

Business One in Action – How To Create The Business Partner Code Automatically?



Applies to:

SAP Business One, [Logistics](#), [Customization](#).

Summary:

This article explains how to create automatically alphanumeric Business Partner codes.

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How to create the Business Partner code automatically?

To ensure continuity and transparency in their *Business Partner Master Data*, many companies require a tightly controlled sequential business partner code generation. In SAP Business One auto-generated sequential business partners' codes are easy to set up.

For example, Dr Computer Repairs (DCR) is a company that repairs laptops and sells rebuilt second hand laptops: user laptops, bus and trucks laptops. Their suppliers are divided per their geographical region. Each geographical region is set up as one supplier group. As a consequence, the business requirement is to set up the application such that new alphanumeric business partner codes are automatically generated when a new supplier is entered in the system. In the system, the first part of the code indicates the geographical region and is controlled by the business partner group. The second part of the code is a numerical value which increases by one with each new entry. To ensure consistency of this numbering system, a *Formatted Search* is linked to the *Code* field, in the *Business Partner Master Data* (OCRD, CardCode), and it is triggered when the supplier group is selected.

The code for the first business partner, of each group, must be manually created, or imported with DTW. For all subsequent *Business Partner Master Data* records, the query retrieves the different parts of the code and increase the numbering automatically.

In the following example, the *Code* Reg1 was manually entered when creating the first supplier for the *Group* 'Region1'.

Code	Reg1	Supplier	Local Currency
Name	Treasure Shop	Account Balance	0.00
Foreign Name			
Group	Region1		
Currency	British Pound		
VAT Number			

The following sample query will update the *Code* field according to the specifications:

```

/* Call the last BP number and keep only the alpha part at the beginning of the
code. The lenght expression (4 in the below) has to be modified according to the
lenght of the alpha part of the code.
Concatenate the alpha and the numeric value (+).
Call the numeric part of the last code. Increase it by one(1). The result is
then converted in alphanumeric type */
SELECT
    substring ((MAX(T0.CardCode)), 0,4)
+
    cast ((Substring ((MAX(T0.CardCode)),4,4)+1) AS varchar (20))
FROM
    OCRD T0
WHERE
    T0.GroupCode = @[OCRD.GroupCode]

```

To save this query in SAP Business One and activate the *Formatted Search*:

1. Go to *Tools -> Queries-> Query Generator -> Execute*.
2. Copy and paste the above query and amend the substring start and length expression according to the desired code definition.
3. Save the query in the relevant category in the *Query Manager*.
4. Open the *Business Partner Master Data (Business Partner -> Business Partner Master Data)* and change it to the *Add* mode.
5. Standing in the *Code* field, press *Shift+ALT+F2* or go to *Tools -> Customization Tools->User Defined Value Setup* and complete the *Formatted Search* set up. For more information on setting up *Formatted Searches*, please refer to the document *How To Define and Use User-Defined Values in 8.8* on the [Documentation Resource Centre](#).

The screenshot shows the 'Business Partner Master Data' dialog box. The 'Code' field is highlighted in green and contains 'Customer'. The 'Group' field is set to 'Africas'. The 'Currency' is 'British Pound'. A sub-dialog box titled 'User-Defined Values - Setup' is open, showing three radio button options: 'Without Search in User-Defined Values', 'Search in Existing User-Defined Values', and 'Search in Existing User-Defined Values According to Saved Query'. The third option is selected. Below it, a text field contains '2010.08_AutomaticCardCode' and a button 'Open Saved Query'. A checkbox 'Auto Refresh When Field Changes' is checked. A dropdown menu shows 'Group Code'. At the bottom are 'Update' and 'Cancel' buttons.

Once the formatted search is created, each time the group is modified the code is automatically created. In the following example a second supplier has been added to the *Group* 'Region1'. This time *the Formatted Search* created the *Code* 'Reg2'.

The screenshot shows the 'Business Partner Master Data' dialog box. The 'Code' field is highlighted in green and contains 'Reg2'. The 'Group' field is highlighted in green and contains 'Region1'. The 'Currency' is 'British Pound'. The 'Account Balance' is '0.00'.

Note: In this example the *Formatted Search* was set to activate when the *Group* field changes. If adding a new supplier, the default *Group* is automatically selected. If you need to use this *Group* then you will need to manually trigger the *Formatted Search* by resetting the *Group*.

If in the company business process the group of a business partner can be updated/changed, the formatted search should not use *Auto Refresh*. The *Code* in the *Business Partner Master Data* cannot be changed once transactions exist. As a consequence, there may be no need to use *Auto Refresh*.

The screenshot shows the 'User-Defined Values - Setup' dialog box. The third radio button option, 'Search in Existing User-Defined Values according to Saved Query', is selected. Below it, a text field contains '2010.08_AutomaticCardCode' and a button 'Open Saved Query'. The checkbox 'Auto Refresh When Field Changes' is unchecked.

The user will then have to manually update the *Code*. This can be done by using *Shift+F2* or *Tools -> User Defined Values* or clicking on the magnifier in the field when activated (*View -> Pickers Display -> User Defined Values*). Again, the *Business Partner Master Data Code* can only be changed if no transactions exist for that business partner.

Related Contents

- [SAP Business One in Action Catalog Page](#)
- [Link to DRC](#) documentation
- Note [1378434](#)
- For more information, visit the [Business One homepage](#).

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