

Microsoft Dynamics® C5

Newsletter 2012 Hotfix 001
Version 4.4.00.001

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USE OF ACTION LISTS

In version 2012 HF1 the functionality for the use of customer and vendor action lists has been extended to include the possibility to delimit the execution of actions depending on the action's element type. This change only affects standard action lists and action lists which have been set up **locally** for individual **customers/vendors**

As a rule, all actions which are set up on an action list are executed when the action list is called by a function, for example invoicing, whilst users get the additional opportunity to delimit the execution of the action list to just include **reports** and thus skip other types of actions.

This functionality has been introduced in connection with the desire to be able to reprint a document without executing other actions which are set up on the customer's or vendor's action list such as creating an OIOUBL file. However this functionality requires that there is a **report setup** on the current action list.

Example:

A customer has a local action list for invoicing with 2 actions: a **standard invoice printout** and an **OIOUBL invoice**

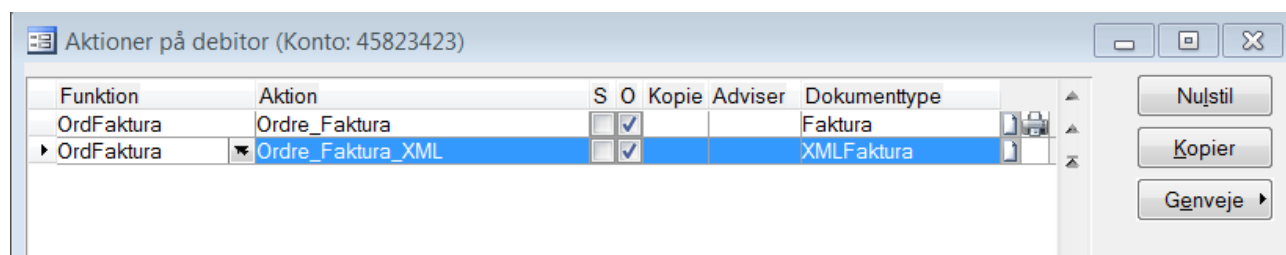
When invoicing, in addition to the usual prompt field **Print Yes/No**, the prompt will also contain a new prompt field **Action list**, where it is possible to choose between:

All actions

Only reports

If you choose "All actions" and "Yes" to "Print", the action list will be executed in its entirety, i.e. all actions on the action list will be executed – both print and OIOUBL.

If you choose "Only reports" and "Yes" to "Print", only the printout will be executed and all other actions including OIOUBL will be ignored



The same functionality is implemented for the following functions in Microsoft Dynamics C5:

CustInterestNote

CustReminder

CustAccStatement

SalesQuotation

SalesConfirmation
SalesPackingSlip
SalesInvoice
Purchnquiry
PuirchRequisition
PurchPackingSlip
PurchInvoice
ProjQuotation
ProjConfirmation
Proj PackingSlip I
ProjInvoice
SimpleSalesInvoice

and so on for all Proforma invoices and Vendor statements of account.

COPYING ACTION LISTS

A new menu item **Copy** has been added to the windows with local action lists in the Customer and Vendor modules. This item allows you to copy a customer's or vendor's action list to other customers/vendors.

The new menu item calls a search based on the Customer/Vendor table which must be delimited to the customer(s)/vendor(s) to whom you want copy the current action list.

Another prompt appears in which you must choose the following:

In the **Copy** field select the required copying method

- **Only to empty**
The current action list will be copied to the chosen customers/vendors if they do not already have an action list.
- **Delete and copy**
The current action list will be copied to the chosen customers/vendors and all their pre-existing action lists will be deleted before the copying is performed.
- **Add only new**
Before copying is started, any action lists which may already exist for the chosen customers/vendors are compared with the current action list and only action lines which do not already exist on the chosen customers/vendors are copied.

In the **Copy printer setup** you specify whether the printer setup on reports should be copied along with action lists.

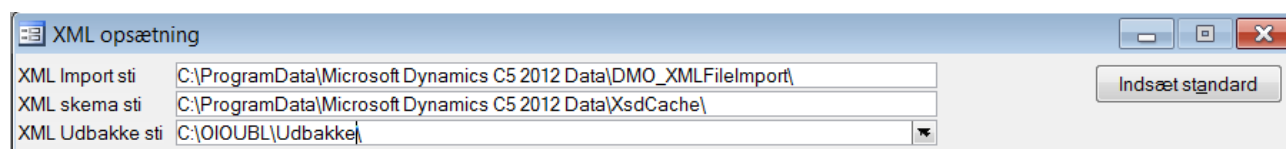
ACTION LIST OVERVIEW

A new menu item **Action lists** has been added under **Customer/Reports/Master data** and **Vendor/Reports/Master data**. Here it is possible to print an overview of all the action lists that have been set up in the Customer and Vendor modules.

XML OUTBOX

When XML documents are generated in Microsoft Dynamics C5 the documents are saved in the data set (company)'s document management archive in a folder corresponding to the document's type, for example **\DocMgmt\DAT\XMLInvoice** for an OIOUBL invoice.

In this version the XML setup has been extended with the possibility to specify an extra folder where you want **all** outgoing XML files to be collected together, for example, in connection with centralised dispatching of files. This folder can be specified by using the local menu **XML setup** in the **XML Schema** window. If you specify a folder under **XML outbox path** a copy of all the data set (company)'s outgoing XML files will be saved in this folder no matter what type the document is.



The files will also continue to be saved in the document management archive. If an XML file cannot be successfully validated it will **not** be copied to the **Outbox folder**.

PATH FOR SAVED DOCUMENTS AND XML-FILES

Standard document management folder logics is based on Company extension and document types, i.e. a new document is placed in the document management folder's subfolder that has the same name as the company's data file extension. Furthermore if a document type has been specified for the document (on the action list that creates the document or in the report setup) then the document will be placed in the subfolder with the name that is the same as the specified document type. All folder names taken from document type names (except those that are created by users manually) are created in the company's language (DK for Denmark and IS for Iceland).

OIOUBL created the document type folders in the screen language - which means that the same document type can be placed in at least 3 different folders (depending on which language the application has been started with). Furthermore the document type was taken from the general Action setup and not the Action lists.

This has been changed in Hot fix 001 så all document types follows the same logic.

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