



Generating Documents? It's a Job for a Wizard!

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The Document Generation Wizard enables you to generate large number of marketing documents in batches. Over time, the wizard has been enhanced with various options, that can increase your day to day efficiency.

You can draw source documents of various types to the selected target document – for example, you can draw sales orders and deliveries to a given A/R invoice.

Document Generation Wizard

Base Documents
Select the base documents to be processed by choosing the appropriate document types and selection criteria.

Doc. Types	Posting Date	From	To
<input checked="" type="checkbox"/> Sales Quotations	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Sales Orders	Delivery Date	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Deliveries	Series	<input type="text"/>	<input type="text"/>
	<input type="checkbox"/> Allow Partial Delivery		
	<input type="checkbox"/> Expanded Selection Criteria		

Ignore Quotations with Alternative Items Do Not Create Docs Cont. Zero Qty Lines or No Lines

Sort By

#	Sort Field	Order
1	Document Number	Ascending
2		Ascending
3		Ascending

Step 3 of 8

In addition, the consolidation options are expanded, allowing you to consolidate the documents by various parameters such as numbering series, document currency, project code, etc.

The screenshot shows the 'Document Generation Wizard' window, specifically the 'Consolidation Options' step. The title bar reads 'Document Generation Wizard'. Below the title, the section is titled 'Consolidation Options' with the instruction: 'Select "No Consolidation" to create one target document for each base document.' There are two main radio button options: 'Consolidate By:' (selected) and 'No Consolidation'. Under 'Consolidate By:', there are several checkboxes: 'System Defaults' (checked), 'Ship-to Address' (unchecked), 'Payment Terms' (unchecked), and 'Payment Method' (unchecked). Below these is a section for 'Expanded Consolidation Options' with a checked box. Under this section, there are three dropdown menus: 'Project Code' (checked), 'Series' (checked), and two empty dropdowns (unchecked). Under the 'No Consolidation' option, there are two checked checkboxes: 'Consider Cust. Sequence' and 'Consider Base Doc Type'. At the bottom left, it says 'Step 4 of 8'. At the bottom right, there are three buttons: 'Cancel', '< Back', and 'Next >'.

The Document Generation Wizard is located under the Sales – A/R module.

Available in SAP Business One, version for SAP HANA and SAP Business One.

This tip and all the other tips are available on the [Tip of the week SCN page](#).

You can also visit the [Implementation Arena](#) for useful implementation tips.



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