

# SAP Business One 9.2

## Release Highlights

July 2016

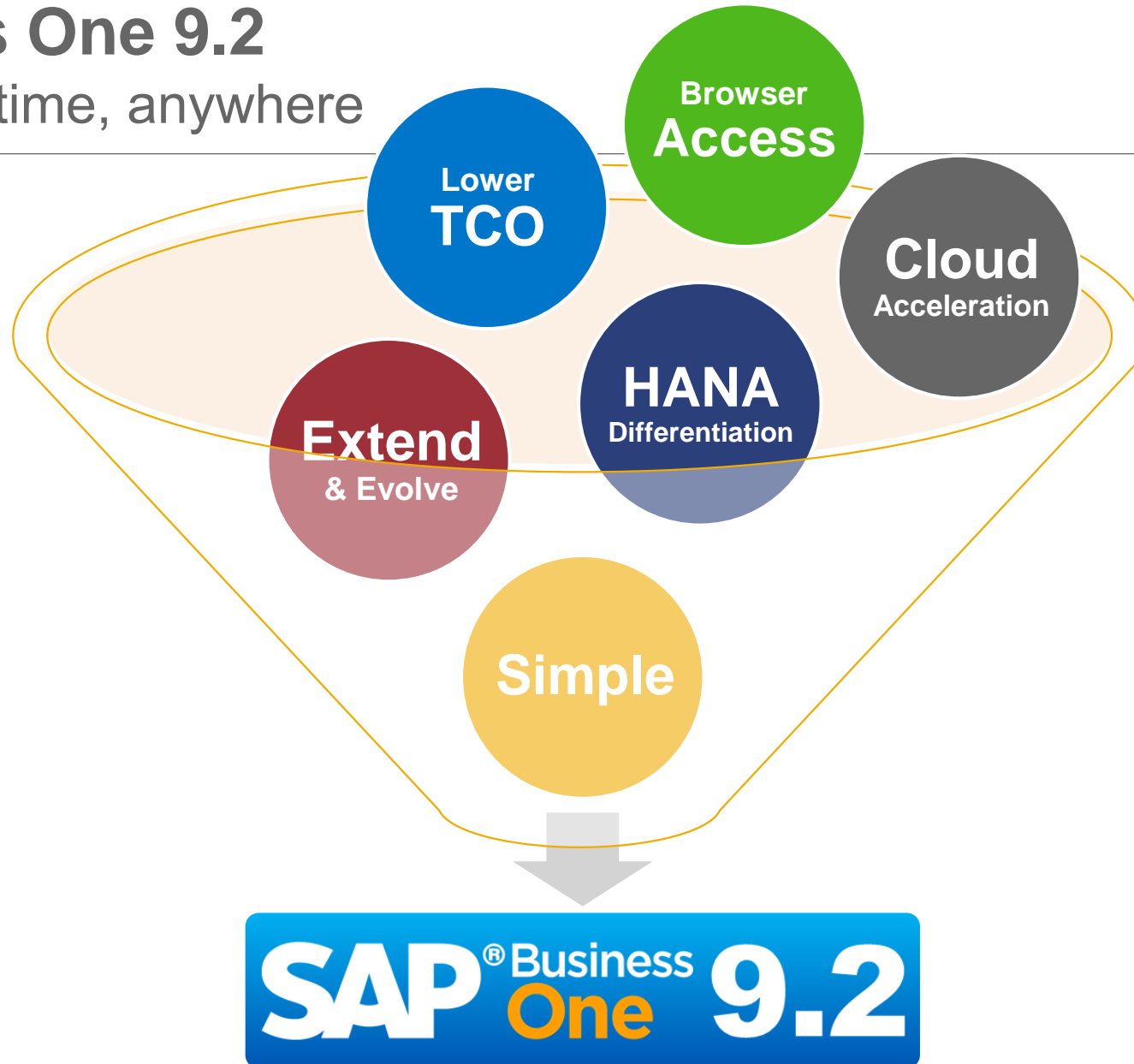
CUSTOMER



SAP

# SAP Business One 9.2

Run simple... anytime, anywhere



# Highlights of SAP Business One 9.2 (1/2)



## Administration

Business Partner Data Ownership

Approval Procedure Update

Electronic Document Framework

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Gross Freight



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Pervasive Analytics Designer



Excel Reports



Intelligent Forecast



# Highlights of SAP Business One 9.2 (2/2)



## Inventory | Distribution

Price Update Wizard

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Item Cost Standard Valuation

UoM Restriction for Bin Locations

Stock Counting Print Preview

Inventory Posting & Opening Balances



## MRP | Production

MRP Wizard

Forecasts

Production Updates



## Lifecycle Management

Remote Support Platform 3.2

Simplified Setup Wizard

SAP Business One Package

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Logging & Tracing Updates



## Platform | Extensibility

Browser Access

DI/UI objects and feature enhancement

UDO, UDF, UDT related improvements

UI Configurable Framework enhancements.



# Administration

SAP Business One 9.2

# Extension of Field Lengths



Item Master Data

Item No. Manual 12345678909876543210123456

Description

Foreign Name

Item Type Items

Item Group Items

UoM Group Manual

Price List Base Price

Stock Item

Sales Item

Purchase Item

Bar Code

Unit Price Primary Curre

Sales Order

Customer C20000

Name Maxi-Teq

Contact Person Norm Thompson

Customer Ref. No.

BP Currency GBP

No. Primary 368

Status Open

Posting Date 03.09.15

Delivery Date

Document Date 03.09.15

| # | Item No.       | BP Catalogue No. | Item Description | Quantity | No. of Packages | Unit Price | D. |
|---|----------------|------------------|------------------|----------|-----------------|------------|----|
| 1 | 12345678909876 | 56789011234      | Long MD Code     | 1        | 1               |            |    |
| 2 |                |                  |                  |          |                 |            |    |

## Feature

- The following fields have been extended to 50 characters:
  - Item No.
  - BP Catalogue No.
  - Resource No.
  - Mnf. Catalogue No.
  - User Code (extended to 25 characters).

## Benefit

- Greater flexibility to define various items of the same product distinguished by different attributes such as; size, colour, height & width.
- Supports greater range of naming conventions.

# Electronic Document Framework



The screenshot displays the SAP A/R Invoice interface. The top section shows customer information for 'Microchips' (Customer No. 30000, Invoice No. 357, Status Open, Posting Date 20.11.15, Due Date 20.12.15, Document Date 20.11.15). Below this is a table with columns for Item No., BP Catalog No., Quantity, Unit Price, Tax Code, and Total (LC). A red arrow points from the 'Add' button in the bottom left to the XML output files in the file explorer.

| # | Item No. | BP Catalog No. | Quantity | Unit Price | Disco... | Tax Code | Total (LC) |
|---|----------|----------------|----------|------------|----------|----------|------------|
| 1 | P10001   |                | 1        | GBP 912.50 | 0.00     | 01       |            |
| 2 |          |                |          |            |          |          |            |

The file explorer shows a folder named 'XML\_Output' containing one file: '13\_001\_000357\_19112015' (XML File, 327 bytes, modified 19.11.2015 10:29). The Notepad window shows the XML content:

```
<?xml version="1.0" encoding="windows-1250"?>
<Element>
  <Element>
    <DocuNum>3763</DocuNum>
    <DocuDate>2015-11-19</DocuDate>
    <DocuTotal>117.15</DocuTotal>
  </Element>
  <Element>
    <ItemCode>10014</ItemCode>
    <ItemQty>1.000000</ItemQty>
    <ItemPrice>100.000000</ItemPrice>
  </Element>
</Element>
```

## Feature

- Creation of outbound documents in electronic format saved to a folder.
- Supported transactions: A/R marketing documents
- Utilization of Electronic File Manager to define mapping and output format which can be adjusted according to requirements.
- Template provided via SAP note for a quick start in mapping
- Electronic Documents Monitor: a central place to see, review and retrigger the output.

## Benefit

- Easy start in electronic data exchange and integration
- Simple approach to generate XML output

# Quick Copy



## Feature

- The following data categories are now supported:
  - User group authorization
  - Data ownership (Documents & Business Partners)
  - Forecasts
  - Completion of the Financials module
  - Field naming and formatting
  - Multi-language translation
  - Cockpits and dashboards (Only non Fiori-style cockpits and dashboards are supported.)

## Benefit

- Quick Copy is now more powerful and flexible to use by supporting more objects, making it easy to copy or update objects such as group authorizations and forecasts.



# Business Partner Data Ownership (1/2)



**Business Partner Master Data**

Code: Manual C20000 Customer  
Name: Maxi-Teq  
Foreign Name:   
Group: Construction  
Currency: British Pound  
Federal Tax ID: GB566678929  
Owner:   
Account Balance: 59,336.19  
Deliveries: 105.35  
Orders: 7,343.47  
Opportunities: 6

**General Settings**

BP Budget  
Customer Activity Restriction:  
 Credit Limit  
 Commitment Limit  
 Consider Deliveries B  
Default Payment Term for  
Default Payment Term for  
Default Payment Method  
Default Payment Method for Vendor: Outgoing BT  
Submit Credit Vouchers: Automatically  
Default Dunning Term for Customer: Standard  
 Activate Approval Procedures  
 Activate Approval Procedures in DI  
 Display Inactive Business Partners in Reports  
 Display Inactive Business Partners in Marketing Documents  
 Apply IBAN Validation to Bank Accounts  
 Allow Multiple Blanket Agreements for Same Period  
 Enable Data Ownership  
Manage Data Ownership By: Business Partners Only  
 Allow BP Without an Owner

**List of Employees**

| # | Last Na... | First Name | Employee No. |
|---|------------|------------|--------------|
| 1 | Butler     | Jayson     | 1            |
| 2 | Shone      | Bob        | 3            |
| 3 | Thompson   | Brad       | 2            |

## Feature

- Data ownership management extended to business partners.
- Restrict access and visibility to:
  - Business Partner Master Data
  - Documents using Business partner with owners
- Manage data ownership by:
  - Documents Only:
    - Permissions are defined per document.
  - Business Partners Only:
    - Permissions to documents are defined by whether users are assigned ownership of the business partner used in documents.
  - Business Partners and Documents:
    - When Business Partners have owners, permissions to documents are decided by whether users are assigned ownership of the business partner used in documents.
    - When Business Partners have no owner, permissions are decided per document.

# Business Partner Data Ownership (2/2)



Data Ownership Authorizations

| Employees     | Document         | Peer      | Manager | Subordinate | Department | Branch | Team | Company |
|---------------|------------------|-----------|---------|-------------|------------|--------|------|---------|
| Bob Shone     | Business Partner | Read Only | Full    | None        | None       | None   | None | None    |
| Brad Thompson | Purchase Request | None      | None    | None        | Full       | None   | None | None    |
| Jayson Butler |                  |           |         |             | Read Only  |        |      |         |
|               |                  |           |         |             | None       |        |      |         |

Buttons: OK, Cancel, Full Authorization, Read Only, No Authorization

## Feature

- Bypass Data Ownership for Business Partners of a specific user by granting access at Company level.
- Restrict system reports like Open Items List to reflect only results against specific Business Partners for specific users.
- Exclude specific restrictions and enable read access.

Data Ownership Sharing Options

Documents Business Partner Windows

Define the data owners for listed documents; those affected by the owner of the business partner that is used in the documents.

| Document               | Owner                  |
|------------------------|------------------------|
| Business Partner       | Business Partner Owner |
| A/P Credit Memo        | No Restriction         |
| A/P Down Payment       | Business Partner Owner |
| A/P Invoice            | Business Partner Owner |
| A/R Correction Invoice | Business Partner Owner |
| A/R Credit Memo        | Business Partner Owner |
| A/R Down Payment       | Business Partner Owner |
| A/R Invoice            | Business Partner Owner |
| Delivery               | Business Partner Owner |
| Goods Receipt PO       | Business Partner Owner |
| Goods Return           | Business Partner Owner |

Buttons: Update, Cancel

Data Ownership Sharing Options

Documents Business Partner Windows

Define the data owner for listed windows. The data owner definitions on the current tab have higher priority than those on the Document tab.

| Window          | Owner                  |
|-----------------|------------------------|
| Open Items List | Business Partner Owner |
| Service Call    | No Restriction         |
|                 | Business Partner Owner |

Buttons: Update, Cancel

## Benefit

- Additional layer of authorization and security.
- Enhanced usability as only relevant data is considered.
- Safe guard company information against data theft.

# Job Service



SAP Business One Job Service

Job Service Configuration

Mail Settings Alert Settings

SAP Business One User: AlertSvc Status: ● RUNNING Stop

Save

Database Server: 10.55.83.215:30015 Save

| Company Databases                   |                           |               |              |         |
|-------------------------------------|---------------------------|---------------|--------------|---------|
|                                     | Company Name              | Database Name | Localization | Version |
| <input type="checkbox"/>            | OEC Computers Deutschland | SBODEMODE     | DE           | 920001  |
| <input checked="" type="checkbox"/> | OEC Computers UK          | SBODEMOGB     | GB           | 920001  |

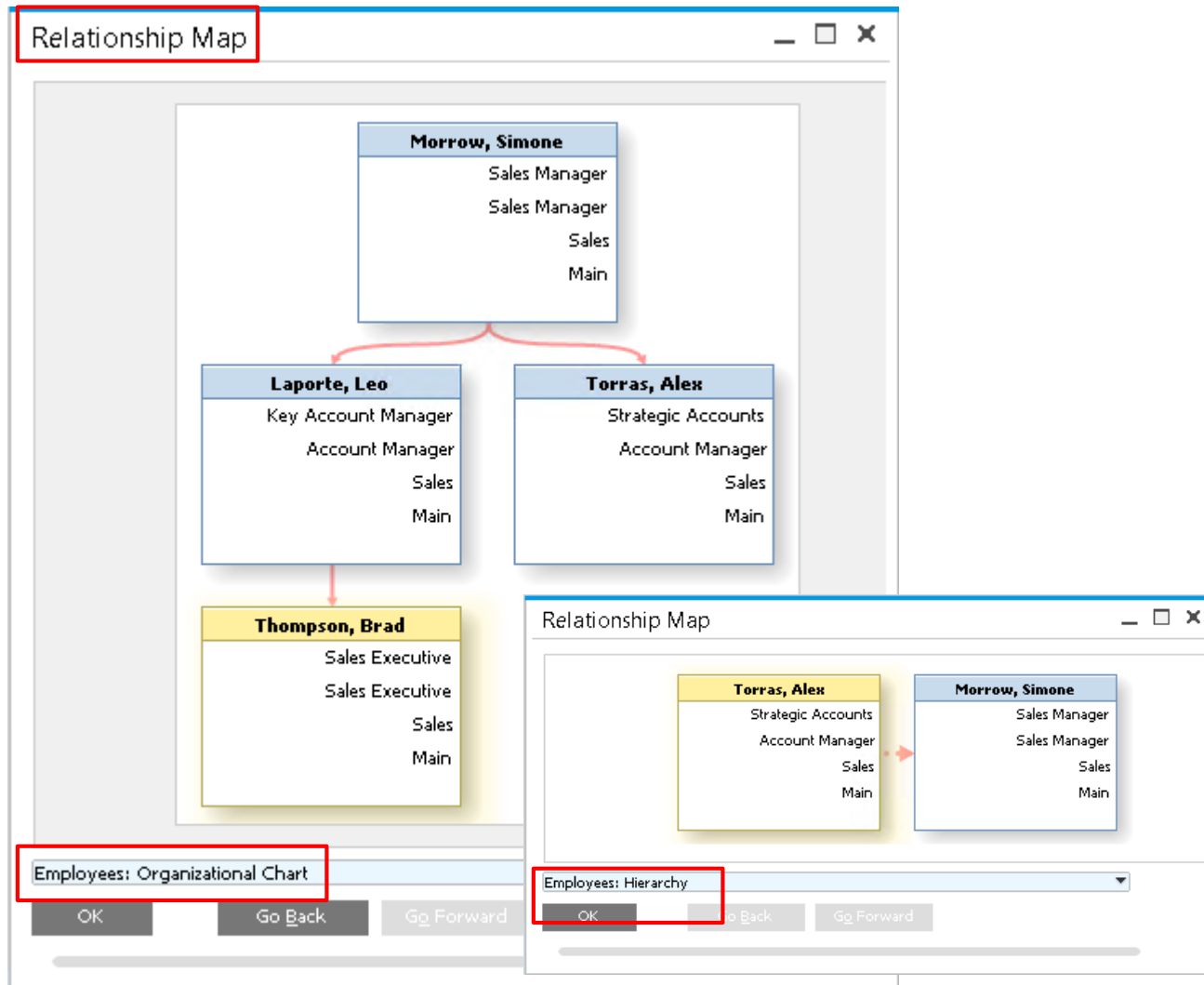
## Feature

- New service available in System Landscape Directory: SAP Business One Job Service
- Manage alert settings on the server-side.
- Send alerts when SAP Business One client is closed.
- *AlertSvc* user is a predefined user to send internal messages or trigger SAP Business One Mailer to send E-mail.
- Service Layer needs to be installed for SAP Business One, version for SAP HANA

## Benefit

- Ability to receive alerts at anytime whenever they occur to meet business demands.

# Human Resources Relationship Map



## Feature

- Relations Map feature is now available for the Human Resources module -> Employee Master Data.
- The Relationship Map supports the following views:
  - Employees – Hierarchy
  - Employees - Organizational Chart
  - Employees: Teams and Roles

## Benefit

- Easily visualize HR related data
- Provides a visual overview of employees, teams, positions and a company organizational chart.

# Master Data Enhancements (9.2 PL05)



The image shows two overlapping SAP forms. The top form is 'Employee Master Data' and the bottom form is 'Business Partner Master Data'. In the 'Employee Master Data' form, the 'Cost Center' field is highlighted with a purple box. In the 'Business Partner Master Data' form, the 'Country of Birth', 'Date of Birth', 'Gender', 'Profession', and 'City of Birth' fields are highlighted with a purple box. The 'Business Partner Master Data' form also shows a 'Define New' table with various fields like Title, Position, Address, Telephone 1, Telephone 2, Mobile Phone, Fax, E-Mail, E-Mail Group, Pager, Remarks 1, Remarks 2, and Password. There are also checkboxes for 'Block Sending Marketing Content' and 'Active'.

## Feature

- The fields “Country of Birth”, “Date of Birth”, “Gender”, “Profession”, and “City of Birth” are added to the contact persons tab in all localizations
- Cost Center field is added to Employee Master Data, in all localizations enabling the user to assign the relevant cost center to each employee

## Benefit

- Supports maintaining important data related to the ongoing business activity
- Increases clarity and accuracy of costs allocation in the business

# Implementation Tasks Enhancements (9.2 PL03)



The image displays three overlapping screenshots of the 'Implementation Tasks' window, illustrating the enhancements in SAP 9.2 PL03. Each window shows a 'What would you like to do?' section with three tabs: Configuration, Customization, and Data Management. The tasks listed are:

- Configuration:**
  - Configure Company Settings:** Configure company settings, such as accounting, inventory, business purchasing, banking, and users. [More Info](#)
  - Design Electronic File Formats:** Design file formats (GEP, BPP, BFP, SPP) for converting retrieved data for various uses. [More Info](#)
  - Import Financial Template:** Import financial report templates from Microsoft Excel file. [More Info](#)
  - Configure Reports and Layouts:** Manage your reports and layouts in Print Layout Designer and Crystal. [More Info](#)
  - Package a Preconfigured Solution Using Solution Packager:** Package a preconfigured solution that you can later use to create a new. [More Info](#)
- Customization:**
  - Customize the User Interface:** Customize the user interface of various windows by using customiz example, change the location of fields. [More Info](#)
  - Add User Defined Fields:** Add your own fields for various objects, such as master data and t. [More Info](#)
  - Add User Defined Tables:** Add your own tables for storing additional data in the database. [More Info](#)
  - Add User Defined Objects:** Add your own objects for extending the existing functionality. [More Info](#)
- Data Management:**
  - Import from Excel:** Add and update master data records by using Microsoft Excel files. [More Info](#)
  - Migrate Data From Legacy System Using Data Transfer Workbench:** Import data from third-party systems via Microsoft Excel templates or Open Database Connectivity (ODBC). [More Info](#)
  - Copy Data Between Companies:** Copy data between two SAP Business One companies using a file. [More Info](#)
  - Post Corrections Due To VAT Changes:** Post corrections resulting from VAT changes, for amounts transferred from revenue or expense accounts to new accounts. [More Info](#)

## Feature

- The Implementation Tasks window is a single point of entry for launching various tools required during the implementation project

## Benefit

- Enhanced usability and greater efficiency throughout the implementation process



| Feature                       | Description   |
|-------------------------------|---|
| <b>Approval Procedure</b>     | Sometimes a document that has already been approved needs to be updated. If the user requires approval to update the document, the approval process will be initiated again to approve changes that meet the approval condition made prior to adding the document to the system.  |
| <b>Import from Excel</b>      | You can now import the following data types from Microsoft Excel into SAP Business One: Prices Lists & Business Partner catalogue numbers.  |
| <b>ENTER Key as a TAB key</b> | You can now use the ENTER key on the numeric keypad as the TAB key to move between fields for faster data entry. Furthermore, the DOT key on the numeric keypad can be used as the separator you defined on the Display tab in the General Settings window. You can also disable the document operations (Add, Update, OK) by the main ENTER key. |
| <b>License Mechanism</b>      | The license mechanism now prevents users from logging into the same company with the same user code which is already logged in for Indirect Users and Browser Access. You can either cancel your logon or confirm your logon (which will lock out the other user using the user account).   |
| <b>License Server</b>         | License server based on https is now fully integrated into the System Landscape Directory. No additional license file is needed on further servers to support a high availability landscape.  |



# Financial Management

SAP Business One 9.2



# IFRS Enhancements



The screenshot displays two SAP windows. The top window is 'Delivery' for customer C20000 (Maxi-Teq, Norm Thompson) with primary account 384. It shows various fields like 'Use Shipped Goods Account' (checked), 'Payment Terms' (2P10Net30), and 'Payment Method' (Incoming BT). The bottom window is 'Edit Chart of Accounts' for GL Account 99200000-01-001-01 (Deferred Tax). It shows 'G/L Account Location' with 'Level' set to 4 and 'Drawer' set to 10. A 'Chart of Accounts' window is also visible, showing a list of accounts with 'Updated Assets' highlighted in the name field and a corresponding 'Updated Assets' drawer in the right-hand pane.

## Feature

- Activation of matching principle standards for correct revenue recognition.
- Chart of Accounts:
  - Maximize number of CoA levels up to 10 levels.
  - All levels can be used for posting.
- CoA Drawer Renaming:
  - Reflected across the system, reports etc.

## Benefit

- Enablement of matching principles allows correct revenue recognition in order to comply with standard accounting principles.
- Supports business case if sold goods are delivered at the end of a period and invoiced at the beginning of the next period.
- CoA enhancements provide greater flexibility to create CoA according to business needs.

# Align Postings of Journal Entries with Marketing Documents



**A/R Invoice**

Customer: C20000  
Name: Maxi-Teq  
Contact Person: Norm Thompson  
Customer Ref. No.:  
BP Currency: GBP

No.: Primary 357  
Status: Open  
Posting Date: 20.11.15  
Due Date: 20.12.15  
Document Date: 20.11.15

**Contents**

| # | Item No. | Item Description      | Quantity | Unit Price |
|---|----------|-----------------------|----------|------------|
| 1 | A00001   | J.B. Officeprint 1420 | 1        | GBP 300    |
| 2 | A00002   | J.B. Officeprint 1111 | 1        | GBP 150    |
| 3 | A00003   | J.B. Officeprint 1186 | 1        | GBP 225    |
| 4 | A00004   | Rainbow ColorJet 5    | 1        | GBP 375    |
| 5 | A00005   | Rainbow ColorJet 7.5  | 1        | GBP 300    |

**Journal Entry Preview**

Series: Primary 2209  
Posting Date: 20.11.15  
Due Date: 20.12.15  
Doc. Date: 20.11.15  
Remarks: A/R Invoices - C20000

| #  | G/L Acct/BP ... | G/L Acct/BP Name                       | Debit        | Credit       | Offset Account | Base Amount | Source Line Internal ID |
|----|-----------------|--|--------------|--------------|----------------|-------------|-------------------------|
| 1  | C20000          | Maxi-Teq                               | GBP 1,581.53 |              | 400000         |             | 1                       |
| 2  | 207000          | VAT Payable (output Tax)               |              | GBP 51.45    | C20000         | GBP 294.00  | 0                       |
| 3  | 207000          | VAT Payable (output Tax)               |              | GBP 25.73    | C20000         | GBP 147.00  | 1                       |
| 4  | 207000          | VAT Payable (output Tax)               |              | GBP 38.59    | C20000         | GBP 220.50  | 2                       |
| 5  | 207000          | VAT Payable (output Tax)               |              | GBP 64.31    | C20000         | GBP 367.50  | 3                       |
| 6  | 207000          | VAT Payable (output Tax)               |              | GBP 51.45    | C20000         | GBP 294.00  | 4                       |
| 7  | 400000          | Sales Revenue (Domestic) - Product No. |              | GBP 300.00   | C20000         |             | 0                       |
| 8  | 400000          | Sales Revenue (Domestic) - Product No. |              | GBP 150.00   | C20000         |             | 1                       |
| 9  | 400000          | Sales Revenue (Domestic) - Product No. |              | GBP 225.00   | C20000         |             | 2                       |
| 10 | 400000          | Sales Revenue (Domestic) - Product No. |              | GBP 375.00   | C20000         |             | 3                       |
| 11 | 400000          | Sales Revenue (Domestic) - Product No. |              | GBP 300.00   | C20000         |             | 4                       |
| 12 | 130000          | Raw Materials                          |              | GBP 149.54   | C20000         |             | 0                       |
| 13 | 500005          | Raw Materials - Cost of Goods Sold     | GBP 149.54   |              | C20000         |             | 0                       |
| 14 | 130000          | Raw Materials                          |              | GBP 72.33    | C20000         |             | 1                       |
| 15 | 500005          | Raw Materials - Cost of Goods Sold     | GBP 72.33    |              | C20000         |             | 1                       |
|    |                 |  | GBP 2,238.36 | GBP 2,238.36 |                |             |                         |

## Feature

- Rows with the same G/L accounts are not grouped in a Journal Entry.
- One row in a Journal Entry is linked to one row in marketing documents adding a visible reference for users.

## Benefit

- Unambiguous references to document rows from journal entry rows.
- Provides basis for more detailed reporting.
- Key input for tax audit cross-check vs accounting - offset G/L accounts with posted taxes on document row with precise revenue G/L account or inventory G/L account details.

# Fixed Assets - Virtual Item



**Asset Master Data**

Item No. Autom 10026  
Description Computer  
Foreign Name  
Item Type Fixed Assets  
Item Group Items  
UoM Group  
Price List

Inventory Item  
 Sales Item  
 Purchase Item  
 Virtual Item  
 Enforce Serial Numbers

**A/P Invoice**

Vendor V10000  
Name Acme Associates  
Contact Person Sarah Kierl  
Vendor Ref. No.  
Local Currency

No. Primary 404  
Status  
Posting  
Due D.  
Docum

**Capitalization**

Origin PU Origin No. 404  
Depreciation Area \*  
Reference

| # | Item No. | Item Description | Quantity | Unit Price | Total |
|---|----------|------------------|----------|------------|-------|
| 1 | 10026    | Computer         | 10       | GBP 850.00 |       |

**Asset Serial Numbers - Setup**

Rows from Documents

| # | Virtual Asset No. | Asset Description | Total Needed | Total |
|---|-------------------|-------------------|--------------|-------|
| 1 | 10026             | Computer          | 10           | 0     |

| #  | Asset Description | Total (LC) |
|----|-------------------|------------|
| 4  | Computer          | GBP 850.00 |
| 5  | Computer          | GBP 850.00 |
| 6  | Computer          | GBP 850.00 |
| 7  | Computer          | GBP 850.00 |
| 8  | Computer          | GBP 850.00 |
| 9  | Computer          | GBP 850.00 |
| 10 | Computer          | GBP 850.00 |

## Feature

- Automatic creation of fixed assets equivalent to the number of items in an A/P Invoice.
- Ideal for purchase of large quantities of identical items.
- Supports enforcing serial numbers.

## Prerequisite

- Automatic numbering series has to be defined and used for fixed assets.

## Benefit

- Fast processing of large quantities of fixed assets that share the same properties.

# Checks for Payment - Authorization



Checks for Payment

|                   |                      |  |   |
|-------------------|----------------------|--|---|
| To Order of       | <input type="text"/> | Internal ID  | <input type="text" value="13"/>         |
| Pay to            | <input type="text"/> | Reference  | <input type="text" value="13"/>         |
| Credited G/L Acct | <input type="text"/> | Posting Date   | <input type="text" value="09.09.2015"/> |
| Trans. No.        | <input type="text"/> | <input checked="" type="checkbox"/> Create Journal Entry |   |

## Feature

- New authorizations added for better control over checks for payment.
- When creating checks for payment manually, the Create Journal Entry field is checked automatically - only authorized users can uncheck it.

Find

| Subject  | Authorization          |
|--|------------------------|
| ▼ Banking                                      | Various Authorizations |
| ▶ Incoming Payments                            | Full Authorization     |
| ▶ Deposits                                     | Full Authorization     |
| ▼ Outgoing Payments                            | Various Authorizations |
| Outgoing Payments                              | Full Authorization     |
| Payment Draft                                  | Full Authorization     |
| ▼ Checks for Payment                           | Full Authorization     |
| Void Checks for Payment                        | Full Authorization     |
| Update Pay To                                  | Full Authorization     |
| Create Check for Payment Without Journal Entry | Full Authorization     |
| ▼ Print Check for Payment                      | Read-Only              |
| Print Check for Payment                        | No Authorization       |
| Print Voided Checks for Payment                | Full Authorization     |
| Reprint Checks for Previously Printed Payment  | Full Authorization     |
| ▶ Payment Drafts Report                        | Full Authorization     |
| Checks for Payment Draft                       | Full Authorization     |
| ▼ Checks for Payment Drafts Report             | Full Authorization     |
| Remove Checks for Payment Drafts               | Full Authorization     |
| ▼ Payment System                               | Full Authorization     |

## Benefit

- Avoid fraud in relation to misuse of outgoing checks.
- Greater control over user authorizations to create, print, update and design check layouts.

# Allow Cash Account Only on Cash Payments (9.2 PL05)



The screenshot shows two 'Document Settings' windows. The left window is for 'Outgoing Payment' and the right is for 'Incoming Payment'. Both have the 'Allow Cash Accounts Only for Cash Payment Means' checkbox selected. Below them is the 'Payment Means' window with 'Cash' selected. At the bottom is the 'List of Accounts' window showing a table of accounts with a 'Cash Account' column.

| #   | Account Number | Account Name             | Account Balance | Cash Account |
|-----|----------------|--------------------------|-----------------|--------------|
| 84  | 161010         | GBP Bank Account No. 1   | -225,272.11     | Yes          |
| 85  | 161011         | GBP Bank No.1 (cheques p | 0.00            | Yes          |
| 86  | 161012         | GBP Bank No.1 (domestic  | 0.00            | Yes          |
| 87  | 161013         | GBP Bank No.1 (foreign b | 0.00            | Yes          |
| 88  | 161014         | GBP Bank No.1 (bank clea | 0.00            | Yes          |
| 89  | 161015         | GBP Bank No.1 (other pos | 0.00            | Yes          |
| 91  | 161020         | GBP Bank Account No. 2   | 0.00            | Yes          |
| 92  | 161021         | GBP Bank No.2 (cheques p | 0.00            | Yes          |
| 93  | 161022         | GBP Bank No.2 (domestic  | 0.00            | Yes          |
| 94  | 161023         | GBP Bank No.2 (foreign b | 0.00            | Yes          |
| 95  | 161024         | GBP Bank No.2 (bank clea | 0.00            | Yes          |
| 96  | 161025         | GBP Bank No.2 (other pos | 0.00            | Yes          |
| 97  | 161026         | GBP Bank No.2 (cheques r | 0.00            | Yes          |
| 98  | 161090         | USD Account (UK Bank)    | 86,888.04       | Yes          |
| 99  | 161091         | USD Account Clearing     | 0.00            | Yes          |
| 100 | 201000         | Bank Loans due <1 year   | 0.00            | Yes          |
| 101 | 201020         | Other Loans due <1 year  | 0.00            | Yes          |

## Feature

- New settings enable to force using cash accounts when generating incoming or outgoing payment for payment means cash

## Benefit

- Helps avoiding cases of using non-cash accounts for cash payments
- Increases accuracy of financial reports

# Enhanced Recurring Transactions (9.2 PL 05)



**Recurring Transactions - Templates**

| # | Template | Type           | Doc No. | Recurrence Period | Recurrence Date | Start Date | Next Exec... | Valid Until | BP   |
|---|----------|----------------|---------|-------------------|-----------------|------------|--------------|-------------|------|
| 1 | PO_1     | Purchase Order | 1       | Monthly           | On 10           | 08.05.2015 | 10.05.2015   |             | V001 |
| 2 | SO_1     | Sales Order    | 2       | Monthly           | On 13           | 08.05.2015 | 13.05.2015   |             | C002 |
| 3 | DL_1     | Delivery       | 1       | Daily             | Every 18        | 08.05.2015 | 08.05.2015   |             | C001 |

**Recurring Transactions for Business Partner**

Display not executed transactions only

| # | Template | Type        | Instance | Status       | Date       | Doc. Total |
|---|----------|-------------|----------|--------------|------------|------------|
| 1 | SO_1     | Sales Order | 1        | Executed     | 01.01.2015 | 5,95 EUR   |
| 2 | SO_1     | Sales Order | 3        | Executed     | 03.01.2015 | 5,95 EUR   |
| 3 | SO_1     | Sales Order | 2        | Not Executed | 02.01.2015 | 5,95 EUR   |
| 4 | SO_1     | Sales Order | 4        | Not Executed | 04.01.2015 | 5,95 EUR   |

**Recurring Transactions for Business Partner**

Display not executed transactions only

| # | Template | Type        | Instance | Status       | Date       | Doc. Total |
|---|----------|-------------|----------|--------------|------------|------------|
| 1 | SO_1     | Sales Order | 2        | Not Executed | 02.01.2015 | 5,95 EUR   |
| 2 | SO_1     | Sales Order | 4        | Not Executed | 04.01.2015 | 5,95 EUR   |

## Feature

- The Recurrence Date parameter is extended and when choosing a daily recurrence period more days are available for selection
- When opening the Recurring Transactions for Business Partner window from within the BP master data you can filter the list and display only the not executed transactions

## Benefit

- Provides additional flexibility and enables defining templates that best fit the business needs
- Enhances usability and increases clarity of future transactions

# Tax as a Service (9.2 PL06)



Company Details

General Accounting Data Basic Initialization

Use Tax

Tax Code → NY New York

Tax Office

Federal Tax ID 1

Federal Tax ID 2 23-700986

Federal Tax ID 3

Additional ID

Exemption Number

Tax Deduction Number

Use Deferred Tax for Customers

Use Deferred Tax for Vendors

Apply Exchange Rate on Deferred Tax

Holidays → 2016 Holidays

Use SAP Localization Hub Tax Service

User Name b1admin

Password \*\*\*\*

OAuth Token Endpoint <https://oauthservices-d99fc3b9d.us2.hana.ondemand.com>

Tax Service URL <https://taxservicesd99fc3b9d.us2.hana.ondemand.com/taas>

Sales Tax Account for TaaS 22200000-01-001-01

Purchase Tax Account for TaaS 22200000-01-001-01

OK Cancel

## Feature

- New functionality is introduced to SAP Business One enables businesses to integrate with SAP Localization Hub tax service
- When activated, the Tax Service will be primarily used in case there is matching rate according to the document and business partner properties

## Benefit

- Supports VAT calculation for 75+ countries
- Withholding tax determination and computation
- Supports deferred tax, deductibility and other financial relevant indicators
- Multi-currency and time bound tax rate support
- Faster roll-out and adoption
- Single source to determine and compute tax
- Pre-delivered and perpetually updated tax configuration content
- Lower costs by reducing maintenance efforts to keep systems updated




| Feature                                  | Description  | Localization             |
|--|--|--------------------------|
| <b>Third Party Checks</b>                | <p>You can now select an endorsable third-party check in an outgoing payment as a payment means instead of endorsing the check by creating a manual journal entry.</p>   | <p>ALL except Brazil</p> |
| <b>Posting Schemas for Manufacturing</b> | <p>You can choose between two posting schemas for manufacturing:</p> <ul style="list-style-type: none"> <li>▪ Accounting with Balance Sheet Accounts Only</li> <li>▪ Accounting with Balance Sheet Accounts and Profit and Loss Accounts</li> </ul> <p>If you choose the latter, offset accounts are used for postings related to issues for production, receipts from production, and production orders. Offset accounts appear in any posting in which the WIP account, Inventory account and the Std Cost Expense accounts are used. The offset postings are dependent on the definition in the Document Settings window for the production order of whether to use component or parent item WIP accounts for component transactions.</p> |                          |



# Financial Management



| Feature  | Description  |
|--|--|
| <b>Business Partner Opening Balance</b>  | You can now define the control account used for posting opening balance transactions for each business partner.          |
| <b>External Reconciliation</b>  | For automatic external reconciliations, you can now choose to hide the reconciliation process for optimized performance. |



# Project Management

SAP Business One 9.2

# Project Management



Project

Project Type  External  Internal

BP Code → C20000

BP Name PC Welt GmbH & Co.KG

Contact Person Christian Gander

Territory

Sales Employee Hermann Ludger

Owner → Leitner, Robert

Project with Phases

Project Name  
Project No.  
Status  
Start Date  
Due Date  
Closing Date  
Open Activities  
% Complete  
Financial Project

Overview Phases Stages Summary Remarks Attachments

|   | Phas... | Phase ...  | Start D... | End Date  | Planned... | Actual ... | Phase ... | Finished... | Owner           | Closed |
|---|---------|------------|------------|-----------|------------|------------|-----------|-------------|-----------------|--------|
| 1 | → 1     | Customizin | 09.09.201  | 10.10.201 | 10.000,00  | 0,00       | 20,0000   | 0,0000      | Leitner, Robert |        |
| 2 | → 2     | Developme  | 09.09.201  | 11.11.201 | 20.000,00  | 0,00       | 40,0000   | 0,0000      | Adelheid, Kora  |        |
| 3 | → 3     | Deploymer  | 09.09.201  | 31.12.201 | 12.000,00  | 0,00       | 40,0000   | 0,0000      | Lübke, Conrad   |        |

## Feature

- Combines both financial and project management data in one solution.
- Centralize all project related transactions, documents, resources and activities in one place.
- Depending on the size and scope of a project, it can be split into different “Sub Projects” or “Phases” which may represent a functional area for example.

## Benefit

- Helps to monitor the progress of: Tasks, Stages & Phases.
- Manage projects more effectively from start to finish.
- Better project transparency by analyzing budget and costs and generating reports on aspects of the project, such as stage analysis, open issues and resources.

# Implementation Project Enhancements (9.2 PL03)



Implementation Project

Progress Plan

Select Level: 5

Project Template: Narrowed Project Plan (A project plan based on a subset c)

| Complete                            | Step                               | I... | N... | A... | Start Date | Finish Date | Actual Duration (Hours) | Total Planned Time (Hou... | Progress (...) |
|-------------------------------------|------------------------------------|------|------|------|------------|-------------|-------------------------|----------------------------|----------------|
| <input type="checkbox"/>            | Project Realisation                |      |      |      | 31.05.16   | 31.05.16    | 5                       |                            | 0              |
| <input type="checkbox"/>            | Configuration of SAP Business One  |      |      |      | 31.05.16   | 31.05.16    | 5                       |                            | 0              |
| <input type="checkbox"/>            | Company Details                    |      |      |      | 31.05.16   | 31.05.16    | 5                       |                            | 0              |
| <input checked="" type="checkbox"/> | General                            |      |      |      | 31.05.16   | 31.05.16    | 5                       |                            | 0              |
| <input type="checkbox"/>            | GL Account Determination           |      |      |      |            |             |                         |                            | 0              |
| <input type="checkbox"/>            | Basic Initialisation               |      |      |      | 31.05.16   | 31.05.16    |                         |                            | 0              |
| <input checked="" type="checkbox"/> | Chart of Account Template          |      |      |      | 31.05.16   | 31.05.16    |                         |                            | 100            |
| <input type="checkbox"/>            | Local Currency                     |      |      |      |            |             |                         |                            | 0              |
| <input type="checkbox"/>            | System Currency                    |      |      |      |            |             |                         |                            | 80             |
| <input type="checkbox"/>            | Default Account Currency           |      |      |      |            |             |                         |                            | 0              |
| <input type="checkbox"/>            | Display Credit Balance with Negati |      |      |      |            |             |                         |                            | 120            |
| <input type="checkbox"/>            | Use Segmentation Accounts (if Ap   |      |      |      |            |             |                         |                            | 0              |
| <input type="checkbox"/>            | Use Negative Amount for Reverse    |      |      |      |            |             |                         |                            | 0              |
| <input type="checkbox"/>            | Use Continuous Stock               |      |      |      |            |             |                         |                            | 0              |
|                                     |                                    |      |      |      |            |             | 5                       |                            |                |

OK Cancel

## Feature

- Supports configuration steps including functions introduced in 9.2
- Include steps for SAP HANA and Cloud deployment

## Benefit

- More comprehensive tool that supports various implementation scenarios



# **Sales | Purchasing | Service**

**SAP Business One 9.2**



# Campaign Management



The screenshot displays the Campaign Management interface. The main window is the "Campaign Generation Wizard" (Step 1 of 5). It features three radio buttons for campaign creation: "Create New Campaign", "Create Campaign Based on Existing Campaign", and "Run an Existing Campaign Again" (which is selected and highlighted with a red box). Below these, there is a checkbox for "Exclude Lines with Business Partner's Response" (also highlighted with a red box). A "Start Date" field is present. A table lists existing campaigns, with the first row highlighted: # 1, Campaign No 1, Campaign Name "Summer Sale", Remarks. A "Find by Name" search bar is also visible. At the bottom, a "Run and Proceed to Final S" button is highlighted with a red box, along with "Cancel", "Back", and "Next" buttons.

Two dialog boxes are overlaid on the wizard:

- Target Group - Setup**: A table with columns: #, Target Group Code, Target Group Name, Target Group Type. The first row is: 1, T1, T1, Supplier. The "Target Group Type" column is highlighted with a red box.
- Campaign**: A form with fields: Target Group Type (radio buttons for Customer and Supplier, with Supplier selected and highlighted in a red box), Campaign No. (2), Campaign Type (E-Mail), Owner, Start Date (03.09.15), and Remarks.

## Feature

- Create and manage campaigns for Vendors.
- Run saved campaigns repeatedly without having to create a new campaign.

## Benefit

- Allows greater communication with Vendors using newsletter or email campaigns.
- Tender purchase quotations to multiple vendors for specific products.
- Save time and effort re-running saved campaigns when required.

# Re-open Sales/Purchase Order Process



The screenshot shows two instances of the 'Document Settings' dialog box. The left instance is for 'Purchase Order' and the right is for 'Sales Order'. Both have the 'Document' dropdown highlighted with a red box. In the 'Sales Order' instance, the 'Reopen Doc. by Creating Returns/Goods Returns/Credit Notes Based on Doc.' checkbox is checked, and the 'Without User Confirmation' checkbox is unchecked, both highlighted with a red box. The 'Purchase Order' instance also has the 'Reopen Doc. by Creating Returns/Goods Returns/Credit Notes Based on Doc.' checkbox checked and the 'Without User Confirmation' checkbox unchecked, both highlighted with a red box.

## Feature

- A Sales Order or Purchase Order can be reopened when you create Credit Memos for A/P or A/R Reserve Invoices drawn from corresponding orders.

## Benefit

- Users can decide whether to re-open the item quantity in the original document.
- Supports real business scenarios.

# Extended Service Module (1/2)



Service Call

**Service Call Type**  Sales  Purchasing

Business Partner Code → S10000

Business Partner Name Servicepartner

Contact Person Müller

General Business Partner Remarks Activities Solutions

Ship To   
Lieferadresse

Bill To   
Rechnungsempfänger

Territory

Add Cancel

## Feature

- Support vendors in Service Module for:
  - Service Calls
  - Service Contracts
  - Customer Equipment Cards
- New tab for Business Partner data in Service Call to capture most relevant BP information. Option to change/edit address, but does not update BP Master Data.

## Benefit

- All Business Partners can be captured for service call arrangements.
- Enables more efficient and simpler planning of Service Calls.



# Extended Service Module (2/2)



**Business Partner Master Data**

Code: Manual C20000 Customer  
 Name: Maxi-Teq  
 Foreign Name:   
 Group: Construction  
 Currency: British Pound  
 Federal Tax ID: GB566678929

Account Balance: 59,336.19  
 Deliveries: 105.35  
 Orders: 7,343.47  
 Opportunities: 6

Local Currency:   
 Account Balance:   
 Deliveries:   
 Orders:   
 Opportunities:

General Contact Persons Addresses Payment Terms Payment Run Accounting Properties Remarks Attachments

Tel 1: 020 5894 9483  
 Tel 2:   
 Mobile Phone:   
 Fax: 020 5894 9484  
 E-Mail: info@norm.co.uk  
 Web Site: www.norm.co.uk  
 Shipping Type: UPS Ground  
 Password:   
 Factoring Indicator:   
 BP Project:   
 Industry:   
 Business Partner Type: Company

Contact Person: Norm Thompson  
 ID No. 2  
 Unified Federal Tax ID:   
 Company Reg. No. (CRN):   
 Remarks:   
 Sales Employee: Sales Manager  
 BP Channel Code:   
 Technician:   
 Territory:

**Service Call**

Service Call Type:  Sales  Purchasing

Business Partner Code: V10000  
 Business Partner Name: Acme Associates  
 Contact Person: Sarah Kierl  
 Telephone No.: 0191 4904 3990  
 Business Partner Ref. No.:   
 Mif Serial No.:   
 Serial Number:   
 Item:   
 Description:   
 Item Group:   
 No.: Primary 21  
 Call Status: Open  
 Call ID: 22  
 Priority: Low  
 Created On: 15.06.16 12:26  
 Closed On:   
 Contract No.:   
 End Date:   
 Subject: Network optimization

ending Marketing Content:   
 Create Activity  
 Create Service Call  
 Create Opportunity  
 Create Quotation  
 Create Order  
 Create Invoice  
 Create Credit Memo  
 You Can Also

General Business Partner Remarks Activities Solutions Expenses Resolution History Scheduling Attachments

| # | Technician     | Start Date | Start Time | End Date | End Time | Duration | Duratio... | Actual ... | Location | Address |
|---|----------------|------------|------------|----------|----------|----------|------------|------------|----------|---------|
| 1 | Butler, Jaysol | 15.06.16   | 12:32      | 15.06.16 | 12:47    | 15.00    | Minutes    | 15.00      | Business |         |
| 2 | Butler, Jaysol | 16.06.16   | 12:33      | 16.06.16 | 12:48    | 15.00    | Minutes    | 15.00      |          |         |

OK Cancel

## Feature

- New fields added to Business Partner Master Data (Vendor/Supplier) > You can also button:
  - View Related Service Calls
  - View Related Service Contracts
  - Create Service Call
- New field on General tab:
  - Territory
- Multiple scheduling for Service Calls:
  - Calls can be scheduled for several times/dates instead of only one occasion

## Benefit

- Manage service directly from Business Partner master data.

# Document Linking



**A/R Invoice**

Customer: C23900  
Name: Parameter Technology  
Contact Person: Daniel Brown  
Local Currency: [Dropdown]

No. Primary: 362  
Status: Open  
Posting Date: 26.04.16  
Due Date: 25.06.16  
Document Date: 26.04.16

Contents: Logistics, **Accounting**, Electronic Document, Attachments

Journal Remark: A/R Invoices - C23900  
Control Account: 140000 - Trade Debtors (domes)

Payment Block: [ ]  
Max. Cash Discount: [ ]  
Payment Terms: [ ]  
Payment Method: [ ]  
Central Bank Ind.: [ ]  
Installments: [ ]

Manually Recalculate Du: [ ]  
Cash Discount Date Off: [ ]  
Deferred Tax: [ ]  
Use Shipped Goods: [ ]  
Print SEPA Direct De: [ ]  
Sales Employee: [ ]  
Owner: [ ]

BP Project: [ ]  
Indicator: [ ]  
Federal Tax ID: GB566679931  
Order Number: [ ]  
Asset Value Date: 26.04.16

**Reference Information**

| # | Transact. Type  | Doc. Number | Date     | Remarks |
|---|-----------------|-------------|----------|---------|
| 1 | Sales Quotation | 366         | 26.04.16 |         |
| 2 | Sales Order     | 373         | 26.04.16 |         |
| 3 | Sales Order     | 374         | 26.04.16 |         |
| 4 |                 |             |          |         |

**Relationship Map**

Marketing Document: Referenced Documents

OK Go Back Go Forward

## Feature

- Documents can be linked to another using the Referenced Documents radio button on the accounting tab.
- Documents can either be in open or closed status.
- Can be visualized using the Relationship Map > Referenced Documents.
- Does not replace base / target documents.

## Benefit

- Linking documents can provide better transparency across related transactions.

SAP Note **2273995**

# Preferred Single Bin Allocation



Warehouses - Setup

Warehouse Code: 05 Warehouse Name: Bin Warehouse

**General** | **Bin Locations**

Bin Loc. Code Separator: -

No. of Bin Locations: 73

Default Bin Location: 05-A1-S1-L1

Enforce Default Bin Loc.

Auto Alloc. on Issue: Single Choice

Auto Alloc. on Receipt:  Receive Up to Max. Qty  
 Receive Up to Max. Weight

Enable Receiving Bin Locations

Receive Items By: Bin Location Code Order

Restrict Receipts to Empty Bin Locations

Receive up to: Maximum Qty

Tax Office:

Address Name 2:

Address Name 3:

OK Cancel

**Dropdown Menu:**

- Single Choice
- Bin Location Code Order
- Alternative Sort Code Order
- Descending Quantity
- Ascending Quantity
- Ascending Quantity - Single Bin Preferred**
- FIFO
- LIFO

## Feature

- Ability to issue items from a preferred single bin location.

## Benefit

- Faster issuing process due to assigning a single bin location.

SAP Note [2264012](#)

# Printing and Attaching PDFs to Documents



**Print Preferences**

General | Per Document | Print

Max. Rows per Page: 99  
Print With Vertical Compression: 100  
Top Margin (cm):  
Bottom Margin (cm):  
Max. Rows per Page in Export: 10  
When Printing Layout Including SN, Print: Serial No.

Print Text as Picture  
 Print on Letter Paper  
 Print SAP Business One Generation Message  
 Print Draft Watermark on Draft Documents  
 Generate PDF When Printing  
 Print Canceled or Cancellation Watermark on Applicable Documents  
 Use System Print Preference for Crystal Reports  
 When Adding Marketing Document, Use Attachments Folder as Default Path to Export PDF  
 Attach Exported PDF to Marketing Document

**User Defaults**

Code: mana | Description: mana

General | Defaults | Print | Credit Cards | Path

Document: A/R Invoice

PLD and CR Properties:

When Adding Document

Export to MS-Word  
 Print Document  
 E-Mail Document  
 Export to PDF

## Feature

- Automatic creation of PDFs when adding documents
- Stored in attachment folder

## Benefit

- Improved audit trail

**A/R Invoice**

Customer: C20000 | Name: Maxi-Teq | Contact Person: Norm Thompson | Customer Ref. No.: | Local Currency:

No.: 367 | Primary: | Status: Open | Posting Date: 02.09.16 | Due Date: 02.10.16 | Document Date: 02.09.16

Contents | Logistics | Accounting | Electronic Document | **Attachments**

| # | Target Path                       | File Name                      | Attachment Date |
|---|-----------------------------------|--------------------------------|-----------------|
| 1 | \\mo-166cf828a\B1_SHF\Attachments | AR Invoice_367_20160902_090209 | 02.09.16        |

Browse | Display | Delete

SAP Note [2271634](#)

# Resource in Marketing Documents (9.2 PL 06)



**Resource Master Data**

Resource No. Manual Resource Bar Code  
Description Resource  
Foreign Name  
Resource Type Machine  
Resource Group Resources  
Unit of Measure Text  
Time per Resource Units 0:00:00

General Capacity Data Planning Data P

Issue Method Backflush  
Resource Allocation On Start Date  
Linked to Item Resource

Active Inactive Advanced  
From To

OK Cancel

**Resource Capacity**

Capacity Type All  
Capacity Period <- From 01.11.2016 To  
Warehouse Code From To  
Resource No. From To  
Resource Group From To  
Resource Type

Resource Properties Ignore

| # | Resource No. | Resource Desc... | Whse | Type      | Total | 01.11 |
|---|--------------|------------------|------|-----------|-------|-------|
| 1 | Resource     | Resource         | 01   | Available | -4    | -4    |
| 2 |              |                  |      | Internal  |       |       |
| 3 |              |                  |      | Ordered   |       |       |
| 4 |              |                  |      | Committed |       | 4     |
| 5 |              |                  |      | Consumed  |       |       |

**Resource Capacity Details**

Resource Number Resource  
Description Resource  
Date 01.11.2016  
Warehouse 01

| # | Type        | Source | Line ... | Capacity |
|---|-------------|--------|----------|----------|
| 1 | Sales Order | 1      | 1        | 4        |

## Feature

- Ability to use a Non-Inventory item as a Resource by linking it to a Resource
- Once linked usage of the Non-Inventory Item on AR and AP Marketing Documents will impact Resource Capacity

## Benefit

- Ability to buy and sell Resources
- Will enable businesses supplying resource based services to more comprehensively manage their resources

# Vendor - Customer Connection (9.2 PL 06)



**Dunning Wizard**

**Business Partners - Selection Criteria**  
Select the range of customers for the dunning report.

| # | Customer Code | Customer Name  | BP Bal |
|---|---------------|----------------|--------|
| 1 | C20000        | Maxi-Teq       |        |
| 2 | C23900        | Parameter Tech |        |
| 3 | C30000        | Microchips     |        |
| 4 | C40000        | Earthshaker Co |        |
| 5 | C42000        | Mashina Corpor |        |
| 6 | C50000        | ADA Technolog  |        |
| 7 | C60000        | SG Electronics |        |
| 8 | C70000        | Aquent Systems |        |
| 9 | C99999        | One Time Custo |        |

Include Customers with Credit or  
 **Consider Connected Vendors**

**Step 3 of 8**

**BP Internal Reconciliation - Selection Criteria**

Reconciliation Type:  Manual  Automatic  Semi-Automatic

Multiple Business Partners:  **Consider Connected BPs**

Group By:  Vendor  Buyer

Code: From [ ] To [ ]

Vendor Group: All

Properties: Ignore

Control Accts

Aging Date: 07.05.2015

Interval: Days [30] [60] [90] [120]

Posting Date: From [ ] To 07.05.2015

Due Date: From [ ] To [ ]

Document Date: From [ ] To [ ]

Translate Leading Currency at Aging Date  
 Display Vendors with Zero Balance  
 Display Reconciled Transactions  
 Ignore Future Remit  
 Display in Pages  
 **Consider Connected Customers**

OK Cancel

| P Currency | Balance Due (LC) | Balance Due (FC) |
|------------|------------------|------------------|
| BP         | GBP 2,449.91     |                  |
| BP         | GBP -20,986.95   |                  |

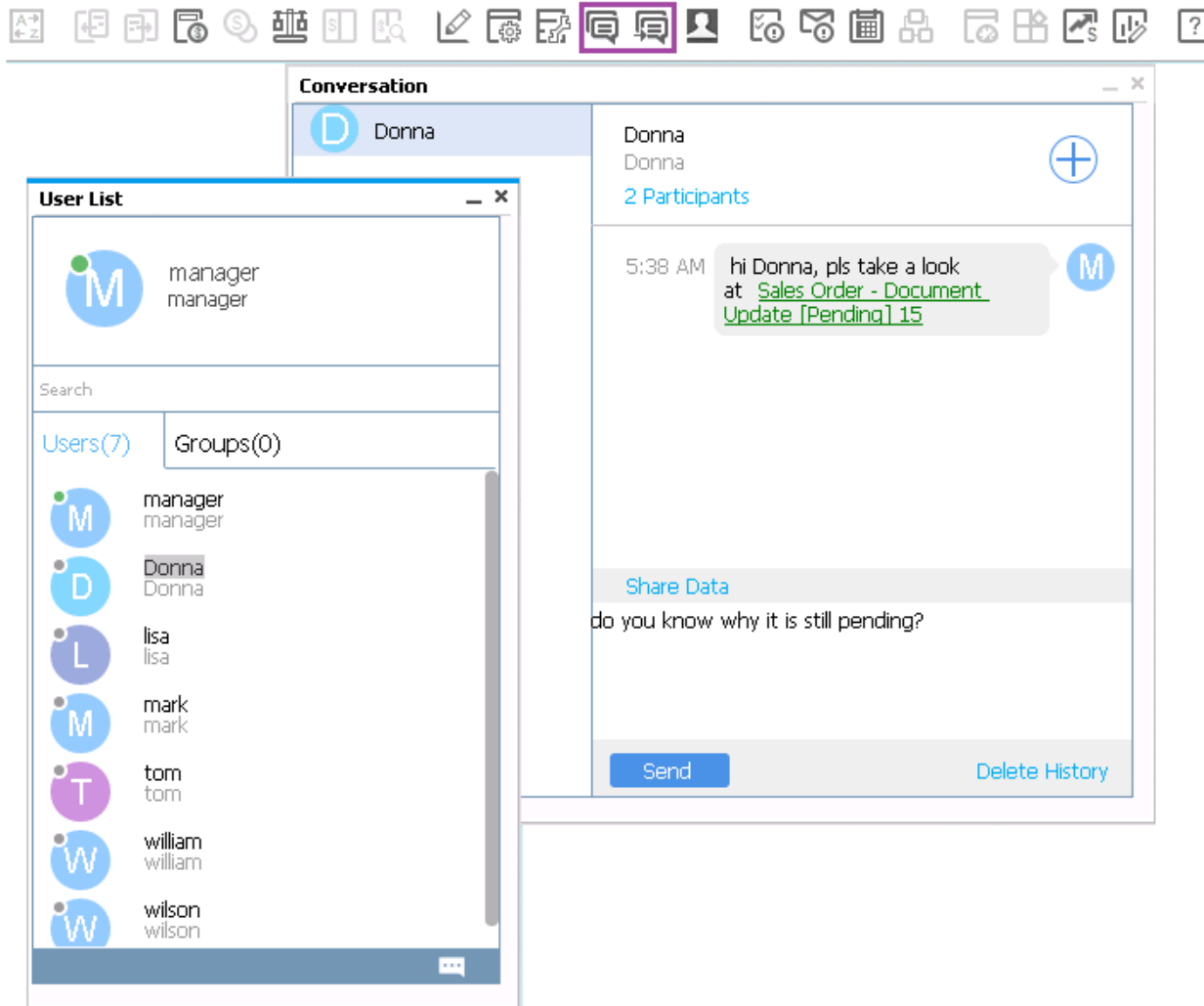
## Feature

- Vendor-Customer 1:1 Connection - Enables create symmetrical relationship between customer and vendor and reflect this link in dunning wizard, aging reports and internal reconciliation

## Benefit

- Increase transparency of business activity in cases where a customer is also a vendor and vice versa
- Increases productivity as the user receives at a glance a clear picture about the sum of the activities on both sides

# Live Collaboration for Business Users (9.2 PL06)



## Feature

- Enables sending instance messages between SAP Business One users. Users can also share documents within the chat.

## Benefit

- Increases productivity and workflow, contributes to the day to day work efficiency.

# Tooltip Preview (9.2 PL05)



**A/R Invoice**

Customer: C23900  
Name: Parameter Technology  
Contact Person: Daniel Brown  
Customer Ref. No.:  
Local Currency:

Contents | Logistics | Accounting | Electron

Item/Service Type: Item

| # | Item No. | Item Description      |
|---|----------|-----------------------|
| 1 | A00001   | J.B. Officeprint 1420 |
| 2 | A00002   | J.B. Officeprint 1111 |

**Item Master Data**

Item No.: A00001  
Item Description: J.B. Officeprint 1420  
Item Type: Items  
Item Group: J.B. Printers  
UoM Group: Manual  
Manufacturer: J.B.  
Shipping Type: Fedex EM  
Item Management: None

Sales Employee: Brad Thompson  
Owner:

**Tooltip Preview - Setup**

Enable Tooltip Preview

| #  | Object Name          | Enabled                             |
|----|----------------------|-------------------------------------|
| 1  | Chart of Accounts    | <input checked="" type="checkbox"/> |
| 2  | Business Partners    | <input checked="" type="checkbox"/> |
| 3  | Item Master Data     | <input checked="" type="checkbox"/> |
| 4  | Contact Persons      | <input checked="" type="checkbox"/> |
| 5  | Journal Entry        | <input checked="" type="checkbox"/> |
| 6  | Payment Terms        | <input checked="" type="checkbox"/> |
| 7  | Warehouses           | <input checked="" type="checkbox"/> |
| 8  | Sales Tax Codes      | <input checked="" type="checkbox"/> |
| 9  | Payment Methods      | <input checked="" type="checkbox"/> |
| 10 | Employee Master Data | <input checked="" type="checkbox"/> |
| 11 | Blanket Agreement    | <input checked="" type="checkbox"/> |

| #  | Property Name               | Visible                             |
|----|-----------------------------|-------------------------------------|
| 1  | Account Code                | <input checked="" type="checkbox"/> |
| 2  | Account Name                | <input checked="" type="checkbox"/> |
| 3  | Foreign Name                | <input type="checkbox"/>            |
| 4  | Account [Active/Title]      | <input type="checkbox"/>            |
| 5  | Confidential Account        | <input type="checkbox"/>            |
| 6  | Account Level               | <input type="checkbox"/>            |
| 7  | Account Currency            | <input checked="" type="checkbox"/> |
| 8  | Current Balance             | <input checked="" type="checkbox"/> |
| 9  | Balance in System Currency  | <input type="checkbox"/>            |
| 10 | Balance in Account Currency | <input type="checkbox"/>            |
| 11 | Account Type                | <input checked="" type="checkbox"/> |
| 12 | Control Account             | <input type="checkbox"/>            |
| 13 | Cash Account                | <input type="checkbox"/>            |

OK Cancel

## Feature

- The tooltip preview enables you to display relevant data by mouse hover according to your needs
- You can define which data will be displayed, including user-defined fields, in Administration → System Initialization → Tooltip Preview

## Benefit

- Enhanced usability and efficiency - no need to click the link arrow
- Increased productivity as you can customize which data will be displayed



# CRM Enhancements (9.2 PL03)



The screenshot displays the SAP CRM 'Activity' window. The main form includes fields for Activity Type (Meeting), Number (4), BP Code (C20000), BP Name (Maxi-Teq), and Contact Person (Norm Thompson). A 'Remove' button is highlighted in a pink box. Below the main form, a 'You Can Also' menu is open, listing various actions such as 'View Related Service Calls', 'Create Activity', and 'Create Service Call'. A secondary dialog box at the bottom shows options for 'Active', 'Inactive', and 'Advanced' activity states.

## Feature

- Enable deactivation of activities' types and subjects
- Enable remove and reopen closed activities
- Enhance 'You Can Also' Functionality:
  - Support service document for vendors
  - Copy selected contact person to follow-up documents

## Benefit

- Enables more efficient and simpler usage of Activities

# Extended Service Module (9.2 PL03)



**Service Call**

Sales  Purchasing

Business Partner Code: C40000  
Business Partner Name: Earthshaker Corporation  
Contact Person: Bob McKensly  
Telephone No.: 020 5890 4901  
Business Partner Ref. No.:  
Mfr Serial No.:  
Serial Number:  
Item:  
Description:  
Item Group:

No. Primary: 19  
Call Status: Pending  
Call ID: 19  
Priority: Medium

Created On: 03.07.09 18:09  
Closed On:  
Contract No.:  
End Date:

Subject: Call 00019

| # | Technician | Start Date | Start Time | End Date | End Time | Duration | Duration | Actual ... | Location | Address |
|---|------------|------------|------------|----------|----------|----------|----------|------------|----------|---------|
| 1 | Shone, Bob | 03.07.09   | 18:09      | 03.07.09 | 18:09    | 0.00     | Minutes  | 0.00       |          |         |
| 2 | Shone, Bob | 22.11.16   | 11:12      | 22.11.16 | 11:27    | 15.00    | Minutes  | 15.00      |          |         |

OK Cancel

## Feature

- New setting enables you to change the structure of the service call so it supports recording multiple scheduling in a single service call

## Benefit

- Supports cases where follow up activities for a given service call are required. This setup increases productivity, improves tracking and saves the need to create additional service call in case follow up is required



| Feature              | Description  |
|----------------------|--|
| <b>Gross Freight</b> | SAP Business One 9.2 now provides you with the option to define a freight amount that includes tax, according to your business requirements. |

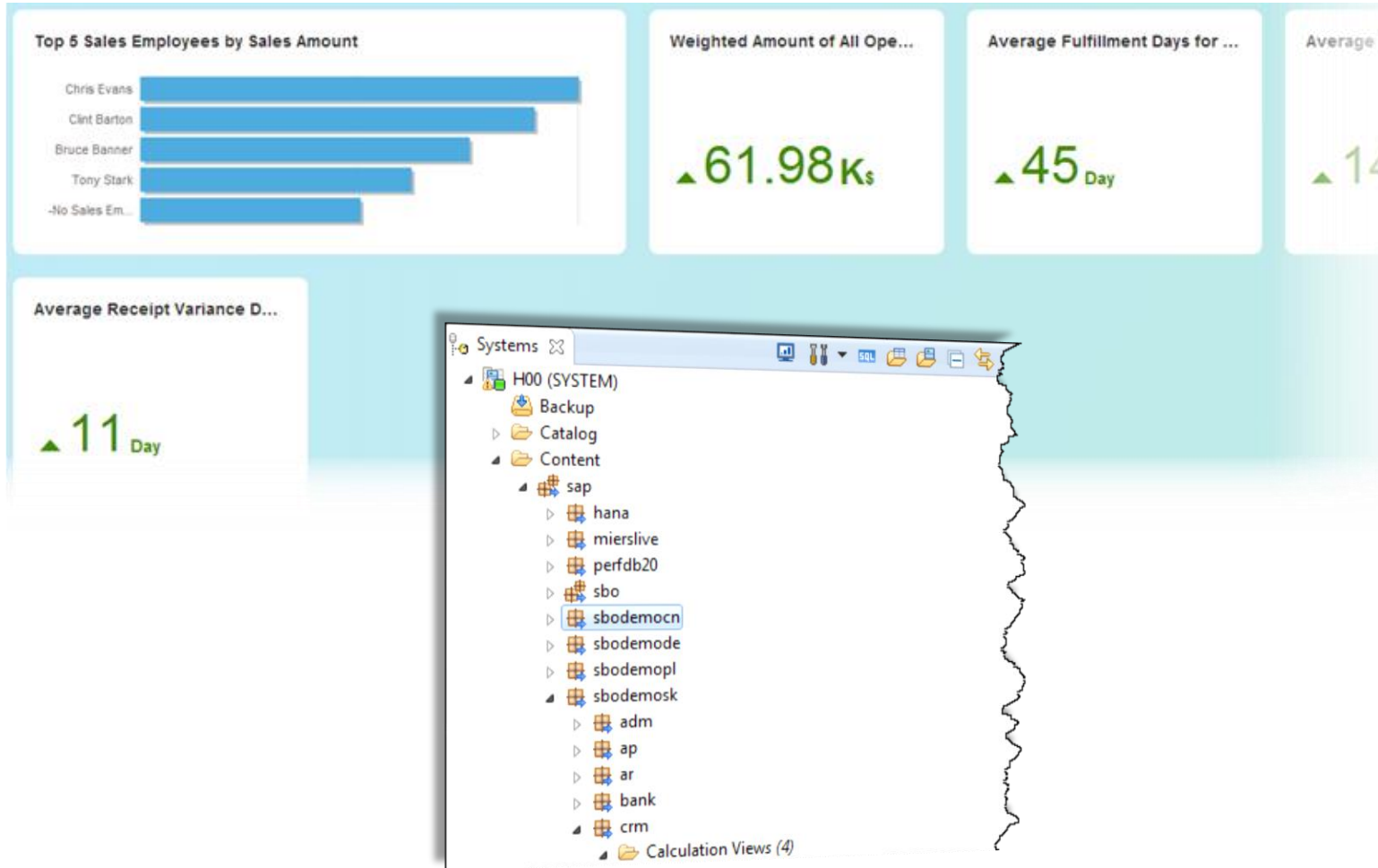


# Business Intelligence

SAP Business One 9.2



# HANA Model Content



## Feature

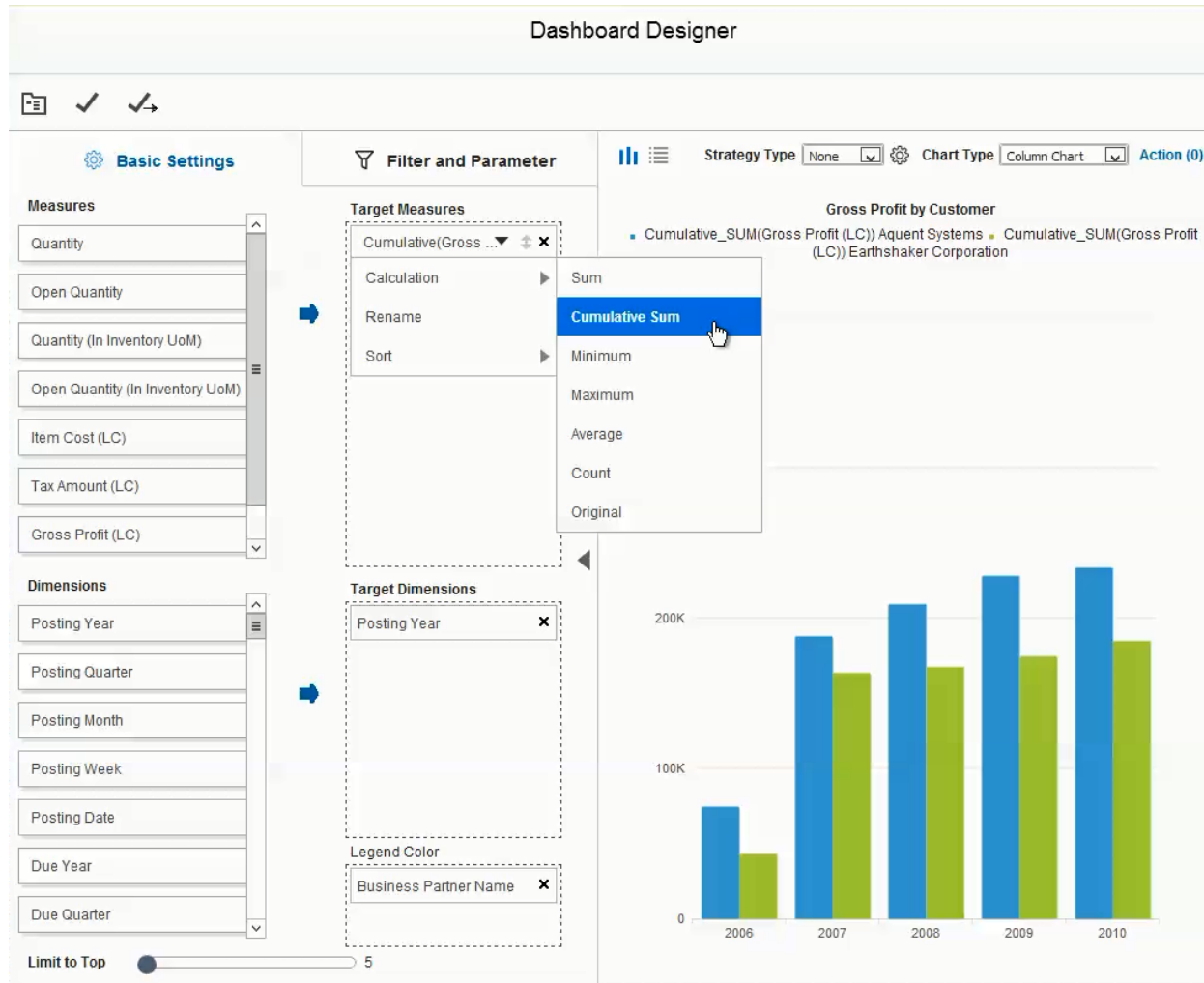
### Enhanced Semantic Layers:

- Newly added module:
  - CRM (incl. views for opportunity analysis)
- Additional views in existing modules:
  - Sales (SalesAnalysisByDocument, SalesQuotation)
  - Purchasing (PurchaseAnalysisByDocument)
  - Stock (InventoryStatus, InventoryTransactionDocuments)
- Additional predefined KPIs:
  - Weighted Amount of All Open Opportunities
  - Average Fulfillment Days of Sales Order
  - Average Delivery Variance Days
  - Average Fulfillment Days of Purchase Order
  - Average Receipt Variance Days
  - Top 5 Sales Employees by Sales Amount

## Benefit

- Users can better analyze business data and build dashboards and KPIs.
- Ready-to-use KPIs

# Pervasive Analytics Designer (1/2)



## Feature

- Use legend color to display more data series in one graph.
- More date types, e.g. year-month, year-quarter
- Time slider function for a clearer view of trends.
- Measure settings supports more calculation types: Cumulative Sum, Minimum, Maximum, and Count.

## Benefit

- More options and flexibility to analyze data and build more powerful dashboards.

# Pervasive Analytics Designer (2/2)

## Filter Editor



The screenshot shows the Pervasive Analytics Designer interface. The main window is titled 'Dashboard Designer' and has a menu bar (File, Edit, View, Data, Go To, Modules, Tools, Window, Help) and a toolbar. The 'Filter and Parameter' tab is active, showing a list of parameters and an 'Active Parameters' section. A 'Filter Editor' dialog box is open, showing the configuration for a filter. The dialog has a 'Dimensions' field set to 'Posting Date' and a 'Time Unit' field set to 'Date'. The 'From' field is set to 'Beginning Of This Year' and the 'To' field is set to 'End Of This Year'. A dropdown menu is open for the 'To' field, showing options: 'This Year', 'This Quarter', 'This Month', 'This Day', and 'All Future'. The '-Current User-' option is highlighted. The dialog also shows 'Update' and 'Cancel' buttons.

### Feature

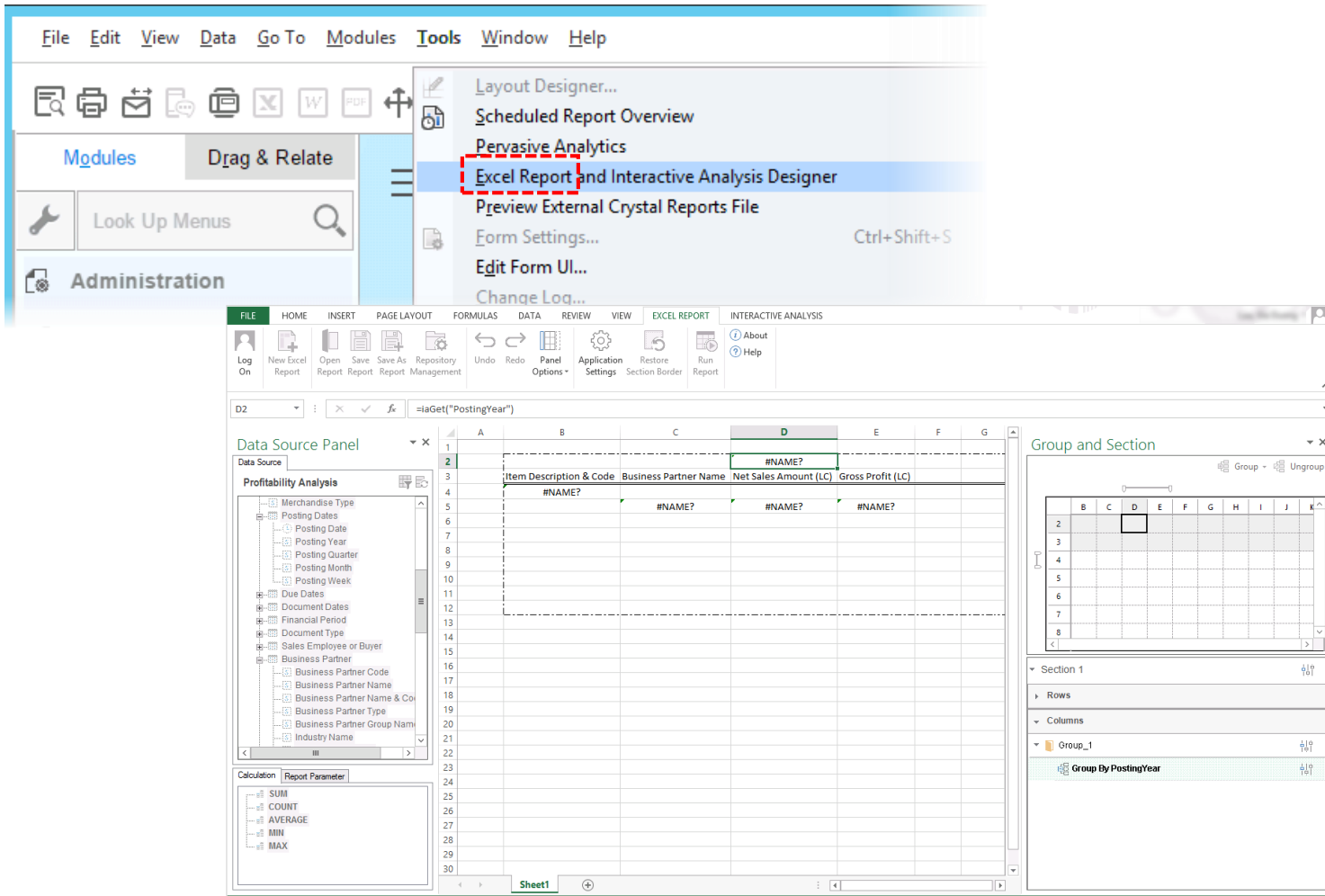
- Dynamic time range can be set in filter.
- Filter parameter “current user” can be applied.

### Benefit

- Dynamic KPIs, dashboards → less effort.
- Personalized KPIs, dashboards → less dashboards to manage.

# Excel Reports (1/4)

## built with Excel Report Designer



### Feature

- Reporting and analytical tool based on MS Excel.
- Utilizes SAP Business One Semantic Layer (SAP HANA views) as data source.
- Fully integrated with SAP Business One.
- Excel Report Designer tool delivered as Excel add-on.

### Benefits

- Leverage the power of Excel with its plugin for easy reporting, manipulation of data and layout design.
- Customers and end users can design Excel-based reports themselves.
- Enables better decision-making.



# Excel Reports (2/4)

## Designer



basic functions

selection of measures & dimensions

drag & drop

working area

calculation types

parameter settings

Group and Section

grouping

sorting & filter settings

The screenshot displays the SAP Excel Reports Designer interface. At the top is a ribbon with tabs: FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, EXCEL REPORT, and INTERACTIVE ANALYSIS. Below the ribbon is a toolbar with icons for Log On, New Excel Report, Open Report, Save Report, Save As Report, Repository Management, Undo, Redo, Panel Options, Application Settings, Restore Section Border, Run Report, About, and Help. The main workspace is a grid with columns A through G and rows 1 through 26. The grid contains a table with headers: 'Item Description & Code', 'Business Partner Name', 'Net Sales Amount (LC)', and 'Gross Profit (LC)'. The formula bar at the top shows '=iaGet("PostingYear")'. On the left is the 'Data Source Panel' for 'Profitability Analysis', listing various dimensions like 'Posting Date', 'Posting Year', 'Posting Quarter', 'Posting Month', 'Posting Week', 'Due Dates', 'Document Dates', 'Financial Period', 'Document Type', 'Sales Employee or Buyer', and 'Business Partner'. A green arrow points from this panel to the grid. On the right is the 'Group and Section' panel, showing a preview of the report grid and a tree view with 'Section 1', 'Rows', 'Columns', and 'Group\_1' containing 'Group By PostingYear'. A green box highlights this 'Group By PostingYear' setting. At the bottom, the 'Calculation' and 'Report Parameter' panels are visible, showing aggregation functions like SUM, COUNT, AVERAGE, MIN, and MAX.

# Excel Reports (3/4)

## Preview in Designer



Separate Excel for viewing (no Excel add-on)

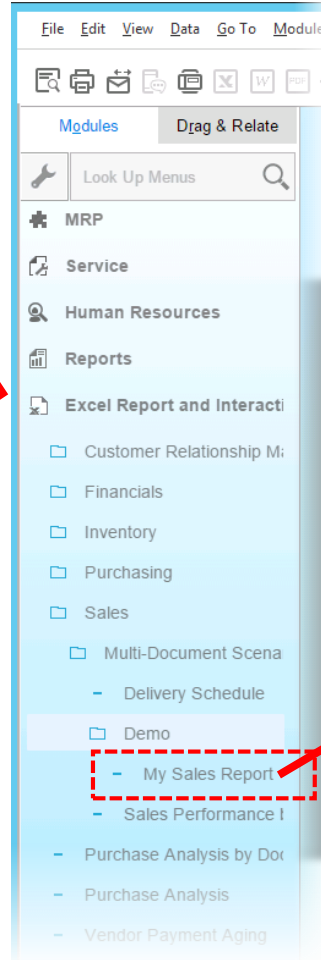
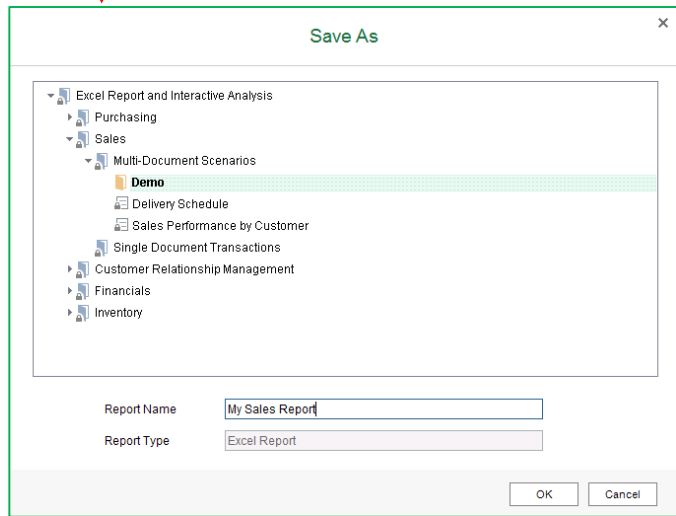
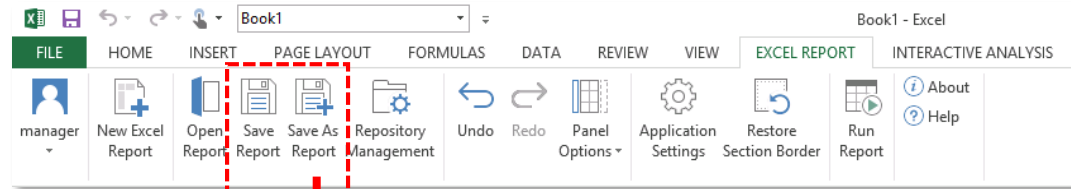
|    |                             |                         | 2006                  |                   | 2007                  |                   | 2008                  |                   |
|----|-----------------------------|-------------------------|-----------------------|-------------------|-----------------------|-------------------|-----------------------|-------------------|
|    | Item Description & Code     | Business Partner Name   | Net Sales Amount (LC) | Gross Profit (LC) | Net Sales Amount (LC) | Gross Profit (LC) | Net Sales Amount (LC) | Gross Profit (LC) |
| 4  | J.B. Officeprint 1111 (A000 | Subtotal                | 50475                 | 16345,5           | 80375                 | 25838,98          | 12750                 | 5860,68           |
| 5  |                             | ADA Technologies        | 2250                  | 571,5             | 15625                 | 3885,46           | 1875                  | 726,78            |
| 6  |                             | Andreas Ackermann       |                       |                   |                       |                   |                       |                   |
| 7  |                             | Aquent Systems          |                       |                   | 875                   | 492,26            | 2625                  | 1476,78           |
| 8  |                             | Earthshaker Corporation | 8250                  | 2095,5            | 625                   | 242,26            |                       |                   |
| 9  |                             | Mashina Corporation     | 9375                  | 2381,25           | 13750                 | 3339,6            | 1875                  | 726,78            |
| 10 |                             | Maxi-Teq                | 6750                  | 2553,75           | 18750                 | 7191,38           | 2250                  | 1101,78           |
| 11 |                             | Microchips              | 2250                  | 571,5             | 8625                  | 2366,22           | 1875                  | 726,78            |
| 12 |                             | One Time Customer       |                       |                   | 2625                  | 1125              |                       |                   |
| 13 |                             | Parameter Technology    | 12150                 | 4596,75           | 7500                  | 2768              | 2250                  | 1101,78           |
| 14 |                             | SG Electronics          | 9450                  | 3575,25           | 12000                 | 4428,8            |                       |                   |
| 15 |                             | Web Customer            |                       |                   |                       |                   |                       |                   |
| 16 |                             | Werner Richter          |                       |                   |                       |                   |                       |                   |
| 17 | J.B. Officeprint 1186 (A000 | Subtotal                | 107662,5              | 35545,24          | 95812,5               | 30196,98          | 19800                 | 9540,47           |
| 18 |                             | ADA Technologies        | 8437,5                | 1998,45           | 12750                 | 3130,26           |                       |                   |
| 19 |                             | Andreas Ackermann       |                       |                   |                       |                   |                       |                   |
| 20 |                             | Aquent Systems          | 16537,5               | 7522,83           | 2100                  | 1207,86           | 3937,5                | 2264,76           |
| 21 |                             | Earthshaker Corporation | 10125                 | 2398,14           |                       |                   |                       |                   |
| 22 |                             | Mashina Corporation     | 9000                  | 2131,68           | 32625                 | 8129,58           | 2812,5                | 1139,76           |
| 23 |                             | Maxi-Teq                | 10125                 | 3685,95           | 18900                 | 7495,98           |                       |                   |
| 24 |                             | Microchips              | 12937,5               | 3064,39           | 16312,5               | 4472,1            | 4500                  | 1823,58           |
| 25 |                             | One Time Customer       |                       |                   | 13125                 | 5761,2            |                       |                   |
| 26 |                             | Parameter Technology    | 25650                 | 9337,74           |                       |                   | 5175                  | 2610,11           |
| 27 |                             | SG Electronics          | 14850                 | 5406,06           |                       |                   | 3375                  | 1702,26           |
| 28 |                             | Web Customer            |                       |                   |                       |                   |                       |                   |
| 29 |                             | Werner Richter          |                       |                   |                       |                   |                       |                   |

# Excel Reports (4/4)

## Saving & Consuming Reports



### Design Time



### Run Time

Note: No addon required for report consumption.

| Item Description & Code               | Business Partner Name | 2006                  |                   | 2007                  |                   | 2008                  |                   |
|---------------------------------------|-----------------------|-----------------------|-------------------|-----------------------|-------------------|-----------------------|-------------------|
|                                       |                       | Net Sales Amount (LC) | Gross Profit (LC) | Net Sales Amount (LC) | Gross Profit (LC) | Net Sales Amount (LC) | Gross Profit (LC) |
| J.B. Officeprint 1111 (A00C) Subtotal |                       | 50475                 | 16345,5           | 80375                 | 25838,98          | 12750                 | 5860,68           |
| ADA Technologies                      |                       | 2250                  | 571,5             | 15625                 | 3885,46           | 1875                  | 726,78            |
| Earthshaker Corporation               |                       | 8250                  | 2095,5            | 625                   | 242,26            | 2625                  | 1476,78           |
| Mashina Corporation                   |                       | 9375                  | 2381,25           | 13750                 | 3339,6            | 1875                  | 726,78            |
| Microchips                            |                       | 2250                  | 571,5             | 8625                  | 2366,22           | 1875                  | 726,78            |
| One Time Customer                     |                       |                       |                   | 2625                  | 1125              |                       |                   |
| Parameter Technology                  |                       | 12150                 | 4596,75           | 7500                  | 2768              | 2250                  | 1101,78           |
| SG Electronics                        |                       | 9450                  | 3575,25           | 12000                 | 4428,8            |                       |                   |
| Web Customer                          |                       |                       |                   |                       |                   |                       |                   |
| Werner Richter                        |                       |                       |                   |                       |                   |                       |                   |
| J.B. Officeprint 1186 (A00C) Subtotal |                       | 107662,5              | 35545,24          | 95812,5               | 30196,98          | 19800                 | 9540,47           |
| ADA Technologies                      |                       | 8437,5                | 1998,45           | 12750                 | 3130,26           |                       |                   |
| Earthshaker Corporation               |                       | 16537,5               | 7522,83           | 2100                  | 1207,86           | 3937,5                | 2264,76           |
| Mashina Corporation                   |                       | 9000                  | 2131,68           | 32625                 | 8129,58           | 2812,5                | 1139,76           |
| Microchips                            |                       | 12937,5               | 3064,39           | 16312,5               | 4472,1            | 4500                  | 1823,58           |
| One Time Customer                     |                       |                       |                   | 13125                 | 5761,2            |                       |                   |
| Parameter Technology                  |                       | 25650                 | 9337,74           |                       |                   | 5175                  | 2610,11           |
| SG Electronics                        |                       | 14850                 | 5406,06           |                       |                   | 3375                  | 1702,26           |
| Web Customer                          |                       |                       |                   |                       |                   |                       |                   |
| Werner Richter                        |                       |                       |                   |                       |                   |                       |                   |

# Intelligent Forecast



The screenshot displays the SAP Business One Intelligent Forecast interface. It includes a menu bar (File, Edit, View, Data, Go To, Modules, Tools, Window, Help) and a toolbar with various icons. A left sidebar lists modules such as Administration, Financials, Opportunities, Sales - A/R, Purchasing - A/P, Business Partners, Banking, Inventory, Resources, Production, MRP, Service, Human Resources, and Project Management. The main window is titled 'Forecasts' and contains the following elements:

- Forecast Code:** Forecast
- Forecast Name:** Forecast
- Start Date:** 02.2015
- Intelligent Forecast Configuration:**
  - Order History:** Select Item By (Item), Item No. From (01) To (10), Item Group.
  - Properties:** Warehouse, Transaction (Sales Order, Delivery, A/R Invoice).
  - Forecast Algorithm:** Algorithm (Auto).
- Forecast Value:** (Forecast Period: 6 months 2015.06.01-- 2015.12.31)
- Forecast Value Table:**

| Item | Warehouse | 02.2015 Quantity | 02.2015 Quantity | 02.2015 Quantity | 02.2015 Quantity | 02.2015 Quantity | 02.2015 Quantity | 02.2015 Quantity |
|------|-----------|------------------|------------------|------------------|------------------|------------------|------------------|------------------|
| 01   | 01        | 899              | 899              | 899              | 899              | 899              | 899              | 899              |
| 02   | 01        | 899              | 899              | 899              | 899              | 899              | 899              | 899              |
| 03   | 01        | 899              | 899              | 899              | 899              | 899              | 899              | 899              |
- Forecast Value Chart:** A line chart showing 'Past Data' (blue line) and 'customize Data' (dotted line) from 01.2013 to 03.2014. The chart includes a 'Forecast Start' (dashed vertical line) and 'Forecast End' (solid vertical line) at 12.2013. The 'Max History Period' is set to 100 Months. The current algorithm is 'TES'.

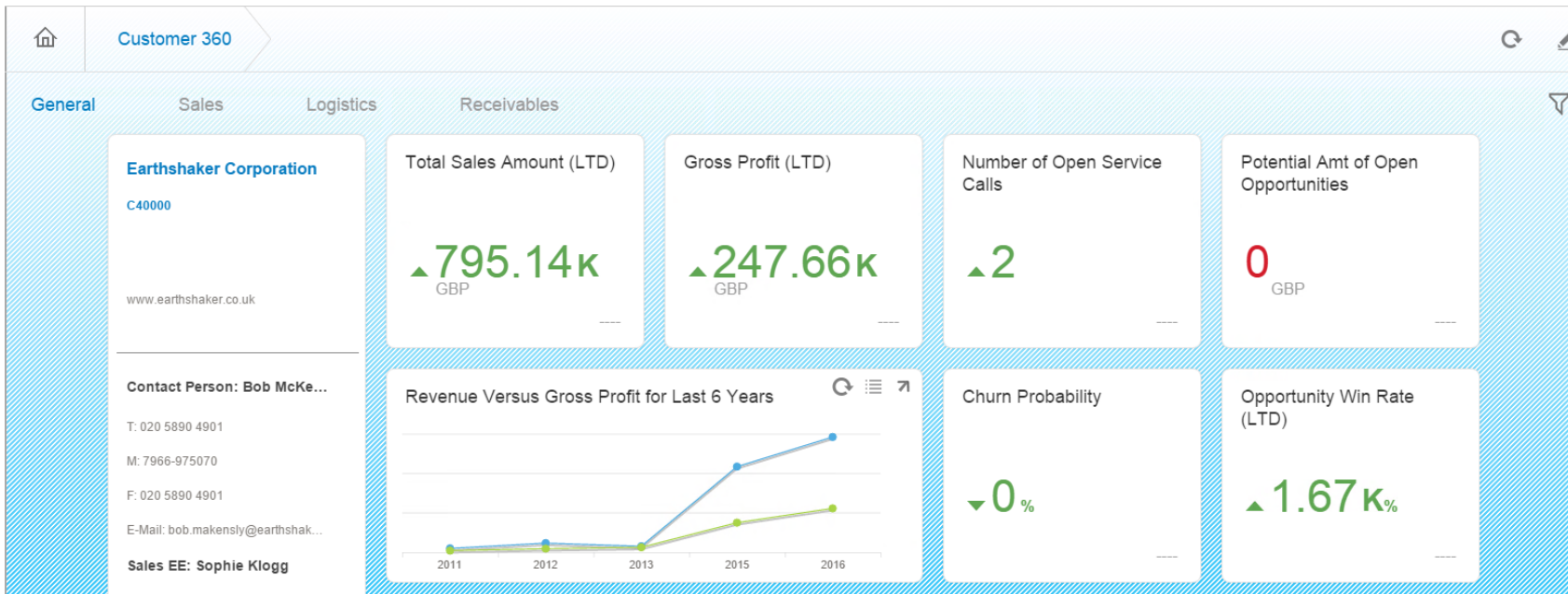
## Feature

- Statistical forecast with built-in models, incorporating trends and seasonal factors.
  - TESM (Triple Exponential Smoothing)
  - LRDTSA (Linear Regression with Damped Trend and Seasonal Adjust)
- SAP Business One automatically selects the best algorithm.
- Hindcast to dynamically adjust outlier and what-if scenarios.
- Forecast results can be used in MRP wizard.

## Benefit

- Easily forecast and leverage what-if-analysis to improve decision-making.

# Customer 360 (9.2 PL 05)



## Feature

- Customer 360 - new dashboard, available from within the customer master data showing lots of up-to-date valuable information about the specific customer
- The dashboard is divided into four tabs organizing the data according to different aspects

## Benefit

- Receiving the complete info about the customer within a click enables real-time decision making based on the most accurate information
- Displaying the data in four tabs increases accuracy and user productivity

# Order Recommendation (9.2 PL 04)



**Sales Order**

Customer: C40000  
 Name: Earthshaker Corporation  
 Contact Person: Bob McKensly  
 Customer Ref. No.:  
 BP Currency: GBP

No. Primary 499  
 Status Open  
 Posting Date 03.03.17  
 Delivery Date:  
 Document Date 03.03.17

| # | Item No. | Item Descripti...   | Quantity | No. of Packages | Unit Price | Disc... | Tax ... |
|---|----------|---------------------|----------|-----------------|------------|---------|---------|
| 1 | A00003   | J.B. Officeprint 11 | 1        | 1               | GBP 187.50 | 0.00    | O1      |
| 2 | A00004   | Rainbow ColorJe     | 1        | 1               | GBP 312.50 | 0.00    | O1      |
| 3 |          |                     |          |                 |            | 0.00    | O1      |

Sales Employee: Sophie Klogg  
 Owner:  
 Remarks:

Total Before Discount: GBP 500.00  
 Discount: %  
 Freight: GBP 0.00  
 Rounding  
 Tax: GBP 87.50  
 Total: GBP 587.50

Add Cancel Copy From Copy To

**Sales Recommendation**

Recommendations for This Customer

**Z00001** 700.00GBP  
 Tablet PC 64GB Black Add

**P10001** 730.00GBP  
 PC - P4 2.4G, DDR 512M, 400G HD Add

**A00003** 150.00GBP  
 J.B. Officeprint 1186 Add

**C00005** 30.00GBP  
 WLAN Card Add

**C00002** 150.00GBP  
 Motherboard P4 Turbo - Asus Chipset Add

Customers Who Bought This Item Also Bought

**P10001** 730.00GBP  
 PC - P4 2.4G, DDR 512M, 400G HD Add

**P10003** 885.00GBP  
 PC Set 1 Add

**MRP\_Child1** 5.00GBP  
 MRP\_Child1 Add

**C00005** 30.00GBP  
 WLAN Card Add

**I00012** 15.00GBP  
 Add

## Feature

- Product recommendations are displayed in the sidebar of sales order and sales quotation for a customer
- Recommendations are based on association rules generated from the buying history of the given customer and similar customer
- Ligon to `https://<Server Address>:<Port>/PredictiveAnalysis` in a web browser in order to refresh data or schedule an automatic update

## Benefit

- Ability to drive sales growth by expanding customer footprint.
- Automatic update of product recommendations thought new scheduling functionality

# Excel Report Designer



## Feature

- Input Parameter – define parameters to dynamically filter data in excel report designer. There are two types of parameters: the data source parameter and the report parameter (PL01)
- Time Functions - This feature enables you to retrieve dates and financial period codes dynamically as a list based on your available statistics in the database, and to filter your data with the dates and financial period codes it retrieves (PL04)

## Benefit

- Dynamic filtering of data



# Inventory | Distribution

SAP Business One 9.2



# Prices Update Wizard



The screenshot displays the SAP Prices Update Wizard interface. The main window is titled "Prices Update Wizard" and is currently in the "Simulation" step. The simulation table shows the following data:

| #  | Update                   | Item No. | Item Description      | UoM Group | Price List                  | UoM    | Current Price | Suggested Price |
|----|--------------------------|----------|-----------------------|-----------|-----------------------------|--------|---------------|-----------------|
| 1  | <input type="checkbox"/> | A00001   | J.B. Officeprint 1420 | Manual    |                             |        |               |                 |
| 2  | <input type="checkbox"/> |          |                       |           | ▼ Base Price                |        |               |                 |
| 3  | <input type="checkbox"/> |          |                       |           |                             | Manual | GBP 200.00    | GBP 202.00      |
| 4  | <input type="checkbox"/> |          |                       |           | ▼ Discount Purchase Price   |        |               |                 |
| 5  | <input type="checkbox"/> |          |                       |           |                             | Manual | GBP 100.00    | GBP 101.00      |
| 6  | <input type="checkbox"/> |          |                       |           | ▼ Distributor Sales Price   |        |               |                 |
| 7  | <input type="checkbox"/> |          |                       |           |                             | Manual | GBP 250.00    | GBP 252.50      |
| 8  | <input type="checkbox"/> |          |                       |           | ▼ Regular Purchase Price    |        |               |                 |
| 9  | <input type="checkbox"/> |          |                       |           |                             | Manual | GBP 150.00    | GBP 151.50      |
| 10 | <input type="checkbox"/> |          |                       |           | ▼ Regular Sales Price       |        |               |                 |
| 11 | <input type="checkbox"/> |          |                       |           |                             | Manual | GBP 300.00    | GBP 303.00      |
| 12 | <input type="checkbox"/> |          |                       |           | ▼ Small Account Sales Price |        |               |                 |
| 13 | <input type="checkbox"/> |          |                       |           |                             | Manual | GBP 350.00    | GBP 353.50      |

## Feature

- New Prices Update Wizard allows the user to:
  - systematically update item prices in price lists,
  - mass convert prices into different currencies.
- Price update can be restricted to apply only for selected items, price lists, currencies and UoMs.
- Simulation mode allows you to preview changes.

## Benefit

- Updating prices globally is made simple, more intuitive and much more efficient.
- Handle bulk price list updates easily.

# Bin Locations - Unit of Measure Restriction



The screenshot displays the SAP Bin Location Master Data form. The 'UoM Restrictions' dropdown menu is highlighted with a red box, showing the following options: None, Specific UoM, Single UoM Only, Specific UoM Group, and Single UoM Group Only. The form also shows fields for Warehouse (05), Aisle (A1), Shelf (S1), Level (L1), Bin Location Code (05-A1-S1-L1), and UoM (6Pack).

## Feature

- Bin locations can be restricted according to the unit of measure (UoM) of items stored in the bin location.
- You can choose the following UoM restrictions:
  - specific UoM
  - single UoM only
  - specific UoM group
  - single UoM group only
- When posting goods receipts, restricted bin locations are only offered for selection.

## Benefit

- Enhanced flexibility and greater control to meet specific bin location requirements.

# Pick & Pack



Pick and Pack Manager - Selection Criteria

Status: Open Group By: None

Manage:  Sales Orders  Reserve Invoices  Production Orders  Inventory Transfer Requests

Production Order No.:  From:  To:

Delivery/Due Date:

Customer:

Fulfillment %: 0.000 100.000

Type:  Item  Resource

Warehouses:

| Location                            | Whse Code | Whse Name   |
|-------------------------------------|-----------|-------------|
| <input checked="" type="checkbox"/> | 05        | Bin Wareho  |
| <input checked="" type="checkbox"/> | 02        | West Cost v |
| <input checked="" type="checkbox"/> | 01        | General Wa  |

Sort By:  Delivery/Due Date

OK Cancel

---

Pick and Pack Manager

Open Released Picked

Find Document Number:

| #  | Trans. T...                         | Doc. No. | Doc. Row | Delivery/Du... | Type       | Number   | Description                     | Whse | Open | Conf... | To Release | Avail. to R... | Fu... |
|----|-------------------------------------|----------|----------|----------------|------------|----------|---------------------------------|------|------|---------|------------|----------------|-------|
| 1  | <input type="checkbox"/>            | PW       | 154      | 3              | 06/19/2015 | Resource | R.1000 Resource1000             | 01   | 2    |         | 2          |                |       |
| 2  | <input type="checkbox"/>            | PW       | 154      | 4              | 06/19/2015 | Resource | R.1001 Resource1001             | 01   | 2    |         | 2          |                |       |
| 3  | <input checked="" type="checkbox"/> | PW       | 153      | 3              | 06/22/2015 | Resource | R.1000 Resource1000             | 01   | 2    |         | 2          |                |       |
| 4  | <input type="checkbox"/>            | PW       | 153      | 4              | 06/22/2015 | Resource | R.1001 Resource1001             | 01   | 2    |         | 2          |                |       |
| 5  | <input checked="" type="checkbox"/> | PW       | 63       | 1              | 08/20/2007 | Item     | LM4029 LeMon 4029 Printer AC A  | 01   | 10   | 10      | 10         | 680            |       |
| 6  | <input type="checkbox"/>            | PW       | 63       | 2              | 08/20/2007 | Item     | LM4029 LeMon 4029 Printer AC P  | 01   | 10   | 10      | 10         | 630            |       |
| 7  | <input type="checkbox"/>            | PW       | 89       | 1              | 04/26/2008 | Item     | LM4029 Memory Chip              | 01   | 20   | 20      | 20         | 402            |       |
| 8  | <input type="checkbox"/>            | PW       | 89       | 2              | 04/26/2008 | Item     | LM4029 LeMon 4029 500 sheet paj | 01   | 10   | 10      | 10         | 752            |       |
| 9  | <input type="checkbox"/>            | PW       | 89       | 3              | 04/26/2008 | Item     | LM4029 LeMon 4029 Printer Head  | 01   | 10   | 10      | 10         | 762            |       |
| 10 | <input type="checkbox"/>            | PW       | 89       | 4              | 04/26/2008 | Item     | LM4029 LeMon 4029 Printer Powe  | 01   | 10   | 10      | 10         | 24             |       |
| 11 | <input type="checkbox"/>            | PW       | 89       | 5              | 04/26/2008 | Item     | LM4029 LeMon 4029 Printer Syste | 01   | 10   | 10      | 10         | 503            |       |
| 12 | <input type="checkbox"/>            | PW       | 115      | 1              | 12/20/2008 | Item     | LM4029 Memory Chip              | 01   | 10   | 10      | 10         | 382            |       |
| 13 | <input type="checkbox"/>            | PW       | 115      | 2              | 12/20/2008 | Item     | LM4029 LeMon 4029 500 sheet paj | 01   | 5    | 5       | 5          | 742            |       |
| 14 | <input type="checkbox"/>            | PW       | 115      | 3              | 12/20/2008 | Item     | LM4029 LeMon 4029 Printer Head  | 01   | 5    | 5       | 5          | 752            |       |
| 15 | <input type="checkbox"/>            | PW       | 115      | 4              | 12/20/2008 | Item     | LM4029 LeMon 4029 Printer Powe  | 01   | 5    | 5       | 5          | 14             |       |
| 16 | <input type="checkbox"/>            | PW       | 115      | 5              | 12/20/2008 | Item     | LM4029 LeMon 4029 Printer Syste | 01   | 5    | 5       | 5          | 493            |       |
| 17 | <input type="checkbox"/>            | PW       | 125      | 1              | 04/16/2009 | Item     | LM4029 LeMon 4029 Printer AC A  | 01   | 10   | 10      | 10         | 670            |       |
| 18 | <input type="checkbox"/>            | PW       | 125      | 2              | 04/16/2009 | Item     | LM4029 LeMon 4029 Printer AC P  | 01   | 10   | 10      | 10         | 620            |       |

Release to Pick List Create

- Manual Delivery
- Automatic Delivery
- Manual Invoice
- Transfer Request
- Item/Component Transfer
- Inventory Transfer
- Issue for Production
- Receipt from Production

## Feature

### Pick and Pack Selection Criteria:

- New selection criteria: type
  - Include both items and resources
  - Include only items
  - Include only resources
- Define range for items & resources to be included.

### Pick and Pack Manager:

- New field called "Type".
- Selected resources/items can be issued for or received from production.

## Benefit

- Greater flexibility and control of picking items.
- One stop shop for handling production orders in a basic production environment.

# Item Cost Standard Valuation



Inventory Revaluation

Number: 1 Series: Primary Posting Date: 07.09.15  
Document Date: 07.09.15  
Revaluation Type: Price Change Ref. 2

| # | Item No. | Item Description | Whse | Current Cost | New Cost | Unit of Measure | In Stock |
|---|----------|------------------|------|--------------|----------|-----------------|----------|
| 1 | St1000   | Standard         | 01   | GBP 0.00     | 100      |                 | 0.00     |
| 2 |          |                  |      |              |          |                 |          |

Serial/Batch Number Filter  
Filtered By:   Display Issued Serials/Batches  
Filter:   
Find:   
Admission Date: From  To  Set value for selection:   
Expiry Date: From  To

FIFO Layers

| # | Doc. No. | Entry Date | Current Cost | New Price | Open Qty |
|---|----------|------------|--------------|-----------|----------|
|   |          |            |              |           |          |
|   |          |            |              |           |          |
|   |          |            |              |           |          |
|   |          |            |              |           |          |

Remarks:   
Journal Remark: Inventory Revaluation

## Feature

- Setting standard valuation of item cost now only possible via Inventory Revaluation.
- No longer possible to set item cost via Item Master Data in Add or Update mode - After adding new items with the standard valuation method, you need to add an Inventory revaluation document.

## Considerations

- Check add-on compatibility.
- Feature is documented in “Compatibility Issues” document.

## Benefits

- Clear audit trail for all price changes as Inventory Revaluation creates a Journal Entry.
- Greater control and visibility tracking inventory costs.

# Inventory | Distribution



| Feature   | Description   |
|---|---|
| <b>Stock Counting Print Preview</b>                       | Inventory Counting documents can now be previewed or printed before adding these documents to the system.                                     |
| <b>Inventory Posting &amp; Inventory Opening Balances</b> | For items managed by Serial/Batch valuation method, variances are now valued on a serial or batch level as opposed to bin or warehouse level. |



# MRP | Production

SAP Business One 9.2



# Material Resource Planning (1/2)



The image shows two overlapping dialog boxes from the SAP MRP Wizard. The top dialog, 'Items list - selection criteria', has the 'Expanded Selection Criteria' checkbox checked. Under this section, the 'Preferred Supplier' dropdown is highlighted with a red box. The bottom dialog, 'Items List - Update Selected Items', has the 'Update with Values from Item Master Data' radio button selected, also highlighted with a red box. A dropdown menu is open for the 'MRP Component Warehouse' field, with 'From Bill of Materials Line' selected and highlighted in blue.

## Feature

### MRP Wizard Updates:

- Item selection in MRP Wizard includes expanded selection criteria to choose:
  - Preferred Vendor,
  - and UDF's for items.
- Update Option: selection whether to use specific values or item master data to perform MRP

## Benefit

- Greater flexibility to be more specific with item selection.
- Easily manipulate master data variables for an MRP scenario and revert back to default variables at a later stage when re-running a saved scenario.

# Material Resource Planning (2/2)



Forecasts

Forecast Code: Forecast  
Forecast Name: Forecast  
Start Date: 01.09.15 End Date: 31.12.15 View: Monthly

| Item No. | Item Description | Warehouse | Sep | Oct | Nov | Dec |
|----------|------------------|-----------|-----|-----|-----|-----|
| 1        | MRP_Item1        | 01        | 50  | 50  | 50  |     |
| 2        | MRP_Item2        | 02        | 10  | 10  | 10  |     |
| 3        | MRP_Item3        | 03        |     |     |     | 5   |
| 4        |                  |           |     |     |     |     |

Context Menu: Cut, Copy, Copy Table, Paste, Delete, Maximise/Restore Grid, Remove, Duplicate, **Delete Row**, List of Warehouses

Buttons: OK, Cancel, Generate Forecast

## Feature

Forecasting:

- Create and maintain forecasts for items per warehouse.
- Increase or decrease the forecast % across multiple line items.
- Delete multiple item rows.

## Benefit

- Forecasting items on a warehouse level enables you to select sales orders according to relevant warehouses allowing greater control over your forecast demand.
- Managing forecast scenarios becomes easier with multiple line item selection.



# Production - Standard Cost (1/2)



**Item Master Data**

Item No. Manual Child1  
 Description Child1  
 Foreign Name  
 Item Type Items  
 Item Group Items  
 UoM Group Manual  
 Price List Base Price

Bar Code  
 Unit Price  
 Primary Curre

General Purchasing Data Sales Data Inventory Data Planning Data Production Data

Phantom Item  
 Issue Method Backflush

BOM Type  
 No. of Item Components 0  
 No. of Resource Components 0

Production Std Cost GBP 12.00  
 Include in Production Std Cost Rollup

**Production Std Cost Update - Selection Criteria**

Update Production Standard Cost from Current Valuation Cost

Item No. From To  
 Item Group All  
 Item Properties Ignore

OK Cancel

**Production Std Cost Rollup - Selection Criteria**

Parent Item No. From To  
 Item Group All  
 Item Properties Ignore

OK Cancel

**Bill of Materials**

Product No. 10013 X Quantity 1 Warehouse 01  
 Product Description Custom Computer Price List Base Price  
 BOM Type Production Distr. Rule  
 Project

Production Std Cost GBP 846.00  
 Planned Average Production Size 10.00

| #  | Price List | Unit Price | Total      | Production Std Cost | Total Production Std Cost | Co... |
|----|------------|------------|------------|---------------------|---------------------------|-------|
| 6  | Base Price |            |            | GBP 60.00           | GBP 60.00                 |       |
| 7  | Base Price |            |            | GBP 110.00          | GBP 110.00                |       |
| 8  | Base Price |            |            | GBP 160.00          | GBP 160.00                |       |
| 9  |            |            |            |                     |                           |       |
| 10 |            | GBP 70.00  | GBP 35.00  | GBP 70.00           | GBP 35.00                 |       |
| 11 | Base Price |            |            |                     |                           |       |
|    |            |            | GBP 380.00 |                     | GBP 726.00                |       |

## Feature

- A budgeted production cost which can be compared to the actual production cost.
- Bill of Materials window presents the actual Production Std Cost of the parent together with its detailed structure according to Total Production Std Cost of its item and resource components.
- Supports multi level bill of material calculations.
- Item Master Data Production Std Cost can be optionally set to the current valuation cost and can also be optionally rolled up through multiple levels of bill of materials.

## Benefit

- Facilitates budget to actual cost comparisons and production variance calculations.

# Production - Start and End Dates (2/2)



Production Order

Type: Standard  
 Status: Released  
 Product No.: 10013  
 Product Description: Custom Computer  
 Planned Quantity: 10 UoM Name:   
 Warehouse: 01

No.: Primary 153  
 Order Date: 29.10.15  
**Start Date: 29.10.15**  
 Due Date: 27.11.15  
 User: Jayson Butler  
 Origin: Sales Order  
 Sales Order: 1429  
 Customer: C30000  
 Distr. Rule:   
 Project:

| # | Type     | No.    | Description                                  | Base Qty | Planned Qty | Start Date | End Date | Resource Allocation |
|---|----------|--------|--|----------|-------------|------------|----------|---------------------|
| 1 | Text     |        | Step 1 - Design of Logo for computer etching |          |             |            |          |                     |
| 2 | Resource | R10000 | Design Hours                                 | 1        | 10          | 29.10.15   | 30.10.15 | Start Date Forwards |
| 3 | Text     |        | Step 2 - Etching & Assembly                  |          |             |            |          |                     |
| 4 | Resource | R10001 | Labor Hours                                  | 2        | 22          | 30.10.15   | 13.11.15 | Start Date Forwards |
| 5 | Resource | R10002 | Machine Hours                                | 1        | 10          | 30.10.15   | 13.11.15 | Start Date Forwards |
| 6 | Item     | 10014  | Computer Casing                              | 1        | 10          | 29.10.15   | 24.11.15 |                     |
| 7 | Item     | 10015  | 8 GB CPU                                     | 1        | 10          | 29.10.15   | 24.11.15 |                     |
| 8 | Item     | 10016  | 250 GB SSD                                   | 1        | 10          | 29.10.15   | 24.11.15 |                     |
| 9 | Text     |        | Step 3 - Quality Check                       |          |             |            |          |                     |

Remarks:   
 OK Cancel

Resource Master Data

Resource No.: Manual Resource1  
 Description: Resource1  
 Foreign Name:   
 Resource Type: Machine  
 Resource Group: Resources  
 Unit of Measure Text:   
 Time per Resource Units: 0:00:00

General Capacity Data Planning Data Fixe

Issue Method: Backflush  
**Resource Allocation: On Start Date**

## Feature

- New start date on Production Order header and start and end dates on row level.
- Resource Allocation field in Resource Master Data window now has 4 options.
- Resource components are committed according to the chosen production order Resource Allocation method.
- All start and end dates at row level can be optionally changed when changing header start and end date values.
- MRP can commit item components according to Start Date at row level.
- Resource Allocation on the Resource Master Data window is the default for resource lines on a Production Order.

## Benefit

- Greater visibility of individual components required for consumption.
- More easily plan allocation of items/resources across multiple production runs.

# Production Order Batch Update (9.2 PL05)



Open Items List

Open Documents: Production Orders

| Select                              | Doc. No. | Type     | Status  | Product No. |
|-------------------------------------|----------|----------|---------|-------------|
| <input type="checkbox"/>            | ➔ 63     | Standard | Planned | ➔ LM4029PS  |
| <input checked="" type="checkbox"/> | ➔ 89     | Standard | Planned | ➔ LM4029    |
| <input checked="" type="checkbox"/> | ➔ 115    | Standard | Planned | ➔ LM4029    |
| <input type="checkbox"/>            | ➔ 125    | Standard | Planned | ➔ LM4029PS  |
| <input checked="" type="checkbox"/> | ➔ 131    | Standard | Planned | ➔ LM4029    |
| <input checked="" type="checkbox"/> | ➔ 137    | Standard | Planned | ➔ LM4029    |
| <input type="checkbox"/>            | ➔ 141    | Standard | Planned | ➔ LM4029PS  |
| <input checked="" type="checkbox"/> | ➔ 142    | Standard | Planned | ➔ LM4029    |
| <input type="checkbox"/>            | ➔ 143    | Standard | Planned | ➔ LM4029PS  |
| <input type="checkbox"/>            | ➔ 144    | Standard | Planned | ➔ LM4029PS  |
| <input type="checkbox"/>            | ➔ 145    | Standard | Planned | ➔ LM4029    |
| <input type="checkbox"/>            | ➔ 146    | Standard | Planned | ➔ LM4029    |
| <input type="checkbox"/>            | ➔ 147    | Standard | Planned | ➔ LM4029PS  |

OK

Change Status

## Feature

- In the Open Items List you can select multiple production orders, choose the “Change Status” button and assign the selected documents the required status

## Benefit

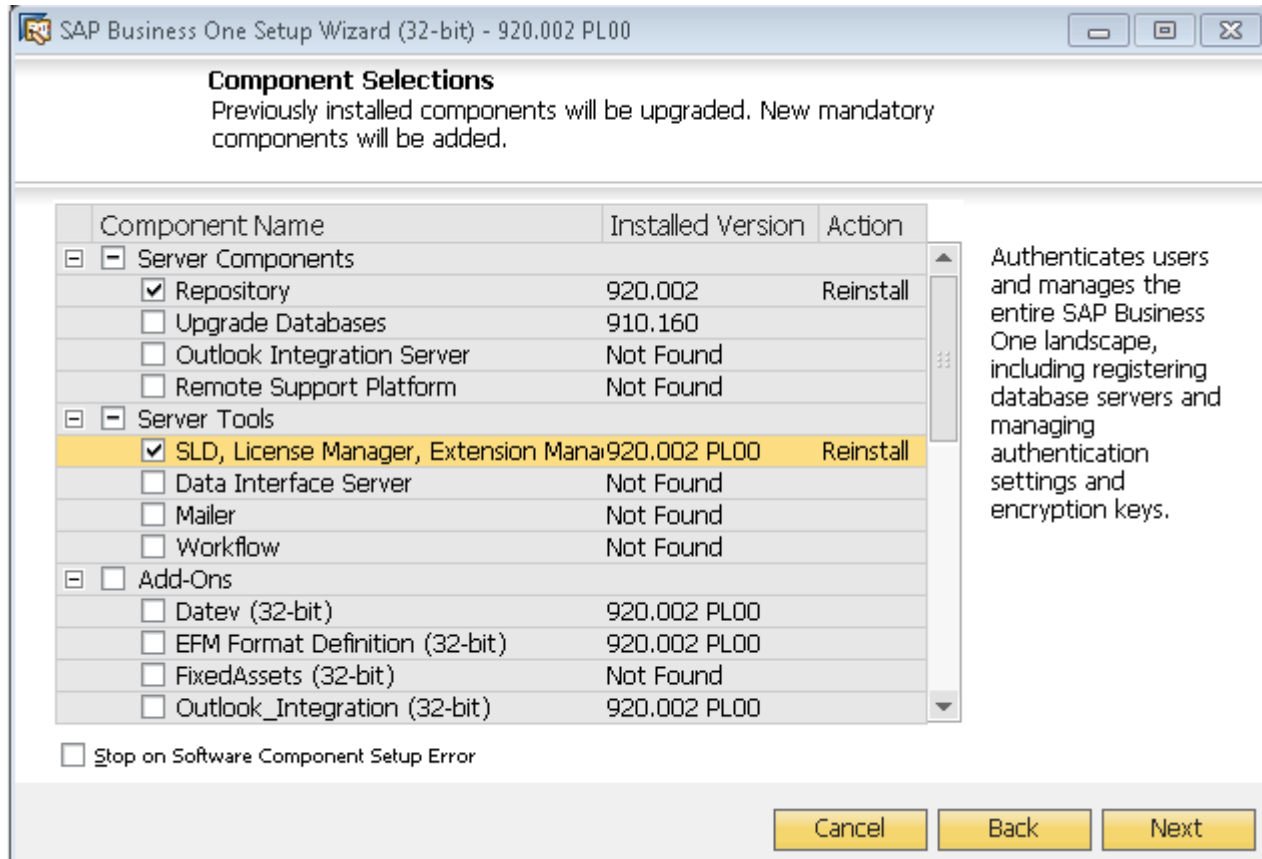
- Increased productivity and enhanced usability



# Lifecycle Management

SAP Business One 9.2

# Installation & Upgrade Simplification



## Feature

- Installation wizard and upgrade wizard are merged into one setup wizard.
- Structure of the SAP Business One installation and upgrade package has been simplified.
- Improved performance and database upgrade.

## Benefit

- Simplified landscape management for supportability & maintainability.
- Guided and simplified installation process for easier and faster deployment.
- One centralized wizard for both install and upgrade.

# Logging & Tracing



The screenshot displays the SAP Business One user interface. On the left is the 'Main Menu' with categories like Administration, Financials, Opportunities, Sales - AR, Purchasing - AP, Business Partners, Banking, Stock Management, Resources, Production, and MRP. The 'Administration' menu is expanded, showing options such as 'Choose Company', 'Exchange Rates and Indexes', 'Time Sheet', 'System Initialization', 'Setup', 'Data Import/Export', 'Utilities', 'Approval Procedures', 'Licence', 'Integration Service', 'Add-ons', 'Workflow', and 'Alerts Management'. In the center, the 'Logger Settings' dialog box is open, showing configuration options for 'Business Information Level' (set to 'Errors Only'), 'System Information Level' (set to 'Custom'), and 'Log File Max Size' (set to 5 MB). Below these are options to 'Apply changes to this machine' or 'all machines', and buttons for 'Restore Default Settings', 'Open Folder', and 'Clean Log Folder'. In the foreground, an 'Open' file dialog window is open, showing a list of log files in the 'SAPAdmin > BusinessOne' directory. The list includes files like 'Client.AuditLogger.20150812\_170522.pid32...' and 'Client.blogger.20150812\_170542.pid2236.I...'. The 'File name' field is empty, and the file type is set to 'All Files (\*.\*)'. At the bottom of the SAP interface, a 'System Messages Log (1)' window is visible, showing filters for 'Errors', 'Warnings', 'Information', and '50 Last'.

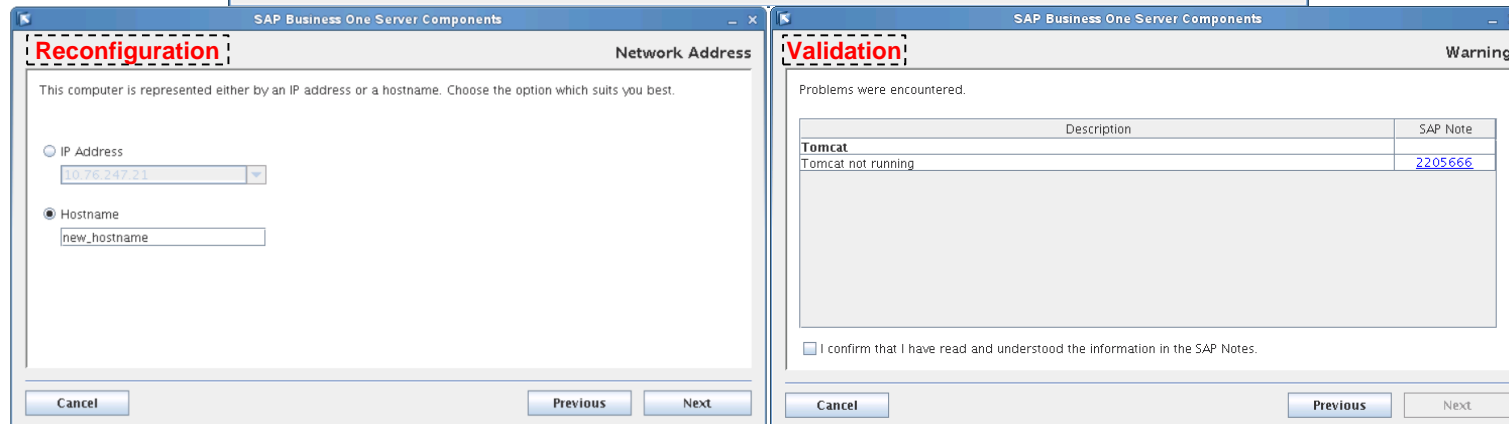
## Feature

- Improved log file management with central access to support information.
- New logging and tracing objects added to MS SQL Server trace.
- Improved logger settings enabling full logging to record messages of all client issues.

## Benefit

- Easily identify log files and their locations with a more unified and centralized approach to storage.
- Easily identify SAP Business One operations that trigger SQL statements such as a form ID or table name.
- By enabling full logging settings with one simple click, administrators can easily trouble shoot issues.

# HANA Server Components & Setup Wizard



## Feature

Server Components Setup Wizard:

- Naming changes:
  - `Install.bin -> install`
  - `Uninstall.bin -> setup`
- Free selection of local IP addresses if you install SAP Business One server components on a Linux server with more than one network interface.
- Utilize the hostname to register components

Reconfiguration mode:

- Use **setup** to configure an existing installation.

Validation mode:

- Validation is performed upon completion of an installation, upgrade or reconfiguration.
- Use **setup** to manually perform a validation to check all components are working.

# Remote Support Platform 3.2

## Communication with New SAP backend via Technical User



**Configuration**

General Accounts Databases **Channels** Content Upload Software Updates Backups

Directory Channel E-Mail Channel **SAP Channel** Partner Channel

**Enable SAP Channel**

Choose the channel if you want to send task results to SAP.

S-User: S00 [Info icon]

Password: [Masked] [Info icon]

**Test Connection**

**Approvals**

|                  |                         |
|------------------|-------------------------|
| New Task         | Request Manual Approval |
| Task Updating    | Request Manual Approval |
| Task Result      | Request Manual Approval |
| Refresh Interval | 72 [1 - 168] Hour(s)    |

Allow Remote Management  
(Allows SAP partners to use the Remote Console to remotely manage this agent)

### Feature

- Delivery of a technical user in RSP 3.2 to connect to new SAP Backend.
- See SAP Note [2063077](#) to obtain the new technical user.
- Request & activate the technical user via the SAP Portal.

### Benefits

- Enhanced security, as the technical user is designed for data transfer only.
- Minimized maintenance effort, as the password of a technical user no longer needs to be changed as often as an S-user profile.
- The technical user is currently free of charge.



# Remote Support Platform 3.2

## Central Task Management in the RSP Studio



The screenshot displays the 'Remote Support Platform Studio for SAP Business One' interface. It features a navigation bar with tabs for 'Customer Management', 'Simple Tasks', 'Advanced Tasks', and 'SAP Tasks'. Below the navigation bar, there are filters for 'All (1)', 'In Process (1)', 'Approved (0)', and 'Rejected (0)'. A toolbar contains 'Manage Task', 'Configuration', and 'Refresh' buttons. A table lists tasks with columns for GUID, Name, Version, Priority, Category, Created On, In Process, Approved, and Rejected. The first row shows a task with GUID '0001290086', Name 'System Status Report', Version '28', Priority 'High', Category 'SpecificHealthCheck', and Created On '6/25/2015 11:53:07 AM'. Below the table, there is a 'Task Details' section with 'Document' and 'General' tabs. The 'Document' tab is active, showing the purpose and actions of the task.

| GUID       | Name                 | Version | Priority | Category            | Created On            | In Process<br>Custome... | Approved<br>Custome... | Rejected<br>Custome... |
|------------|----------------------|---------|----------|---------------------|-----------------------|--------------------------|------------------------|------------------------|
| 0001290086 | System Status Report | 28      | High     | SpecificHealthCheck | 6/25/2015 11:53:07 AM | 1                        | 0                      | 0                      |

**Task Details**

Document General

Document:

Purpose:  
This task creates a report that provides an overview of the SAP Business One installation and its status.  
The task enables SAP to be proactive in the case of any detected issue, thus resulting in a faster Return of Investment (ROI) for customers.  
The task enables SAP to be proactive in the case of any detected issue, thus resulting in a faster Return of Investment (ROI) for customers.

Actions:  
1. Generates an overview report.  
2. Evaluates the system status and display different traffic lights so as to indicate different statuses: healthy/acceptable/critical  
3. Checks, for example, disk space usage, and last performed backup through a data load generated on the system  
4. Provides a summary of the installed SAP Business One components, such as add-ons.  
5. Sends regular status e-mails to keep you informed  
The task is executed on a regular basis by schedule. You can also run the task manually.

If a message has been logged for this installation, the report provides important insight into the environment for SAP Support consultants, and helps to resolve the reported issues effectively.  
It avoids unnecessary delays in the processing of a customers messages.

## Feature

- Customer landscapes managed remotely by Partners via RSP Studio including distribution of tasks.
- Adjust schedule of SAP tasks based on customer's needs.

## Benefit

- Partners can control both partner and SAP tasks for their customers in one single place: the RSP Studio.
- Reduced maintenance downtime.

# Remote Support Platform 3.2

## Landscape Synchronization with System Landscape Directory



The screenshot shows the 'Remote Support Platform for SAP Business One' interface. The 'Configuration' window is open, displaying the 'SLD' tab. The 'Synchronize Company Database Information from System Landscape Directory' checkbox is checked. The 'Server' field contains 'http://kvs\_rds:1080/sld/sld0100.svc', 'User Name' is 'B1SiteUser', and 'Password' is masked with dots. A 'Test Connection' button is visible. Below these fields, the 'RSP Public Server' section has 'Host Name' and 'Port' (48802) fields. A 'Save' button is at the bottom right of the configuration window. The background shows a task list with columns for GUID and Name, and buttons for Run, Approve, Reject, and Activate.

### Feature

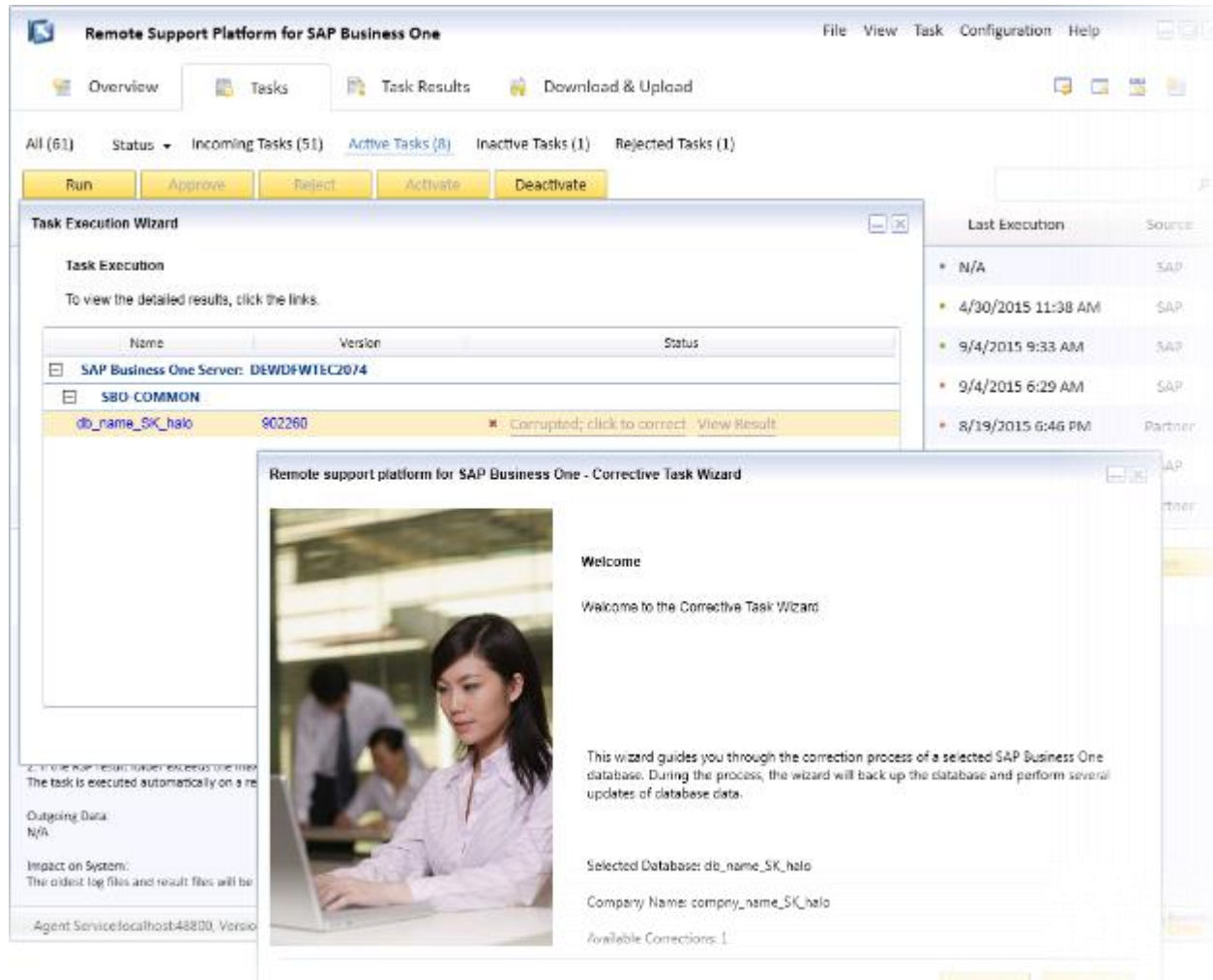
- Synchronize company database information from System Landscape Directory (SLD) in RSP 3.2.

### Benefits

- Landscape changes done in SLD on customer site are automatically replicated to RSP.
- RSP configuration and setup is much easier.
- No disruption of RSP results in case of landscape changes (e.g. exchange of database server or password change).

# Remote Support Platform 3.2

## SAP Business One, version for SAP HANA



### Feature

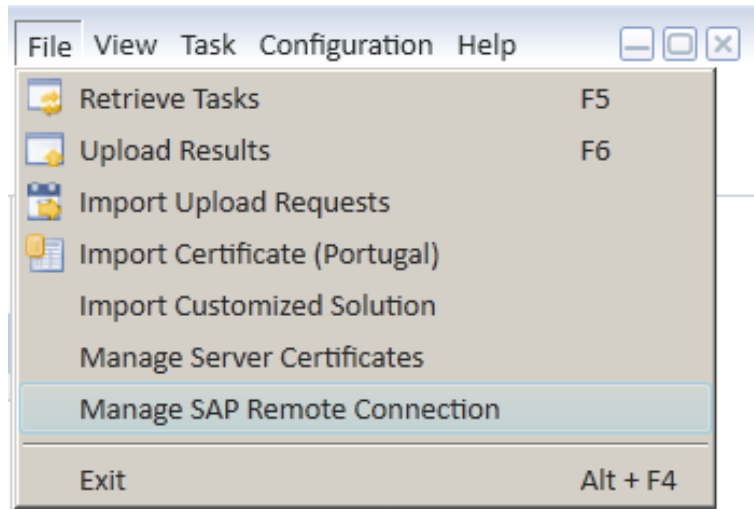
- Dedicated SAP HANA health checks.
- Healing tasks for SAP Business One, version for SAP HANA.
- Perform instance backups of SAP HANA databases, schedule backup or delete old backups.

### Benefit

- SAP HANA health checks allow to resolve issues with SAP HANA effectively by collecting necessary information.
- SAP HANA databases can leverage the healing tasks delivered from RSP 3.2 to resolve any potential issues easily.
- Scheduling regular backups of the SAP HANA database and deleting old backups automatically saves maintenance time.
- Higher level of automation.

# Remote Support Platform 3.2

## Remote Connection



### Feature

- RSP 3.2 offers a Remote Connection service for all SAP Business One customers.
- Remote Connection enables secure remote access between the customer and SAP.
- Remote Connection leverages the SAProuter application.
- The Remote Connection Wizard Package simplifies the implementation and configuration of SAProuter.
- Mandatory for SAP HANA DB support.

### Benefit

- Secure remote access to SAP Business One Customer systems.
- Speeds up resolution process with root cause analysis directly performed in customer environment.
- Customer has full control to manage Remote Connection.
- Logged remote sessions for auditing purposes.

# On-premise Support User



Support User Login

Real Name: John Meyer - B1 Con Inc

Login Reason: Consulting

Login Detail: Customer needs a new report in the system

OK Cancel

Welcome, Support. You are in cockpit of OEC Computers UK.

System Message

Support account login is being recorded

OK Logout

Support User Log

| # | Login Reason         | Login Detail       | Real Name     | MAC Address       | Machine Name | Session Start Time | Session End Time  |
|---|----------------------|--------------------|---------------|-------------------|--------------|--------------------|-------------------|
| 1 | Consulting           | Customer needs a r | John Meyer -  | 00-50-56-8C-1D-08 | BGSOFWSSC21  | 20150828 10:42:38  | 20150828 10:48:16 |
| 2 | Other                | ...                | Darius        | 00-50-56-8C-1D-08 | BGSOFWSSC21  | 20150828 13:21:58  |                   |
| 3 | Setup Issue Analysis |                    | Darius        | 00-50-56-8C-1D-08 | BGSOFWSSC21  | 20150904 08:35:03  | 20150904 08:43:53 |
| 4 | Setup Issue Analysis |                    | Darius Heydar | 00-50-56-8C-1D-08 | BGSOFWSSC21  | 20150904 08:45:30  |                   |
|   |                      |                    |               |                   |              |                    |                   |
|   |                      |                    |               |                   |              |                    |                   |
|   |                      |                    |               |                   |              |                    |                   |
|   |                      |                    |               |                   |              |                    |                   |
|   |                      |                    |               |                   |              |                    |                   |
|   |                      |                    |               |                   |              |                    |                   |
|   |                      |                    |               |                   |              |                    |                   |

OK Cancel

## Feature

- Special predefined support user is built into SAP Business One.
- Able to perform maintenance and support without needing an additional license.
- The support user is only available when RSP is activated and has uploaded an RSP system status report within the last 7 days.
- Login/ logout time and date, real name, reason and machine information is being logged and can be reviewed via Administration → License → Support User Log.

## Benefit

- No disruption to business, as no user is forced to logout during support and/or maintenance.
- Clear audit trail on support user activities.



# Platform | Extensibility

SAP Business One 9.2

# Browser Access (1/2)



The screenshot displays the SAP Business One web interface accessed via a browser. The main window shows the 'Business Partner Master Data' for 'Customer 01'. Overlaid on this is a 'Sales Analysis by Customer (Annual)' report, which includes a table and a bar chart. The table lists sales data for five customers, and the bar chart compares Gross Profit and Gross Profit % for each. To the right, an 'Original INVOICE' is displayed, showing document details and a line item table.

| # | Customer Code | Customer Name | A/R Invoice | Total A/R Invoice | Gross Profit | Gross Profit % | Total Open IN |
|---|---------------|---------------|-------------|-------------------|--------------|----------------|---------------|
| 1 | C01           | Customer 01   | 18          | \$ 95,180.00      | \$ 53,838... | 130.218        | \$ 95,180.00  |
| 2 | C02           | Customer 02   | 17          | \$ 85,310.00      | \$ 44,158... | 107.309        | \$ 85,310.00  |
| 3 | C03           | Customer 03   | 2           | \$ 22,800.00      | \$ 11,799... | 107.288        | \$ 22,800.00  |
| 4 | C04           | Customer 04   | 2           | \$ 520.00         | \$ 271.19    | 108.995        | \$ 520.00     |
| 5 | C05           | Customer 05   | 2           | \$ 37,740.00      | \$ 19,783... | 110.179        | \$ 37,740.00  |

| Quantity | UoM | Price  | Tax % | Total     |
|----------|-----|--------|-------|-----------|
| 200      |     | 80.00  | 8.400 | 16,000.00 |
| 180      |     | 120.00 | 8.400 | 21,600.00 |

| Tax Code | Tax % | Net       | Tax      |
|----------|-------|-----------|----------|
| CA       | 6.000 | 37,600.00 | 2,256.00 |
| LA       | 1.200 | 37,600.00 | 451.20   |
| HSQ      | 1.200 | 37,600.00 | 451.20   |

## Feature

- Securely access SAP Business One from a Browser.
- A web UI engine translates SAP Business One UI forms to HTML5.
- Add-ons developed with SAP Business One UI-API easily run with Browser Access.
- Supports hybrid mode:
  - Light and regular users can leverage the SAP Business One client in Microsoft Windows Desktop or Browser Access mode\*.

## Benefit

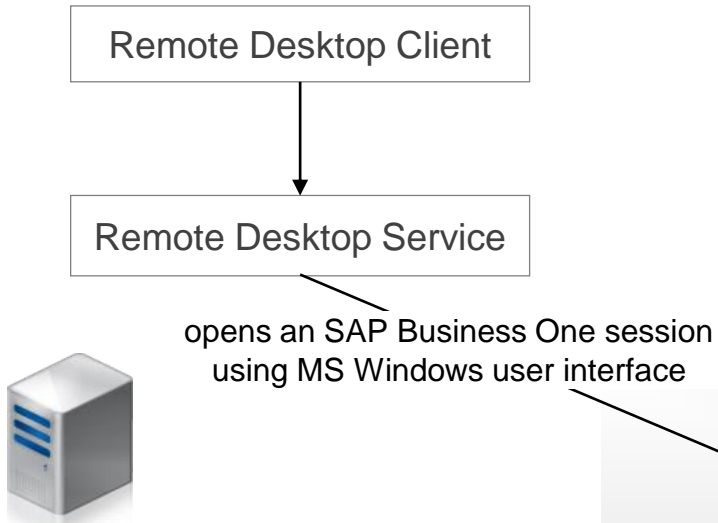
- No need to install and upgrade client software.
- Simpler lifecycle management with minimized ecosystem effort.
- Lower overall total cost of ownership as there is no need for Citrix/RDS licenses for the Browser Access users.
- Access securely from any location with a compatible browser.
- Increased “cloud experience” for end user when using SAP Business One.

\* For power users, it's recommended to use Microsoft Windows Desktop mode via RDS/Citrix or similar tools instead of leveraging Browser Access. For current limitations see SAP Notes [2194215](#) and [2194233](#). Please note that the readiness & availability of add-ons compatible for Browser Access also need to be investigated directly with the add-on providers.

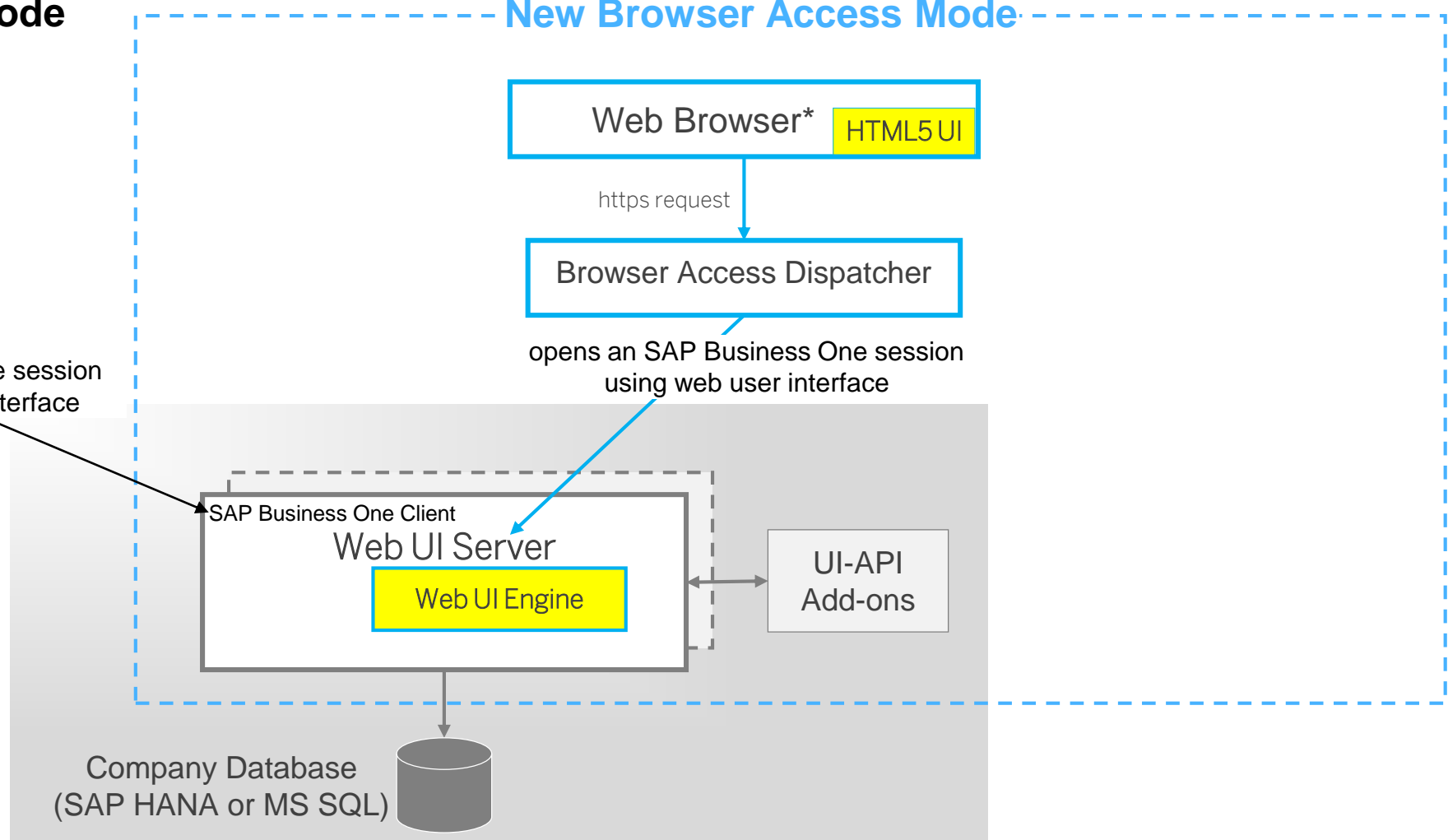
# Hybrid Infrastructure for Browser Access (2/2)



## Existing Remote Access Mode



## New Browser Access Mode



### Notes:

- Mozilla Firefox® and Google Chrome® (as of 9.2 PL01) are currently supported only

Mozilla and Firefox and their logos are registered trademarks of the Mozilla Foundation  
Google Chrome and their logos are trademarks or registered trademarks of Google Inc.



# Browser Access Enhancements (9.2 PL04 - PL06)



The screenshot displays the SAP Business One browser interface. The top navigation bar includes 'SAP Business One', a search bar, and standard browser controls. The main dashboard area is titled 'Welcome, Jayson Butler. You are in cockpit of OEC Computers UK.' and features several key components:

- Top 5 Best Selling Items by Sales Amount:** A horizontal bar chart showing items A00001, I00010, C00007, A00004, and A00005.
- Top 5 Customers by Sales Amount:** A horizontal bar chart showing customers C30000, C40000, C20000, C60000, and C70000.
- Sales Process:** A flowchart illustrating the sales cycle from Sales Quotation to A/R Credit Memo, including steps like Sales Order, Delivery, A/R Invoice, and Incoming Payments.
- Total Sales Amount:** A card displaying '0 GBP'.

The left sidebar contains a menu with categories like Administration, Financials, Opportunities, Sales - A/R, Purchasing - A/P, Business Partners, Banking, Inventory, Resources, Production, MRP, Service, Human Resources, Project Management, and Reports. The bottom status bar shows the date '08.12.16' and time '12:13'.

## Feature

- Browser Access solution is available from within iPad (9.2 PL 04)
- Relationship Map is made available to Browser Access users (9.2 PL05)
- The “server side printing” solution allows users to print single document directly (without first creating a PDF) as well as to print multiple documents in one go. Depends on the customer, infrastructure set up and additional 3rd party cloud printing service might be needed (9.2 PL 06)
- Copying from MS Excel to SAP Business One is supported (9.2 PL 04)

## Benefit

- These enhancements increase productivity and promote browser access towards becoming a complete SAP Business One solution on the cloud

# User Defined Fields and System Tables



The screenshot shows the 'Activity' window in SAP Business One. The 'General' tab is active, displaying fields for Activity (Phone Call), Type (Vendor discussion), Subject, Assigned To (User: Jayson Butk), and Assigned By (Jayson Butler). A red box highlights the 'Goods Receipt' and 'Goods Return' fields, which are user-defined fields. The 'Field Data' dialog is open, showing the configuration for the 'Goods\_Receipt' field. The dialog includes fields for Title (Goods\_Receipt), Description (Goods Receipt), Type (Alphanumeric), Length (15), Structure (Regular), and Validation (Linked to Entities). The 'Link to System Object' radio button is selected, and a list of system objects is displayed, with 'Accounts' selected.

| System Object | Description       |
|---------------|-------------------|
| OACT          | Accounts          |
| OCRD          | Business Partners |
| OITM          | Items             |
| OINV          | A/R Invoices      |
| ORIN          | A/R Credit Memos  |
| ODLN          | Deliveries        |
| ORDN          | Returns           |
| ORDR          | Sales Orders      |
| OPCH          | A/P Invoices      |
| ORPC          | A/P Credit Memos  |
| OPDN          | Goods Receipt PO  |
| ORPD          | Goods Return      |
| OPOR          | Purchase Orders   |
| OQUT          | Sales Quotations  |
| ORCT          | Incoming Payments |
| OJDT          | Journal Entries   |
| OVPM          | Outgoing Payments |
| OIGN          | Goods Receipt     |
| OIGE          | Goods Issue       |
| OWHS          | Warehouses        |

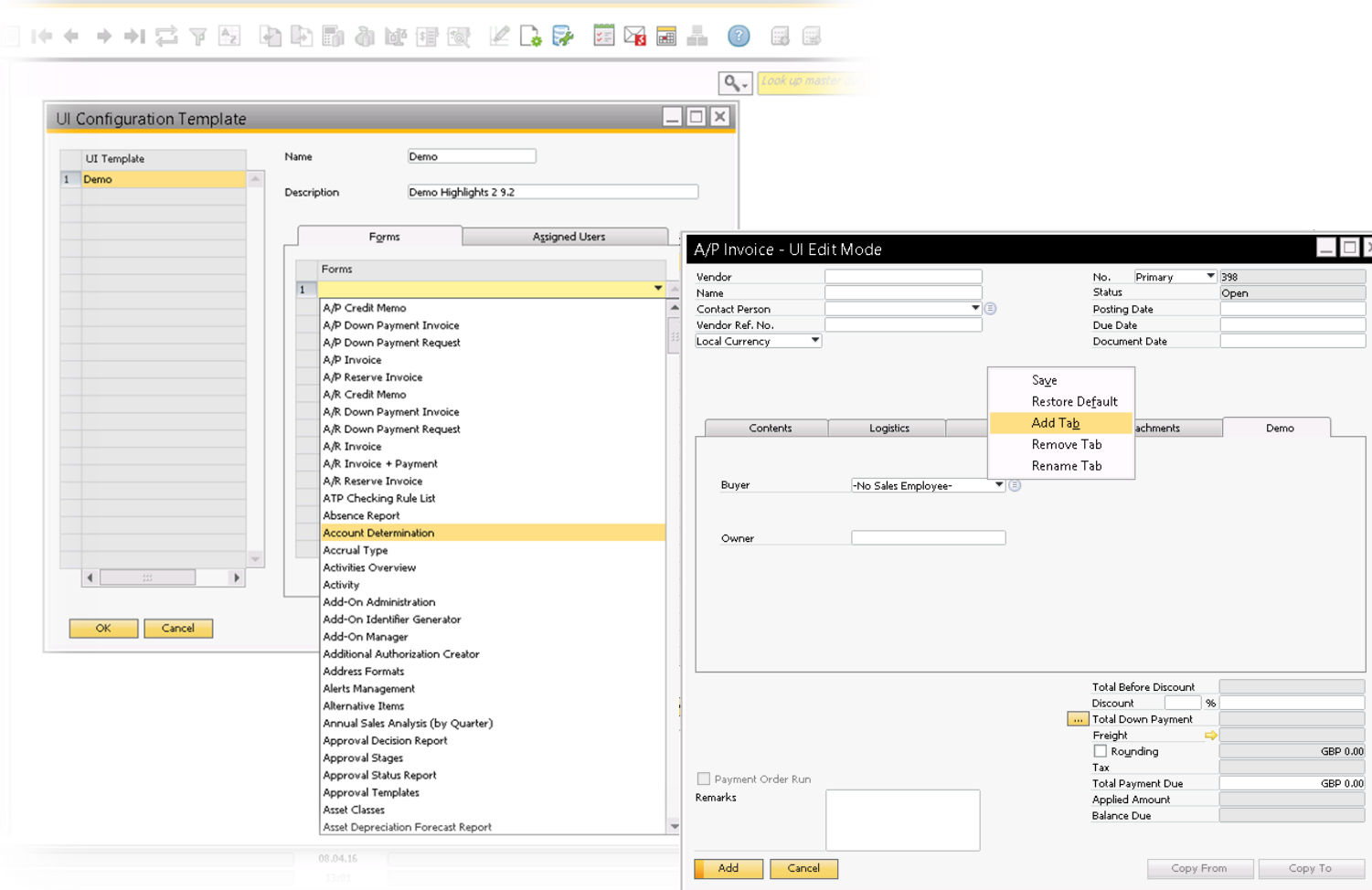
## Feature

- Enhance existing SAP Business One windows or user-defined tables and/or objects by linking UDFs to a system object.

## Benefit

- Ensures data integrity and a single source of truth.
- Supports greater visibility and more streamlined business processes.
- Enables new and flexible business scenarios.

# Enhanced Configurable UI Framework



## Feature

- All SAP Business One Forms can be configured.
- Assignment templates to Super Users is supported.
- Ability to add additional tabs.

## Benefit

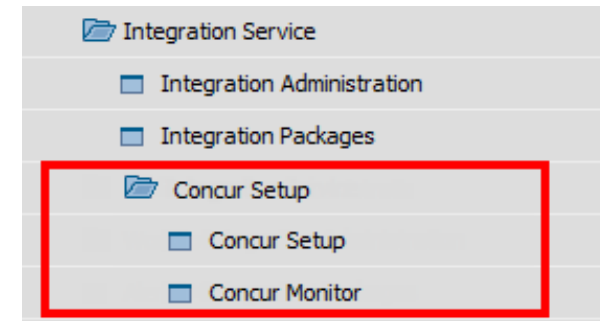
- Simplified user interface improves user experience and productivity.

# Concur Integration Support (9.2 PL 06)



| # | Code | Currency      | International Code | International Description |
|---|------|---------------|--------------------|---------------------------|
| 1 | DKK  | Danish Krone  | DKK                | Danish Krone              |
| 2 | EUR  | Euro          | EUR                | Euro                      |
| 3 | GBP  | British Pound | GBP                | British Pound             |
| 4 | SEK  | Swedish Krone | SEK                | Swedish Krone             |
| 5 | USD  | US Dollar     | USD                | US Dollar                 |
| 6 |      |               |                    |                           |

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| 5 | USD  | US Dollar     | USD                | US Dollar                 |
| 6 |      |               |                    |                           |



## Feature

- Upon activation and initial configuration, an integration of SAP Business One and Concur is available, using specific B1i scenario

## Benefit

- Answers the requirement of most of SAP Business One customers to have a Travel Expense Solution for their employees
- Provides a great upsell opportunity as we have with Concur the perfect solution for the SAP Business One market segment

Supplier: S10000  
Name: Max Müller  
Contact Person: Müller  
Supplier Ref. No.:  
Local Currency:

No. Primär: 475  
Status: Open  
Posting Date: 15.10.2015  
Due Date: 16.11.2015  
Document Date: 15.10.2015

Journal Remark: AP Invoices - S10000  
Control Account: 1610 - Verbindlichkeiten aus Lu  
Payment Block:  
Max. Cash Discount:  
Payment Terms: Netto 30 Tage  
Payment Method: Outgoing Checks  
Instalments: 1

RP Project:  
Origin: CONCUR  
Indicator:  
VAT Number:  
Order Number:



| Feature   | Description  |
|---|--|
| <b>User Defined Table and User Defined Field Length</b> | UDF (metadata level): 'Title' field increased to 50 characters; 'Description' field increased to 80 characters.<br>UDT (DB schema level): 'Code' field increased to 50 characters; 'Name' field increased to 100 characters.   |
| <b>User Defined Objects</b>                             | Form size settings are stored. When forms are resized and/or moved, the system will remember these settings upon next login.   |
| <b>User Defined Tables</b>                              | In the User Defined Tables - Setup window a new object type 'No Object with Auto Increment' is added in the dropdown list of the Object Type field. When you apply this type, the application creates a user-defined table with two fields Code and Name. The Code field is auto-increasing, therefore no need for manual input by the user. |



| Feature  | Description  |
|--|--|
| <b>New UI API Modal Form</b>                                     | In UI API, you can now use the modal form feature. Add-on codes can create modal forms using either the <code>Forms.AddEx</code> method or the <code>Application.LoadBatchActions</code> method.   |
| <b>UI API Performance</b>  | Performance has been improved for: Loading data in grids for data tables; Changing settings of multiple rows and cells in Grid/Matrix. In UI API, the <code>CommonSetting</code> object now provides two XML based new methods <code>CommonSetting.UpdateFormXML</code> and <code>CommonSetting.GetAsXML</code> for batch operation. |
| <b>UI API Item Level Event Filter</b>                            | In UI API, a new optional filter type of item is added. If used, this filter will ensure that only events from the white listed items, that also match the event types and forms filters will be passed through the SDK.   |
| <b>New DI API Functions for Resources and Project Management</b> | New DI API functions related to the Resources and Project Management module are available.   |



# Thank you

SAP Global SME Business Unit | Rollout Services

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