



How to Work with SAP Business One Microsoft 365 Integration

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Introduction

With SAP Business One Microsoft 365 integration, you do not have to install Microsoft Office Word or Excel, and you can achieve the following:



- Export documents, reports and queries from SAP Business One to the Microsoft OneDrive as Word or Excel files
 - Export the following marketing documents to Word and Excel:
 - Sales quotation
 - Sales order
 - Delivery
 - Return request
 - Return
 - A/R down payment request
 - A/R down payment invoice
 - A/R invoice
 - A/R invoice + payment
 - A/R reserve invoice
 - A/R credit memo
 - Purchase request
 - Purchase quotation
 - Purchase order
 - Goods receipt PO
 - Goods return
 - Goods return request
 - A/P down payment request
 - A/P down payment invoice
 - A/P invoice
 - A/P reserve invoice
 - A/P credit memo
 - Export grid data to Excel
 - Export queries to Excel
 - Export the **Customers Receivables Aging** report to Word
 - Export the **Open Items List** report to Word when you select A/R invoices or A/R reserve invoices
- View the exported file online in the Microsoft OneDrive

- Design your own export templates

Exporting Documents in SAP Business One

On the machines where you have installed the server components or the SAP Business One client application, make sure that the operating system time is the same as the network time, and that you can access the OneDrive. Otherwise, you may not export documents successfully. If you cannot open the OneDrive page, try setting a proxy in your network.

Procedure

1. From the SAP Business One **Main Menu**, choose **Administration** > **System Initialization** > **General Settings**, and on the **Path** tab, in the **Export Word and Excel File To** section, select the **OneDrive** radio button.
2. In SAP Business One, open the document that you want to export.
3. In the toolbar, to export the document as an Excel file, choose , and to export the document as a Word file, choose .

i Note

Only a user with full authorization for **MS-WORD** or **MS-EXCEL** can choose the two buttons mentioned in step 3 above. For more information, see [Authorizations](#).

i Note

Make sure that you have set your default web browser as Google Chrome, Microsoft Edge, Mozilla Firefox or Apple Safari.

Results

The exported file is opened in the OneDrive page in your default web browser.

Exporting and Emailing Documents in SAP Business One, Web client

With SAP Business One Microsoft 365 integration, you can export and email documents in SAP Business One, Web client. For more information, search for SAP Business One Microsoft 365 integration in the *Web Client User Guide* on [SAP Help Portal](#), or see SAP Note [3285126](#).

Designing a Template

Context

You can design both Word and Excel templates for each type of marketing documents.

Procedure

1. Download an SAP-predefined template. To do this, in the **File Name** column of the **Template Management** page, click the file name for a predefined template to download it.

i Note

This is custom documentation. For more information, please visit the [SAP Help Portal](#)

You can create a new Word or Excel file from scratch. However, we recommend that you create a customized template from an SAP-predefined template.

2. Open the file and define the fields that you want to export.

To identify a field, use the following placeholder:

- For fields that are not in the table area of the **Contents** tab, use `#{<BO>.<field>}`. For more information about the business objects and fields, see the following section.
- For fields that are in the table area of the **Contents** tab, use `#{Lines.<field>}`. For more information about the types of tables, see the following section.

When you are exporting documents, the placeholder will be replaced by the value in the database.

3. Save the document.

Fields Available For Export

You can find fields available for export in this [complete list](#). Some of the descriptions are the example values of the fields.

- Table 1 displays all the fields that are supported by SAP Business One Microsoft 365 integration and that are not in the table area of the **Contents** tab.

There are five kinds of business objects:

- Doc stands for the marketing document
- BP stands for the business partner of the marketing document
- Payment stands for the payment information of the marketing document
- Contact stands for the contact person of the marketing document
- Company stands for the information of the company that creates the marketing document

Field names may be the same, but as they belong to a different object, you can still identify them with the placeholder `#{<BO>.<field>}`. If you do not enter the object name in the placeholder, the default object Doc will be used.

Example

You enter a placeholder as `#{DocNum.Val}`, and the system will use `#{Doc.DocNum.Val}`.

- Tables 2 - 5 display all the fields that are supported by SAP Business One Microsoft 365 integration and that are in the table area of the **Contents** tab.
 - Fields in Table 2 belong to **Item** type and the **Summary Type** is **No Summary**.
 - Fields in Table 3 belong to **Service** type and the **Summary Type** is **No Summary**.
 - Fields in Table 4 belong to **Item** type and the **Summary Type** is **By Items**.
 - Fields in Table 5 belong to **Item/Service** type and the **Summary Type** is **By Documents**.

You can find the **Item/Service Type** and **Summary Type** on the **Contents** tab of the marketing document.

In a template, you can design four types of tables, and the system will export the data to the table according to the opened document. To define the specific types of tables, add respective beginning placeholders as follows and the ending placeholder `<End of the table>`.

Table Type	Beginning Placeholders
Item type and the Summary Type is No Summary	<Begin of the table: Type = Item>
Service type and the Summary Type is No Summary	<Begin of the table: Type = Service>
Item type and the Summary Type is By Items	<Begin of the table: Type = Item&Summary Type=By Items>
Item/Service type and the Summary Type is By Documents	<Begin of the table: Summary Type=By Documents>

When exporting, the system will first match the table type to the beginning placeholders. If the placeholders cannot be accurately matched, the system will export the data to the table whose beginning placeholder matches part of the table type.

❁ Example

The document that you want to export is of **Item** type, and its **Summary Type** is **By Items**, and in the template, there is no such placeholder as <Begin of the table: Type = Item&Summary Type=By Items>. The system will export the data to the table whose beginning placeholder is <Begin of the table: Type = Item>.