



b2Mail-Merge 8.5

Implementation Guide – Baan ERP

NAZDAQ – Nazareth Data Quest

2013

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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** Business Partner for each document
- **Match** it with Business Partner 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 business partner 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 business partner, employee or other entity to look-up the E-mail addresses. 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.

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.

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1.1 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 *Baan Mail-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

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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 from 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 manager 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).

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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.

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.

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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 tcom2conf7 session which are:

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

The screenshot shows a software configuration window titled 'Form 2' for the user 'baan'. The window is divided into several sections for configuring email and signature settings:

- User:** 'baan' (Name: Baan)
- Email Settings:**
 - Sender Address: hiba@nazdaq-it.com
 - Supervisor Email Address: george@nazdaq-it.com
 - Sending Mode: SMTP
 - Outgoing Mail Address: sout.inter.net.il
 - Email Authentication: Use Authentication. User: nizo, Password: *****
 - Outgoing Port Number: 25, Number of Retries: 1
- Signature Settings:**
 - Signature Filename: nazeps.pdf (Dimensions: 0 x 0, Orientation: Left, Right)
 - Scale: 10 %
 - Use Border
 - Border Width: 12, Border Height: 13
- Printer Settings:**
 - Default Printer: Generic / Text Only

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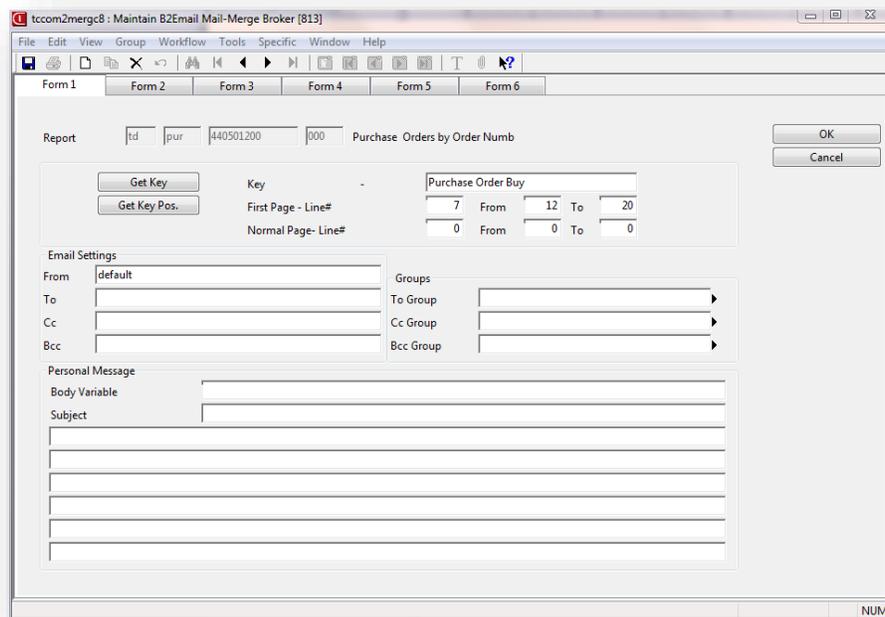
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2.2 Maintain Baan Broker

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-Mergebroker* (tccom2mergc8 session)

Print your Baan report to MERGC8 device:



The screenshot shows the 'tccom2mergc8: Maintain B2Email Mail-Merge Broker [813]' window. The 'Report' field is set to 'Purchase Orders by Order Numb'. The 'Key' field is set to 'Purchase Order Buy'. The 'First Page - Line#' is 7, 'From' is 12, and 'To' is 20. The 'Normal Page - Line#' is 0, 'From' is 0, and 'To' is 0. The 'Email Settings' section includes fields for 'From', 'To', 'Cc', and 'Bcc', and a 'Personal Message' section with 'Body Variable' and 'Subject' fields.

In *b2Mail-Mergebroker* you define the settings/definitions that *b2Mail-Mergewill* be working according to.

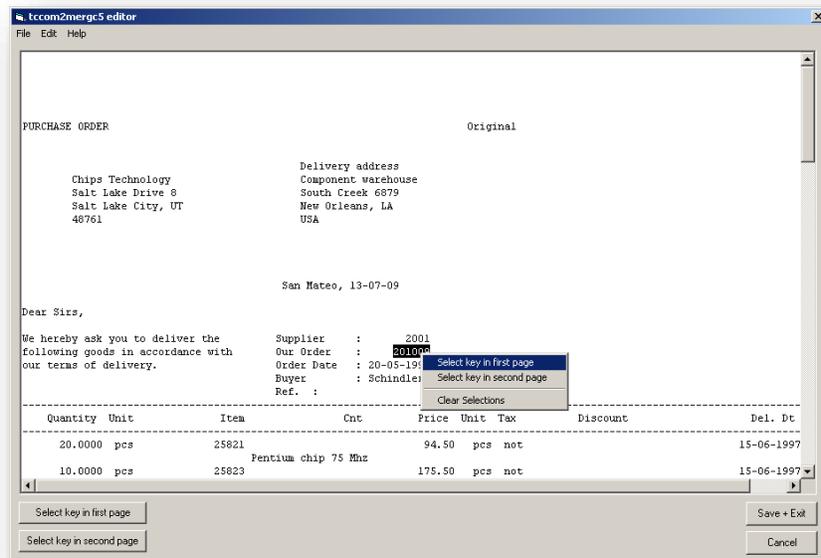
In this chapter we will be defining only few parameters so that *b2Mail-Mergewill* start to work:

- Define the Key that *b2Mail-Mergewill* parse the Baan report. In the example above, the key selected is Purchase Order meaning that *b2Mail-Mergewill* 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 Position", highlight the order number and click on "Select Key" in first page:

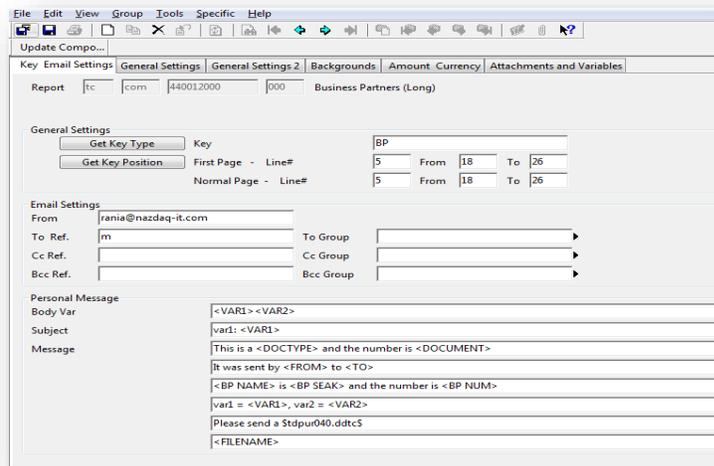
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If the position of the order number is different in the second/rest of the pages, you will have to scroll down, highlight it in the second page and then click on “Select Key Type” in second page.



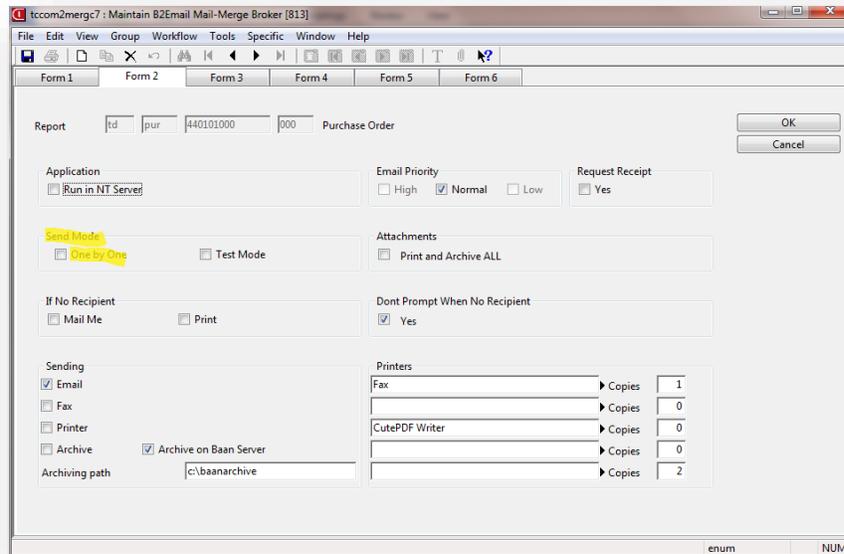
Next step would be defining the run mode settings, of *tccom2mergc8*:

- 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”

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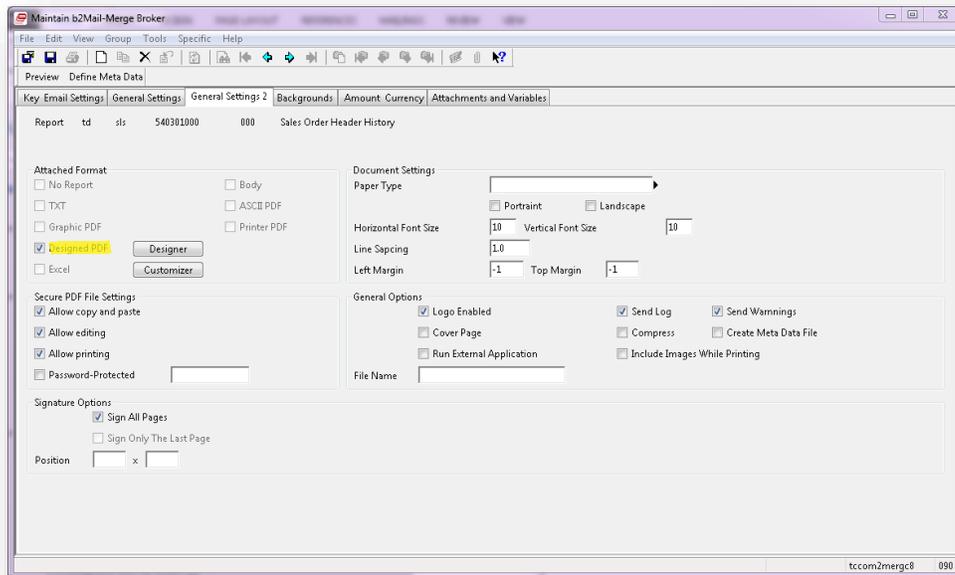
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Next step is defining the "Format" of the sent document, of tccom2mergc8:

Check "Graphic PDF" option

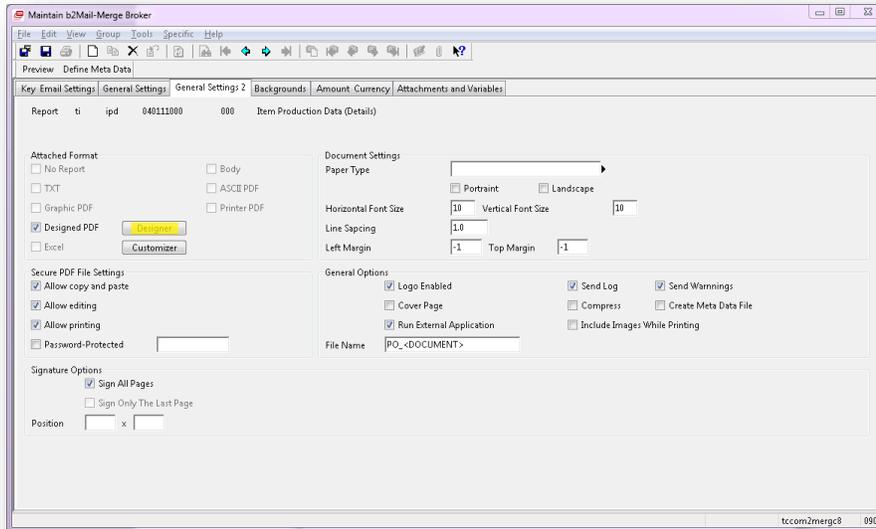


Choosing "Designer" option launches the NAZDAQ Report Designer Extension (If it was licensed):

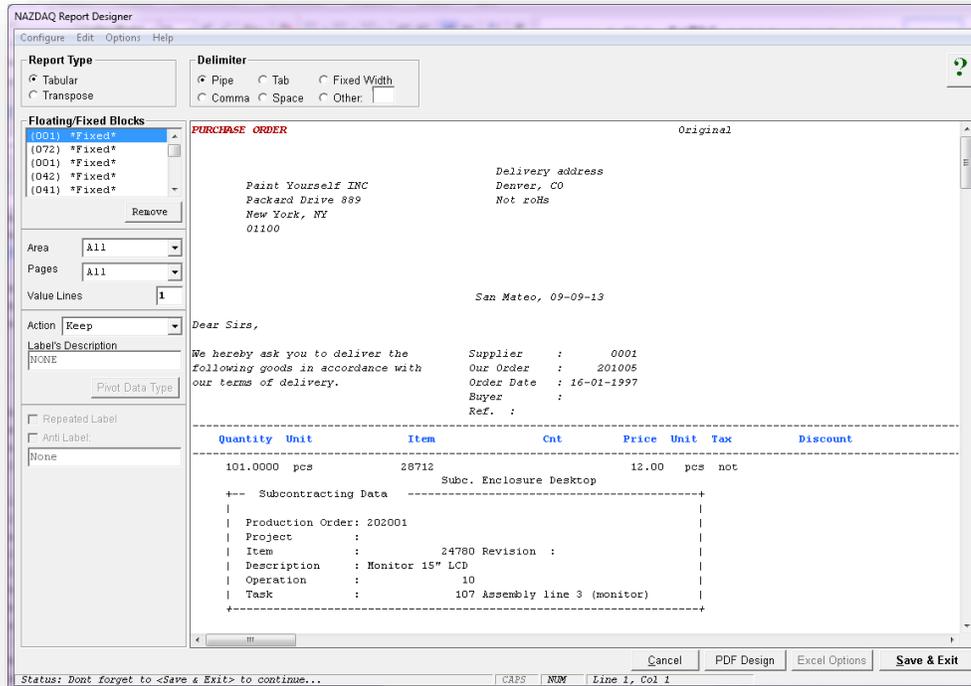
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The Designer wizard is launched for PDF design for that specific report:

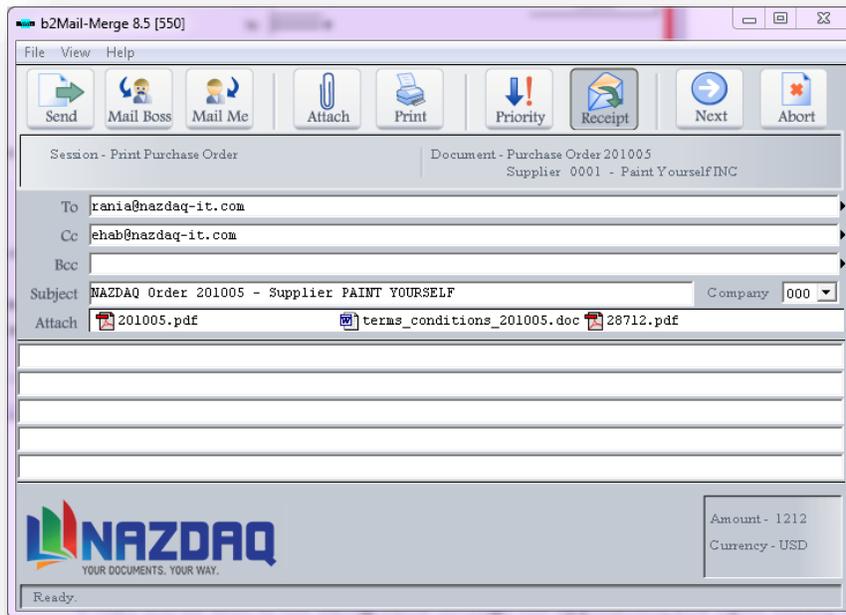
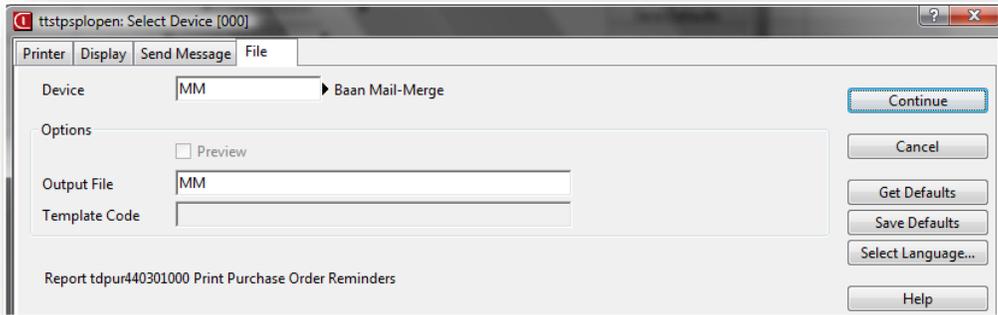


Save and Exit. b2Mail-Merge is now ready for your first and basic run.

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2.3 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: You must license the *Barcode and Special Graphics Extension* for this. 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.

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).

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2.4 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 must 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 dummy company that starts with a letter (**GEO**, for example) for the sake of picking additional logos in *Baan Mail-Merge*.

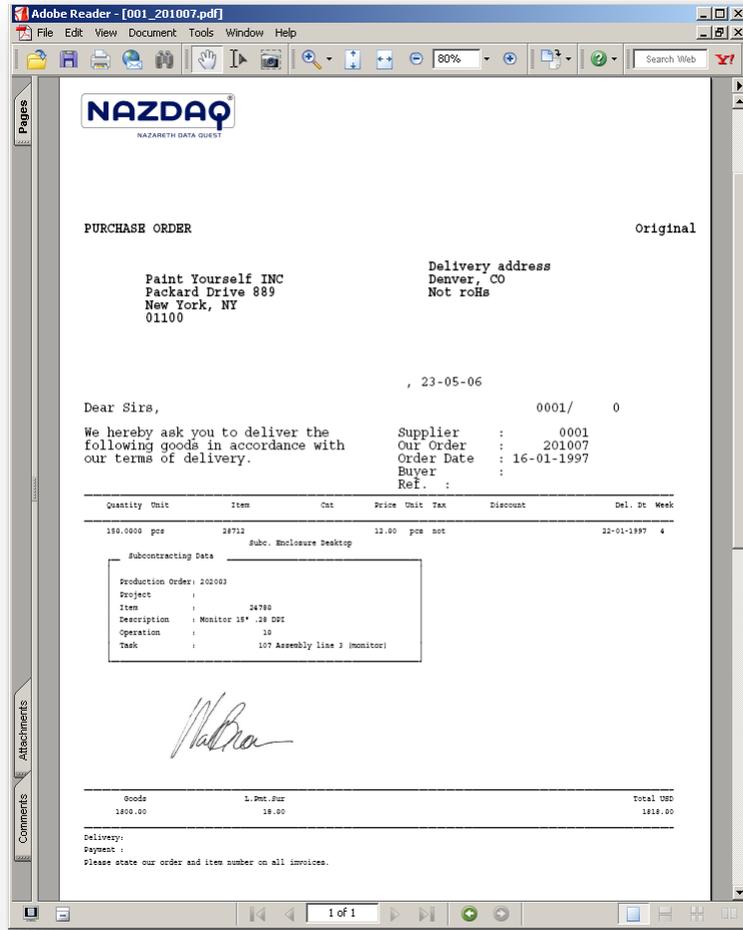
Logos per user are defined in *tccom2conf8* (Form 2)

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The following is an example of using a header logo.



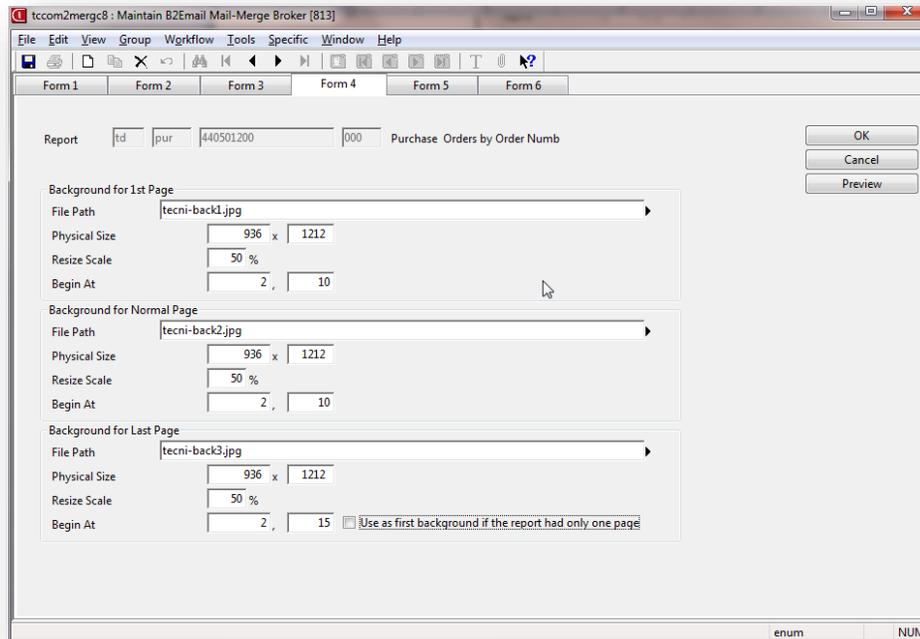
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2.5 Defining Background

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 all other pages, and 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.

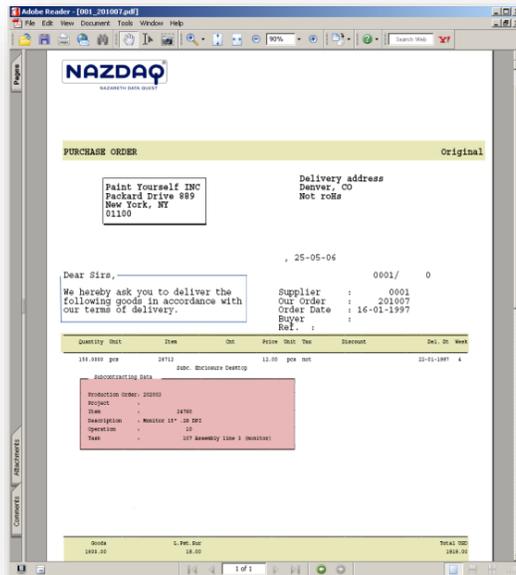
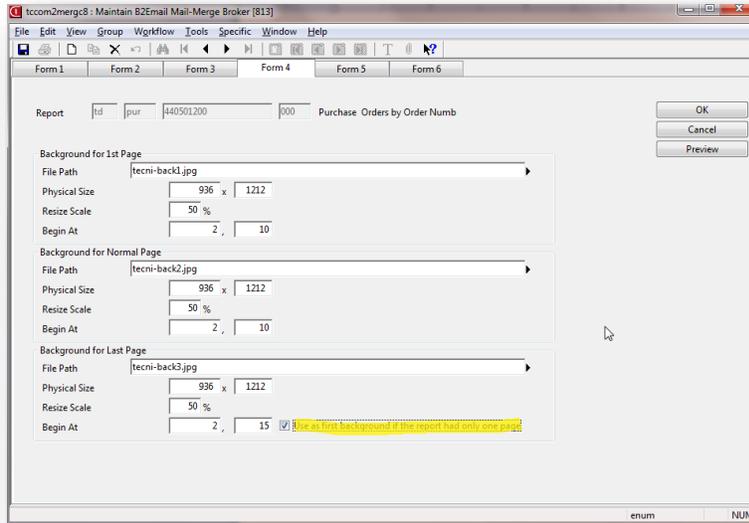
Begin At

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

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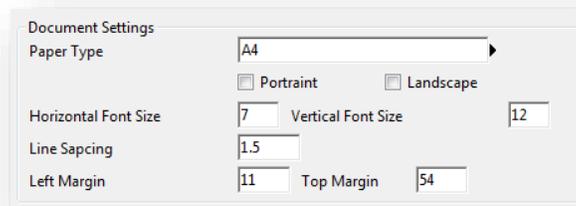
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Fonts, Orientation and Line Spacing:

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



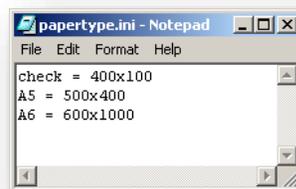
- Font size: possible popular values are 7, 8, 9, 10, 12, and 14
- Orientation: “L” for landscape or “P” for portrait.

You can set the font and orientation for each report in the *b2Mail-Mergebroker*.

Custom Paper Types:

You can define any paper type you want (A4, A6, small checks, etc.)

Maintain all your paper types in \$BSE/B2Email7/settings/adm/papertype.ini



The default paper type for the *b2Mail-Mergedevice* 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-Mergebroker*.

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.

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

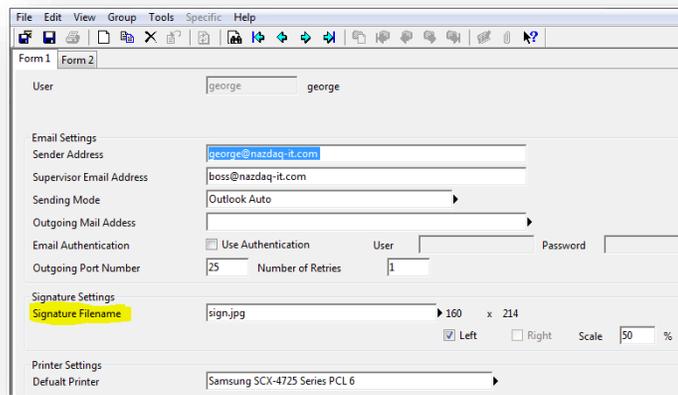
You can set the margins for each report in the *b2Mail-Mergebroker*.

Additional PDF Settings

There are additional PDF settings available in *Baan Mail-Merge*.

Signature Options (From 7 of the *b2Mail-Mergebroker*):

Every user can set his signature from within tcom2conf8. 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 tcom2conf8 (Left/Right)

Secure PDF settings (From 3 of the *b2Mail-Mergebroker*):

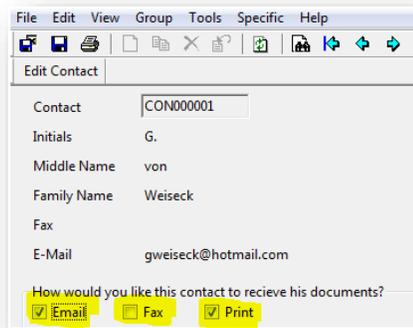
- You can forbid copy and paste text from the PDF
- You can forbid printing the PDF file
- You can forbid editing the PDF file even with Acrobat Writer
- You can lock the PDF file with a password

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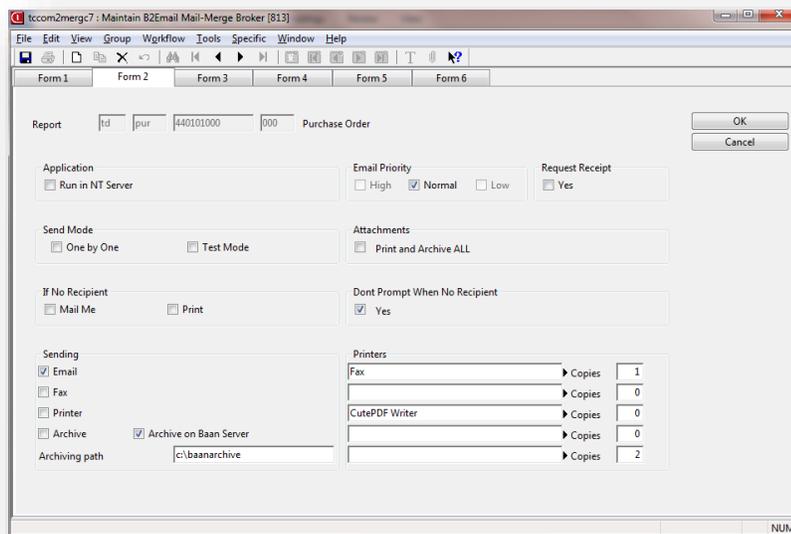
3 E-mailing, Faxing, Printing and Archiving

3.1 Introduction

You can send Baan documents to e-mail addresses, fax numbers, print or archive them. You can define your preference for each business partner address or contact using tcom2mmcnt8 and tcom2mmadd8 sessions.



In the broker session tcom2mergc8, you define your world. When you check any option under "Sending", b2Mail-Mergedevice will pick what is defined in tcom2mmcnt8 or tcom2mmadd8 for this option. If you **do not check it**, b2Mail-Mergewill totally ignore whatever is defined for the specific contact or address. As an example, if the "Fax" option is **unchecked** for the report in the broker, b2Mail-Mergewill not send any faxes at all, even if certain business partners have the "Fax" option chosen.



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Archiving is global and is defined per report and not for every Business partner. In this form, you can define the specific “Archiving Path” for this report.

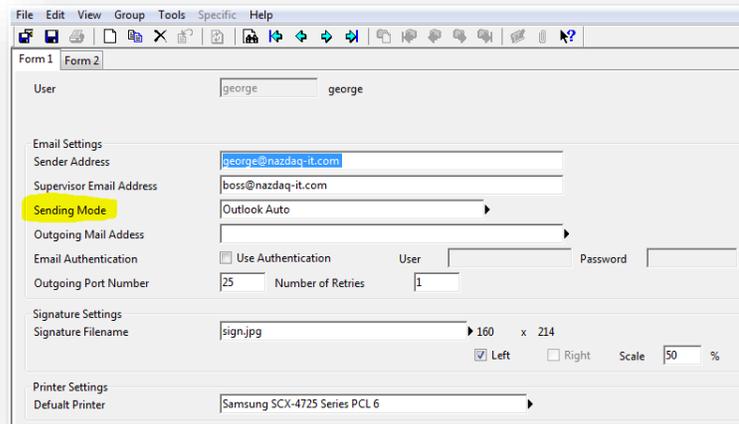
3.2 Emailing

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

3.2.1 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:



The screenshot shows a software window titled "Form 1" with a menu bar (File, Edit, View, Group, Tools, Specific, Help) and a toolbar. The "User" field is set to "george". Under "Email Settings", the "Sender Address" is "george@nazdaq-it.com", "Supervisor Email Address" is "boss@nazdaq-it.com", and "Sending Mode" is set to "Outlook Auto". Other fields include "Outgoing Mail Address", "Email Authentication" (unchecked), "Outgoing Port Number" (25), "Number of Retries" (1), "Signature File Name" (sign.jpg), and "Default Printer" (Samsung SCX-4725 Series PCL 6).

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:

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Sender E-mail Address

This is the e-mail address that will appear in the “From Field” for e-mails sent out of *Baan Mail-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-MergeBroker* (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-MergeBroker* (tccom2mergc8).

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-MergeBroker*. 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.

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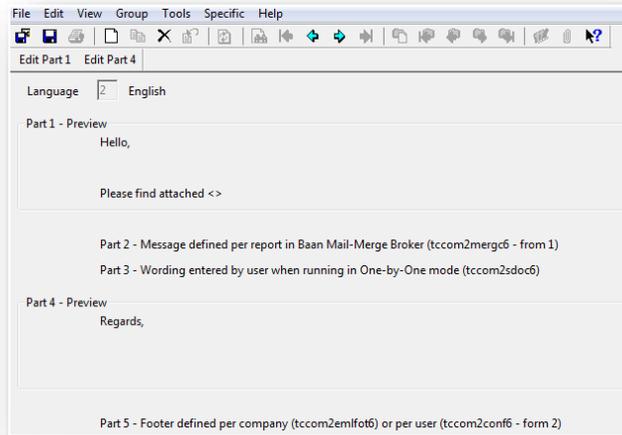
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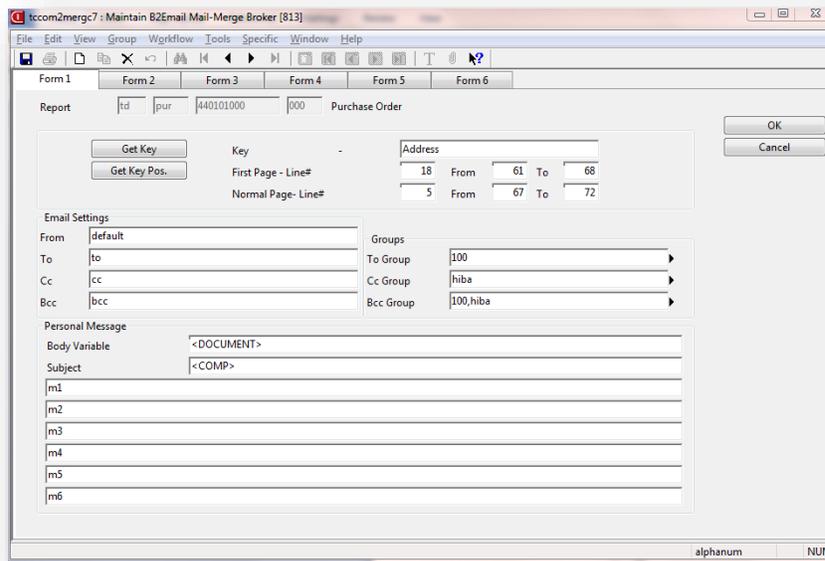
3.2.2 Email Message

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

Part 1: Handled by new session *tccom2mmsg8* and is defined per Baan language



Part 2: Defined in *b2Mail-Mergebroker*.



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.

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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 tccom2mmsg8 text.

Baan Labels can also be used in the message. You need to put them between “\$” signs

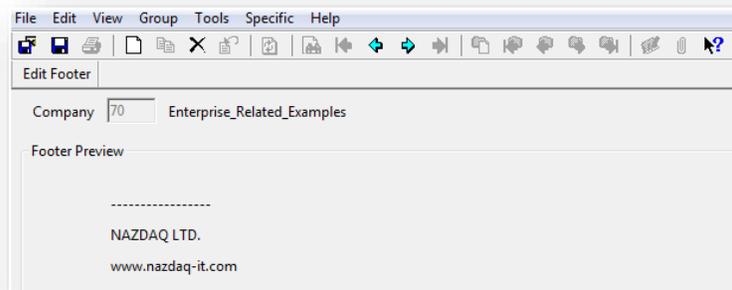
In the “From” field the sender address can be specified where the following values are possible:

- 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

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

Part 4: Handled by new session tccom2mmsg8 – the same as in part 1

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



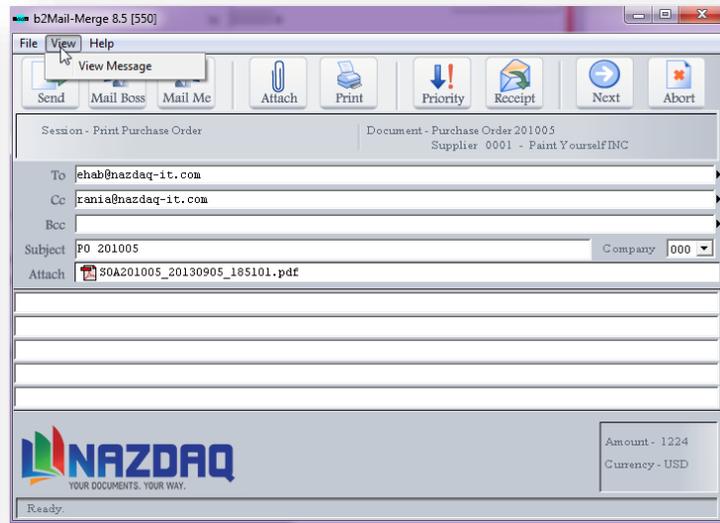
If you want to remove the footer totally, you can set the “*Email_Footer*” ini variable to “No”.

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

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3.2.3 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/B2Email8/settings/msg.



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

<nazpart1> - Text from part 1 (tcom2mmmsg8)

<nazpart2> - Text from part 2 (The *b2Mail-Merge*Broker – tcom2mergc8 - message)

<nazpart3> - Text from part 3 the user interface

<nazpart4> - Text from part 4 (tcom2mmmsg8)

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<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>

<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>

</BODY></HTML>
```

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3.3 Faxing

3.3.1 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 *Baan Mail-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.

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3.3.2 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

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

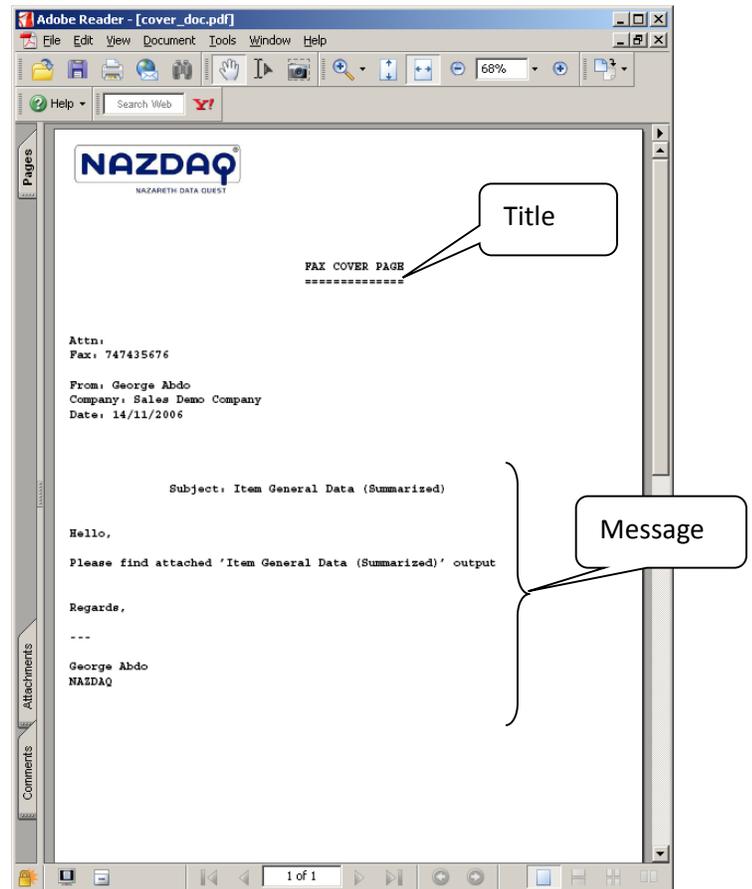
From = My From

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

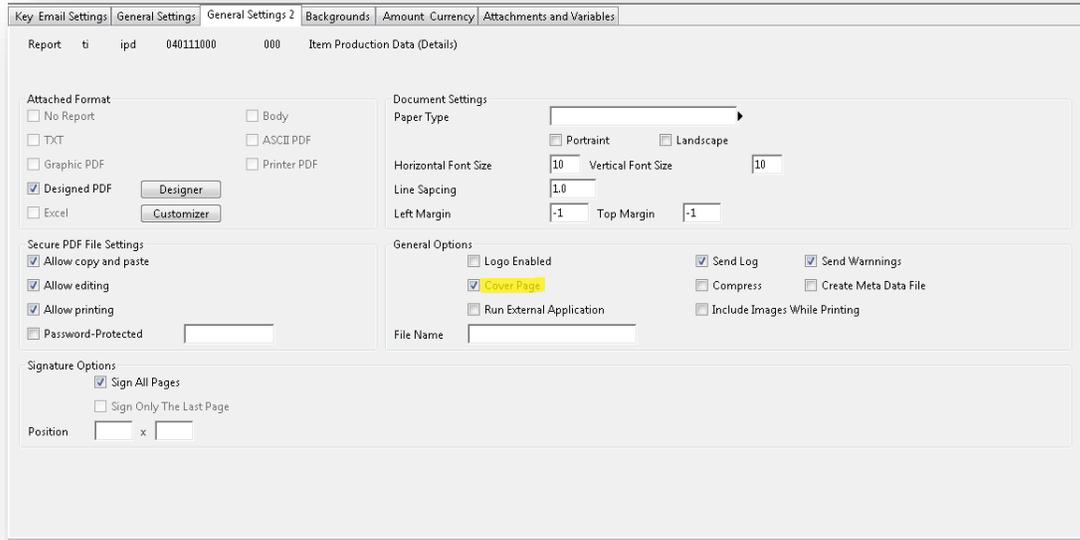


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If you want to add a cover page check that option in the *b2Mail-Mergebroker* (tccom2mergc8).



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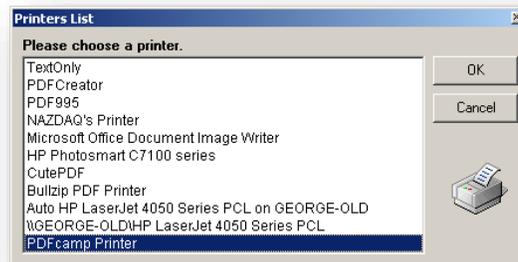
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3.4 Printing

b2Mail-Merge can print on the windows default printer. Moreover, every user can have their own “*Baan Mail-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 (`tccom2mergc8`). 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.

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Form 1 Form 2 Form 3 Form 4 Form 5 Form 6

Report [td] [pur] [440501200] [000] Purchase Orders by Order Numb

OK
Cancel

Application
 Run in NT Server

Email Priority
 High Normal Low

Request Receipt
 Yes

Send Mode
 One by One Test Mode

Attachments
 Print and Archive ALL

If No Recipient
 Mail Me Print

Dont Prompt When No Recipient
 Yes

Sending
 Email
 Fax
 Printer
 Archive Archive on Baan Server

Archiving path [c:\archive\PO\verp]

Printers

CutePDF Writer	Copies	1
	Copies	0

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 (Form 3)

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3.5 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 (*tccom2mergc8*).

The screenshot shows the 'tccom2mergc7: Maintain B2Email Mail-Merge Broker [813]' window. The form is titled 'Form 1' through 'Form 6'. The 'Report' section contains fields for 'td', 'pur', '440101000', '000', and 'Purchase Order'. The 'Application' section has a checkbox for 'Run in NT Server'. The 'Email Priority' section has radio buttons for 'High', 'Normal' (selected), and 'Low'. The 'Request Receipt' section has a checkbox for 'Yes'. The 'Send Mode' section has radio buttons for 'One by One' (selected) and 'Test Mode'. The 'Attachments' section has a checkbox for 'Print and Archive ALL'. The 'If No Recipient' section has radio buttons for 'Mail Me' and 'Print'. The 'Dont Prompt When No Recipient' section has a checkbox for 'Yes'. The 'Sending' section has checkboxes for 'Email' (selected), 'Fax', 'Printer', and 'Archive'. The 'Archive on Baan Server' checkbox is also checked. The 'Archiving path' field is highlighted in yellow and contains the value 'c:\baanarchive'. The 'Printers' section has a table with columns for printer name and 'Copies'.

Printer	Copies
Fax	1
	0
CutePDF Writer	0
	0
	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.

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3.6 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*).

Report: Purchase Orders by Order Numb

Application
 Run in NT Server

Email Priority
 High Normal Low

Request Receipt
 Yes

Send Mode
 One by One Test Mode

Attachments
 Print and Archive ALL

If No Recipient
 Mail Me Print

Dont Prompt When No Recipient
 Yes

Sending
 Email
 Fax
 Printer SharePoint
 Archive Archive on Baan Server

Archiving path

Printers

Printer	Copies
CutePDF Writer	1
	0
	0
	0
	0

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3.7 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.

The screenshot shows the b2Mail-Merge Broker settings window. The 'General Settings' tab is selected. The window title is 'Report ti ipd 040111000 000 Item Production Data (Details)'. The settings are organized into several sections:

- Attached Format:** No Report, TXT, Graphic PDF, Designed PDF (with Designer and Customizer buttons), Excel.
- Document Settings:** Paper Type (dropdown), Portrait, Landscape, Horizontal Font Size (10), Vertical Font Size (10), Line Spacing (1.0), Left Margin (-1), Top Margin (-1).
- Secure PDF File Settings:** Allow copy and paste, Allow editing, Allow printing, Password-Protected (with input field).
- General Options:** Logo Enabled, Cover Page, Run External Application, Send Log, Send Warnings, Compress, Create Meta Data File, Include Images While Printing.
- Signature Options:** Sign All Pages, Sign Only The Last Page, Position (input field) x (input field).

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.

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4 Run Mode

b2Mail-Merge can run in different modes. You can set the mode in the *b2Mail-Merge* Broker.

Report: [td] [pur] [440501200] [000] Purchase Orders by Order Numb

Application: Run in NT Server

Email Priority: High Normal Low

Request Receipt: Yes

Send Mode: One by One Test Mode

Attachments: Print and Archive ALL

If No Recipient: Mail Me Print

Dont Prompt When No Recipient: Yes

Sending: Email Fax Printer Archive Archive on Baan Server

Archiving path: [c:\archive\PO\erp]

Printers:

CutePDF Writer	Copies	1
	Copies	0
	Copies	0
	Copies	0

enum NUM

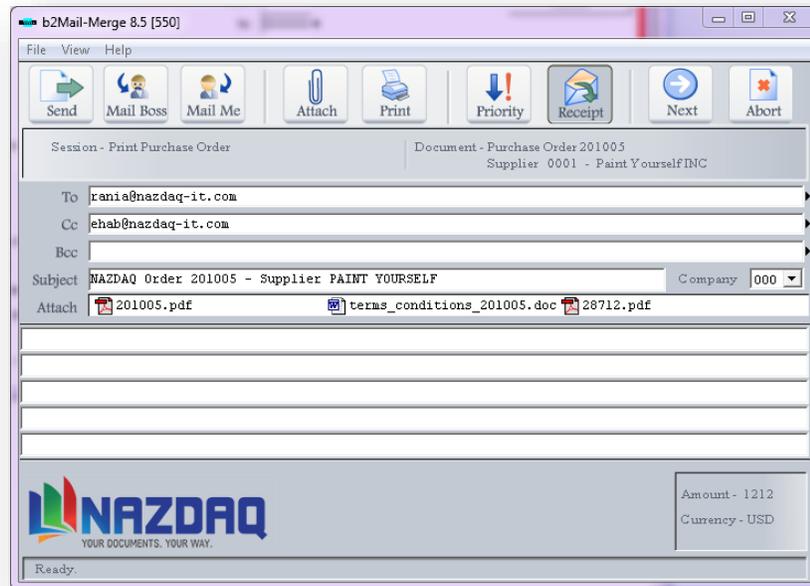
4.1 Send mode

- 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.

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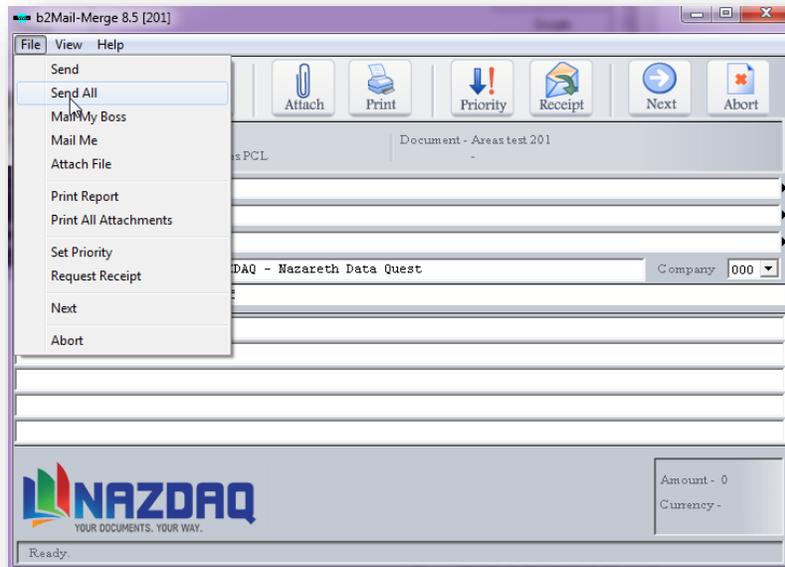


- You can manually change the e-mail address or fax number that the system found for you
- You can also use CC or BCC to send the document to additional people
- A customized e-mail body can be sent in addition to the standard email message. In case you send a fax, the customized message will appear 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 tcom2conf8)
- 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 tcom2mergc8)
- 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 tcom2mergc8 session – Form5)
- 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 the email without a report attached
- You can send all remaining messages automatically instead of one by one mode

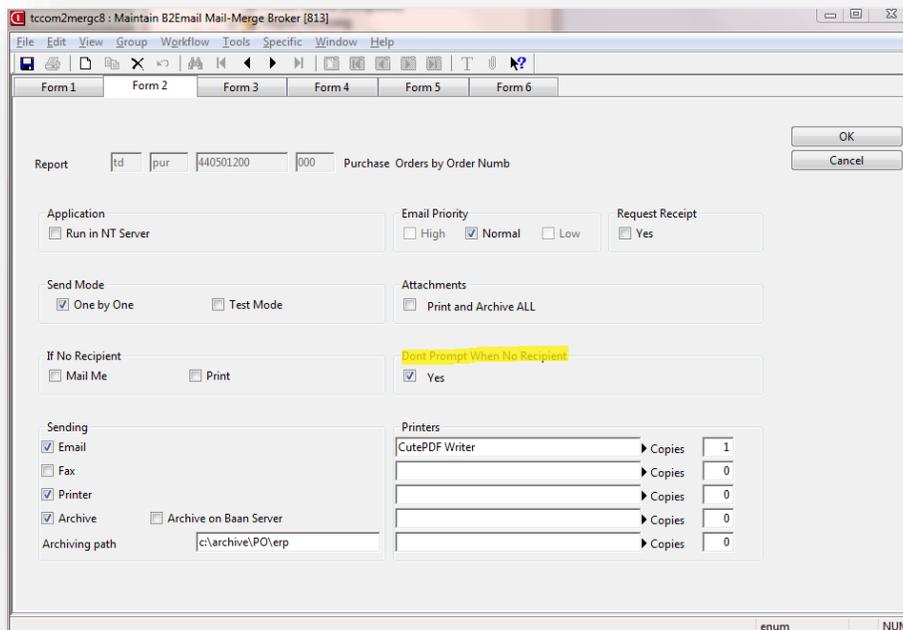
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- You can run all actions when you press on send button (in one by one mode) even when no recipient specified

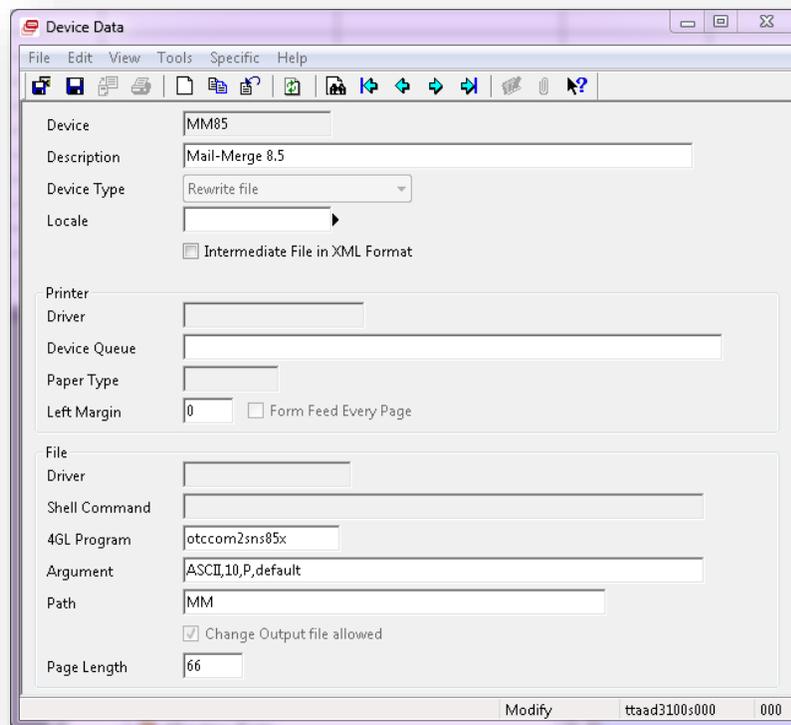


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4.2 Running *b2Mail-Merge* with Different Parameters

You can run *b2Mail-Merge* with different parameters than the ones defined in *tccom2mergc8*. 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

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jobs, while we need the properties of a real user for logo, background, signature and also sending in their name.

The rest of the parameters are the same as the ones in the b2Mail-MergeBroker.

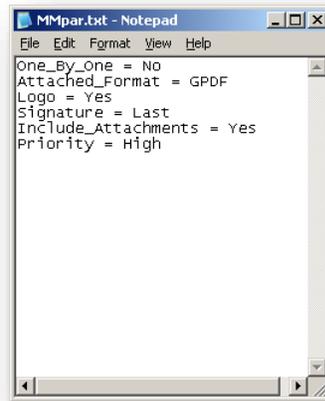
NT_Mode = Yes\No
One_By_One = Yes\No
Attached_Format = APDF\GPDF\TXT
Logo = Yes\No
Cover_Page = Yes\No
Run_External_App = Yes\No
Send_Log = Yes\No
Zipped = Yes\No
File_Name =
Enable_Email = Yes\No
Enable_Fax = Yes\No
Enable_Print = Yes\No
Enable_Archiving = Yes\No
Archiving_Path =
Mail_Me_If_No_Recipient = 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 =

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Example:



4.3 Running *b2Mail-Merge* in a Different Company

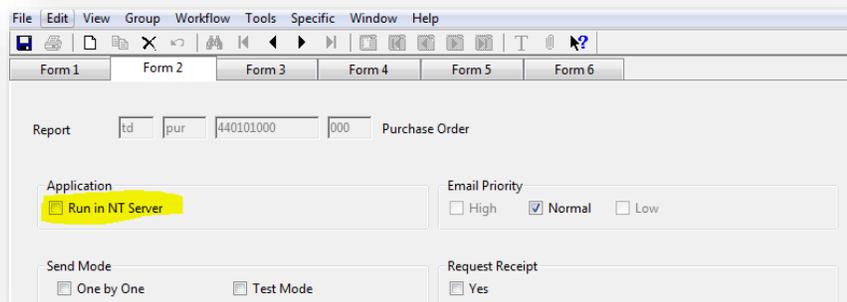
You can also run a report to the *b2Mail-Merge* device with parameters and definitions from a different company. As an example, when we use this argument in the device:

ASCII,10,P,default, d:\baan\nazdaq8\MMpar.txt,**200**

Definitions of company 200 will be used, no matter what company you are currently logged in.

4.4 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 (tccom2mergc8)



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.

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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.

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5 Keys and Addresses

5.1 Introduction

For every report you want to perform a Mail-Merge, you need to have an entry in session *tccom2mergc8*

The screenshot shows a software interface for configuring a mail merge. The window title is "tccom2mergc8". The menu bar includes "File", "Edit", "View", "Group", "Workflow", "Tools", "Specific", "Window", and "Help". The toolbar contains various icons for file operations and navigation. The main area shows a report configuration for "Purchase Order". The "Report" field contains "td", "pur", "440101000", and "000". Below this are buttons for "Get Key" and "Get Key Pos.". A yellow highlight is on the "Key" field. To the right, there are "Address" fields with values: "18 From 61 To 68" and "5 From 67 To 72". At the bottom, there are "To" and "To Group" fields with values "to" and "100" respectively.

Report

The Baan Report Code

Key

The key word in the document that will be used for performing the Mail-Merge from Baan
Possible Values are:

Purchase Order (Used in Purchase Order output or other Purchasing Reports)

Purchase Order Buy -	E-mail/Fax will be sent to Buy-from contact
Purchase Order Ship -	E-mail/Fax will be sent to Ship-from contact
Purchase Order Invoice -	E-mail/Fax will be sent to Invoice-from contact
Purchase Order Pay -	E-mail/Fax will be sent to Pay-to contact

BP

Email/Fax will be sent to B.P. contact

Email (This value is used when the explicit e-mail address itself is printed in the report)

General (This will merge the reports according to the selected value but won't send e-mails)

Employee E-mail/Fax will be sent to **Employee**

Sales Order

(Used in Sales Order Acknowledgement and other Sales Reports)

Sales Order Sell -	Email/Fax will be sent to Sell-to contact
Sales Order Ship -	Email/Fax will be sent to Ship-to contact
Sales Order Invoice -	Email/Fax will be sent to Invoice-to contact

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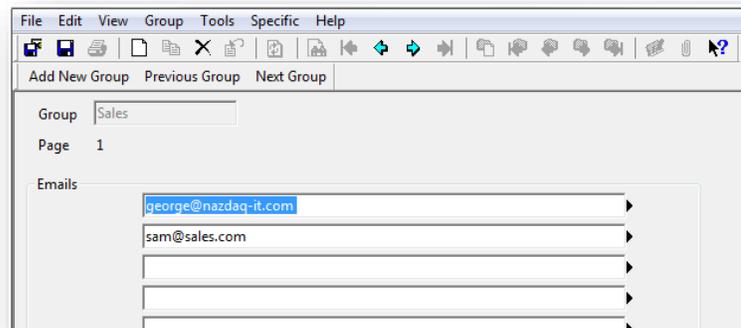
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Sales Order Pay -	E-mail/Fax will be sent to Pay-to contact
Sales Quotation Sell -	E-mail/Fax will be sent to Sell-to contact
Sales Quotation Ship -	E-mail/Fax will be sent to Ship-to contact
Sales Quotation Pay-	E-mail/Fax will be sent to Invoice-to contact
Sales Quotation Invoice-	E-mail/Fax will be sent to Pay-to contact

Sales Invoice with Transaction E-mail/Fax will be sent to **Invoice-to** contact

5.2 Sending to Groups

b2Mail-Merge allows you to send documents to a group of people. Insert a new group in *tccom2group8* and fill the e-mails



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

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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:

The screenshot displays the Baan ERP b2Mail-Merge 8.5 interface. The window title is "b2Mail-Merge 8.5" and the menu bar includes File, Edit, View, Group, Workflow, Tools, Specific, Window, and Help. The toolbar contains various icons for file operations and navigation. The main area is divided into several sections:

- Form Selection:** A row of tabs labeled Form 1 through Form 6.
- Report Information:** Fields for Report (td, pur, 440101000, 000) and Purchase Order.
- Key and Address:** A "Get Key" button, a "Key" field with a hyphen, and an "Address" field.
- Page Navigation:** Fields for "First Page - Line#" (18) and "Normal Page- Line#" (5), with "From" and "To" sub-fields (61, 68 and 67, 72 respectively).
- Email Settings:** Fields for From (default), To (to), Cc (cc), and Bcc (bcc).
- Groups:** A section with a "To Group" dropdown (100), "Cc Group" (hiba), and "Bcc Group" (100,hiba).

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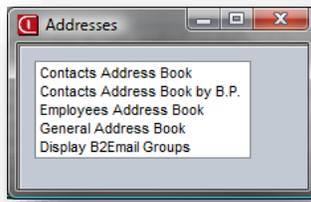
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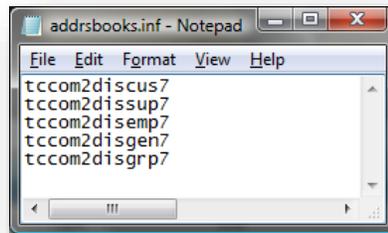
5.3 *Maintain b2Mail-MergeAddresses*

5.3.1 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/B2Email7/settings/abk`:



b2Mail-Merge 8.5

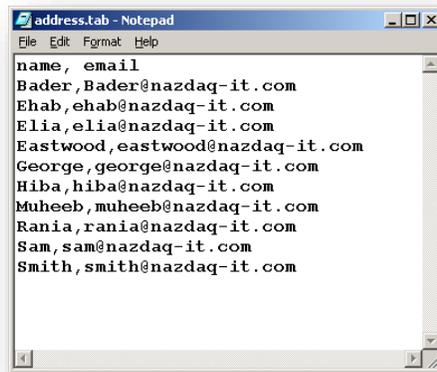
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5.3.2 General Address Book

In order to create a global address book for *Baan Mail-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 $\${BSE}/nazdaq8/settings/abk$

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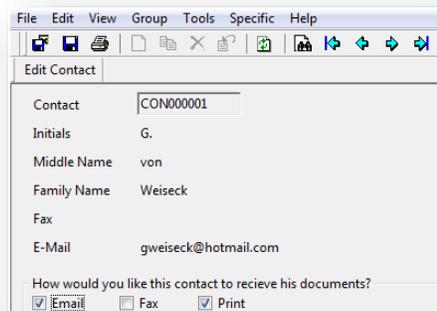
5.3.3 Maintain Mail-Merge Contact/Address Options

b2Mail-Merge picks the E-mail and Fax information from the Contact table – (tccom140 - session tccom4540m000) and if there is no contact defined for the business partner, it picks it from the Address table (tccom130 - session tccom4530m000).

For every report, you define the accepted means of communication for this report (you can choose between E-mail, Fax, Print and Archive). This information is defined with the broker.

As for the specific contact or address, the preferred means of communication is defined using **tccom2mmcnt8** – Maintain Mail-Merge Contact Options and **tccom2mmadd8** – Maintain Mail-Merge Address Options.

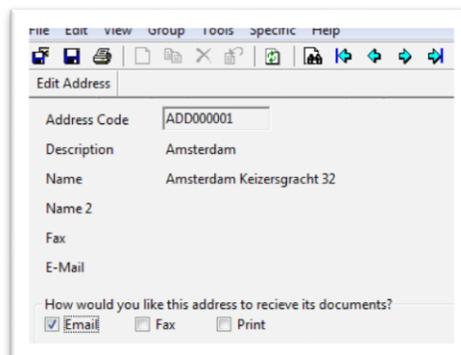
As an example, for contact CON00008 we define e-mail and printing as the means we wish *b2Mail-Merge* to communicate with this contact, as you can see here:



Field	Value
Contact	CON000001
Initials	G.
Middle Name	von
Family Name	Weiseck
Fax	
E-Mail	gweiseck@hotmail.com

How would you like this contact to receive his documents?
 Email Fax Print

As for Address ADD000044, it is defined to print only, Even though an e-mail and a fax number are defined.



Field	Value
Address Code	ADD000001
Description	Amsterdam
Name	Amsterdam Keizersgracht 32
Name 2	
Fax	
E-Mail	

How would you like this address to receive its documents?
 Email Fax Print

If no entry is defined for a certain contact or address, the default is picked, as if Email, Fax and Print options are chosen. In this case, whatever data that exists will be picked based on the report settings.

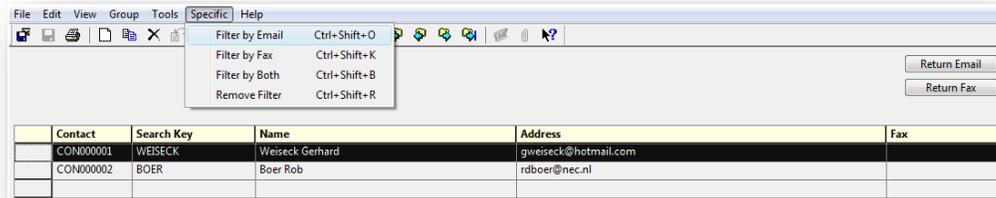
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5.3.4 Filtering E-mails

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.

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6 Attachments

6.1 External Attachments

Basic attachment functionality is available using the *b2Mail-Merge* basic functionality. This is good 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 Baan Mail-Merge.

The screenshot shows a 'Display Browser - Purchase Order' window. The form contains the following information:

PURCHASE ORDER Original

Mrs. Byle Inc
Harvard Lane 44
Chicago, IL 60604
United States of America

Delivery address
Component warehouse
South Creek 6879
New Orleans, LA 70125

Nazareth, 12-02-04

Dear Sirs,

We hereby ask you to deliver the following goods in accordance with our terms of delivery.

Supplier : 1003
Our Order : 281011
Order Date : 05-25-2001
Buyer : Landnan
Ref. :

Quantity	Unit	Item	Cnt	Price	Unit	Tax	Discount	Del. Dt	Week
5.0000	pcs	25825		280.50	pcs	not		05-25-2001	21
10.0000	pcs	Pentium chip 133 Mhz 26852		246.75	pcs	not		05-25-2001	21
12.0000	pcs	Video Card Diamond 28841		22.00	pcs	not		05-25-2001	21
12.0000	pcs	Front tower 120x600mm 41414		35.00	pcs	not		05-25-2001	21
		Piston for Diesel 2.0							

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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.

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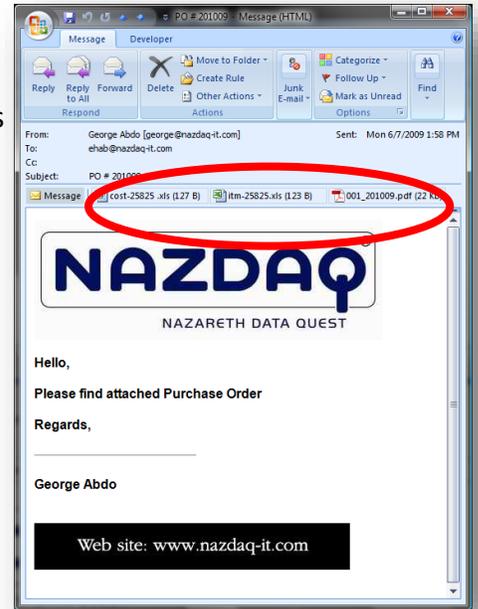
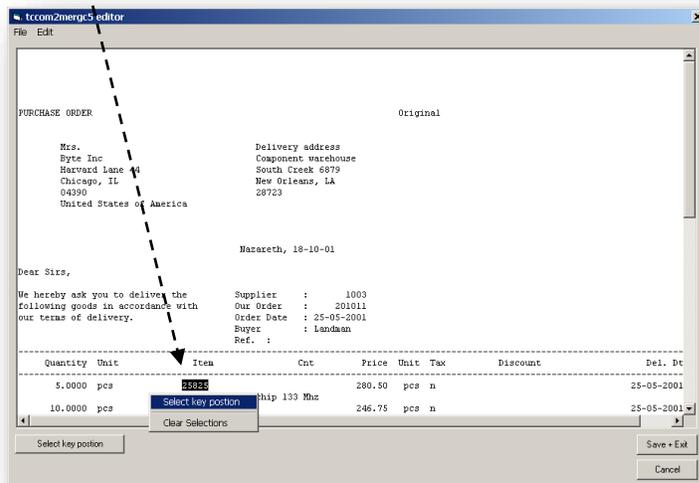
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File Path = The location of the external file that you wish to add to your document

Prefix = File name Prefix

Suffix = File name Suffix

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-Mergevariables in both of those fields. Example:

Archiving Attachment Names

Prefix

Suffix

b2Mail-Merge 8.5

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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](#).

The screenshot shows a 'Display Browser - Purchase Order' window. On the left, there is a list of files: 25825.gif, Pentium chip 133 Mhz.pdf, item-25825.xls, 26852.gif, item-26852.xls, Video Card Diamond.pdf, 28841.gif, Front tower 120x600mm.pdf, item-28841.xls, 41414.gif, item-41414.xls, and Piston for Diesel 2.0.pdf. The main window displays a purchase order for 'Original' with the following details:

Mr's. Byte Inc
Harvard Lane 44
Chicago, IL 04398
United States of America

Delivery address
Component warehouse
South Creek 6879
New Orleans, LA 28723

Hazareth, 12-02-04

Dear Sirs,
We hereby ask you to deliver the following goods in accordance with our terms of delivery.

Supplier : 1003
Our Order : 201011
Order Date : 05-25-2001
Buyer : Landman
Ref. :

Quantity	Unit	Item	Cnt	Price	Unit	Tax	Discount	Del. Dt	Week
5.0000	pcs	25825		280.50	pcs	not		05-25-2001	21
10.0000	pcs	26852		246.75	pcs	not		05-25-2001	21
12.0000	pcs	28841		22.00	pcs	not		05-25-2001	21
12.0000	pcs	41414		35.00	pcs	not		05-25-2001	21

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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.

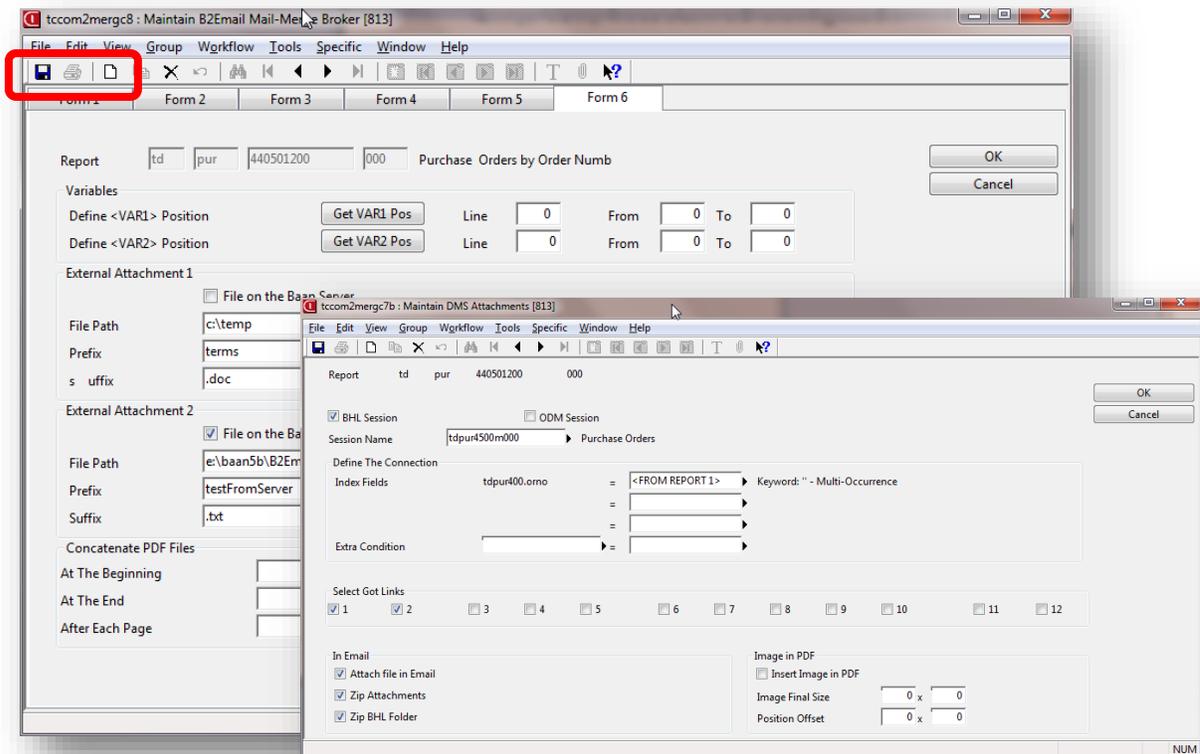
You can possibly link to Folder and not only a file, and by this, you can attach all files in a certain folder. As an example, if you store all documents that are related to an item in a specific folder, you can possibly zip all folders for all items and attach them to the purchase order being sent!

b2Mail-Merge 8.5

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We need to link between entities in the Baan report and the linked files they have defined in *Baan Hot Link* (or ODM). We do 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-MergeVariable*

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.

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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-Mergevariable* 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-MergePurchase Order* report with *Baan Hot Link Maintain Item Data*.

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

Images in PDF will be released in the coming versions.

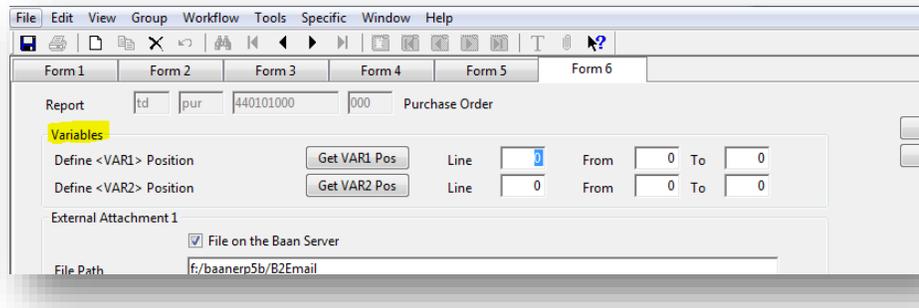
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7 Variables

You can define two variables from the report in the *b2Mail-Merge* broker. Those 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 (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
- <VAR2> - Defined in Mail-Merge Broker
- <FILENAME> - File Name

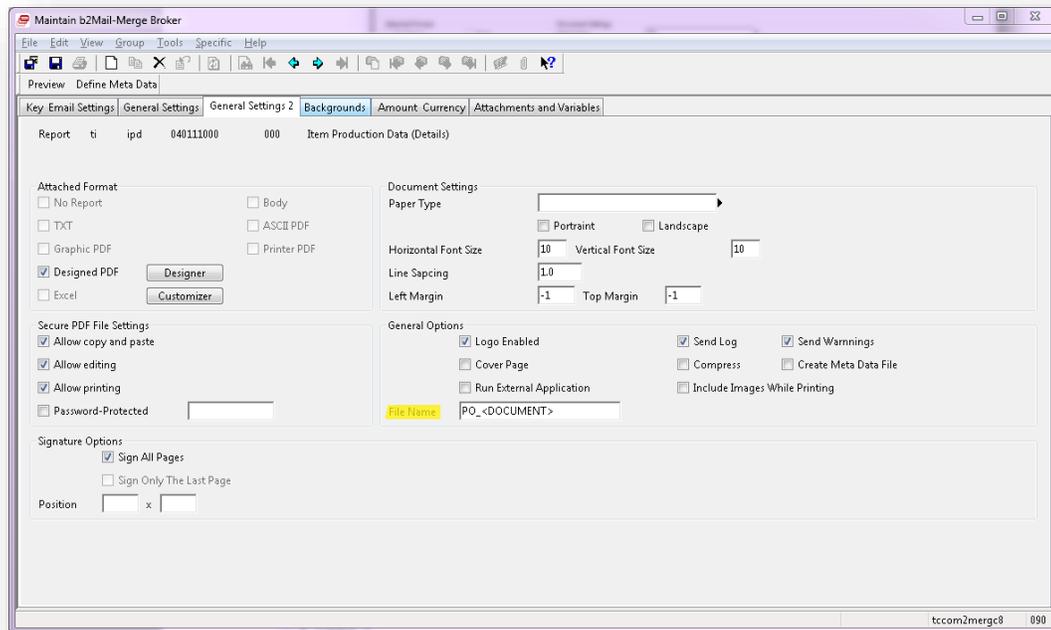
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8 File-Name

In the *b2Mail-MergeBroker* 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:

PO_<DOCUMENT>

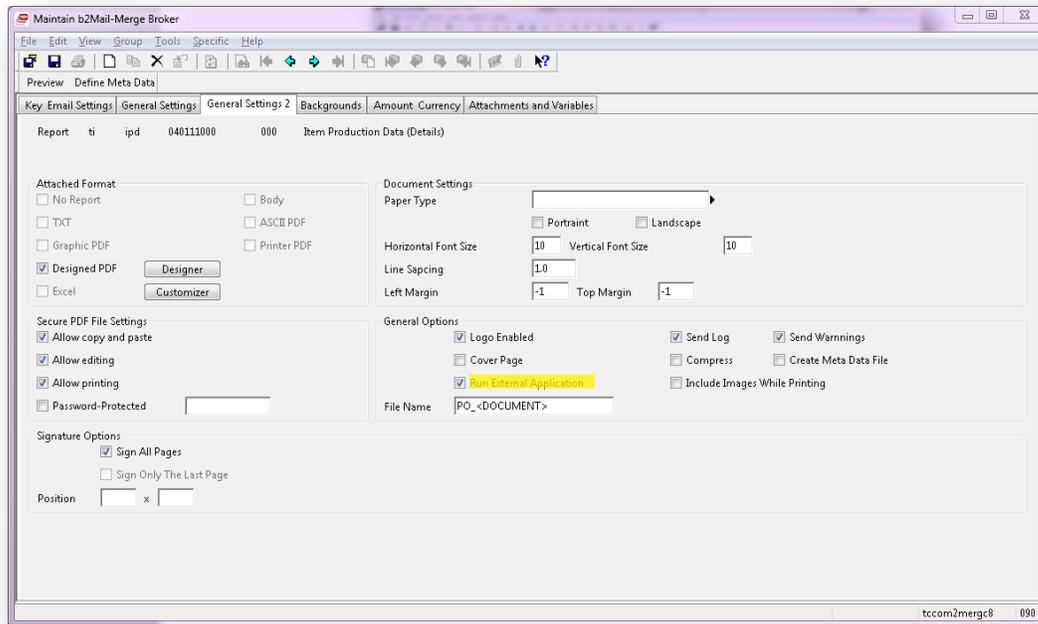
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8.1 Running External Applications with Baan Mail-Merge

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* *External_App_Output_Extension* variables.



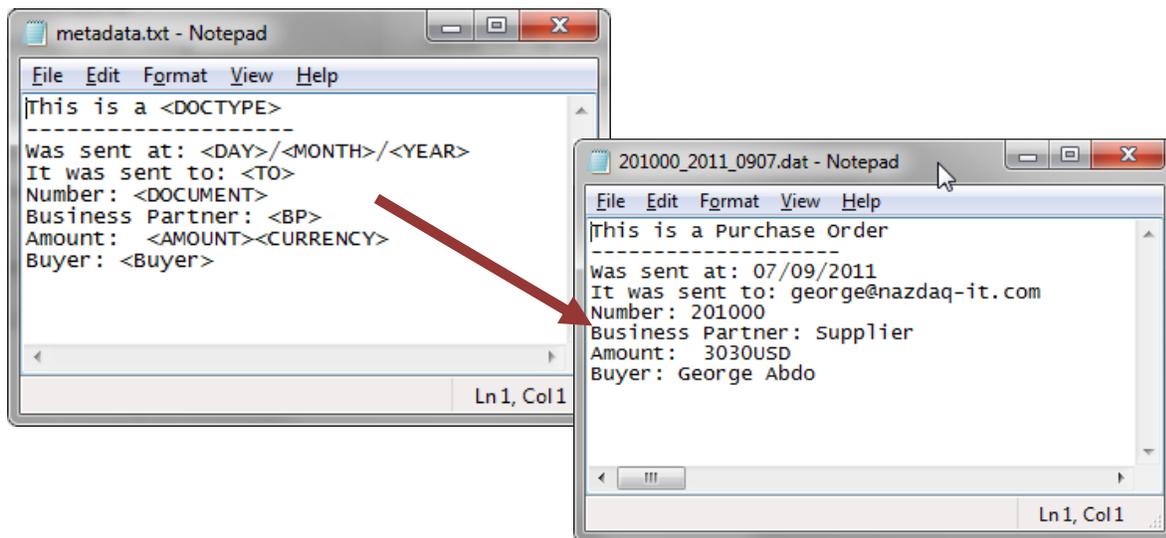
8.2 Define Meta Data File

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-MergeVariables*: Here is an example:

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9 Purchase Order Approval Module

9.1.1 Introduction

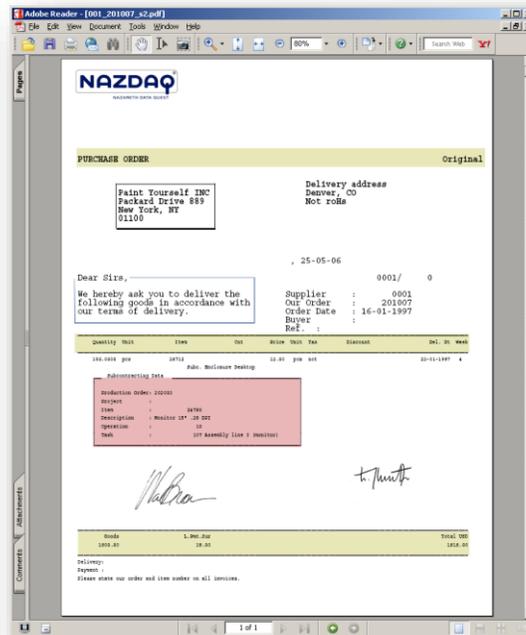
The Purchase Order Approval extension covers the area where b2Mail-Merges is used for purchase orders, and more than one person must sign certain orders, based on the amount.

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 manager 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.



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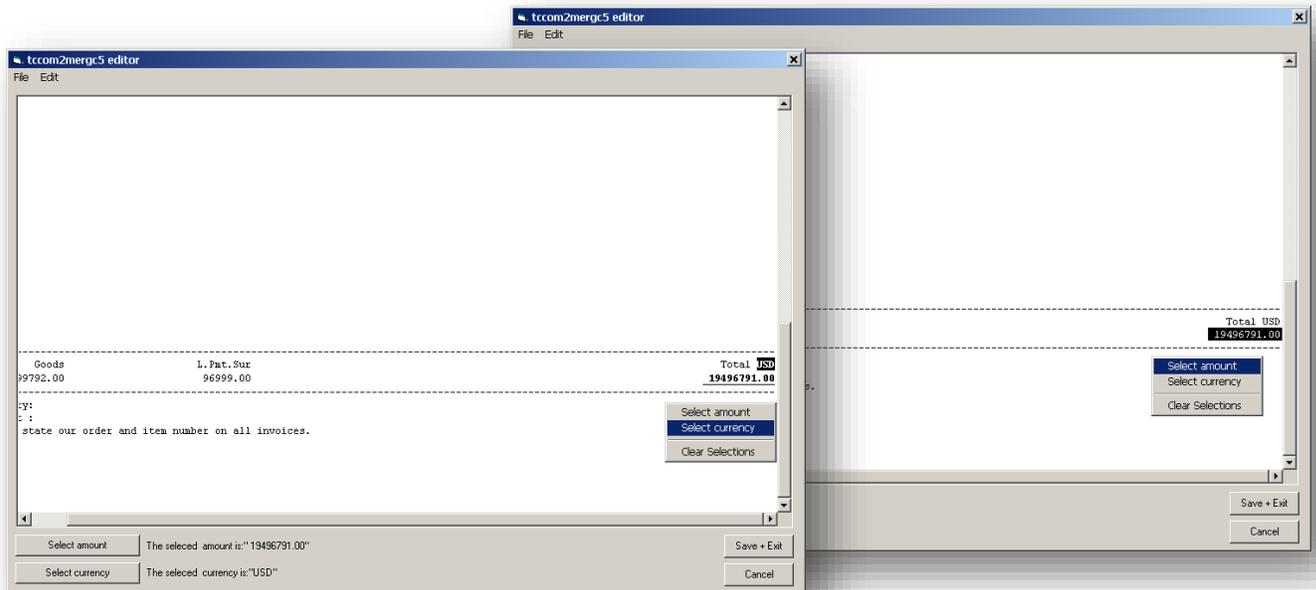
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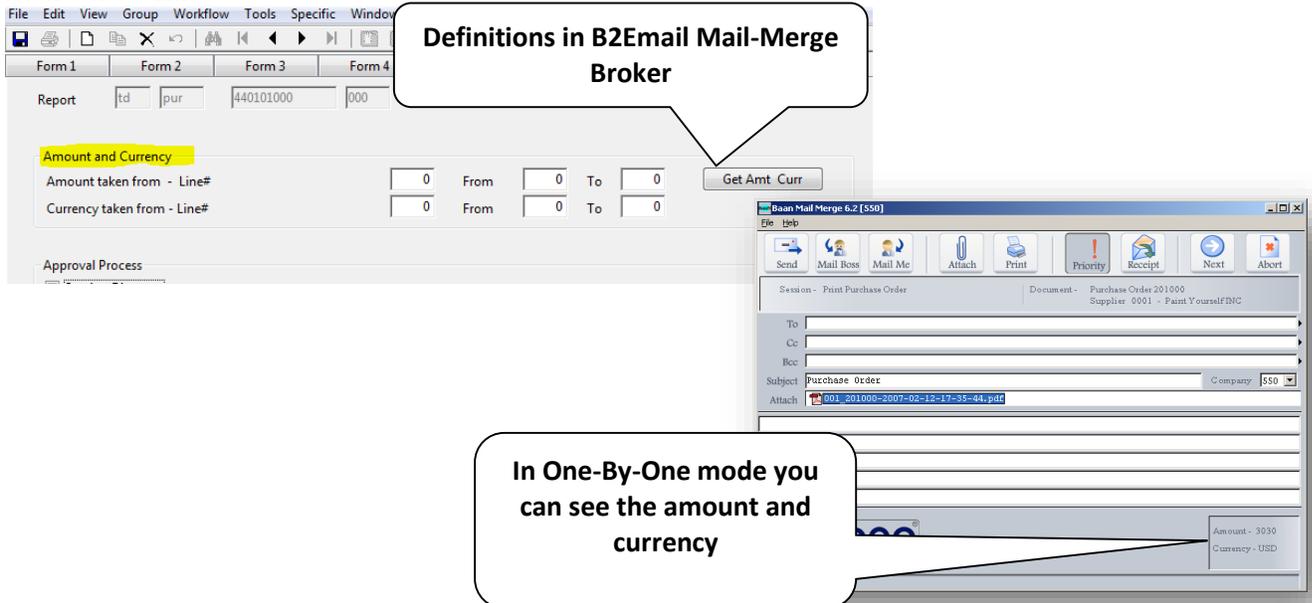
9.1.2 Amount/Currency

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



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9.1.3 Purchase Approval Process Settings

The screenshot shows the 'Purchase Approval Process Settings' window. The 'Approval Process' section is highlighted in yellow and contains the following settings:

- Staging Directory
- Path: \\ln6\staging

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

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10 General Options

10.1.1 File Management

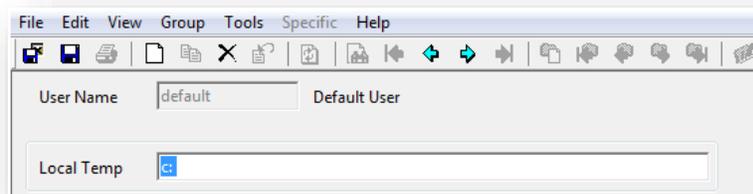
b2Mail-Merge creates multiple temporary files on the server and the client in order to produce the end result. This chapter discusses these files and how to best manage them for better performance and maintenance of your system.

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.

10.1.2 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 temp directory 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%.

10.1.3 Managing the Temporary Directory on the Server

By default *b2Mail-Merge* creates a directory in `$BSE/tmp` under the name `<userid>mmddyhhmmss`

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

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10.1.4 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.

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10.2 Online Help

b2Mail-Merge8.0 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`.

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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.

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 trial 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.)

Use_Fax_County_Code

Defines whether to use the Baan fax Country code or not. Values “Yes” or “No”

Paper_Type

Default A4. You can set any paper type you have defined in papertypes.ini. In addition there are A4, Letter & Legal

Server_Temp

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

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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-Mergewhere* 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.

Header_Dist

In order to enlarge the distance (in points) between the page top and the top of the header and the logo you will have to change the value of Header_Dist (Default is 10).

Hide_Path_in_Log

If “yes”, the path of the attachments will be hidden the log.

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

Filter

When you zoom to your address sessions from the *b2Mail-Mergeuser* 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)

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External_App

If you want to run any program on *Baan Mail-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-MergeGroups.

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11 Legal Notice – Warning

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.

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