user name and e-mail address needs to be created; the first line in this file should be “name, e-mail”.
The following is an example of such file:



A good way to create such file is by exporting the address book from outlook, outlook express or lotus notes as in the following example (Outlook Express example)



Once address file is ready it should be saved as **address.tab** under ${BSE}/nazdaq8/settings/abk

5.4.3 Supplier Address Books

b2Mail-Merge supports up-to 100 supplier address books (from 0 to 99). This will enable different departments like Accounts Payable and Purchasing to have separate Supplier E-mail and Fax Address Books.

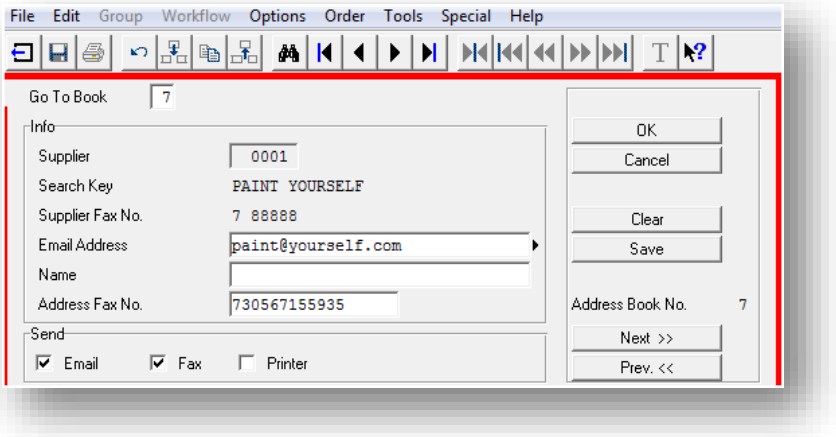
To maintain the Supplier Address Book, you can create a tab-delimited file in the following format:

1) Supplier Code
2) Name of Contact Person
3) E-mail of Contact Person
4) Fax Number of Contact Person (In case it is different from the default Fax Number in the Supplier Master Data)

The file created for Address Book 0 should be saved under $BSE/nazdaq8/settings/abk as supp<company name>.tab (example is supp550.tab for company 550)

File for Address Books between 1 and 99 will be saved under $BSE/nazdaq8/settings/abk as supp<company name>_<address book name>.tab
(Example is supp550_3.tab for Supplier Address Book number 3 for company 550)

To maintain this file in day-to-day operations, use session tccom2mains8



Note: Earlier versions of *b2Mail-Merge* (versions 2.0-3.5) used CSV files. The best way to convert these files is to read them in Excel and then save them in the correct format as tab-delimited files.

The default values of the E-mail, Fax and Print checkboxes can be defined by setting the "*Sup_Options*" b2email.ini variable to the wanted values

Every user can assign a default address book by defining the address book fields in tccom2conf8. Then the session will automatically open on the default address book. You can prevent the user from viewing other address books by setting the Address_Lock *b2email.ini variable to "yes"*

5.4.4 Customer Address Books

b2Mail-Merge supports up-to 100 customer address books (from 0 to 99). This will enable different departments like Accounts Receivable and Sales Administration to have separate Customer E-mail and Fax Address Books.

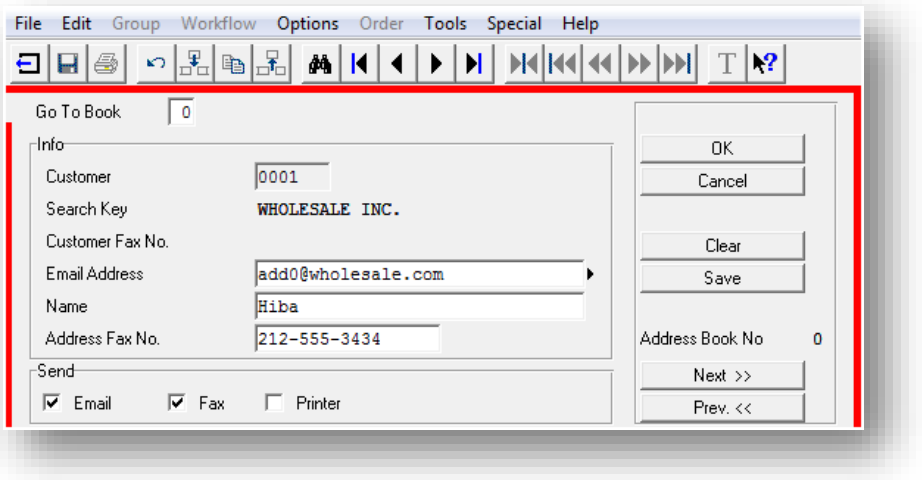
To maintain the Customer Address Book, you can create a tab-delimited file in the following format:

1) Customer Code
2) Name of Contact Person
3) E-mail of Contact Person
4) Fax Number of Contact Person (In case it is different from the default Fax Number in the Customer Master Data)

The file created for Address book 0 should be saved under $BSE/nazdaq8/settings/abk as cust<company name>.tab (Example is cust550.tab for company 550).

File for Address Books between 1 and 99 will be saved under $BSE/nazdaq8/settings/abk as cust<company name>_<address book name>.tab (example is cust550_3.tab for Customer Address Book number 3 for company 550).

To maintain this file in day-to-day operations, use session tccom2mainc8:



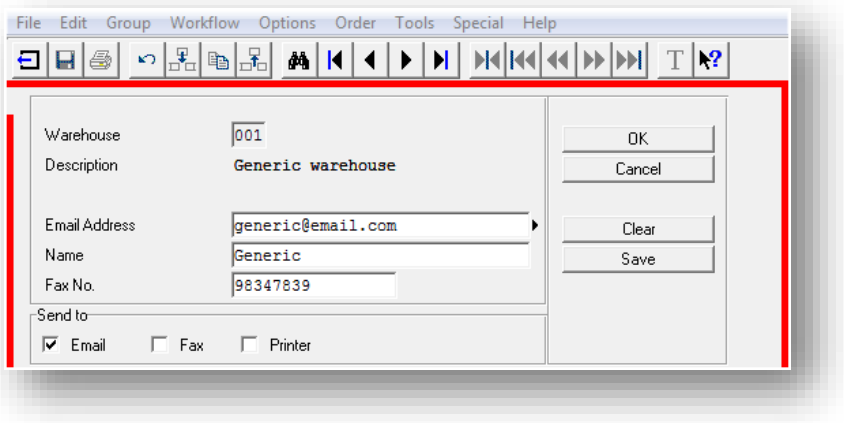
Note: Earlier versions of *b2Mail-Merge* (versions 2.0-3.5) used CSV files. The best way to convert these files is to read them in Excel and then save them in the correct format as tab-delimited files.

The default values of the E-mail, Fax and Print checkboxes can be defined by setting the "*Cus_Options*" b2email.ini variable to the wanted values.

Every user can assign a default address book by defining the address book fields in tccom2conf8. Then the session will automatically open on the default address book. You can prevent the user from viewing other address books by setting the Address_Lock *b2email.ini variable to "yes".*

5.4.5 Warehouse Address Books

b2Mail-Merge supports an address book for the warehouses. Each warehouse can have an e-mail address and a fax number. The session name is tccom2mainw8.

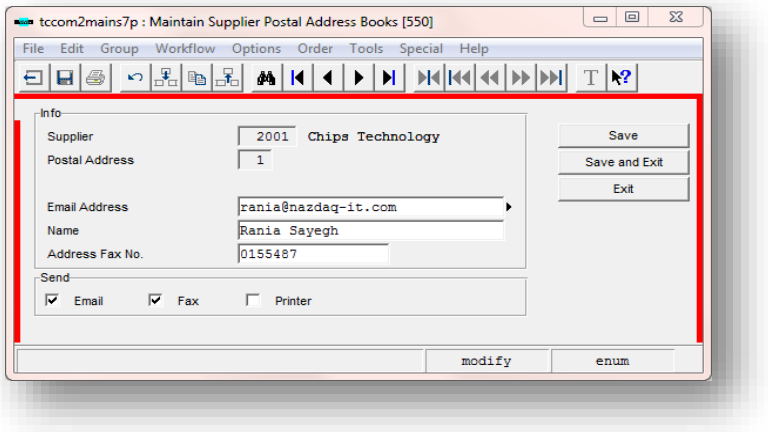


When the key "Replenishment Order" is chosen in *b2Mail-Merge* broker, the device will E-mail/Fax the report to the associated warehouse.

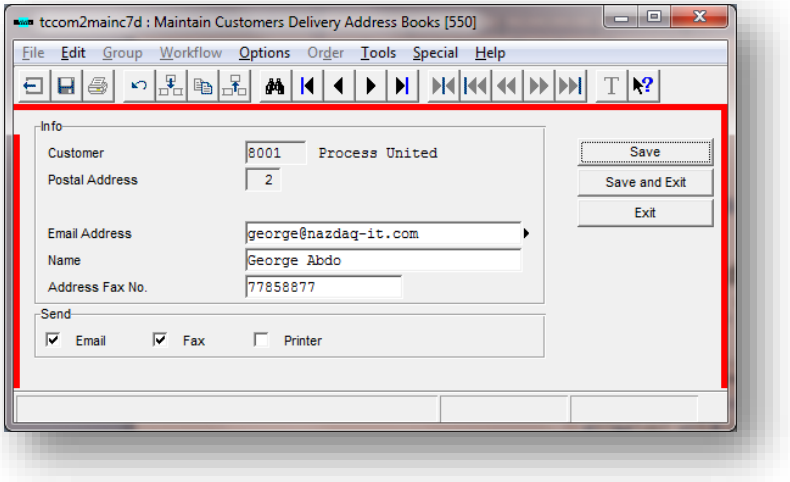
The default values of the E-mail, Fax and Print checkboxes can be defined by setting the "*Ware_Options*" b2email.ini variable to the wanted values.

5.4.6 Postal and Delivery Address Books

Mail-Merge supports postal and delivery address books. Each supplier and customer can have postal email and fax information. The session name is: tccom2mains8p



Customer delivery address book can be also maintained. Email and fax info can be stored using the following session: tccom2mainc8d



5.4.7 Customer and Supplier Table for E-mail and Fax – Address Books 100, 101 and 102

Some companies prefer to use the existing customer or supplier table to store e-mail and fax information. This can be done by using existing fields with an alternative use (telx field is used for e-mail address for example), or by adding new fields to the tccom010 and tccom020 tables.

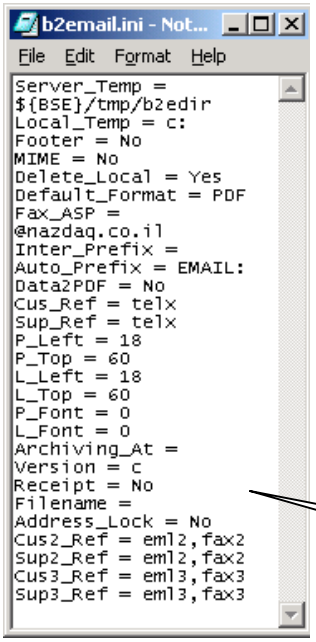
b2Mail-Merge allows you to use the following three additional address books that read from customer/supplier table:

Address Book 100: Fax: field tccom010.tefx and tccom020.tefx
E-mail: Variables Defined in Cus_Ref and Sup_Ref (in b2email.ini)
Address Book 101: E-mail and Fax are defined with variables Cus2_Ref and Sup2_Ref (in b2email.ini)

Address Book 102: E-mail and Fax are defined with variables Cus3_Ref and Sup3_Ref (in b2email.ini)

Note: Address book 100 is the same as address book "b".

The following is an example for using three address books for every customer and supplier:

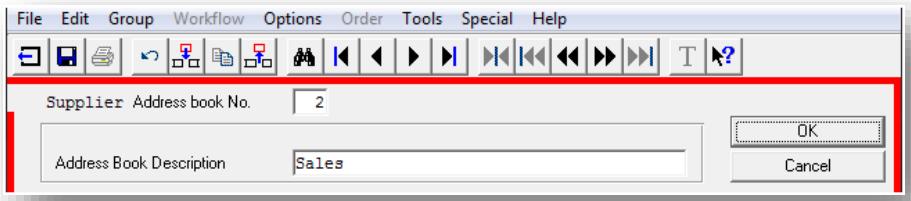


- **Cus_Ref – Address Book 100**: Customer E-mail = tccom010.telx
- **Sup_Ref - Address Book 100**: Supplier E-mail = tccom020.telx
- **Cus2_Ref- Address Book 101**: Customer E-mail = tccom010.eml2
  Customer Fax = tccom010.fax2
- **Sup2_Ref- Address Book 101**: Customer E-mail = tccom010.eml2
  Customer Fax = tccom010.fax2
- **Cus3_Ref- Address Book 102**: Customer E-mail = tccom010.eml3
  Customer Fax = tccom010.fax3
- **Sup3_Ref- Address Book 102**: Customer E-mail = tccom010.eml3
  Customer Fax = tccom010.fax3

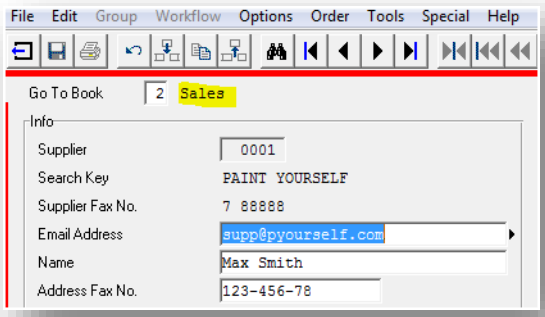
It is important to keep the comma (",") even if one of the fields is not filled in that case the default field will be chosen (telx /tefx)

5.4.8 Maintain Description for Address Books

In this session tccom2desadd8, you can define a description for each address book. For example the second supplier address book's description "Sales"

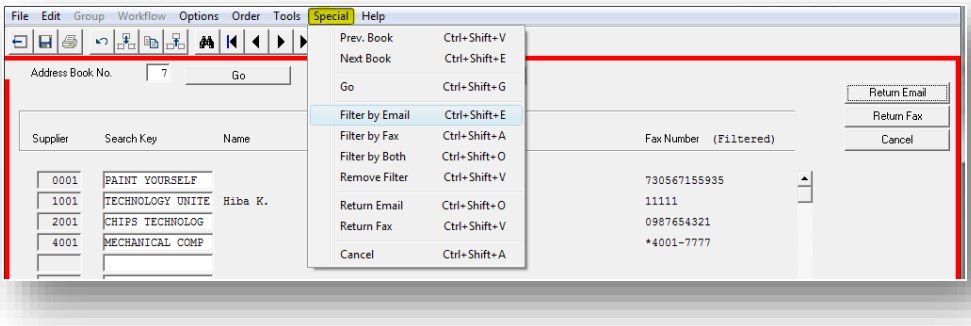


When you view the address book in ***tccom2mains8***:



5.4.9 Filtering E-mails

When zooming to any address book, you can filter by E-mail, Fax or both.

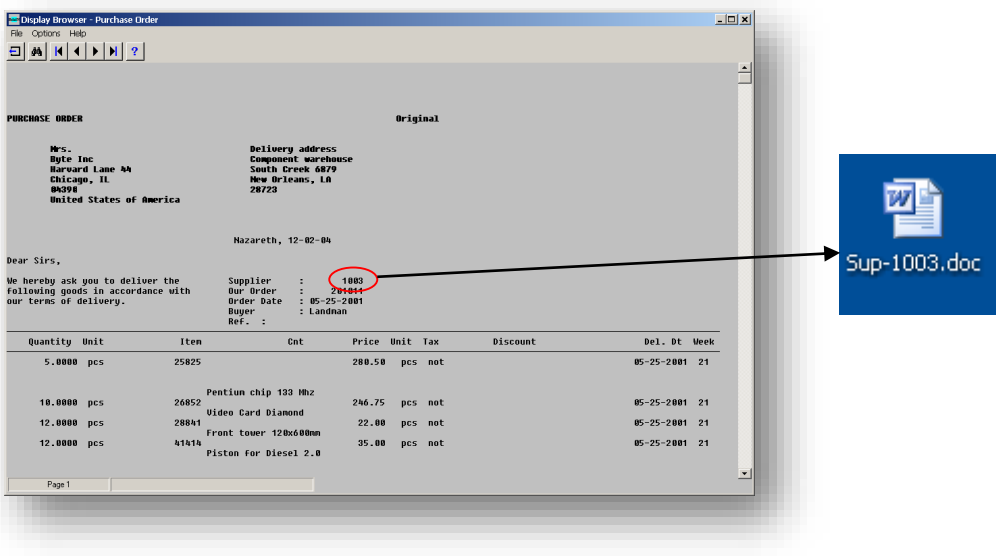


You can set the default filtering state by setting the "*Filter*" b2email.ini variable to any of the above options.

6 Attachments

6.1 External Attachments

Basic attachment functionality is available using the *b2Mail-Merge* basic functionality. This is idle for attaching fixed files like "terms and conditions" for every Purchase Order, or up to two files with a name that is partially derived from a certain part of the report. An example for that will be a specific word document for every supplier, where the name of the file will be SUP-<supplier number>.doc and will be attached to every run of b2Mail-Merge.



Variables:

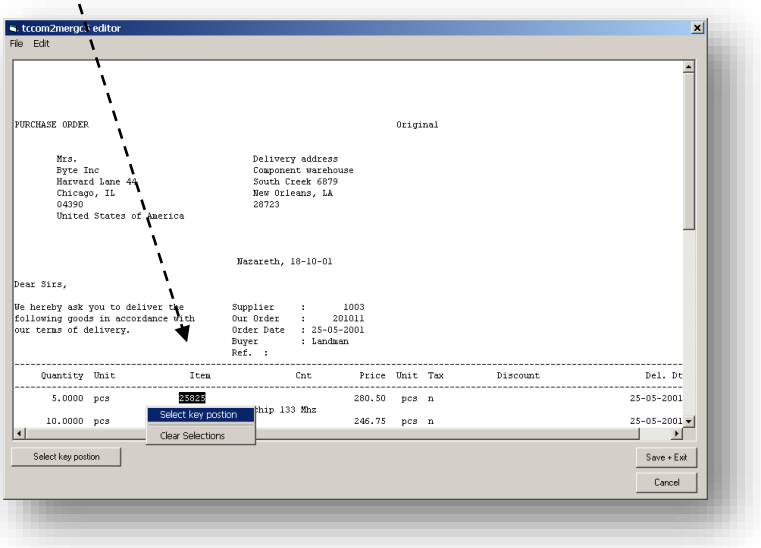
Variables can be also used in the e-mail message and in the external attachment names as in the example.

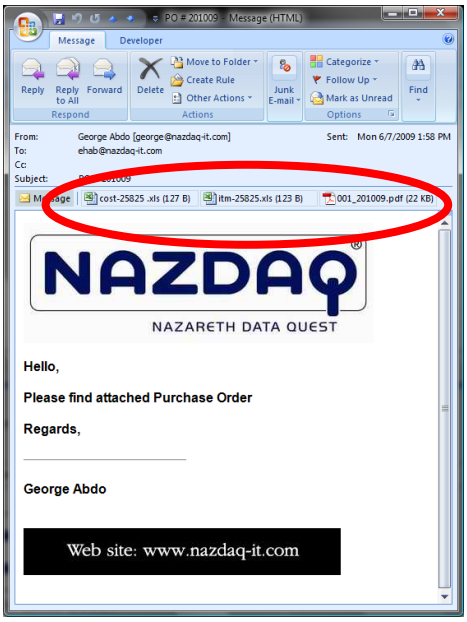
If you wish to send an external attachment together with the output produced from Baan, you need to define its location and the pattern of its name in this form.

For example, you can send an AutoCAD file from your Novell/NT related to the item number of a specific Purchase Order.

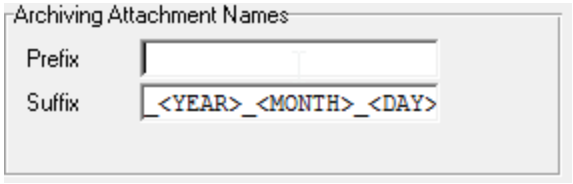
File Path = The location of the external file that you wish to add to your document
Prefix = File name Prefix
Suffix = File name Suffix (.xls, for example)

Using "Get VAR1 POS" select the variable that is taken from the report. The attached files will be itm-25825.xls and cost-25825.xls



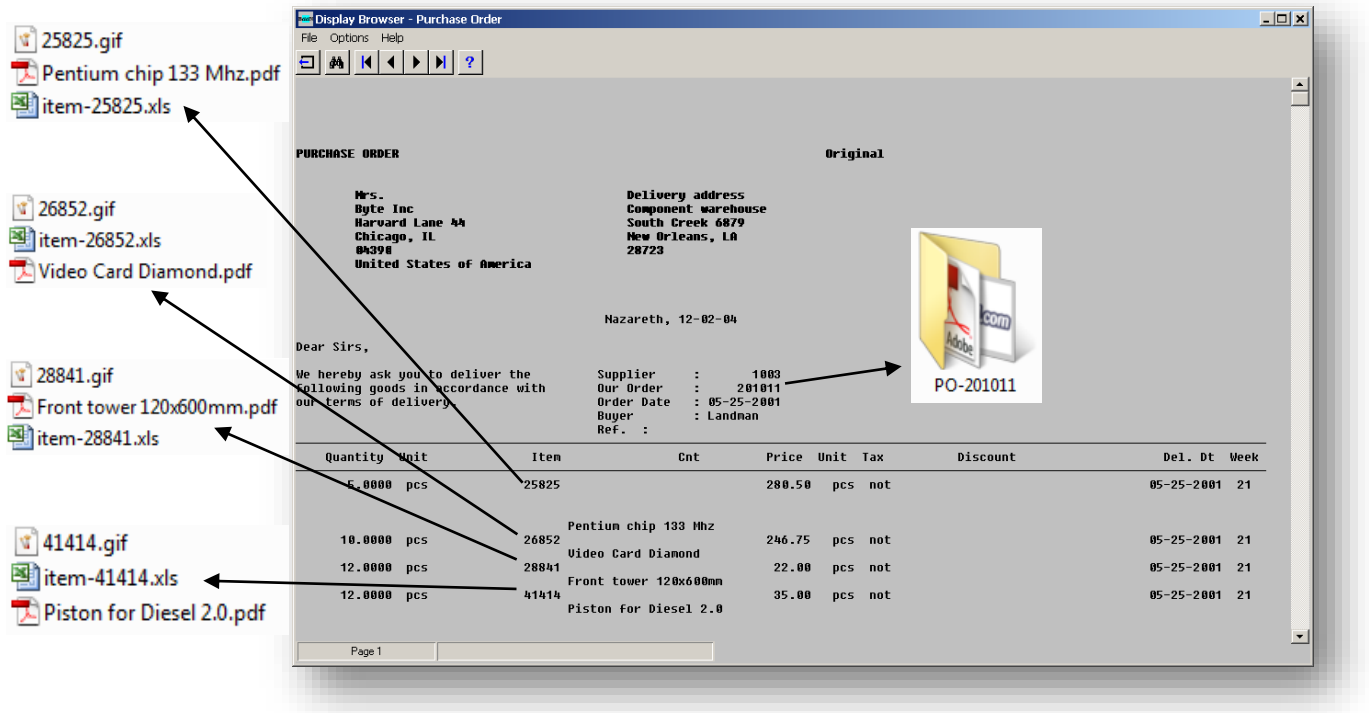


For every predefined attachment, you can a suffix and prefix, when archiving. This will help you not to overwrite your archived attachments. You can use free text and also any of the b2Mail-Merge variables in both of those fields. Example:



6.2 Extended Attachment Functionality

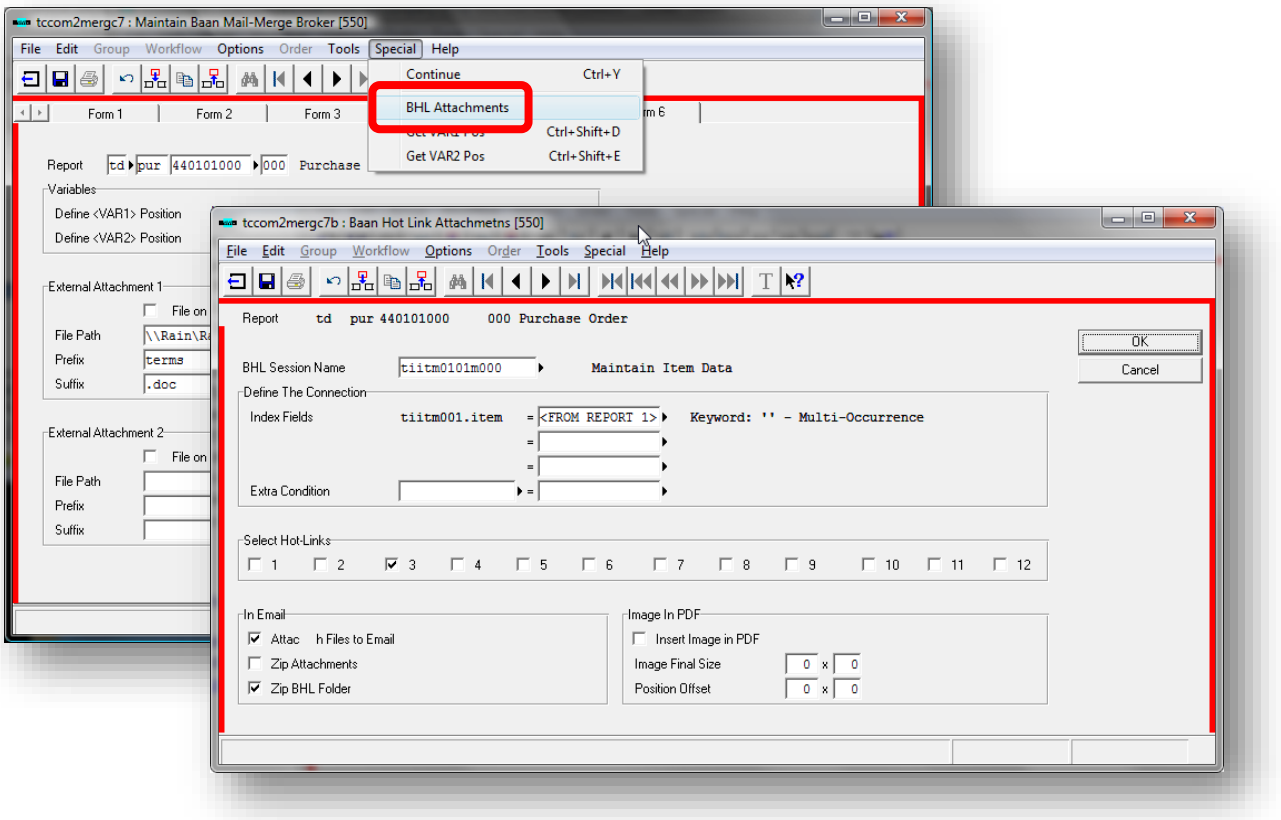
The extended attachment functionality can be obtained in the Integration with NAZDAQ's *Baan Hot Link* Product (Requires Licensing). With this integration, you will be able to attach multiple files to every single occurrence entity in your report (as an example, all documents that are related to your supplier), or attach multiple files to multi-occurrence entities in your report (as an example, all files that are related to all items in the Purchase Order). *Baan Hot Link* is a document management system tightly integrated with Baan and ERP Ln and allows easy linking between Baan Sessions (Maintain Item Data for example) and external files. The Linking is done using naming patterns with no need to manually define every document that is attached to a certain Baan entity. One definition per Baan session will automatically define all attachments. To get a fully operational demo of *Baan Hot Link*, please contact NAZDAQ.



With this integration, you have access to all these files for a certain Purchase Order (or any other document) and can automatically attach them all to the original purchase order when sent by email (possibility for making a zip file). You can also fax them together with the original document, print them or archive them.

You can possibly link to Folder and not only a file, and by this, you can attach all files in a certain folder. As an example, if you store all documents that are related to an item in a specific folder, you can possibly zip all folders for all items and attach them to the purchase order being sent!

If we need to link between entities in the Baan report and the linked files they have defined in *Baan Hot Link* (or ODM). We perform that in the following session:



First, we need to define a connection between the Baan report (Print Purchase Orders – tdpur440101000 by example) and the Baan Session (Maintain Item Data – tcibd0101s000 in this case).

The link between the report and the session is done through the Index of the session. We must define all parts of the index and where do we derive them from. Each part of the index can be a *Baan-Mail-Merge variable*, *Text From Report* or *From Main Table* (use the zoom option to select). Following are the different options for each part

1. ***b2Mail-Merge* Variable**
   Variables are explained in the next chapter and can be used here to derive the index value.

2. **Text from Report**
   We may wish to define a certain text section of the report and base our index on it. We can define single occurrence or a multiple occurrence "text from report" parts. Sometimes, it requires a keyword to appear in front of the "text from the report" part in order to pick the right parts we need.

3. **From Main Table**
   Sometimes, and when the index of the session has more than one field, some fields cannot be obtained from a *b2Mail-Merge variable* or from *Text from Report* – but are another field in the session's main index. When this is the case, we define index field as "From Main Table" and it will be picked by the system. In order to help the system find exactly what we need and not bring too much data, we can possibly define an extra condition on the select statement (Select * from <main table> where <my condition>).

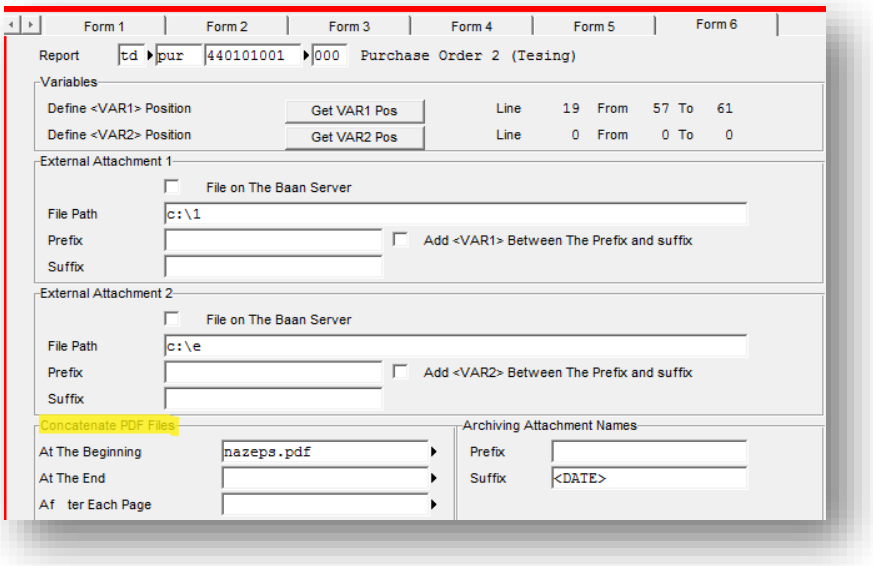
The above screen shot was an example of linking *b2Mail-Merge* Purchase Order report with *Baan Hot Link* Maintain Item Data.

In this session you can pick the specific Hot-Link number, zip the attachments and zip folders.

Images in PDF will be released in the coming versions.

6.3 Concatenate PDF Files to the report

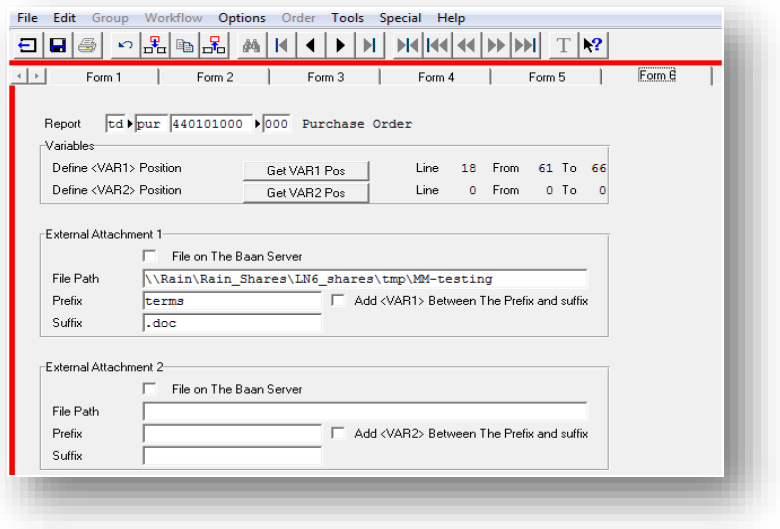
You can concatenate PDF files to your printed report. The concatenated file can be in the beginning, end or after each page of the printed report.



In the *b2Mail-Merge* broker, form 6, you can zoom and pick the PDF that you wish to concatenate.

7 Variables

You can define two variables from the report in the *b2Mail-Merge* broker Form 6. These variables can be used to set the External Attachment names.

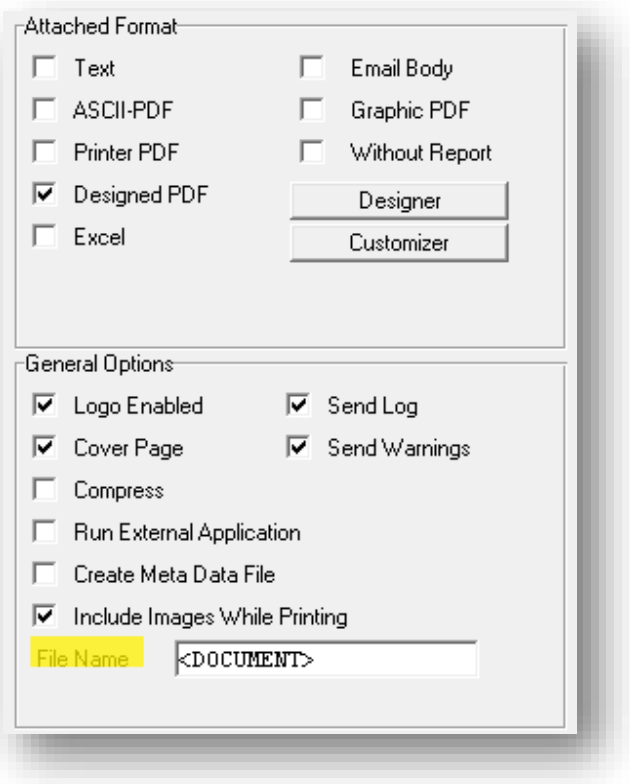


The following is the full list of variables that can be used in the e-mail message, subject, body variable field (Form 1 of the *b2Mail-Merge* broker), archiving path, the file name and the pattern field in the multiple attachments:

- <DOCTYPE> - Document Type
- <DOCUMENT> - Document Number (for example PO number)
- <FROM> - The e-mail of the sender
- <TO> - The e-mail of the receiver
- <BP> - Business Partner Description
- <BP NUM> - Business Partner Number
- <BP NAME> - Business Partner Name
- <BP SEAK> - Business Partner SEAK field
- <COMP> - Company description
- <COMP NO> - Company Number
- <VAR1> - Defined in Mail-Merge Broker Form 6
- <VAR2> - Defined in Mail-Merge Broker Form 6
- <FILENAME> - File Name
- <AMOUNT> - The total amount of the order
- <CURRENCY> - The currency of the order
- <PO DATE> - The date of the order taken from tdpur040.odat
- <BUYER> - the personal name of the PO printer
- <MANAGER> - The personal name of the buyer's manager (applicable only for the approval module)

8 File-Name

In the *b2Mail-Merge* Broker you can define the file name for each report. Alternately you can define the file name for all reports in the b2email.ini *Filename* variable.



You can use one of the following options:

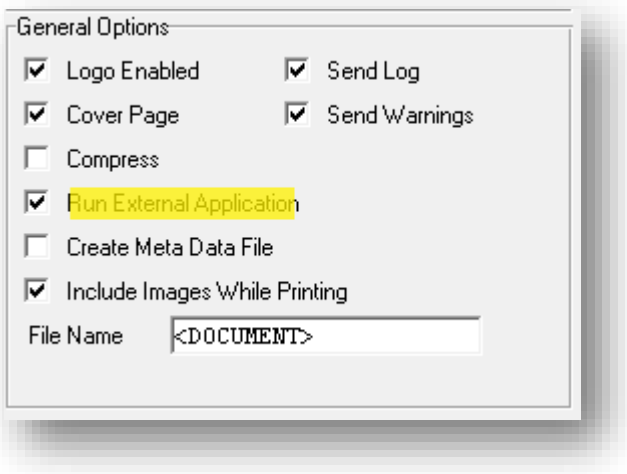
- <Empty> – default
- doc – Name of the file will be the document number (<Order>.pdf)
- doc_datetime_user – 223456_2007-03-01-13-23-23_george.pdf
- doc_datetime - 223456_2007-03-01-13-23-23.pdf
- var1_mmddyyyy - <VAR1> is a free variables set in the second tab of the broker
- num_doc – Name of file will be number_document number (001_<Order>.pdf)
- num_doc_datetime – Name of file will be number _ document number _ date time (001_223456_ 2006-06-01-17-33-37.pdf)

While populating the file name you can also use all variables known to the Mail-Merge broker (<DOCTYPE>, <DOCUMENT>, <FROM>, <TO>, <BP>, <BP NAME>, <BP SEAK> and <COMP>, <COMP NO>, <VAR1> and <VAR2>). Example of file names is:

<DOCUMENT>

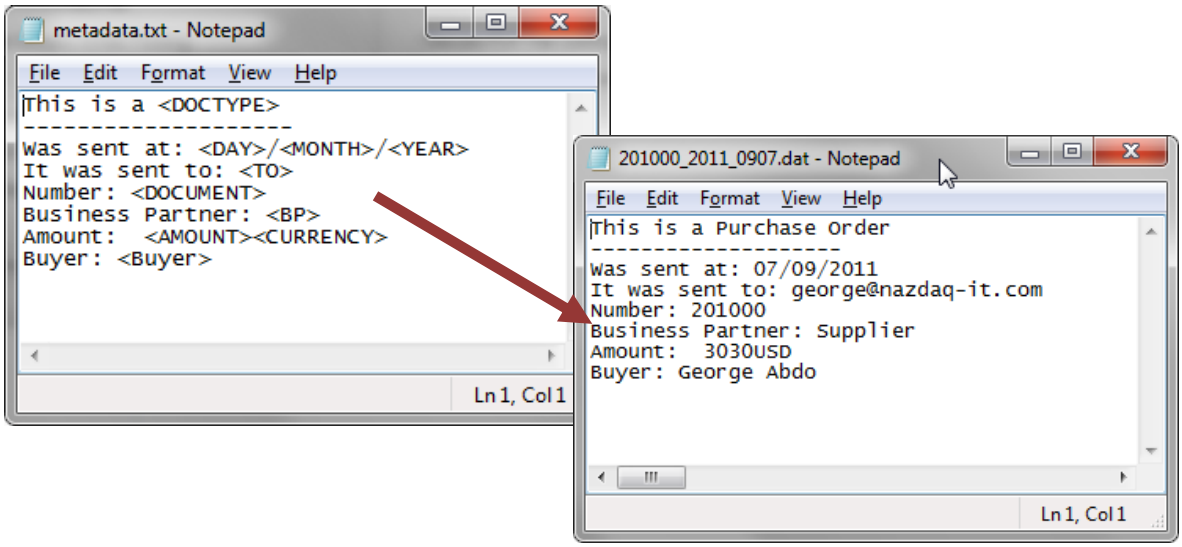
10 Running External Applications with b2Mail-Merge

You can run an external application to modify the output and *b2Mail-Merge* will send the modified file. This should be defined in b2email.ini's External_App and External_App_Output_Extension variables.



8.1 Define Meta Data File

In addition to running an external application you can create a metadata file that includes information from the report you are printing, and an input to any other system that might need it. You can do so by checking the "create a metadata file" checkbox in form 3 of the broker, and then define the metadata file (under the "Special" menu) as you want using the b2Mail-Merge Variables: Here is an example:



9 Purchase Order Approval Module

9.1 Introduction

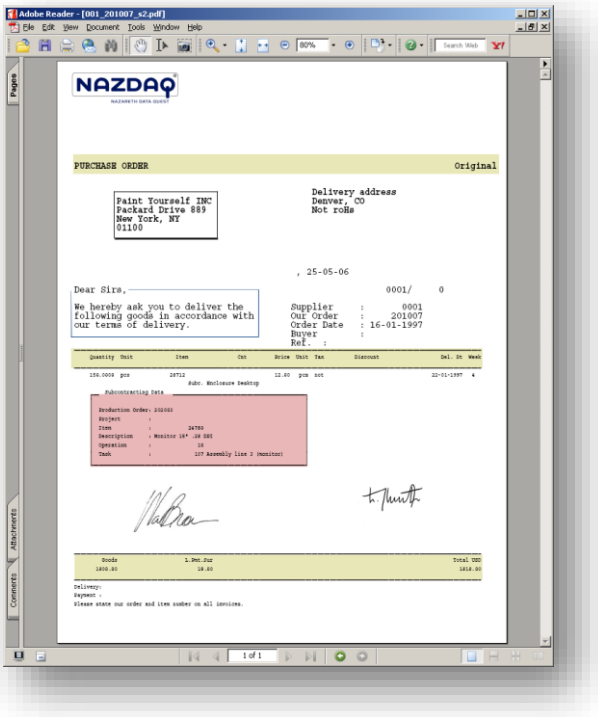
The Purchase Order Approval extension covers the area where b2Mail-Merge is used for purchase orders, and more than one person must sign certain orders, based on the amount.

If you implemented *b2Mail-Merge* with Purchase orders, and your company policy is that Purchase Orders above a certain monetary threshold need to be signed by two people, then the *Purchase Approval Extension* comes into place.

Purchase orders below the threshold amount are automatically signed by the buyer and sent out, while all other purchase orders are routed to the responsible manager for approval within Baan.

The manager assigned to sign the purchase order (or his/her assistant or backup) will be notified with an e-mail, and will be directed to an approval session. If the purchase order is approved or denied, an e-mail will be sent to notify the buyer about the status of each order.

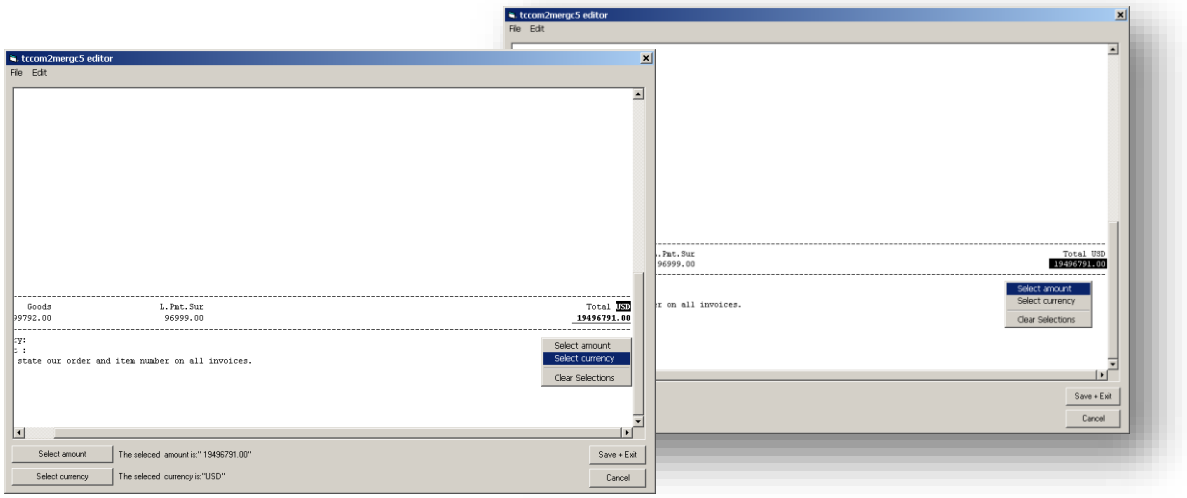
Approved Purchase Orders are now signed with up to five signatures, one for the buyer and one for the manger and is ready to be released. Releasing purchase orders can be performed automatically by a batch job that will release all approved orders – or the buyer can check all approved orders and manually release them, while adding some additional remarks or attachments.



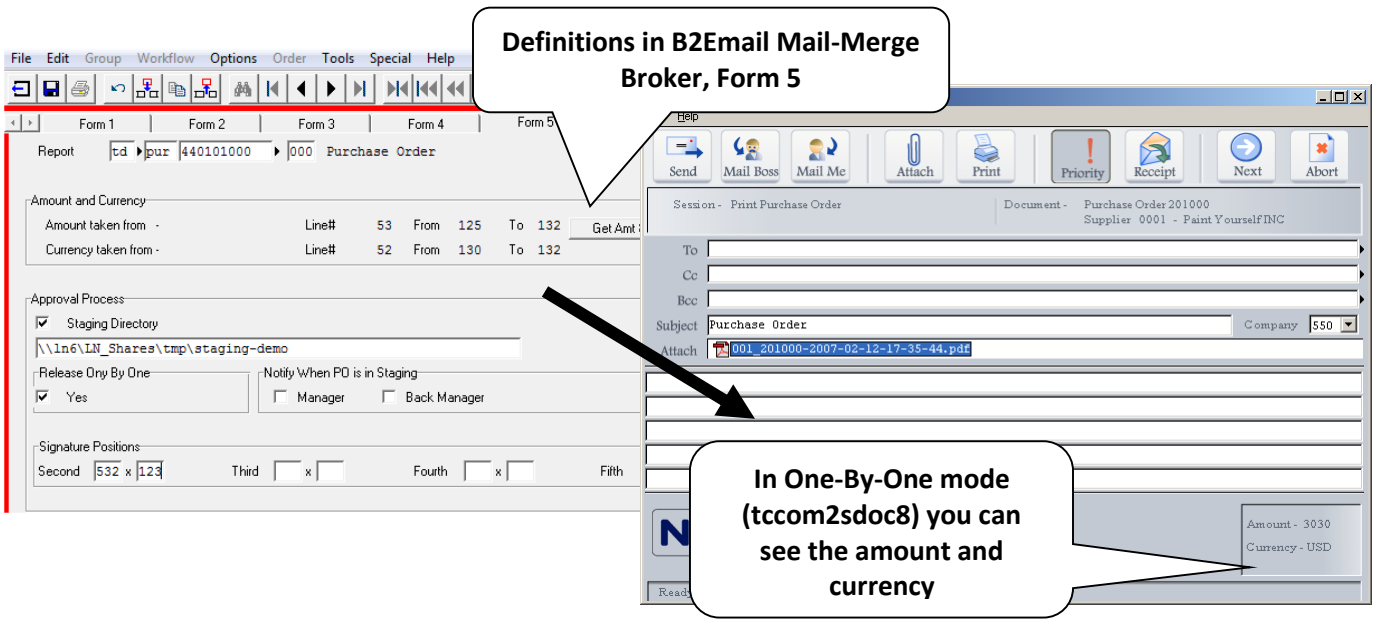
9.2 Amount/Currency

Amount and Currency can appear on *b2Mail-Merge* user interface session, which will help the user see the amount involved in the document before it is sent. This amount sets the rules for a second signature in the Purchase Approval Module (if used).

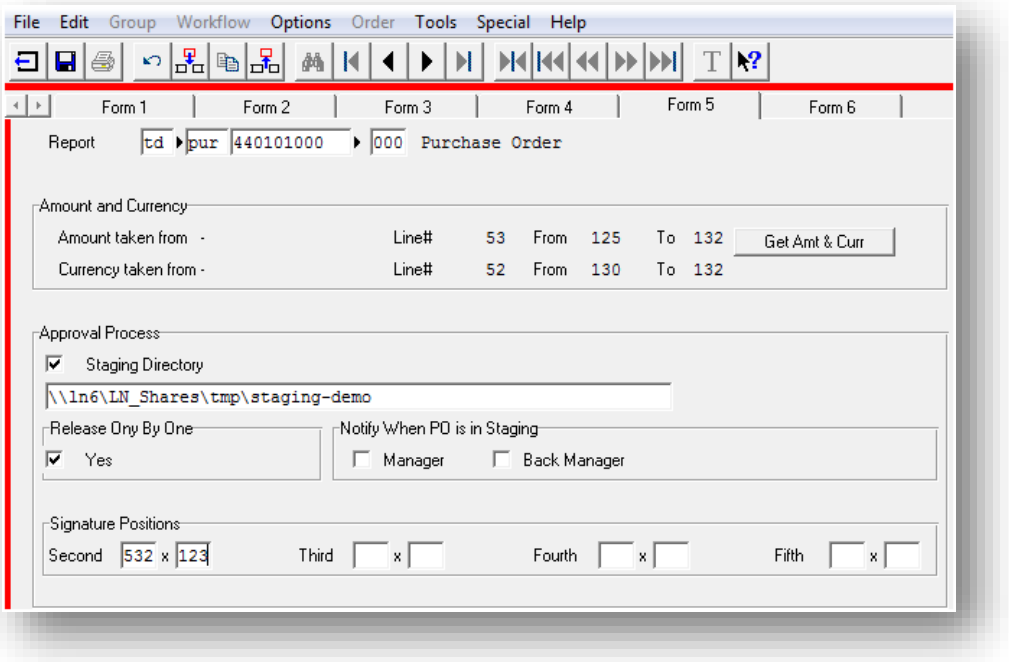
All what you need to do is to select the amount and the currency in the last page of every order.



Then Save + Exit



9.3 Purchase Approval Process Settings



To activate the *Purchase Approval Module*, you need to define a staging directory where all WIP purchase order information is saved. This directory needs to be in a safe location and backed up.

Releasing of approved Purchase Orders can be done in One-By-One mode or in full automatic mode. This can be picked here.

The location of the second, third, fourth and fifth signatures are also defined in this session.

When the order is sent to staging you can notify the manager (or backup manger) that there is an order waiting for him to approve via email.

To receive a fully operational demo version of the Purchase Approval Module, visit www.nazdaq-it.com

10 General Options

10.1 File Management

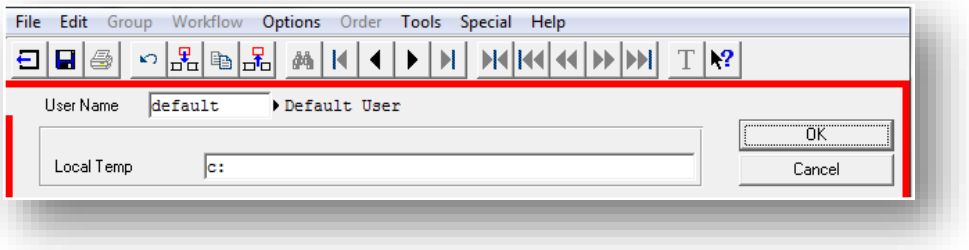
b2Mail-Merge creates multiple temporary files on the server and the client in order to produce the end result. This chapter discusses these files and how to best manage them for better performance and maintenance of your system.

Temporary *b2Mail-Merge* files are created first on the Baan server and then transferred to the local client. Note that *b2Mail-Merge* does not use FTP to transfer from the server to the client – but rather the Baan function server2client, which uses the connection already existing between the Baan server and the BW client to establish a data transfer session.

10.1.1 Defining Local Temp Directory

The default location for creating the *b2Mail-Merge* client temporary directory is C:\

If you have users for which C: is not good (Citrix for example), use **tccom2tmpdir8** and define a specific location for the *b2Mail-Merge* Local Directory for each one of them.



If most of your users use Citrix, change the default in the session above to be the directory on the meta-server where you wish to have the *b2Mail-Merge* Local Directories created. For others, you must define them one-by-one. You can also use the predefined DOS variables like %TEMP%.

10.1.2 Managing the Temporary Directory on the Server

By default *b2Mail-Merge* creates a directory in $BSE/tmp under the name <userid>mmddyyhhmmss Since other temporary files and directories are created in $BSE/tmp, you may wish to change the location of the *b2Mail-Merge* temporary files by changing the variable “Server_Temp” in b2email.ini. By assigning a value to this variable, a special directory is created underneath $BSE/tmp with the name of the value in Server_Temp. This is recommended as it makes tracking easier and eases the maintenance work of having to clean all these files, based on the temp cleanup procedure in your organization.

10.1.3 How often files are copied from the server to the client

In addition to data files, *b2Mail-Merge* copies different programs to the *b2Mail-Merge* local temporary directory every time *b2Mail-Merge* is executed. Some companies may find this to be cumbersome, especially if they have a slow connection or work through WAN. In order to disable copying of the program files in every run, you may wish to change the value of "*Copy2Local*" variable in b2email.ini to No. If a patch is applied and new program components are added, the variable must be set back to yes – until all users have the latest version of these programs.

10.2 Online Help

b2Mail-Merge supports online help for its user interface. You can click the help icon and then on the specific option you wish to know more about, then the system will give you help information in a text box.

Online help is per language and the data is stored in a text file. As an example, bmmhelp2.inf is the help file for language 2.

These help files are saved under $BSE/nazdaq8/settings/help.

10.3 b2email.ini file

The b2email.ini saved in $BSE/nazdaq8/settings/adm contains default parameters for better configuring of the B2Email product. b2email.ini is the default ini file that will be used for all companies unless b2email<COMPANY NUMBER>.ini was defined.

Email_Footer
Available values: Yes or No. Default is Yes. Where Yes includes the e-mail footer (user signature).

Copy2Local
b2Mail-Merge copies different exe programs to Local_Temp every time a report is sent to the *b2Mail-Merge* device. For *b2Mail-Merge* installations with many slow machines, it is recommended to change this variable to No.

Address_Lock
Available values: Yes or No. Default is No. Where Yes blocks users from displaying any address book other than the one that they have defined in tccom2conf8. Users cannot display address books in tccom2discus8 / tccom2dissup8 and cannot maintain them in the sessions tccom2mainc8 and tccom2mains8.

Mode = Ascii

If you want to run b2Mail-Merge *in ASCII mode you will have to add this variable to the ini. Some of the functionalities (client based) won't be available in ASCII mode.*

Fax_ASP / Inter_Prefix
Default faxing from *b2Mail-Merge* is performed through an ASP Fax Server. Faxes are sent by e-mail through a third party company that delivers the faxes.
If you choose to select a fax, *b2Mail-Merge* uses the parameters you enter here as the following: **<Inter_Prefix><fax number><Fax_ASP>.**

For example: If Fax_ASP = @faxme.com and Inter_Prefix = 00 while fax number is 1-510-345-2233 *b2Mail-Merge* will send the e-mail to: 0015103452233@faxme.com
(www.faxme.com is a fake company. If you wish to get a free trail account with an email2fax company, please contact us. If you wish to use Mail-Merge with FaxMaker, RightFax ZetaFax or any other Fax applications, please contact us for details.)

Fax_Plus
The value of this variable will replace the first "plus" (+) in the fax number. For example:
Fax_Plus = 00.

Server_Temp

b2Mail-Merge *uses $BSE/tmp as its default location for creating temporary files. This directory can be changed by changing this variable.*

Filename

You can use one of the following options

- <Empty> – default
- doc – Name of the file will be the document number (223456.pdf)
- num_doc – Name of file will be number_document number (001_223456.pdf)
- bp_doc_datetime – Supplier/Customer Number, document number then date
- num_doc_datetime – Name of file will be number _ document number _ date time (001_223456_ 2006-06-01-17-33-37.pdf)

P_Left
Left margin for Portrait (in pixels)

P_Top
Top margin for Portrait (in pixels)

L_Left
Left margin for Landscape (in pixels)

L_Top
Top margin for Landscape (in pixels)

In other words, these parameters tell *b2Mail-Merge* where physically to start the report

P_Font and L_Font
Font Size for Portrait and Landscape
If the value is equal to 0, font size will be according the default font parameters

Cus_Ref
Field in tccom010 where customer first e-mail address is held for address book number 100

Sup_Ref
Field in tccom020 where supplier first e-mail address is held for address book number 100

Cus_Ref2
Fields in tccom010 where customer second e-mail address, fax number are held for address book number 101

Sup_Ref2
Fields in tccom020 where supplier second e-mail address, fax number are held for address book number 101

Cus_Ref3
Fields in tccom010 where customer third e-mail address, fax number are held for address book number 102

Sup_Ref3
Fields in tccom020 where supplier third e-mail address, fax number are held for address book number 102

Sup_Options
This variable sets the initial actions for the undefined suppliers in tccom2mains8. The possible value is a combination of the following: “E” for e-mail, “F” for fax and “P” for print. For example
Sup_Options = EP

Cus_Options
This variable sets the initial actions for the undefined customers in tccom2mainc8. The possible value is a combination of the following: “E” for e-mail, “F” for fax and “P” for print. For example
Cus_Options = EP

Ware_Options
This variable sets the initial actions for the undefined warehouses in tccom2mainw8. The possible value is a combination of the following: “E” for e-mail, “F” for fax and “P” for print. For example

Ware_Options = EP

PDF2PS
PDF2PS = /opt/Acrobat5/bin/acroread –toPostScript

In order to print in sendmail mode, you will have to define your PS converter. Write the full path after this tag

Hide_Path_in_Log
If "yes", the path of the attachments will be hidden the log

Filter
When you zoom to your address sessions from the *b2Mail-Merge* user interface, you can choose the default way that you like to filter your contacts. Filter by E-mail/Fax/Both or show all
Possible values are E-mail, Fax, Both and All (for show all)

External_App
If you want to run any program on *b2Mail-Merge*'s output, define the name of the program & full path in this parameter. **This will work only in NT mode / Sendmail mode**
External_App = f:\baanerp5b\nazdaq8\new.bat

External_App_Output_Extension
If your program wants to change *b2Mail-Merge* output to some other format, define the new extension here. For example: if you want to use WinRar in your external application, define the extension as the following:

External_App_Output_Extension = rar

Default_Sending_Mode
This variable decides through which application the e-mail should be sent. The possible values are:

- *SMTP*: SMTP freeware mailer "blat" from the local PC or a windows server
- *Outlook Auto*: E-mail sent with MS Outlook API using MS Outlook
- *Outlook Open*: MS Outlook is launched with all information coming from Baan, and the user can interactively choose more e-mail options and then send the e-mail message from within Outlook
- *Lotus Auto*: E-mail sent with Lotus Notes API using Lotus
- *Lotus Open*: Lotus Notes is launched with all information coming from Baan, and the user can interactively choose more e-mail options and then send the e-mail message from within Lotus

AllowBidi
Yes / No. Apply Uni-Code BiDi-algorithm

AllowArabic

Yes / No. Apply shaping of Arabic characters

No_Fax_Msg
Yes / No**.** When sending the fax, do not add the email's message

Use_B2E_Groups
Set this to "No" if you want to use your Outlook groups. When "Yes" it will use b2Mail-Merge Groups.

11 Legal Notice – Warning

In case you are not familiar with Unix/NT commands or with Baan tools, please contact your system administrator before you proceed with the installation. In case of any question, please contact us and we will arrange to have a technical support person assist you install B2Email.

Trade Marks

B2Email is a trade Mark of NAZDAQ Ltd.
All other referenced company and product names may be trademarks or registered trademarks of others.

NAZDAQ

For support, please send examples/ print screens to info@nazdaq-it.com

Our office Hours are Monday - Thursday 10:00 – 19:00 and Friday 10:00 – 17:00 GMT +2

Check our WEB site for other Baan and Infor ERP Ln Related Products

www.nazdaq-it.com

R, Sep 2013