



Version: Early Adopter Care

SAP Business One 9.3

Release Highlights

Rollout Services, SAP

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CUSTOMER

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A comprehensive business solution & platform for connected SMBs.



SAP Business One 9.3 Highlights (1/2)



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New IFRS 15 Revenue Recognition Standard*

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Project Management

Project Management Updates

SAP Business One 9.3 Highlights (2/2)



Business Intelligence

Analytics Portal



Pervasive Analytics Designer Update



New Cockpit Templates



Platform | Extensibility

Web-Based Workflow Management

Company Specific Mailer Configuration

New DI/UI Objects Exposure & Enhancements

Microsoft Visual Studio 2015

X-App Supports Single Sign On

Optimized Login Connection

Electronic File Manager support on Linux



Performance Optimization

Improved Security



Lifecycle Management

Centralized Deployment

Embedded Incident Reporting

System Landscape Directory Enhancements

Remote Support Platform 3.2 Updates



Administration

SAP Business One 9.3



Authorization Simplification



The image displays three overlapping SAP configuration windows. The top-left window shows a 'Setup' menu with 'User Groups' highlighted. The top-right window, 'User Groups', shows a 'Create Group' form for a group named 'Finance' with type 'Authorisation'. The bottom-left window, 'Users - Setup', shows user details for 'Kate Milton'. The bottom-right window, 'Copy Form Settings', shows a table of groups with 'CRM' selected. Arrows indicate the flow of configuration from the menu to the group creation, then to user assignment, and finally to copying form settings.

User Groups Configuration:

Select Type	Group Name	Description	Group Type	Active From	To	Cockpit template
1 Sales						
2 Purchase						
3 Inventory						
4 Finance						

Users - Setup Configuration:

Superuser: ☐ Mobile User: ☐

User Code: Kate
User Name: Kate Milton
Defaults:

General Services Font&Bkgd

Bind with Microsoft Windows Account: ☐ Milton, Kate
Employee: Kate Milton
E-Mail: kate.milton@oec.co.uk
Mobile Phone:
Mobile Device ID:
Fax:

Branch: Main
Department: General
Groups:

Password:

☐ Password Never Expires
☐ Change Password at Next Logon
☐ Locked

Copy Form Settings Configuration:

#	Group Name	Description	
1	CRM		<input checked="" type="checkbox"/>
2	Sales	Sales	<input type="checkbox"/>

☒ User Preferences
☒ Message Preferences
☒ Tgoltip Preview Preferences

Feature

- Authorization Groups renamed to User Groups and relocated under Setup - General.
- 3 Categories:
 - Authorization: User authorizations with validity dates; individual users within the User Group can have further refined validity dates.
 - Form Settings: User form settings.
 - Cross All Types: Applies to all types.
- Copy Form Settings now has a Groups tab; all users in the chosen group inherit the form settings.

Benefit

- Manage temporary authorizations.
- Quickly apply form setting defaults to a group of users.

Approval Procedure Enhancements



General Settings

BP Budget Services Display Font & Bkgd Path Inventory Resources Cash Flow Cockpit Cost Accounting Pricing Hide Functions

Customer Activity Restrictions

☐ Credit Limit ☐ A/R Invoice
☐ Commitment Limit ☐ Delivery
☐ Consider Deliveries Balance ☐ Sales Order
☐ Pick List

Default Payment Method for Customer
Default Payment Method for Vendor
Submit Credit Vouchers Automatically
Default Dunning Term for Customer - Standard -

Set Commission by

☐ Sales Employees
☐ Items
☐ Customers

Payment Terms Preferences

Default Payment Term for Customer - Geldbasis -
Default Payment Term for Vendor - Geldbasis -
☐ Apply Changes in BP Fields to New Business Partners Only

Approval Process

☒ Enable Approval Process
☐ Enable Approval Process in DI
☒ Enable Updating Document Added/Updated by Approval Process
☒ Enable Updating Draft in Status Pending/Approved

☒ Display Inactive Business Partners in Reports
☒ Display Inactive Business Partners in Marketing Documents

☐ Apply IBAN Validation to Bank Accounts
☐ Enable Data Ownership
Manage Data Ownership By Document Only

Blanket Agreement

☐ Allow Multiple Blanket Agreements for Same Period
☐ Enable Updating Price/Planned Amount in Blanket Agreement with Linked Documents

OK Cancel

Feature

- Enable updating a previously approved document.
- Enable updating a draft document with status Pending/Approved.

Benefit

- You are now able to amend/cancel a document processed through the approval process.
- Approver always sees the latest version of the document to be approved.
- Ensures approval is obtained every time the approval criteria have been triggered whether adding or updating the document.

My Settings Support



Users - Setup

☒ Superuser ☐ Mobile User

User Code: manager

User Name: Jayson Butler

Defaults

General Services Display

Bind with Microsoft Windows Account

Employee: [dropdown]

E-Mail: jayson.butler@sap.com

Mobile Phone

Mobile Device ID

Fax

Branch: Main

Department: General

Groups: [dropdown]

Password: [password field]

☐ Password Never Expires

☐ Change Password at Next Logon

☐ Locked

☐ Enable Setting Integration Packages

OK Cancel Copy Form Settings

User Defaults

Code Description

General Defaults Display Print Credit Cards Path

Skin Style: Fiori

Colour: Classic

Language: [dropdown]

Font: [dropdown]

Font Size: [dropdown]

Preview: AaBbYyZz - abcd

Background: [dropdown] Browse...

Image Display: Centralised

Add Cancel

Feature

- The User – Setup form is enhanced to include various user-specific options, that previously used to be in the General Settings form.
- New icon on the toolbar enables users to access their user setup form and personalize it.
- The User Defaults form is extended and includes Display tab.

Benefit

- Better accuracy and clarity of company level settings vs. user-level settings.
- Enhanced usability – all users gain access rights to their own personal preferences (subject to authorizations).
- Better coverage of user defaults settings, enables more efficient implementation.



Import from Excel (1/2)



The screenshot shows two overlapping SAP dialog boxes. The top box is 'Import from Excel', which has a 'Data Type to Import' dropdown menu. The menu is open, showing options: 'Business Partner', 'Business Partner', 'Items', 'Price List', 'Business Partner Catalog Numbers', and 'Journal Entry'. The 'Journal Entry' option is highlighted with a purple box. The bottom box is 'Authorizations', which has a 'Find' search bar and a list of subjects. The 'Data Import' subject is expanded, showing a list of import options. The 'Import from Excel' option is highlighted with a purple box. Below the list, there are checkboxes for 'Max. Discount - Sales', 'Max. Discount - Purchase', 'Max. Discount - General', and 'Max. Cash Amount for Incoming Payments'. At the bottom of the 'Authorizations' box are 'OK', 'Cancel', and 'Apply Auth. to Back End' buttons.

Feature

- Journal Entries added to Import from Excel.
- Import Serial and Batch numbers from Excel.
- Additional Authorizations added for data import.

Benefit

- Simpler, efficient import process.
- DTW not required for importing these objects.

The screenshot shows the 'Serial Numbers - Setup' dialog box. It has two main sections: 'Rows from Documents' and 'Created Serial Numbers'. The 'Rows from Documents' section contains a table with the following data:

#	Doc. No.	Item Number	Item Description	Whse Code	Whse Name	Total Needed	Total Created	Open Qty
1	PD 738	A00006	Rainbow 1200 Laser Series	01	General Warehouse	5		5

The 'Created Serial Numbers' section contains a table with the following data:

#	late	Mfr Date	Admission Date	Mfr Warranty Start	Mfr Warranty End	Location	Details
1			12.05.17				

At the bottom of the dialog box, there is a 'Total Created' label and a text input field. Below this are 'OK' and 'Cancel' buttons. At the very bottom, there are two buttons: 'Import From Excel...' (highlighted with a purple box) and 'Automatic Creation...'.

Import from Excel (2/2)



Journal Entry

Series: Primary Number: 6524 Posting Date: 12.05.17 Due Date: 12.05.17 Doc. Date: 12.05.17 Remarks:

Origin: Origin No.: Trans. No.: Template Type: Template: Indicator: Project:

Trans. Code: Ref. 1: Ref. 2: Ref. 3:

Blanket Agreement:

☐ Fixed Exchange Rate
☐ Reverse
☐ Adj. Trans. (Period 13)
☐ EU Report

☒ Automatic Tax
☐ Manage Deferred Tax
☐ Manage WTax

G/L Acct/BP Code: G/L Acct/BP Name: Ref. 1: Ref. 2: Ref. 3: Offset Account:

Debit (FC): Credit (FC): Debit: Credit: Debit (SC): Credit (SC):

Posting Date: 12.05.17 Due Date: 12.05.17 Doc. Date: 12.05.17 Project: Tax Group: Distr. Rule: Remarks:

Primary Form Item:

#	G/L Acct/BP ...	G/L Acct/BP Name	Debit	Credit	Tax Group	Federal Tax ID	Tax Amount	Gross Value	Base Amount	Departments	Line of Business	Payment ...	Bl...
1												N	

Add Cancel ☐ Display in FC ☐ Display in SC **Import From Excel** Cancel Template



Feature

- Import Journal Entry from Excel.
- Import G/L and BP Opening Balances from Excel.

Benefit


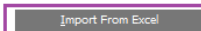
- Simpler, efficient import process.
- DTW not required for importing these objects.

G/L Accounts Opening Balance

Opening Balance Account  100000  Called Up Capital Not Paid

Date	Ref. 1	Ref. 2	Remarks
01.01.17			G/L Accounts Opening Balance

Due Date	Code	Name	Balance (LC)	OB (LC)	Balance (FC)	OB (FC)	Balance (SC)
01.01.17	100010	Uncalled Share Capit					
01.01.17	101000	Capitalised Formator					
01.01.17	101010	Capitalised Business f					
01.01.17	101500	Accumulated Deprec					
01.01.17	102010	Patents and Royalties					
01.01.17	102020	Licences					
01.01.17	102510	Accumulated Deprec					
01.01.17	102520	Accumulated Deprec					
01.01.17	103000	Goodwill					
01.01.17	103500	Amortisation - Good					
01.01.17	110000	Freehold Land					

 Add Cancel 

Business Partners Opening Balance

Opening Balance Account Called Up Capital Not Paid

Date	Ref. 1	Ref. 2	Remarks
01.01.17			Business Partners Opening Balance

Due Date	Code	Name	Control Acct	Balance (LC)	OB (LC)	Balance (FC)	O...
01.01.17	C20000	Maxi-Teq	140000	GBP 11,866.20			
01.01.17	C23900	Parameter Technology	140000	GBP -15,356.78			
01.01.17	C25000	Star Company	140030	GBP 975.18		EUR 1,136.60	
01.01.17	C26000	River Ltd.	140000	GBP 5,094.00			
01.01.17	C30000	Microchips	140000	GBP 2,142.00			
01.01.17	C40000	Earthshaker Corpor	140000	GBP -4,353.03			
01.01.17	C42000	Mashina Corporation	140000	GBP 36.00			
01.01.17	C50000	ADA Technologies	140030				
01.01.17	C60000	SG Electronics	140030	GBP -27,077.56		USD -40,963.78	
01.01.17	C70000	Aquent Systems	140030	GBP 2,325.72		USD 3,073.58	
01.01.17	C99998	Web Customer	140000	GBP 1,596.00			

Add

Cancel

Import From Excel



Change Log Cleanup Utility



Administration

- Choose Company
- Exchange Rates and In
- System Initialization
- Setup
- Data Import/Export
- Utilities**
 - Period-End Closing
 - Check Document Num
 - Duplicate Layout Tem
 - Inconsistency Audit T
 - Transfer Posting Cor
 - Master Data Cleanup
 - Revalidate Manual In
 - Manual Master Data S
 - UI Configuration Tem
 - Connected Clients
 - Change Logs Cleanup**

Change Logs Cleanup

Introduction
The change logs cleanup utility allows you to delete change logs of various documents and master data. Determine the range of change logs to be deleted by setting date into Logs Clean Up To.
Select the documents/master data to clean up their change logs. Executing the cleanup will delete change log entries which were created on a date which is equal or smaller than the selected date.

Warning: Deleting the change log data is irreversible

Change Logs Cleanup Start a New Cleanup

Cleanup Scenario CLC20170606

Cleanup Date 06.06.17

Logs Clean Up To

Remarks

Select	Module	Document Name	Current Size (MB)	Status
<input type="checkbox"/>		Pick List		
<input type="checkbox"/>		Inventory Counting		
<input type="checkbox"/>	▼ Resources			
<input type="checkbox"/>		Resource Master Data		
<input type="checkbox"/>	▼ Production			
<input type="checkbox"/>		Bill of Materials		
<input type="checkbox"/>		Production Orders		
<input type="checkbox"/>	▼ Service			
<input type="checkbox"/>		Service Call		
<input type="checkbox"/>		Equipment Card		
<input type="checkbox"/>	▼ Human Reso			
<input type="checkbox"/>		Employee Master Data		

Expand Collapse

Execute Cancel

Summary:
In total, %d log entries were deleted successfully

Feature

- New Change Log Cleanup Utility available.
- Enables users to clean out the change log to reduce the size of a company database.
- Users have the ability to determine which objects from the change log entries should be deleted and restrict the deletion to a specific date range.
- Utility subject to appropriate user authorisation.

Benefit

- Improve performance when running upgrades due to reducing amount of data to be upgraded.
- Companies running SAP Business One for a long time with a large change log are able to delete old changes that were registered.

▼ Utilities	Full Authorization	Full Authorization
Period-End Closing	Full Authorization	Full Authorization
Update Control Report	Full Authorization	Full Authorization
Check Document Numbering - Selection Cr	Full Authorization	Full Authorization
▶ Data Archive Wizard	No Authorization	No Authorization
Master Data Cleanup Wizard	No Authorization	No Authorization
▼ Change Logs Cleanup	No Authorization	No Authorization
Execute Change Logs Cleanup	No Authorization	No Authorization

Quick Copy



The screenshot shows the 'Quick Copy' dialog box with several sections and a 'Choose Company' sub-dialog.

- Source:** OEC Computers UK
- Target:** (empty)
- Data Categories:** A list of categories including Customization, Administration, Financials, Business Partners, Inventory, Resources, Production, MRP, and Human Resources.
- Source or Target:** Radio buttons for 'Copy to File', 'Copy from File', and 'Copy to Company'. 'Copy to Company' is selected and highlighted with a purple box. The target is 'OEC Computers UK(dewdfth12415:30015)'.
- Copy Method:** Radio buttons for 'Add New Records and Update Existing Records', 'Add New Records Without Updating Existing Records', 'Update Existing Records Without Adding New Records', and 'Delete All Records Then Add New Records'.
- Error Handling:** Radio buttons for 'Ignore All Errors and Copy Valid Records' and 'Errors Terminate the Copy Process'.
- Copy Options:** Checkboxes for 'Force Backup Before Starting Copy Process' and 'Allow Copying When Multiple Connections to the Database Exist Copy Process'. The latter is checked and highlighted with a purple box. A note below states: 'Note: To ensure data integrity, it is recommended that you avoid copying while there are multiple connections to the data.'

The 'Choose Company' sub-dialog is open, showing a table of companies on the current server:

Company Name	Database Name	Localization	Version
OEC Computers UK	DIPAN	United Kingdom/I:	930000
OEC Computers UK	MARIE	United Kingdom/I:	930000
OEC Computers UK	MARC	United Kingdom/I:	930000
OEC Computers UK	DARIUS	United Kingdom/I:	930000
OEC Computers UK	MIRIAM	United Kingdom/I:	930000
OEC Computers UK	SBODEMOGB	United Kingdom/I:	930000

The 'SBODEMOGB' entry is selected. The 'Find By' section has 'Company Name' selected.

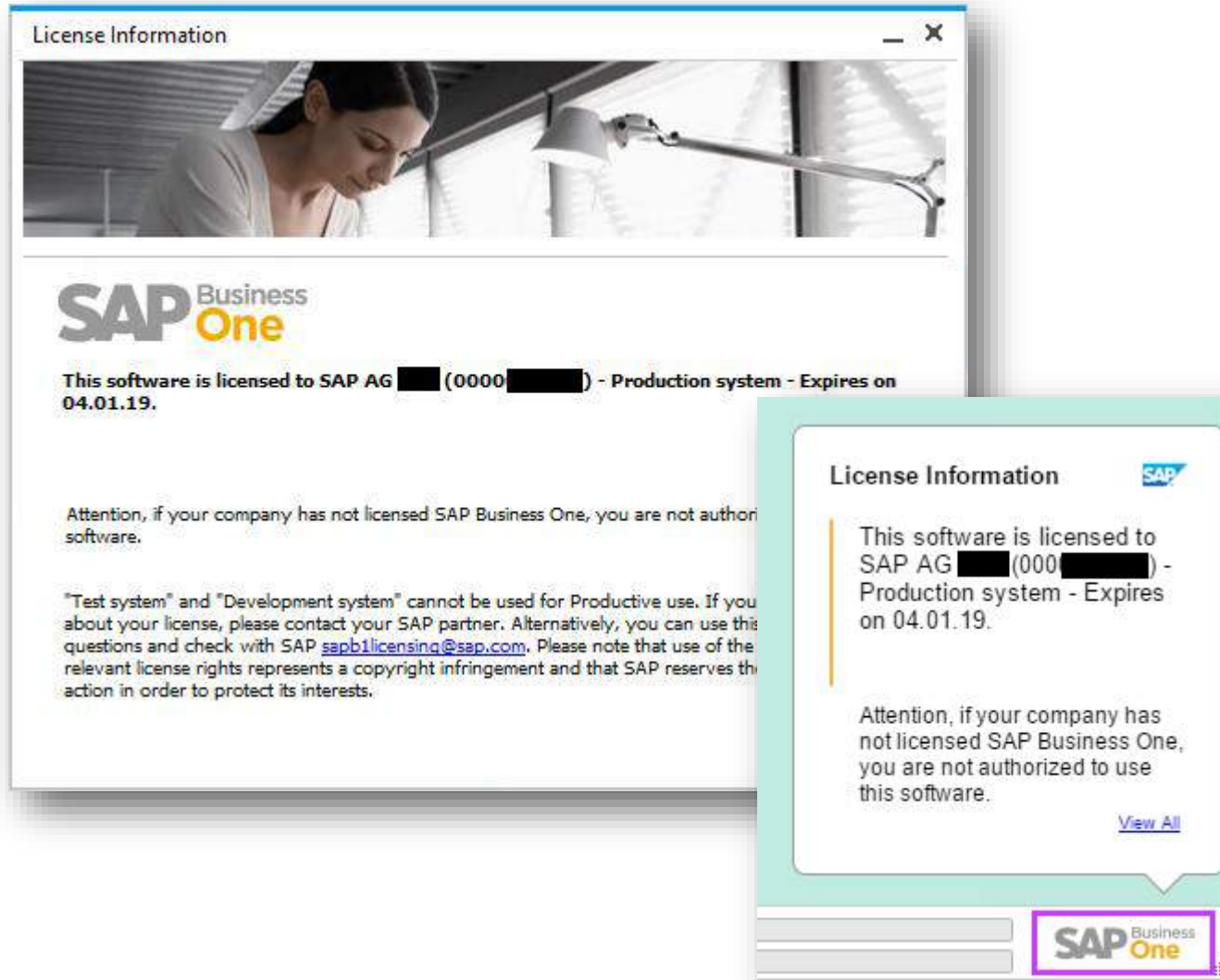
Feature

- Ability to copy data directly to target companies.
- Allows copying to a target company when connections exist to that company.

Benefit

- Saves time and effort without the need to copy data to a file first and then import the file into the target company database.
- Useful when copying data between test DBs and production company DBs.
- Users no longer need to be disconnected and interrupted during the data copying process.

License Updates



Feature

- As of release 9.3, a new license file will need to be generated and imported for every new minor (9.x) release.
- A watermark will be displayed on the bottom right of the SAP Business One desktop and the information sourced from the license file.
- The watermark will appear at each login and can be closed by the user by clicking on the SAP Business One icon.

Benefit

- Visibility for customers/end users to obtain relevant information about their licensed system.
- The new license file is more secure and protects the misuse of licenses.

Administration



Feature	Description	Localization
Multi-Branch Supporting Data Ownership	When managing multiple branches the system can be set such that a user's access to BPs and Documents is possible only when the BPs'/Documents' branch assignment matches the user's branch assignment.	All
Multi-Branch Filtering and Transactions	Conversely, with the filtering functionality, in the choose from lists, the user is restricted to BPs and Documents having the same branch assignment. The user can, however, access all BPs/Documents by typing in the exact code/number. Additionally, reports can be filtered by branch selection.	All
HTML based Online Help	We now support HTML based Online Help files.	All
Browser Access Session Timeout	The session timeout setting is now adjustable when editing the browser access service in the system landscape directory.	All



Sales | Purchasing | Service

SAP Business One 9.3



RMA - Return Material Agreement (1/2)



Sales - A/R

- Sales Blanket Agreement
- Sales Quotation
- Sales Order
- Delivery
- Return Request**
- Return
- A/R Down Payment Request
- A/R Down Payment Invoice

Purchasing - A/P

- Purchase Blanket Agreement
- Purchase Request
- Purchase Quotation
- Purchase Order
- Goods Receipt PO
- Goods Return Request**
- Goods Return Request
- A/P Down Payment Request
- A/P Down Payment Invoice

Return Request

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

No. Primary: 1
 Status: Closed
 Posting Date: 10.05.17
 Due Date: 10.05.17
 Document Date: 10.05.17

Contents Logistics Accounting Attachments

#	Item No.	Quantity	Unit Price	Gross Price	Disc...	Tax Code	Total (LC)	Stage	UoM Code	Return Reason	Return Action
1	A00001	1	GBP 300.00	GBP 360.00	0.00	O1	GBP 300.00		Manual	Damaged	Repair

Item Master Data

Item No.: A00001
 Description: J.B. Officeprint 1420
 Foreign Name:
 Item Type: Items
 Item Group: J.B. Printers
 UoM Group: Manual
 Price List: Base Price
 Bar Code: Manual
 Unit Price: Primary Curr
 GBP 200.00 Manual

General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Attachments

Set Inv. Method By: Warehouse
 UoM Name:
 Weight:
 Valuation Method: Moving Average

Inventory Data

#	Whse Code	Whse Name	Locked	In Stock	Committed	Ordered	Available	Item Cost
1	01	General Warehouse		397	1	1	397	147.33
2	02	Backup Warehouse		30			30	200
3	03	Drop Ship						
4	04	Consignment						
5	05	Bin Warehouse						
6								
				427	1	1	427	

Set Default Whse

OK Cancel

Feature

- Create a Return Request (A/R) or Goods Return Request (A/P).
- This pre-step for the return document includes the agreed quantities, prices, return reason and return action before the goods are actually returned.
- For Goods Return Request you can manage serials and batches.
- Request transaction creates an allocation on the item master record.

Benefit

- Enables management and tracking of the return process.
- Increased transparency.

RMA - Return Material Agreement (2/2)



Open Items List

Currency: Local Currency

Open Documents

Return Requests

- Sales Quotations
- Sales Orders
- Deliveries
- Return Requests**
- Returns
- A/R Down Payments - Unpaid
- A/R Down Payments - Not Yet Fully Applied
- A/R Invoices
- A/R Credit Memos
- A/R Reserve Invoices - Unpaid
- A/R Reserve Invoices - Not Yet Delivered
- Purchase Request
- Purchase Quotations
- Purchase Orders
- Goods Receipt POs
- Goods Return Requests**
- Goods Return
- A/P Down Payments - Unpaid
- A/P Down Payments - Not Yet Fully Applied

OK

Service Call

Service Call Type

Business Partner Code

Business Partner Name

Contact Person

Telephone No.

Business Partner Ref. No.

Mfr Serial No.

Serial Number

Item

Description

Item Group

Subject

General

Documents

Document Type

All Documents

☐ Sales Quotation

☐ Purchase Quotation

☐ Sales Order

☐ Purchase Order

☐ Delivery

☐ Goods Receipt PO

☐ Return Request

☐ Goods Return Request

☐ Returns

☐ Goods Return

☐ A/R Invoice

☐ A/P Credit Memo

☐ A/R Credit Memo

☐ Transferred to Technician

☐ Returned from Technician

OK

Cancel

Display All Documents

Details

Feature

- Return Requests and Goods Return Requests can now be:
 - Listed within Open Items List.
 - Added to a Service Call.

Benefit

- Additional reporting.
- Incorporate returns process into Service Calls.



Gross Price Mode



Company Details

General Accounting Data Basic Initial

Chart of Accounts Template
Local Currency
System Currency
Default Account Currency

☒ Display Credit Balance with Negative Sign
☐ Use Segmentation Accounts
☒ Allow Negative Amounts for Reversal Transaction
☐ Permit More than One Document Type per Segment

☒ Multi-Language Support

☒ Use Perpetual Inventory

Item Groups Valuation Method
☒ Manage Item Cost per Warehouse
☐ Use Purchase Accounts Posting System
☒ Allow Stock Release Without Item Cost

Manage Serial and Batch Cost By
☐ Items Group Valuation Method
☐ Serial/Batch Valuation Method
☒ Enable Separate Net and Gross Price Mode

Business Partner Master Data

Code Manual C30000 Customer
Name Microchips
Foreign Name
Group Large Accounts
Currency British Pound
Federal Tax ID GB566678935

Account Balance 2,142.00
Deliveries 2,159.90
Orders 14,585.66
Opportunities 3

Local Currency

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

Payment Terms 2P10Net30
Interest on Arrears %
Price Mode Gross
Price List Gross Price
Total Discount %
Credit Limit 0.00
Commitment Limit 0.00
Dunning Term Standard
Automatic Posting No

Credit Card Type American Express
Credit Card No. 5119 6291 8983 3414
Expiration Date
ID Number
Average Delay
Priority Second
Default IBAN
Holidays
Payment Dates

Feature

- Use Gross or Net prices in documents.
- Maintain Gross or Net pricelists.
- BP price mode setting drives use of Gross or Net prices in documents

Benefit

- Supports retail businesses
- Streamlined gross price calculation method

*Not available in Brazil, India or Israel localizations

A/R Invoice

Customer C30000
Name Microchips
Contact Person Judy Brown
Customer Ref. No.
Local Currency

No. Primary 1307
Status Open
Posting Date 11.05.17
Due Date 10.06.17
Document Date 11.05.17

Contents Logistics Accounting Attachments

Item/Service Type Item Price Mode Gross Summary Type No Summary

#	Item No.	Item Description	Quantity	Unit Price	Gross Price	Tax Code	Disc...	Gross Price af...	Gross Total (LC)
1	A00001	J.B. Officeprint 1420	1	GBP 200.00	GBP 240.00	O1	10.00	GBP 216.00	GBP 216.00
2	A00002	J.B. Officeprint 1111	1	GBP 100.00	GBP 120.00	O1	5.00	GBP 114.00	GBP 114.00
3	A00003	J.B. Officeprint 1186	1	GBP 150.00	GBP 180.00	O1	0.00	GBP 180.00	GBP 180.00

Gross Price

Find Price Mode Gross

#	m No.	Item Description	Base Price List	Factor	Base Price	Price	Ma...
1	A00001	J.B. Officeprint 1420	Base Price	1.2	GBP 200.00	GBP 240.00	M
2	A00002	J.B. Officeprint 1111	Base Price	1.2	GBP 100.00	GBP 120.00	M
3	A00003	J.B. Officeprint 1186	Base Price	1.2	GBP 150.00	GBP 180.00	M
4	A00004	Rainbow ColorJet 5	Base Price	1.2	GBP 250.00	GBP 300.00	M
5	A00005	Rainbow ColorJet 7.5	Base Price	1.2	GBP 200.00	GBP 240.00	M
6	A00006	Rainbow 1200 Laser Series	Base Price	1.2	GBP 200.00	GBP 240.00	M
7	B10000	Printer Label	Base Price	1.2	GBP 6.90	GBP 8.28	P
8	B10010	Printer Label version 93	Base Price	1.2	GBP 5.00	GBP 6.00	P
9	C00001	Motherboard P4 Turbo	Base Price	1.2	GBP 200.00	GBP 240.00	M
10	C00002	Motherboard P4 Turbo - Asus Chipset	Base Price	1.2	GBP 150.00	GBP 180.00	M
11	C00003	Quadcore P4 2.4 GhZ	Base Price	1.2	GBP 65.00	GBP 78.00	M

OK Cancel Clear Selection Criteria

Price Lists (1/2)



Item Master Data

Item No. ☐ Inventory Item
 Description ☐ Sales Item
 Foreign Name
 Item Type ☐ Purchase Item
 Item Group
 UoM Group
 Price List

Bar Code Each
 Unit Price GBP 1.00 Box
 Pricing Unit

Set Inv. Method By
 UoM Code
 UoM Name
 Weight
 Inventory Counting UoM Code
 Inventory Counting UoM Name
 Items per Counting Unit Each
 Valuation Method

Base Price - UoM Prices

#	UoM Code	UoM Name	Base Price	Reduce By %	Price	Auto
1	Box	Box	GBP 1.00		GBP 1.00	<input type="checkbox"/>
2	Each	Eac	GBP 0.001000	0.00		<input checked="" type="checkbox"/>
3	BigBox	Big Box	GBP 2.000000	0.00	GBP 2.00	<input checked="" type="checkbox"/>
4				0.00		<input checked="" type="checkbox"/>

Base Price

Find Price Mode

#	Item No.	Item Description	Base Price List	F..	Base Price	Price	Ma...	Inventory UoM	Pricing Unit
60	P10002	PC - P4 2.4G, DDR 1G	Base Price	1	GBP 700.00	GBP 700.00	<input type="checkbox"/>	Manual	Manual
61	P10003	PC Set 1	Base Price	1	GBP 885.00	GBP 885.00	<input type="checkbox"/>	Manual	Manual
62	P10004	PC Set 2	Base Price	1	GBP 955.00	GBP 955.00	<input type="checkbox"/>	Manual	Manual
63	P20001	4GB Memory Server	Base Price	1	GBP 700.00	GBP 700.00	<input type="checkbox"/>	Manual	Manual
64	P20002	32GB Memory Server	Base Price	1	GBP 1,750.00	GBP 1,750.00	<input type="checkbox"/>	Manual	Manual
65	P20003	External HD	Base Price	1	GBP 55.00	GBP 55.00	<input type="checkbox"/>	Manual	Manual
66	R00001	Printer Paper A4 Wh	Base Price	1	GBP 5.00	GBP 5.00	<input type="checkbox"/>	Pack	Pack
67	R00002	Printer Paper A4 Rec	Base Price	1	GBP 3.00	GBP 3.00	<input type="checkbox"/>	Pack	Pack
68	R00010	Nail	Base Price	1	GBP 1.00	GBP 1.00	<input type="checkbox"/>	Each	Box
69	S10000	Server Point 10000	Base Price	1	GBP 935.00	GBP 935.00	<input type="checkbox"/>	Manual	Manual
70	TR0001	Travel Expense per 1	Base Price	1	GBP 200.00	GBP 200.00	<input type="checkbox"/>	Manual	Manual
71	Z00001	Tablet PC 64GB Black	Base Price	1	GBP 700.00	GBP 700.00	<input type="checkbox"/>	Manual	Manual
72	Z00002	Tablet PC 64GB White	Base Price	1	GBP 700.00	GBP 700.00	<input type="checkbox"/>	Manual	Manual

Feature

- Define price per pricing unit, e.g. price per 1000 units of a given item.
- Price list reflects this with the additional field Pricing Unit.

Benefit

- Accurate pricing for small value items.

Price Lists (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: 14,378.10

Deliveries: 6,677.91

Orders: 13,674.52

Opportunities: 6

Local Currency:

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

Payment Terms: 2P10Net30

Interest on Arrears %:

Price Mode: Net

Price List: Regular Sales Price

Total Discount %:

Credit Limit: 0.00

Commitment Limit: 0.00

Dunning Term: Standard

Automatic Posting: No

Credit Card Type: Master Card

Credit Card No.: 4556 7992 0067 1821

Expiration Date:

ID Number:

Average Delay:

Priority: First

Default IBAN:

Holidays:

Payment Dates:

Effective Discount Groups: Lowest Discount

Effective Price: Highest Price

Business Partner Bank: Default Hierarchy

Bank Country: Lowest Price

Bank Name: Highest Price

Bank Code: Barclays

Account: 33445577

BIC/SWIFT Code:

Bank Account Name:

Branch: 345678

Ctrl Int. ID:

IBAN:

Mandate ID:

Date of Signature:

OK Cancel

Special Prices for Business Partners

BP Code: C20000 BP Name: Maxi-Teq BP Type: Customer Price Mode: Net

Price List: Regular Sales Price

Discount Percentage: 0.00

Find:

#	Item No.	Item Description	Price List	Primary Curre...	Discount %	Source Price	Price after Discount	A.
1	C00001	Motherboard P4 Turb	Regular Sales Price	GBP 300.00	10.00	Price - Pri.	GBP 270.00	✓
2			Regular Sales Price		0.00	Price - Pri.		✓

Active From 01.05.17 To 31.05.17

OK Cancel Add Items Copy Discounts

Feature

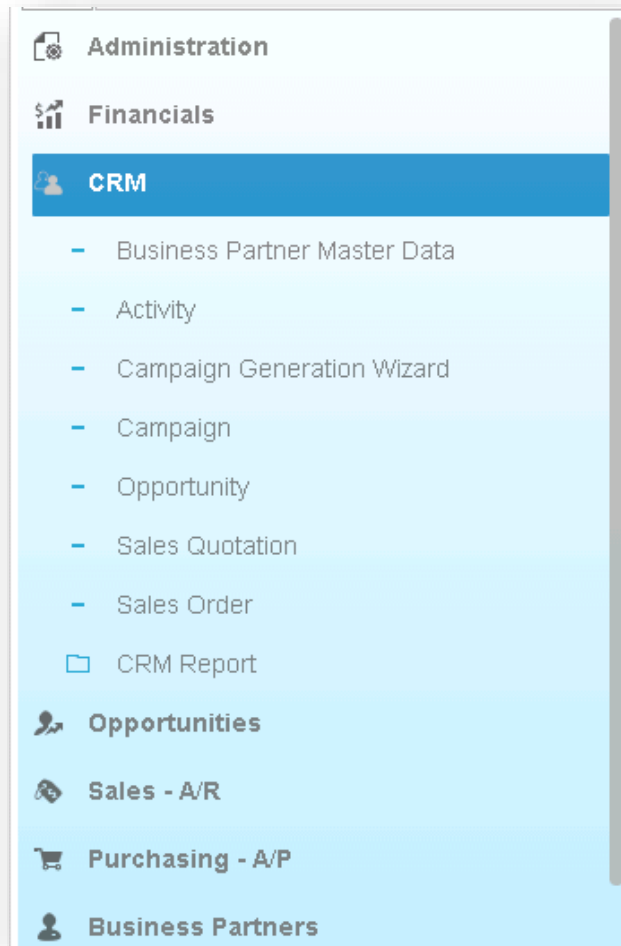
- Pricing hierarchy per BP – options to override the existing logic for selecting effective prices by applying the highest/lowest price per BP.
- Special prices can be limited by an active period.

Benefit

- More flexible pricing functionality by BP.
- Minimize incorrect discounting and maximizing revenue.
- Increase productivity and simplify customization.



Centralized CRM Module



Feature

- New module “CRM” is added under the financials module, listing all the functions related to CRM.

Benefit

- Centralized CRM module enhances usability and increases productivity.

CRM Enhancements



The screenshot displays three overlapping windows from the SAP CRM system:

- Activity Window:** Shows fields for Activity (Phone Call), Type (Project meeting), Subject (NSI-C20000), Assigned To (Recipient List), Assigned By (Jayson Butler), and a Personal checkbox. It also includes a Remarks field, Start/End Time, Duration (15 Minutes), and a Recurrence dropdown set to None.
- Recipient List - Management Team Window:** A table listing recipients for the activity.

#	User Name	Department	Branch	Recipient Type
1	keith	Logistic	Main	User
2	mary	Logistic	Main	User
3	Kora	General	Main	User
4	manager	General	Main	User
- Activities Overview Window:** A table showing a list of activities with columns for Number, Start Date, Start Time, Handled By, Activity, Recurrence, BP Name, Contact Person, and Status. A purple box highlights the 'Handled By' column.

Number	Start Date	Start Time	Handled By	Activity	Recurrence	BP Name	Contact Person	Status
1	18.07.16	12:42	Jayson Butler	Meeting	None	Maxi-Teq	Norm Thomp	
3	17.05.17	17:29	Management Team	Phone Ci	None			
4	17.05.17	17:34	Multiple	Phone Ci	None			
5	17.05.17	17:34	Jayson Butler	Phone Ci	None			

Feature

- Activity can be assigned to multiple users/employees; respective recipient lists can be created and maintained for this purpose.
- Activities Overview indicates handlers, be it single or multiple.

Benefit

- Increases efficiency - no need to create an activity for each user.

Campaign Management



Campaign Generation Wizard

Campaign Generation Options

☐ Create New Campaign
☐ Create Campaign Based on Existing Campaign
☒ Load Saved Campaigns
☒ View Executed Campaigns
☐ Run an Executed Campaign Again

Start Date From

Find by Name

#	Campaign No	Campaign Name	Remarks	Campaign Type	Owner	Targ...	Start...	End ...	Status	Executed
1	1	Summer Sales		E-Mail			08.06.17		Open	Yes

Campaigns List Report

#	Campaign No.	Campaign Name	Start Date	BP C...	Sales Amount	Gross Profit	Gross Profit %	Numbe...	Total Sales Amount	Total Gross Profit	Total Gross Profit %
1	1	Summer Sales	08.06.17					3	GBP 360.00	GBP 152.67	73.64
2				→ C200	GBP 360.00	GBP 152.67	73.64				
3				→ C235							
4				→ C250							

Campaigns List - Selection Criteria

☐ Response Type
☒ Documents

Start Date From

End Date From

OK Cancel

Document Types

Document Type

☐ Sales Opportunities
☐ Sales Quotations
☒ Sales Orders
☐ Deliveries
☒ A/R Invoices
☐ Without Linked Document

Feature

- Manage authorisations for generating and executing campaigns.
- Load saved campaigns, executed or non-executed.
- Find function added to the following forms:
 - Target Group Details
 - Target BPs in Manual Campaign
 - Target BPs in Campaign Generation Wizard
- Campaign List – Selection Criteria expanded to enable filtering by linked Documents.
- Sales Amount and Gross Profit reflected in Campaign List.

Benefit

- Users can differentiate between executed and non-executed campaigns.
- Improved usability and analysis of campaign successes and failures.
- More easily search for details within a target BP list.
- Greater control over campaign execution.



Blanket Agreements (1/2)



Sales Blanket Agreement

BP Code	C50000	No.	Primary	4
BP Name	ADA Technologies	Agreement Method	Items Method	
Contact Person	Mary Brown	Start Date	08.06.17	
Customer Ref. No.		End Date		
BP Currency	EUR	Exchange Rate	1.2000	
Telephone No.	+49 949 32728389	BP Project	PR1	
E-Mail	mary.brown@ada-tech.co	Termination Date		
		Signing Date	08.06.17	

Description
☐ Set as Default

General Details Documents Attachments Recurring Transactions

Agreement Type: General
☒ Ignore Prices Specified in Blanket Agreement
Payment Terms: 2P10Net30
Payment Method: Incoming BT
Shipping Type: Fedex EM
Settlement Probability %: 0.00
Remarks:

Status: On Hold
Owner:
☐ Renewal
Reminder: Day(s)

General Details Documents Attachments Recurring Transactions						
#	Group	Planned Quantity	Unit Price	Cumulative Committed Quantity	Cumulative Committed Amount...	Cumu...
1	Printers	100	EUR 100.00	10	GBP 2,500.00	50
2						

Feature

- Determine exchange rate in blanket agreement when BP currency is foreign currency and blanket agreement is managed on the document header.
- Enable updating planned amount, planned quantity, and price in blanket agreement that is linked to other documents.
- Add committed/ordered qty/amount to *Details* tab.
- Control the deviation from blanket agreement planned amount or planned quantity.
- Determine shipment type within the blanket agreement.
- Payment Method and Payment Terms in the blanket agreement can be determined when the blanket agreement is not managed on the document header.
- When no document is linked to the blanket agreement, you are able to update the Start Date.
- Option to automatically assign a valid Blanket Agreement where no default Blanket Agreement is chosen from many and only one is valid.
- Manage customer/vendor reference no. in blanket agreement.
- Display document status in Documents tab.
- Manage project code in blanket agreement.

Blanket Agreements (2/2)



Document Settings

Blanket Agreements

☒ Block Multiple Blanket Agreements for Same A/P Document

☒ Block Multiple Blanket Agreements for Same A/R Document

When No Default Blanket Agreement is Available, and Only One Valid Blanket Agreement Exists

☐ Automatically Assign the Blanket Agreement to A/P Document

☐ Automatically Assign the Blanket Agreement to A/R Document

When Quantity/Amount Exceeds Planned Quantity/Amount for Documents

Purchase Orders: Without Warning

Goods Receipts POs: Without Warning

Accounting: Without Warning

☐ Enable Negative Payment for Payment Warning

☐ Enable Multiple Scheduling for Scheduling Block Posting

OK Cancel

General Settings

BP Budget Services Display Font & Bkgd Path Inventory Resources Cash Flow

Blanket Agreements

☒ Allow Multiple Blanket Agreements for Same Period

☒ Enable Updating Unit Price/Planned Quantity/Planned Amount in Blanket Agreement with Linked Documents

OK Cancel

Benefit

- Exchange rates can be an agreed blanket agreement term.
- Increases flexibility and productivity - user can update the blanket agreement terms instead of creating new one.
- Easily track committed/ordered qty/amount in blanket agreement which is not delivered yet.
- Better control over the purchasing process by blocking deviations from blanket agreements.





Feature	Description	Localization
Business Partner Master Data	Changing details in payment terms can be set to apply to new Business Partners only.	All
Electronic Documents	<p>You can import XML electronic AP documents with possibility to define import formats per document type using Electronic File Manager (EFM).</p> <p>A new Web Service is available as a SAP Business One Integration Framework (B1iF) package for easier and stable creation of Electronic Documents and related electronic communication.</p>	All



Financial Management

SAP Business One 9.3



Financial Scenario Updates (1/3)



Chart of Accounts

G/L Account Details

☐ Title ☒ Active Account

G/L Account: 400000
 Name: Sales Revenue (Domestic) - P
 External Code:
 Currency: All Currencies

☐ Confidential Level: 5
 Balance: -929,452.48 GBP

G/L Account Properties
 Account Type: Sales
☐ Indexed
☐ Reval. (Currency)

☐ Block Manual Posting

Primary Closing Account: 345000

Relevant for Cost Accounting
☐ Project
 Distribution Rule
☐ Departments
☐ Line of Business

OK Cancel Account Details

Level: 5

Turnover

- 350002 - Gross Sales Revenue
 - 350003 - Domestic Sales
 - 350004 - Domestic Sales
 - 400000 - Sales Revenue (Domestic) - 5
 - 400010 - Sales Revenue (Domestic) - 6
 - 400020 - Sales Revenue (Domestic) - 7
 - 400030 - Sales Revenue (Domestic) - 8
 - 400040 - Sales Revenue (Domestic) - 9
- 400041 - Foreign Sales
 - 400042 - Foreign Sales
 - 410000 - Sales Revenue (Foreign) - Product No.1
 - 410010 - Sales Revenue (Foreign) - Product No.2
 - 410020 - Sales Revenue (Foreign) - Product No.3
 - 410030 - Sales Revenue (Foreign) - Product No.4
- 410031 - Miscellaneous Revenue
 - 410032 - Miscellaneous Revenue
 - 420000 - Miscellaneous Revenue
 - 420100 - Retirement with revenue (net)
 - 420200 - Revenue NBV (net)
 - 420300 - Retirement Revenue
- 420001 - Sales Discounts
 - 420002 - Sales Discounts
 - 420003 - Discounts
 - 450000 - Customer Discounts Allowed
 - 450005 - Customer Discounts for Early Payment
 - 450010 - Unjustified Customer Discounts
 - 420004 - Rebates & Bonuses
 - 450020 - Sales Rebates
 - 450030 - Sales Bonuses
 - 450040 - Other Sales Deductions

Assets

Liabilities

Capital and Reserves

Turnover

Cost of Sales

Operating Costs

Non-Operating Income and Expenditure

Taxation and Extraordinary Items

AcctGroup9AcctName

AcctGroup10AcctName

Feature

- Additional drawers in the Chart Of Accounts (CoA) - total of 10 drawers in all localizations.
- New Level field available to expand/collapse account listing directly in the CoA form.
- Primary Closing Account can be defined per P&L Account (*Applicable to certain localizations only*).

Benefit

- Better support for large enterprise customers and decreases maintenance costs.
- Accurate period closing.

Period-End Closing - Selection Criteria

P/L Accounts Find 1

#	X	Account
1	x	Turnover
32	x	Cost of Sales
94	x	Operating Costs
227	x	Non-Operating Income and Expense
251	x	Taxation and Extraordinary Items
266	x	AcctGroup9AcctName
267	x	AcctGroup10AcctName

Period: From To

Retained Earnings Account: 340000 Retained Earnings

Period-End Closing Account: 350000 Period End Closing

☒ Use Primary Closing Account

Execute Cancel Expanded Previous Report Settings

Financial Scenario Updates (2/3)



G/L Account Details

G/L Account: 161000
 Account Name: Bank Account
 Foreign Name:

Code for Exporting:

Default VAT Group:

Category: Trial Balance
 Planning Level:

Remarks:

☒ Active
☐ Inactive
☐ Advanced

From: To:

☐ Account Balance Allowed
☐ Cost Accounting Adjustment Only
☐ Allow Multiple Linking to Financial Templates

☐ Relevant to Budget
☒ Permit Other VAT Group

☒ Exchange Rate Differences
☒ Rate Conversion

Update Cancel

Document Settings

General Per Document E.J. Documents

☒ Calculate Gross Profit
 Base Price Origin: Item Cost
 Default Gross Profit % for Service Documents:

Calculate % Gross Profit as:
☐ Profit/Sales Price
☒ Profit/Base Price

Document Remarks Include:
☒ Base Document Number
☐ BP Reference Number

For a Sales BOM in Documents, Display:
☐ Price and Total for Parent Item Only
☒ Price for Component Items

Validate Account Balance
☒ Without Warning
☐ Warning Only
☐ Block Posting

Response to Release / Receipt of Inventory Outside Defined Range
☐ Without Warning

Feature

- Additional new category introduced - Trial Balance.
- All categories have predefined sub-categories with ability to define new ones for Balance Sheet and Profit and Loss.
- Restrict the account balance to within a range with ability to block posting.

Benefit

- Categories can help in consolidating large enterprises.
- Better control over account balances.

Financial Scenario Updates (3/3)



Document Settings

General Per Document EJ Documents

Document: Journal Entry

☒ Block Unbalanced FC Journal Entry

☒ Block Multiple Currency Transactions

☒ Block Editing of Totals in System Currency

☒ Block Posting Date Editing per Row

☒ Block Updating of Doc. Date After Posting per Row

☒ Use Automatic VAT

☐ Block Documents with Earlier Posting Date

☒ Mandatory Remarks

Warning Only

Block Posting

Header Only

Header Only

Rows Only

Rows and Header

G/L Account Details

GL Account: 610000

Account Name: Electricity

Foreign Name:

Code for Exporting:

Default VAT Code:

Category:

Planning Level:

Remarks:

Remark Template: Utilities

Active

From: To:

Inactive

Advanced

Journal Entry

Series: Primary Number: 6540 Posting Date: 07.06.17 Due Date: 07.06.17 Doc. Date: 07.06.17 Remarks: Electricity for month 6

Origin: JE Origin No.: 6540 Trans. No.: 6540 Template Type: Template: Indicator: Project:

Trans. Code: Ref. 1: Ref. 2: Ref. 3:

Blanket Agreement:

Expand Editing Mode

#	G/L Acct/BP ...	G/L Acct/BP Name	Debit	Credit	Remarks	Remark Template	VAT Code	VAT Number	Tax Amount	Gross Value	Base Amount
1	610000	Electricity	GBP 35.00		Electricity for month 6	Utilities					
2	160000	Petty Cash		GBP 35.00	Electricity for month 6						

Feature

- Journal Entry Remarks can be made mandatory for Header, Rows or both.
- Remark Template to maintain defaults in rows.

Benefit

- Enforce best practices and auditability.

Cost Accounting Ledger (1/3)



Document Numbering - Setup

Document	Default Series	First No.	Next No.	Last No.
Incoming Payments	Primary	1	1115	
Deposits	Primary	1	7	
Journal Entries	Primary	1	6512	
Outgoing Payments	Primary			
Goods Receipt	Primary			
Goods Issue	Primary			
Inventory Transfer Request	Primary			

Series - Journal Entries - Setup

#	Name	First No.	Next No.	Last No.	Prefix	Suffix	Remarks	Group	Period Ind.	Lock	Cost Accounting Adjustment Only
1	Primary	1	6512					1	Default	<input type="checkbox"/>	<input type="checkbox"/>
2	Second	1	1					1	Default	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Cost Center Transfer

Series: **Second** | Number: 1 | Posting Date: 28.04.17 | Due Date: 28.04.17 | Doc. Date: 28.04.17 | Remarks: Cost centre transfer

Origin: JE | Origin No.: 1 | Trans. No.: 6513 | Template Type: | Template: | Indicator: | Project: |

Trans. Code: | Ref. 1: | Ref. 2: | Ref. 3: |

Blanket Agreement: |

G/L Acct/BP Code: 610001 | G/L Acct/BP Name: Electricity London | Ref. 1: | Ref. 2: | Ref. 3: | Offset Account: 610001

Debit: GBP 300.00 | Credit: GBP 300.00

Posting Date: 28.04.17 | Due Date: 28.04.17 | Doc. Date: 28.04.17 | Project: | Tax Group: | Distr. Rule: 01_Sales:11_App | Remarks: Cost centre transfer

Primary Form Item: |

#	G/L Acct/BP	G/L Acct/BP Name	Debit	Credit	Federal Tax ID	Receipt Number	Primary Form...	Departments	Line of Business	Payment ...	Block Reason
1	610001	Electricity London	GBP 300.00					01_Sales	11_App	N	
2	610001	Electricity London		GBP 300.00				01_Sales	12_HV	N	
			GBP 300.00	GBP 300.00							

OK Cancel ☐ Display in SC Import From Cost Cancel Template

Feature

- Maintain separate numbering series marked as “Cost Accounting Adjustment Only”.
- New transaction called “Cost Center Transfer” for allocating costs between cost centers.
- Flag for “Cost Accounting Adjustment Only” restricts use of the account to cost accounting transactions.

Benefit

- Better management of costs to Cost Centers.
- Audit trail can be maintained by department based on dedicated numbering series.

G/L Account Details

G/L Account: 610001
Account Name: Electricity London
Foreign Name: |

☐ Account Balance Allowed From: | To: |

☒ **Cost Accounting Adjustment Only**

☐ Allow Multiple Linking to Financial Templates

☐ Relevant to Budget
☒ Permit Other VAT Group

OK Cancel

Cost Accounting Ledger (2/3)



Distribution Report

Distr. Rule Code	Distr. Rule Desc.	G/L Acct	Trans. No	Origin	Remarks	Total Costs(LC)	Distribution Total(LC)	Budget (...)	Total Costs Versus Budge...	Cost Centers
01_Sales	Sales	610000 - Ele				GBP 800.00	GBP -800.00	GBP 0.00	GBP 800.00	01_Sales(LC)
		610001 - Ele				GBP 500.00	GBP -500.00	GBP 0.00	GBP 500.00	GBP 500.00
		610001 - Ele	6531	PU	A/P Invoices - V10	GBP 500.00	GBP -500.00	GBP 0.00	GBP 500.00	GBP 500.00
		610001 - Ele	6513	JE	Cost centre transfe	GBP 0.00	GBP 0.00	GBP 0.00	GBP 0.00	GBP 0.00
		610001 - Ele	6513	JE	Cost centre transfe	GBP -300.00	GBP -300.00	GBP 0.00	GBP 300.00	GBP 300.00
		610001 - Ele	6513	JE	Cost centre transfe	GBP -300.00	GBP 300.00	GBP 0.00	GBP -300.00	GBP -300.00
		620020 - Cle				GBP 300.00	GBP -300.00	GBP 0.00	GBP 300.00	GBP 300.00
		620020 - Cle	6530	PU	A/P Invoices - V10	GBP 300.00	GBP -300.00	GBP 0.00	GBP 300.00	GBP 300.00
Total						GBP 800.00	GBP -800.00	GBP 0.00	GBP 800.00	GBP 800.00

Cost Center Transfer Expand Collapse

Feature

- Allocate costs to correct cost centers directly from the Distribution report.

Benefit

- Quicker cost reallocation.
- Increase productivity.

Cost Center Transfer

Series: Second, Number: 1, Posting Date: 28.04.17, Due Date: 28.04.17, Doc. Date: 28.04.17, Remarks: Cost centre transfer

Origin: JE, Origin No.: 1, Trans. No.: 6513, Template Type: , Template: , Indicator: , Project: , Fixed Exchange Rate: , Reverse: , Adj. Trans. (Period 13): , EU Report:

Trans. Code: , Ref. 1: , Ref. 2: , Ref. 3:

Blanket Agreement:

G/L Acct/BP Code: 610001, G/L Acct/BP Name: Electricity London, Ref. 1: , Ref. 2: , Ref. 3: , Offset Account: 610001

Debit: GBP 300.00, Credit:

Posting Date: 28.04.17, Due Date: 28.04.17, Doc. Date: 28.04.17, Project: , Tax Group: , Distr. Rule: 01_Sales;11_App, Remarks: Cost centre transfer

Primary Form Item:

#	G/L Acct/BP ...	G/L Acct/BP Name	Debit	Credit	Federal Tax ID	Receipt Number	Primary Form...	Departments	Line of Business	Payment ...	Block Reason
1	610001	Electricity London	GBP 300.00					01_Sales	11_App	N	
2	610001	Electricity London		GBP 300.00				01_Sales	12_HW	N	
			GBP 300.00	GBP 300.00							

OK Cancel Display in SC Import From Excel Cancel Template

Cost Accounting Ledger (3/3)



General Settings

BP Budget Services Display Font & Bkgd Path Stock Resources Cash Flow Cockpit Cost Accounting Pricing Hide Functions

☒ Use Multidimensions

Display Distribution Rules

☐ In a Unified Column

☒ In Separate Columns

Specify how to post journal entry line without a distribution rule or project when G/L account is set up for cost accounting

Distribution Rule ... Project Code Without Warning

Cost Accounting Adjustment Settings

Default Series Second

Default GL Account 1000001 Cost Accounting Adjustment

OK Cancel

Feature

- Set up Default Series and Default GL Account to automatically populate Cost Accounting Adjustment transactions.
- Journal Voucher adapted to cater for Cost Accounting Adjustment transactions.

Benefit

- Journal Vouchers aligned with Journal entry functionality.

Journal Vouchers

Find ☒ Open Only

Journal Voucher No.	Status	Date	Total (LC)	User

Trans. No.	Status	Total (LC)	Total (FC)	Remarks

OK Cancel

Add Cost Accounting Adjustment Entry to New ...

Add Journal Entry to New Voucher

Add Cost Accounting Adjustment Entry to New Voucher

Add Entry to Existing Voucher

Post Voucher

Voucher Entry for Cost Accounting Adjustment

Voucher No. 2

Series Second

Number 13.06.17

Posting Date 13.06.17

Due Date 13.06.17

Doc. Date 13.06.17

Remarks

Origin Origin No. Trans. No. Template Type Template Indicator Project

Trans. Code Ref. 1 Ref. 2 Ref. 3

Blanket Agreement

Expand Editing Mode

#	G/L Acct/BP ...	G/L Acct/BP Name	Debit	Credit	Rem...	VAT Number	Receipt Number	Primary Form...	Departments	Line of Business	Payment ...	Block Reason
1	1000001	Cost Accounting Adj									N	
1											N	



GL Account Determination Matrix



Determination Criteria - Stock

#	Determination Criteria	Active
1	Item Group	<input checked="" type="checkbox"/>
2	Item Code	<input checked="" type="checkbox"/>
3	Warehouse Code	<input checked="" type="checkbox"/>
4	Business Partner Group	<input type="checkbox"/>
5	VAT Number	<input type="checkbox"/>
6	Ship-to Country	<input type="checkbox"/>
7	Ship-to State	<input type="checkbox"/>
8	VAT Code	<input type="checkbox"/>
9	BP Code	<input type="checkbox"/>
10	BP Type	<input type="checkbox"/>
11	Items - UDF1	<input checked="" type="checkbox"/>
12	Business Partners - UDF	<input checked="" type="checkbox"/>
13	Marketing documents	<input type="checkbox"/>
14	Marketing documents r	<input type="checkbox"/>
15	UDF5	<input type="checkbox"/>

☐ Apply Ship-to Country/Ship-to State on Purchasing

OK Cancel

Advanced GL Account Determination Rules - Stock

Period: 2017

Find Show All

Priority	Code	Type	Item Group	Item Code	Warehou...	Items - UDF1	Business Partners - UDF2	Description	Active	From Date	To Date	Stock Account	Cost of Goods ...	Allo...
1	R10	General	Items	LB0002	All	All	All		<input checked="" type="checkbox"/>					
2	R8	General	Items	L10001	All	All	All		<input checked="" type="checkbox"/>					
3	R9	General	Items	LB0001	All	All	All		<input checked="" type="checkbox"/>					
4	R11	General	Items	All	04	All	All		<input checked="" type="checkbox"/>			130010	500520	
5	R1	General	Items	All	All	All	All		<input checked="" type="checkbox"/>					
6	R2	General	J.B. Printer	All	All	All	All		<input checked="" type="checkbox"/>					
7	R3	General	Rainbow P	All	All	All	All		<input checked="" type="checkbox"/>					
8	R4	General	Accessories	All	All	All	All		<input checked="" type="checkbox"/>			132000	500025	
9	R5	General	Servers	All	All	All	All		<input checked="" type="checkbox"/>					
10	R6	General	PCs	All	All	All	All		<input checked="" type="checkbox"/>					
11	R7	General	Storage	All	All	All	All		<input checked="" type="checkbox"/>					
12		General	All	All	All	All	All		<input checked="" type="checkbox"/>					

Dropdown menu for Business Partners - UDF2:

- All
- Empty
- Filled
- Enter Value

Feature

- Up to 5 user defined fields can be managed in the determination criteria screen.
- You can use these 5 UDFs in defining the rules in the Advanced G/L Account Determination Rules screen.
- Options available:
 - All – criteria not relevant
 - Empty – field must be empty
 - Filled – field must have a value
 - Enter Value – field has a specific value

Benefit

- More flexibility in determining account to be posted to based on business criteria.



Integrated Payment Engine



The screenshot displays two overlapping software windows. The background window is titled 'Payment Wizard' and features a section 'Payment Run Summary and Printing'. This section includes a descriptive paragraph and two columns of checkboxes. The 'Payment Run Summary' column shows counts for payment orders, payments, checks, and bank transfers. The 'Document and Report Printing' column lists various reports like Outgoing Payments, Incoming Payments, Non-Included Transactions, Country Summary, Currency Summary, BP Summary, Payment Method Summary, Bank Account Summary, and Payment Summary, each with a corresponding 'Print' button. A 'Print' button is also located at the bottom right of this window. The foreground window is titled 'Payment Engine' and shows a 'Select Path' field with 'C:\temp' entered. It has radio buttons for 'Test Run' and 'Production Run', with 'Production Run' selected. Below these are tabs for 'Protocol', 'Preview', and 'Payment File'. The 'Preview' tab is active, displaying a log of the production run process, including steps like 'Start Payment Engine', 'Handling outgoing payment...', and 'Production Run finished successfully'. At the bottom of the 'Payment Engine' window are 'Create Files', 'Cancel', and 'OK' buttons. A third window at the bottom shows 'Step 8 of 8' with a 'Bank File' button highlighted by a red box, along with 'Cancel', '< Back', and 'Finish' buttons.

Payment Wizard

Payment Run Summary and Printing
The summary shows the number of documents as well as the document types generated or simulated by this payment run. You can print documents and summary reports by selecting them and choosing "Print". To complete the payment run, choose "Finish".

Payment Run Summary

- 0 Payment orders were added
- 1 Payments were added
- 0 Checks were added
- 1 Bank transfers were added

Document and Report Printing

- ☐ Outgoing Payments
- ☐ Incoming Payments
- ☐ Non-Included Transactions
- ☐ Country Summary
- ☐ Currency Summary
- ☐ BP Summary
- ☐ Payment Method Summary
- ☐ Bank Account Summary
- ☐ Payment Summary

Payment Engine

Select Path: C:\temp

☐ Test Run
☒ Production Run

Protocol Preview Payment File

Production Run
Start Payment Engine
Handling outgoing payment...
Check payment for bank Barclays
1 records were found in payment results table (OPEX)
No EFM format defined for this payment method: Incoming BT
Handling outgoing payment...
Production Run finished successfully.

Create Files Cancel OK

Step 8 of 8

Bank File Cancel < Back Finish

Feature

- Integrated bank file created when Electronic File Manager (EFM) designed outbound bank file formats are linked to the payment method selected in the Payment Wizard.
- Note: Historical .dll bank file formats not designed with the EFM add-on still require the Payment Engine Add-on.

Benefit

- Smoother and faster execution of payments and creation of bank files sent to house bank and/or customer bank.
- Payment wizard is more intuitive.
- No need to install the separate add-on, less time consuming and ready to use after installation.

Scheduled Batch Processing



Payment Wizard

Save Options
Specify how you want to process the payment wizard results: - Save selection criteria without recommendation report- Save recommendation report for future payment run- Generate payment orders - Generate payments and payment documents

☐ Save Selection Criteria Only
☐ Save Recommendations
☐ Execute Payment Order Run
☐ Execute Payment Run
☒ Execute Payment Run on Server

Scheduled Time: 09.06.17 12:00

System Message
Payment wizard successfully scheduled
OK

Payment Wizard

Payment Run Selection
To create a payment run, select "Start New Payment Run". To view the selection criteria/recommendation report of a payment run, select "View Executed Payment Runs".

☐ Start New Payment Run
☒ Load Saved Payment Run
☐ View Executed Payment Runs

Find

#	Payment Run Name	Date	Total	No. of Payments	Status
1	Wiz20170608n1	08.06.17	23,955.76	0	Scheduled

Feature

- Leverage the service layer for parallel processing on the server-side.
- Tasks are dispatched and scheduled in the Job Server.
- Payment Wizard transactions will initially be supported.
- New *Execute Payment Run on Server* option in the Payment Wizard with ability to schedule a specific date and time.

Benefit

- Handle heavy transactions with parallel processing.
- Allows users to close the payment wizard form or even the SAP Business One client as the task is running on the server side.
- Reduces the load on the client side by scheduling a future date and time for processing on the server.
- Faster processing time for large transactions.

Electronic File Layout Templates



File Edit View Data Go To Modules Tools Window Help

Document Journal

Seq. No.	Trans. No.	Posting Date	Series	Doc. No.	G/L Acct/BP Code	G/L Acct/BP Name	Debit/Credit (...)	Remarks
1	2197	25.07.16	Primary	IN 357				A/R Invoices
		25.07.16			C20000	Maxi-Teq	GBP 11,715.00	A/R Invoices
		25.07.16			207000	VAT Payable (output Tax)	GBP (1,715.00)	A/R Invoices
		25.07.16			400000	Sales Revenue (Domestic) - F	GBP (10,000.00)	A/R Invoices
2	2318	11.08.16	Primary	SI 136				Goods Receipt
		11.08.16			500500	Stock Difference Gains	GBP (1,165.00)	Goods Receipt
		11.08.16			130000	Raw Materials	GBP 1,165.00	Goods Receipt
3	2343	25.08.16	Primary					
4	2359	25.08.16	Primary					
5	2360	25.08.16	Primary					

EFM Report Form : [Document Journal into TXT]

Output File Name
C:\Users\Administrator\AppData\Local\Temp\Output.txt

Result File

Error / Message Log

#	Severity	Message
0	Info	EFM file loaded
1	Info	Analyzing file structure
2	Info	Loading Crystal from EFM package
3	Info	Handling Crystal from [CR_StatementOfCashFlows] started
4	Info	Executing get B1_CR_XmlDataSource
5	Info	Exporting xml from Crystal
6	Info	Exporting EFM file
7	Info	Exporting EFM file finished successfully
8	Info	Open result file by pressing Result Button or see the Log file by pressing Log Button

OK

Output.txt - Notepad

```
File Edit Format View Help
||CashflowausbetrieblichenTätigkeiten||0,00|0,00|
|Einzahlungen von Kunden (+)||0,00|0,00|
|Zahlungen von Kunden für Rechnungen|1|-200,00|0,00|
|Anzahlungen von Kunden|2|0,00|-500,00|
|Einkaufsgutschriften von Lieferanten|3|-9.000,00|
|Auszahlungen an Lieferanten (-)||0,00|0,00|
|Zahlungen für Rechnungen an Lieferanten|4|-59.500,00|
|Anzahlungen an Lieferanten|5|0,00|0,00|
|Verkaufsgutschriften an Kunden|6|0,00|0,00|
|Auszahlungen für Miete/Strom/Telefon (-)||0,00|0,00|
|Auszahlungen für Miete|7|0,00|0,00|
|Auszahlungen für Strom|8|0,00|0,00|
|Auszahlungen für Telefon|9|0,00|0,00|
|Auszahlungen an Beschäftigte (-)||0,00|0,00|
|Zahlungen an Beschäftigte, z.B. Löhne|10|0,00|0,00|
|Andere betriebliche Zahlungen (+/-)||0,00|0,00|
|Andere betriebliche Zahlungen|11|0,00|0,00|
|Auslaufender Geschäftstätigkeiten wirtschaftete Zah
|Abzüglich gezahlter Steuern (-)||-68.800,00|-1.800,00|
|Gezahlte Körperschaftsteuer|12|0,00|-700,00|
|Gezahlte Umsatzsteuer|13|-100,00|0,00|
|Abzüglich gezahlter Zinsen (-)||-68.800,00|-1.800,00|
```

Feature

- Export SAP Business One form data into various file formats using XML. See [SAP Note](#).
- Create Crystal reports out of the XML and assign required fields inside EFM mapping file.
- Assign EFM GEP files as electronic file for any report.

Benefit

- Flexible generation of output files.
- One click user experience with generation of electronic reports with simple print preview.



Financial Management



Feature	Description	Localization
IFRS Revenue Recognition Enhancements	In addition to Blanket Agreement (BA) enhancements, following features also help fulfil the new IFRS 15 Standard: Revenue from contracts with customers: <ul style="list-style-type: none">- Currency handling on BA- Approval procedures for BA	All
Manage Change Log for Block Negative Inventory By	Support viewing history of changes made to the setting: Block Negative Inventory By. The fields BlockZero and NegStoLv in table CINP are moved to table OADM.	All



Project Management

SAP Business One 9.3



Project Management (1/3)



Project - Servers & Printer Installation

Project Type: ☒ External ☐ Internal

BP Code: C23900

BP Name: Parameter Technology

Contact Person: Daniel Brown

Territory:

Sales Employee: Brad Thompson

Owner:

☒ Project with Subprojects

Risk Level: Medium

Industry:

Comments: This project is to install 2 new servers and 1 new printer for customer Parameter. This project will be phased out in 3 subprojects.

Subprojects

Subprojects	Task	Description	Work Order	Reso...	Activity	Start Date	Due Date	Progress (%)
1	Phase 1 - Server 1 In					01.07.16	05.10.16	4.000000
2	Phase 2 - Server 2 In					01.07.16	05.07.16	0.0
3	Phase 3 - Printer Inst					05.10.16	05.10.16	0.0

Context Menu:

- Cancel
- Sort Table
- General Ledger
- Transaction Report by Projects
- Document Journal
- Trial Balance
- Profit and Loss Statement
- Project Overview**
- Time Sheet Report

Project Overview

Select Level: 2

Project / Subproject	Stage	Task	Description	Work Order	Reso...	Activity	Start Date	Due Date	Progress (%)
Servers & Printer Installation	Conception/Initiation	Meeting	Project Launch				01.07.16	05.10.16	4.000000
	Finishing Stage	Project	Project Close				05.10.16	05.10.16	0.0
Phase 1 - Server 1 Installati	Definition/Planning	Planning	Planning				05.07.16	30.07.16	10.000000
	Performance and co	Installati	Installation				05.07.16	10.07.16	100.000000
	Performance and co	Monitori	Monitoring				11.07.16	15.07.16	0.0
	Finishing Stage	Project	End of P				15.07.16	28.07.16	0.0
Phase 2 - Server 2 Installati	Definition/Planning	Planning	Planning						
	Performance and co	Installati	Installation						
	Performance and co	Monitori	Monitoring						
	Finishing Stage	Project	End of P						

Time Sheet Report

Project No.: 2

Subproject No.:

Stage:

Project Name:

Subproject Name:

Description:

Time Recording

#	Subpr...	Subproject Name	Stage	User/Employee	Date	St

OK Cancel

Feature

- The context menu links to:
 - Project Overview form detailing the entire project and it's hierarchical structure in one table.
 - Time Sheet Report.
- Create stage dependencies across different project levels including subprojects.
- New column under Stages tab - *Finished Date* allows users to define an actual finish date of each stage which can be compared to the planned end date.
- A *Stage ID* field has been created to better link projects to marketing documents and employee time sheets.
- A new Time Sheet Report clearly displays the link between a project and time worked on the project by employee.
- Under Documents and Work Orders section, a new *Chargeable* tick box field indicates if a connected document line is chargeable to a customer.
- Additional project related information is added to the Activity form and users can also set an activity relevant for project billing.

Project Management (2/3)



Billing Document Generation Wizard

Initial Wizard Configuration
Please select the Target Document, Customer and other

Target Document:

Target Doc. Type:

Target Doc. Series:

Customer:

Financial Project:

Project No.:

Subproject No.:

Stage:

Source Types

☒ Include open AP Documents ☒ Include closed Work Orders

☒ Include open AR Documents ☒ Include Recorded Times

☐ Sales Quotations (0) ☒ Include Project Activities

☐ Sales Orders (0)

☐ Res. Invoice (0)

Posting Date: From To

Delivery Date: From To

Step 1 of 3

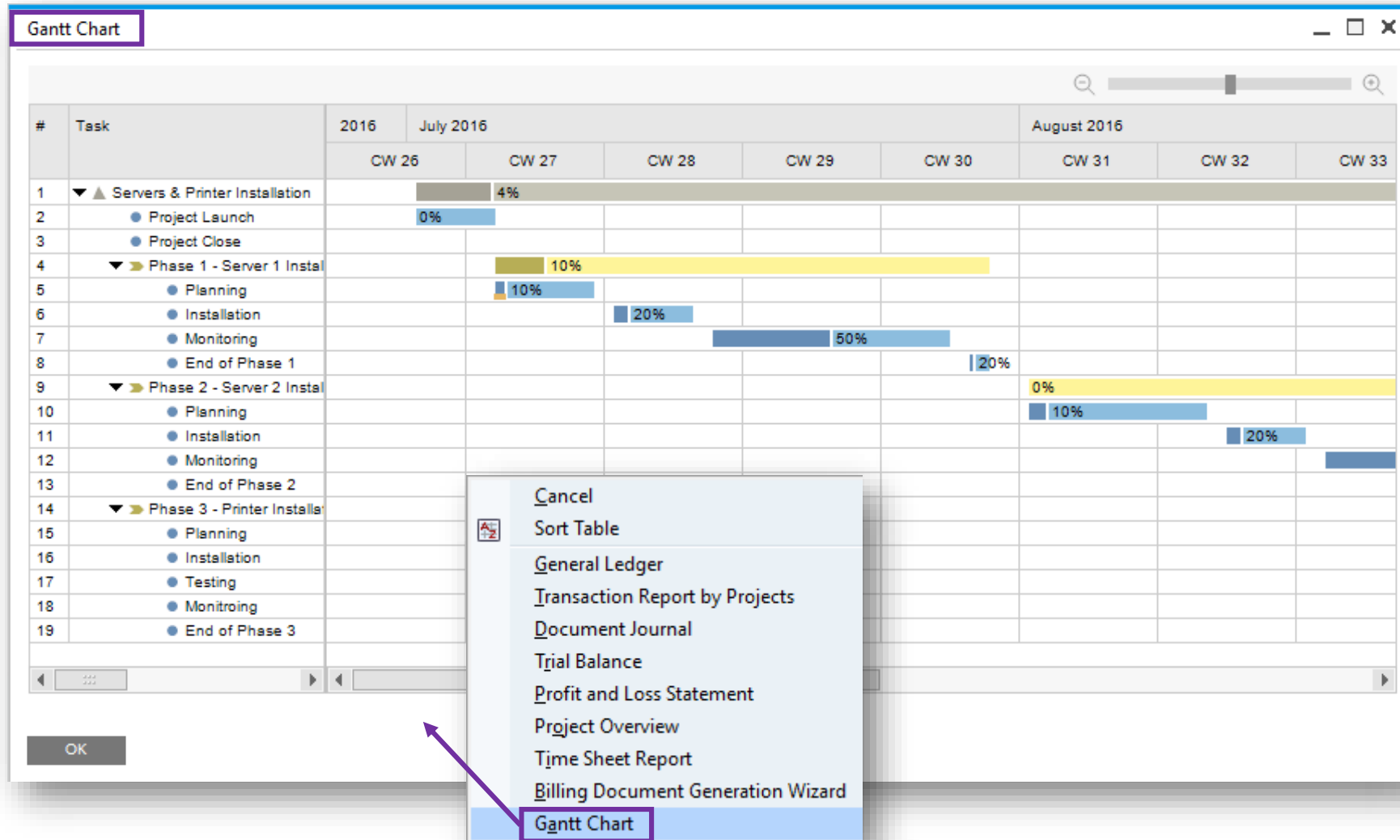
Feature

- New Billing Document Generation Wizard allows users to recharge costs or bill a project.
- The billing wizard collects open document lines and billable items connected to the project for invoicing.
- Creates AR Delivery or AR Invoice documents based on the project data stored in the Project Management form.

Benefit

- Users have a holistic overview of projects and detailed information related to each project.
- Increases productivity and transparency.
- The billing wizard streamlines the standard billing or milestone billing process and helps improve efficiency.

Project Management (3/3)



Feature

- Access a Gantt Chart via context menu in Project window.
- The Gantt Chart visualizes the project as a whole.

Benefit

- More transparency, increased productivity, and enhanced usability.





Production

SAP Business One 9.3



Resource Capacity



Resource Master Data

Resource No. Manual R300004 Bar Code

Description Testing Machine

Foreign Name

Resource Type Machine

Resource Group Resources

Unit of Measure Text

Time per Resource Units 0:00:01 Res. Units per Time Period 1

General Capacity Data Planning Data Fixed Assets Properties Attachments Remarks

Daily Capacity Factors

	1	2	3	4	Daily Capacity	Single Run Capacity	Remarks
Standard Daily Capacity	1	2	3	4			
Monday	3.000	4.000	8.000		96.000	24.000	2 Machines
Tuesday	3.000	4.000	8.000		96.000	24.000	2 Machines
Wednesday	3.000	4.000	8.000		96.000	24.000	2 Machines
Thursday	3.000	4.000	8.000		96.000	24.000	2 Machines
Friday	3.000	4.000	8.000		96.000	24.000	2 Machines
Saturday							

Relevant to Single Run Capacity Yes No Yes Yes

Resource Capacity

Capacity Type All

Capacity Period From To 13.07.17

Warehouse Code From To

Resource No. From To R300007

Resource Group From To

Resource Type Available

Single Run Capacity

Resource Properties

#	Resource No.	Resource Desc...	Whse	Type	Total	13.06	14.06	15.06	16.06	17.06	18.06	19.06	20.06
1	R300004	Testing Machine	01	Available	2,208	96	96	96	96			96	
2				Internal	2,208	96	96	96	96			96	
3				Ordered									
4				Committed									
5				Consumed									
6				Single Run Capa	552	24	24	24	24			24	
7	R300004	Testing Machine	02	Available	2,208	96	96	96	96			96	
8				Internal	2,208	96	96	96	96			96	
9				Ordered									
10				Committed									
11				Consumed									
Total					11,040	480	480	480	480			480	

Feature

- Supports Single Run Capacity which is the available daily capacity of a single resource unit, assuming a Production Order can only be produced on one resource unit at a time.
- Ability to calculate Single Run Capacity by including and/or excluding Daily Capacity Factors.
- Ability to set daily capacity basis using 'Set Internal Capacity to Single Run Capacity' which will allocate a default budgeted capacity of hours per day.
- Resource Capacity window will highlight the maximum daily single run capacity available.

Benefit

- Ability to differentiate between Daily Capacity and Single Run Capacity by including and/or excluding Daily Capacity Factors.
- Supports production orders that are only able to be produced on a single machine.
- Reflects the number of capacity resources a production order can consume on each working day.

Production Routing (1/3)



Production Order

Type: Standard
 Status: Released
 Product No.: P10003
 Product Description: PC Set 1
 Planned Quantity: 20
 Warehouse: 01
 Priority: 100
 Routing Date Calculation: On Start Date

Route Stages - Setup

#	Code	Description
1	Stage 1	Stage 1
2	Stage 2	Stage 2
3		

Update Now

No.	Type	No.	Description	Route Sequence	Planned Qty	Issued	Avail...	UoM ...	UoM ...	Wareho...	Issue Method	Start Date	End Date
1	Route Stag	Stage 1	Stage 1	1								13.06.17	16.06.17
2	Item	P10001	PC - P4 2.4G, DDR 5	1	20	0	-58	Manual		01	Backflush	13.06.17	16.06.17
3	Resource	R300004	Testing Machine	1	20	0	76			01	Backflush	13.06.17	16.06.17
4	Resource	R300005	Assembly Machine	1	20	0	-20			01	Backflush	13.06.17	16.06.17
5	Item	A00003	J.B. Officeprint 1186	1	20	0	525	Manual		01	Backflush	13.06.17	16.06.17
6	Route Stag	Stage 2	Stage 2	2								16.06.17	18.06.17
7	Item	L10001	Labour	2	20	0	0	Manual		01	Backflush	16.06.17	18.06.17
8	Resource	R300006	Senior Technician	2	20	0	0			01	Backflush	16.06.17	18.06.17
9	Item			2		0	0						

Issue Components - Selection Criteria

Route Sequence:
 Route Stage:
 Stage Status:
 Type: Item and Resource
 Item: From: To:
 Resource: From: To:
 Warehouse: From: To:
☒ Open Quantity of Components
☐ Quantity of Parent Items 20.000 ☒ Include Additional Quantity

OK **Cancel**

Feature

- New routing function facilitates production processing through a defined sequence of production stages.
- A new *Routing Stage – Setup* window allows you to define Route Stages.
- Multiple routing stages are added into Production Order structures.
- Allows you to define the route sequence of any combination of Production Order line types.
- New *Priority* field allows you to manually enter a priority of the Production Order. The lower the number, the more important the Production Order.
- An ability to control stage start and end dates with a new *Routing Date Calculation* field to choose *On Start Date*, *On End Date*, *Start Date Forwards* or *End Date Backwards*. This can automatically calculate date dependences between route stages in the Production Order.
- The *Issue Components* window allows you to filter which Production Order component lines will be passed into the drawn document.

Production Routing (2/3)



Bill of Materials

Product No. X Quantity

Product Description

BOM Type

Production Std Cost

Planned Average Production Size

Warehouse

Price List

Distr. Rule

Project

#	Type	No.	Description	Quantity	Issue Method	Total	Route Sequence
1	Route Stage	ASSEMBLY	Assembling	0			1
2	Item	P10002	PC - P4 2.4G, DDR 1024M, 400G HD	1	Backflush	GBP 700.00	1
3	Item	A00004	Rainbow ColorJet 5	1	Backflush	GBP 250.00	1
4	Item	L10001	Labour	1	Backflush	GBP 5.00	1
5	Resource	R300007	Junior Technician	1	Backflush	GBP 150.00	1
6	Route Stage	QUALITY	Final Quality Check	0			2
7	Resource	R300006	Senior Technician	1	Backflush	GBP 200.00	2
8	Item						2

Feature

- Bill of Materials form has been redesigned to improve usability and support routing stages and sequencing.
- Multiple routing stages are added into Bill of Material structures.
- Allows you to define a route sequence of any combination of BOM line types.
- Change the order of and entire stage as a group.
- Add UDF's to the new row Type - Route Stage
- New columns on Bill of Materials Report – Route Sequence, Route Stage and Route Stage Description showing related stage information valid at the time of transaction.

Bill of Materials Report

Item	Item Description	UoM	Quantity	Whse	Price	Depth	BOM Type	Route Sequence	Route Stage	Stage Description
LM4029	LeMon 4029 Printer	Eac	1	01	GBP 250.00	1	Production			
LM4029PS	LeMon 4029 Printer Power Supply		1	01	GBP 12.00	1	Production			
MRP_BOM	MRP_BOM		1	01	GBP 25.00	1	Production			
MRP_Child1	MRP_Child1		1	01	GBP 5.00	1	Production			
P10001	PC - P4 2.4G, DDR 512M, 400G HD		1	01	GBP 730.00	1	Production			
P10002	PC - P4 2.4G, DDR 1024M, 400G HD		1	01	GBP 700.00	1	Production			
P10003	PC Set 1		1	01	GBP 885.00	1	Production			
P10004	PC Set 2		1	01	GBP 955.00	1	Production			
P20001	4GB Memory Server		1	01	GBP 700.00	1	Production			
P20002	32GB Memory Server		1	01	GBP 1,750.00	1	Production			
P20003	External HD		1	01	GBP 55.00	1	Production			
S10000	Server Point 10000		1	01	GBP 935.00	1	Production			

Production Routing (3/3)



Pick Pack and Production Manager

Open Released Picked

Find Document Number

#	ste	Type	Number	Description	Items per Unit	Whse	Open	To Release	Avail. to Release	Fulfillment%	Document Date	Start Date	Product No.	Route Sequence	Route Stage	Route Stage Description	Production Priority
1		Item	Child1	Child1	1	01	1,000	1,000	9,580	100	11.06.17	11.06.17	Parent	1	STAGE 1	STAGE 1	100
2		Item	Child2	Child2	1	01	1,500	1,500	9,250	100	11.06.17	11.06.17	Parent	1	STAGE 1	STAGE 1	100
3		Resource	Resource1	Resource1	1	01	100	100			11.06.17	12.06.17	Parent	1	STAGE 1	STAGE 1	100
4		Resource	Resource2	Resource2	1	01	100	100			11.06.17	12.06.17	Parent	1	STAGE 1	STAGE 1	100
5		Item	Child3	Child3	1	01	2,000	2,000	9,600	100	11.06.17	16.06.17	Parent	2	STAGE 2	STAGE 2	100
6		Item	Child4	Child4	1	01	2,500	2,500	9,500	100	11.06.17	16.06.17	Parent	2	STAGE 2	STAGE 2	100
7		Resource	Resource1	Resource1	1	01	100	100			11.06.17	16.06.17	Parent	2	STAGE 2	STAGE 2	100
8		Resource	Resource2	Resource2	1	01	100	100			11.06.17	16.06.17	Parent	2	STAGE 2	STAGE 2	100
9		Item	Child1	Child1	1	01	100	100	8,580	100	11.06.17	16.06.17	Parent	1	STAGE 1	STAGE 1	100
10		Resource	Resource2	Resource2	1	01	150	150			11.06.17	16.06.17	Parent	1	STAGE 1	STAGE 1	100
11		Item	Child3	Child3	1	01	200	200	7,600	100	11.06.17	26.06.17	Parent	2	STAGE 2	STAGE 2	100
12		Item	Child4	Child4	1	01	250	250									100
13		Resource	Resource3	Resource3	1	01	200	200									100
14		Resource	Resource4	Resource4	1	01	250	250									100
15		Item	Child3	Child3	1	01	400	400									100
16		Item	Child4	Child4	1	01	500	500									100
17		Resource	Resource3	Resource3	1	01	400	400									100
18		Resource	Resource4	Resource4	1	01	500	500									100

Pick Pack and Production Manager - Selection Criteria

Status: Open Group By: None

Manage: ☐ Sales Orders ☒ Production Orders ☐ Reserve Invoices ☐ Inventory Transfer Requests

Production Order No. Start Date Delivery/Due Date Priority Type Item Resource Route Stage Route Sequence Production Order Status Customer Fulfillment %

From To

Warehouses

Location	Whse Code	Whse Name
<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/>	04	Consignment
<input checked="" type="checkbox"/>	05	Bin Warehouse
<input checked="" type="checkbox"/>	Feltham	
<input checked="" type="checkbox"/>	01	General Warehouse
<input checked="" type="checkbox"/>	Manchester	

Expand Collapse

Sort By: Delivery/Due Date

OK Cancel

Feature

- The Pick & Pack Manager has been renamed to Pick Pack and Production Manager.
- New fields to the Open, Released and Picked Drawers make it usable as a simple Production Manager console, such as Route Stage, Route Sequence, Product No. and Production Priority.
- Filter your selection criteria by a number of Production Order attributes such as Start Date, Route Stage, Route Sequence and Production Priority.

Benefit

- Ability to plan, execute and manage basic route based production.
- A significant enhancement for all businesses with a light production requirement.
- Enables greater control over production-related item and resource component management.
- Provides an estimated understanding of when component demand may be required.



Inventory | Distribution

SAP Business One 9.3



Unit of Measure (UoM)



Item Master Data

Item No. Manual B10010 ☒ Inventory Item ☒ Sales Item ☒ Purchase Item

Description Printer Label version 93

Foreign Name

Item Type Items

Item Group Items

UoM Group Paper

Price List Regular Sales Price

Bar Code

Unit Price Primary Curr GBP 7.50 Pack

Pricing Unit Pack

General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Attachments

Preferred Vendor J50000

Mfr Catalog No.

Purchasing UoM Code Carton

Purchasing UoM Name Carton

Items per Purchase Unit 24

General Purchasing Data Sales Data Inventory Data

Tax Group UK Std rate 20% 20

Sales UoM Code 6Pack

Sales UoM Name 6 Pack

Items per Sales Unit 6 Pack

Package Type Box

Quantity per Package 4

General Purchasing Data Sales Data Inventory Data

Set Inv. Method By Warehouse

UoM Code Pack

UoM Name Pack

Weight

Inventory Counting UoM Code

Inventory Counting UoM Name

Items per Counting Unit 1 Pack

Delivery

Customer C20000

Name Maxi-Teq

Contact Person Norm Thompson

Customer Ref. No.

Local Currency

No. Primary 1345

Status Open

Posting Date 02.05.17

Delivery Date 02.05.17

Document Date 02.05.17

Contents Logistics Accounting Attachments

#	Item No.	Item Description	Quantity	Qty(Inventory UoM)	Inventory UoM	No. of Packages	Unit Price	Disc...	Tax ...	Total (LC)
1	B10010	Printer Label ver	3	18	No	1	GBP 45.00	0.00	O1	GBP 135.00

Batch Number Selection

Rows from Documents

#	Item No.	Item Description	Whse C...	Quantity	Total Needed	Total Selected	Total Batches	Direction
1	B10010	Printer Label v	01	3		3	1	Out

Available Batches

Find

#	Batch	Availabl...	Selecte...	Allocate...
1	BAT01	1		

Selected Batches

#	Batch	Selected Qty
1	BAT01	3

Display Available Batches All

Update Cancel Auto Select

OK Cancel

Feature

- View batch quantities in terms of the document UoM from which the Batch assignment/allocation screen is triggered.

Benefit

- Less confusion: batch selection corresponds to quantity in the document and not the Inventory (storage) UoM.
- Increase warehousing efficiency.

Inventory | Distribution



Feature	Description	Localization
Drop-Ship Warehouse in Template BOM	Drop-Ship warehouse is now available to be chosen in a BOM of type Template.	All



Business Intelligence

SAP Business One 9.3



Analytical Portal (1/2)



SBODEMOGB

All Reports

manager

All Reports

Favourite Reports

Report Scheduling

Search

Purchasing

Expand All

Multi-Document Scenarios

Single Document Transactions

Customer Relationship Management

Expand All

Sales Opportunities Report

Stock

Expand All

Inventory by Item Group per Warehouse

Stock Valuation Method Report

Sales

Expand All

Multi-Document Scenarios

Single Document Transactions

Annual Sales Analysis (by Quarter)

Monthly Customer Status

Financials

Expand All

Budget and Cost Accounting

Financial Accounting

Management Accounting

SBODEMOGB

Report Scheduling

manager

All Reports

Favourite Reports

Report Scheduling

Search

No filters selected

Scheduled Task	Report Name	Category	Type	Creation Time	Action
Monthly Customer Status	Monthly Customer Status	Sales	Crystal	2017-07-14 13:27:53	
Purchase Analysis	Purchase Analysis Report	Purchasing	Excel	2017-07-14 13:27:05	
Opportunity Report	Sales Opportunities Report	Customer Relationship Man...	Excel	2017-07-14 13:25:28	
Sales Analysis	Annual Sales Analysis (by Q...	Sales	Crystal	2017-07-14 13:08:25	

Feature

- Ability to publish and share documents via the Analytical Portal for:
 - Crystal Reports
 - MS Excel
- Access the Analytical Portal via this URL:
<https://<hana-server>:<Port>/Portal>
- Ability to access the Analytical Portal for every user but only authorized reports are being displayed
- The authorized documents can be downloaded or run in different formats:
 - MS Excel – PDF, Excel or HTML
 - Crystal Reports – PDF
- It is not necessary to have an SAP Business One Client or MS Excel installed on client side.
- The documents can be run on different devices such as a web client or mobile device.
- On Premise and On Demand users are supported.

Analytical Portal (2/2)



The screenshot displays the SAP Analytical Portal interface. The top navigation bar shows 'SBODEMOGB' and 'Favourite Reports'. The left sidebar has 'All Reports', 'Favourite Reports', and 'Report Scheduling'. The main content area shows 'Sales' and 'Customer Relationship Management' sections. The 'Sales' section highlights 'Annual Sales Analysis (by Quarter)' and 'Sales Opportunities Report'. The 'Customer Relationship Management' section highlights 'Sales Opportunities Report'. Below this, the 'Sales Opportunities Report' configuration screen is shown, featuring 'Report Parameters' (Format: PDF, Excel, HTML), 'Frequency and Time Range' (Trigger Task Every: 1 Weeks, Start Time: 2017-07-14 13:29:41, End Time: 2017-12-31 12:29:47), 'Keep History For' (last 20 records), and 'Send Result by Email' (Email To, Cc). The bottom section shows the 'Report Running History' table, filtered by 'Annual Sales Analysis (by Quarter)'. The table has columns: Report Name, Scheduled Task, Type, Run Time, Status, Parameter, Remarks, and Action.

Report Name	Scheduled Task	Type	Run Time	Status	Parameter	Remarks	Action
Annual Sales Analysis (by Quarter)	Sales Analysis	Crystal	2017-07-14 1...	Success	Document Ty...	Generate rep...	Download, Refresh
Annual Sales Analysis (by Quarter)		Crystal	2017-07-14 1...	Success	Document Ty...		Download, Refresh

Feature

- Favorite Reports tab appears when a minimum of one report is marked as a favorite.
- Documents can be downloaded directly, or scheduled (daily, weekly, monthly) and sent via mail.
- Report runs (scheduled or manual) are saved in the Report History area:
 - Information like report name, type, start date time, run status etc. are listed.
 - The report result can be downloaded and viewed.
 - The maximum number of report results for each report scheduling task can be configured.

Benefit

- Provides an overview of scheduled reports and historical data.
- Documents can be scheduled and are available on different devices.



New Cockpit Templates 1/2



The screenshot displays the SAP Cockpit interface. At the top, a welcome message reads: "Welcome, Jayson Butler. You are in cockpit of OEC Computers UK." Below this, a "Sales Process" flowchart is visible, showing steps like Sales Quotation, Sales Order, Delivery, Return, A/R DP Invoice, A/R Invoice, A/R Credit Memo, Incoming Payments, and Sales Reports. A "Select Templates" dialog box is open on the right, listing various templates with checkboxes and their visibility status.

Select Templates	
<input type="checkbox"/> Finance	Public
<input checked="" type="checkbox"/> Sales	Public
<input type="checkbox"/> Purchase	Public
<input type="checkbox"/> Inventory	Public
<input type="checkbox"/> My Sales Cockpit	Public
<input type="checkbox"/> Start Cockpit	Private

Below the flowchart, another screenshot shows a bar chart titled "by Sales Amount". A context menu is open over the chart, offering two options: "Update My Cockpit" and "Save As Template".

Feature

- New Cockpit Templates available for Finance, Sales, Purchase and Inventory
- Users can create own Cockpit Templates and set them as Public
- Selection of available Cockpit Templates via "Select Templates" button
- Choose the template which should be shown

Benefit

- Possibility to create different views
- More flexibility
- Create different Cockpit views for different roles or for test purposes

New Cockpit Templates 2/2



The image shows two overlapping SAP windows. The top window, titled 'Cockpit Management - Setup', contains a table with the following data:

#	Name	Description	Create Date	Published By	Publication Date	Provider
1	Finance			SYSTEM		SAP
2	Sales			SYSTEM		SAP
3	Purchase			SYSTEM		SAP
4	Inventory			SYSTEM		SAP
6	My Sales Cock		05.07.17	manager	05.07.17	IT
11	Start Cockpit		19.07.17			
13						

The bottom window, titled 'User Groups', is in the 'Create Group' mode. It shows the following fields and options:

- Name:** Sales
- Description:** Sales
- Group Type:** Authorization
- Cockpit Template:** Sales (selected from a dropdown menu that also shows Inventory, Purchase, Finance, and My Sales Cockpit)
- Users:** A table with columns #, User Code, Name, and From/To. The data includes:

#	User Code	Name	From	To
1	Kora			
2	Vicky			
3	brad			
4	john	John Peterson Logistic		
5	alex	Alex Torras General		
6				

Buttons for 'OK', 'Cancel', and 'Publish' are visible at the bottom of the 'User Groups' window.

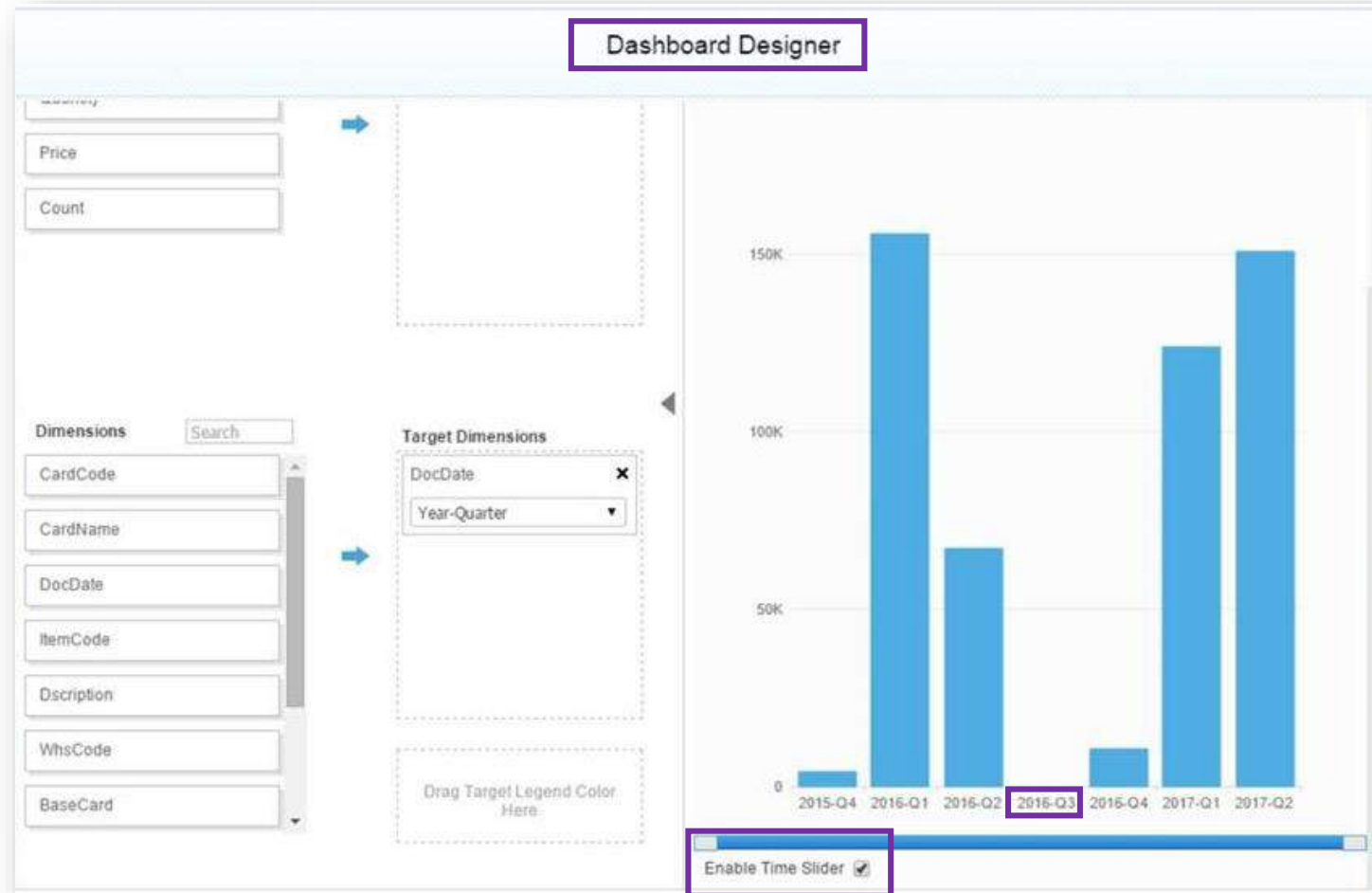
Feature

- Newly created Cockpit Templates can be published to all users
- To do this special authorization is necessary
- Cockpit template can be assigned by a power user to special user groups
- For each system authorization group a default Cockpit Template is available
- Only one template can be assigned to one default authorization group

Benefit

- Possibility to create different Cockpit views
- Central template management and assignment

Pervasive Analytics Dashboard Designer



Feature

- User can enable the Time Slider function.
- After enabling Time Slider, empty data records are shown in the Dashboard.
- Empty data records are shown as zero.

Benefit

- All units of time (day, month, week, year etc.) are shown in the Dashboard.
- Provides an overview of the whole time frame including records shown as zero with no interruption.



Platform | Extensibility

SAP Business One 9.3



Web-based Workflow Management



The screenshot displays the SAP Business One Workflow Manager web interface. At the top, the header includes the SAP logo, 'SAP Business One Workflow Manager', and user information: 'Welcome, B1SiteUser' with links to 'System Landscape Directory' and 'Help'. Below the header is a navigation bar with 'Workflow Settings' (selected), 'Template Assignments', and 'Template Activations'. The main content area is divided into three sections:

- Workflow Service:** Contains a 'Restart' button and a status indicator showing 'Running'.
- Workflow Companies (13):** A table listing workflow companies. A 'Set Password' dialog box is open over this section, showing fields for Database Name (SBODEMOGB), Company Name (OEC Computers UK), Database Type (HANADB), Version (930000), User Name (Workflow), and User Password (masked with ****). The dialog has 'Update' and 'Cancel' buttons.
- Workflow Configurations:** Contains a 'Save' button and configuration options for Log Type (Information, Debug, Error, Warning), Log File Size (5 MBs), and Conditional Event Start Interval (1 Minutes).

Feature

- Web-based management.
- Improved performance (response time) and stability.

Benefit

- Unified and centralized configuration in the System Landscape Directory.

Company Specific Mailer Configuration



General Settings

BP Budget Services Display Font & Bkgd Path Inventory Resources CASH Flow Cockpit Cost Accounting Pricing Hide Functions

At the Beginning of Each Session

- ☐ Perform Data Check
- ☐ Open Exchange Rates Table
- ☐ Display Recurring Postings on Execution
- ☐ Display Recurring Transactions on Execution
- ☐ Send Alert for Activities Scheduled for Today
- ☒ Display Inbox When New Message Arrives
- ☐ Open Window for Credit Voucher Ref. Update
- ☐ Open Postdated Checks Window
- ☒ Display Worklist When New Task Arrives

Internet Definitions

- ☐ Use Proxy Server for Web Connection
- ☐ Enable Case Sensitive Search
- ☒ Enable Transaction Notification
- ☐ Enable Live Collaboration

Integration Framework Connection Timeout (Seconds) 30

Default E-Mail Method

- ☒ SAP Business One Mailer
- ☐ Outlook E-Mail

Telephone No.

Area Code:

For External Line:

Map Service: Google Map

History / Log: 99

Update Messages (Min.) 5

Screen Locking Time (Min.) 30

Open Postdated Credit Vouchers Window No

Alternative Keyboard Usage

- ☐ Use Numeric Keypad ENTER Key as TAB Key
- ☐ Use Numeric Keypad DOT Key as Separator on Display Tab
- ☐ Enable Document Operations by Mouse Only (Such as Add, Update, OK)

Enable Company Specific Mailer Configuration

- ☒ Enable Company Specific Mailer Configuration
- SMTP Server: mail.oec.co.uk
- SMTP Port: 25
- Authentication: Plain Password
- User Name: mail@oec.co.uk
- Password:
- Encoding: English (UK)
- ☐ Use TLS Encryption
- ☐ HTML Direction Right to Left
- ☐ Include Subject in Message Body

Update Cancel

Feature

- Enable company specific mailer configuration.
- Switch between global company mailer configuration and company specific configuration.

Benefit

- Each tenant can have their own mail server in SAP Business One Cloud.

Query Manager UI Enhancements



The screenshot shows the 'Query Manager' window. At the top, there's a title bar with standard window controls. Below it, the 'Query Name' field contains the text 'credit'. The 'Query Category' dropdown is set to 'System'. To the right of the category dropdown is a 'Manage Categories' button. Below the category dropdown, a tree view shows the following structure:

- ▼ System
 - Credit Limit Deviation
 - Customers Credit Limit Deviation
- ▼ General
- ▼ Item Master

At the bottom of the window, there are four buttons: 'OK', 'Cancel', 'Schedule', and 'Create Report'. On the right side of the bottom bar, there are two more buttons: 'New Stored Procedure' and 'Remove'. A double-headed arrow points to the 'Remove' button.

Feature


- Filter the list of queries by query name.
- Expand the form to fit the results on your screen.

Benefit

- Fast access to queries.
- Full view of long query names and folders.

Platform | Extensibility



Feature	Description
EFM Enhancement	Porting from C# to JAVA to support electronic invoices in service layer (Portugal only). 
SAP Business One Studio	SAP Business One Studio supports Visual Studio 2015 and TFS (Team Foundation Server) 2015.
X-App Supports SSO for Service Layer	X-Apps can make calls to Service Layer without requiring the end user login again.
UI-API Lost Focus-Get Focus Improvements	Improved performance of grids when updating calculation fields
Support XML methods for SAPbouiCOM.DBDataSource	Fast data retrieve and manipulation on DBDataSource.
Service Layer as a Service*	A new service on the Service Layer platform which exposes semantic layer views in OData format. * Planned for later patch level in SAP Business One 9.3, version for SAP HANA
Optimized Login Connection	Connect method optimization



Lifecycle Management

SAP Business One 9.3



Centralized Deployment



SAP System Landscape Directory

SLD Version: 930100 | Welcome, B1SiteUser | Help

DB Instances and Companies | **Logical Machines** | Components | Services | Security | External Mapping | Global Settings

Logical Machines (4)

Register Edit

Alias	MachineStatus	Version	CPU Utilization	Memory Utilization	Description	Agent Status	SLD Agent Version	Log
mo-4fe0f729a.mo.sap.corp	Running	-----	3.7%	21.65%		Online		
dewdfth12415	Running	9.30.100 pl00	0.7%	95.77%		Online	9.30.100 PL00	
10.55.179.125	Running	-----	19.0%	11.15%	Employee 1	Online	9.30.100 PL00	
10.55.178.54	Running	-----					9.30.100 PL00	

SAP Business One Components

Deploy Remove Refresh

Component Name Deployment State

Select Components

Name	Installed Version	New Version	Action
Implementation tools			
<input checked="" type="checkbox"/> SAP Business One Client			
<input checked="" type="checkbox"/> 10.55.179.125		9.30.000 PL00	INSTALL
<input checked="" type="checkbox"/> 10.55.178.54		9.30.000 PL00	INSTALL
SAP Business One Client (64bit)			
<input type="checkbox"/> 10.55.179.125			
<input type="checkbox"/> 10.55.178.54			
<input checked="" type="checkbox"/> Data Interface API			
<input checked="" type="checkbox"/> 10.55.179.125			
<input checked="" type="checkbox"/> 10.55.178.54			

Review

Parameter	Value
Installation	
Installation folder (32-bit)	C:\Program Files (x86)\SAP
Selected Features [10.55.178.54]	
Implementation tools - SAP Business One Client	B1Client
Implementation tools - Data Interface API	B1DI/API
Selected Features [10.55.179.125]	
Implementation tools - SAP Business One Client	B1Client
Implementation tools - Data Interface API	B1DI/API

Cancel Previous Start

Feature

- Register MS Windows and SUSE Linux machines of a company
- Remotely install and use the SLD agent for various operations, such as:
 - Creating Server Repository (SBO-COMMON)
 - Installing SAP Business One Client remotely
 - Adding Demo Databases
 - Upgrading SAP Business One Database

Benefit

- Comprehensive and direct management of the company landscape at hand
- Save time in implementation tasks



Embedded Incident Reporting



Recorded Steps

This file contains all the steps and information that was recorded to help you describe the recorded steps to others. Before sharing this file, you should verify the following:

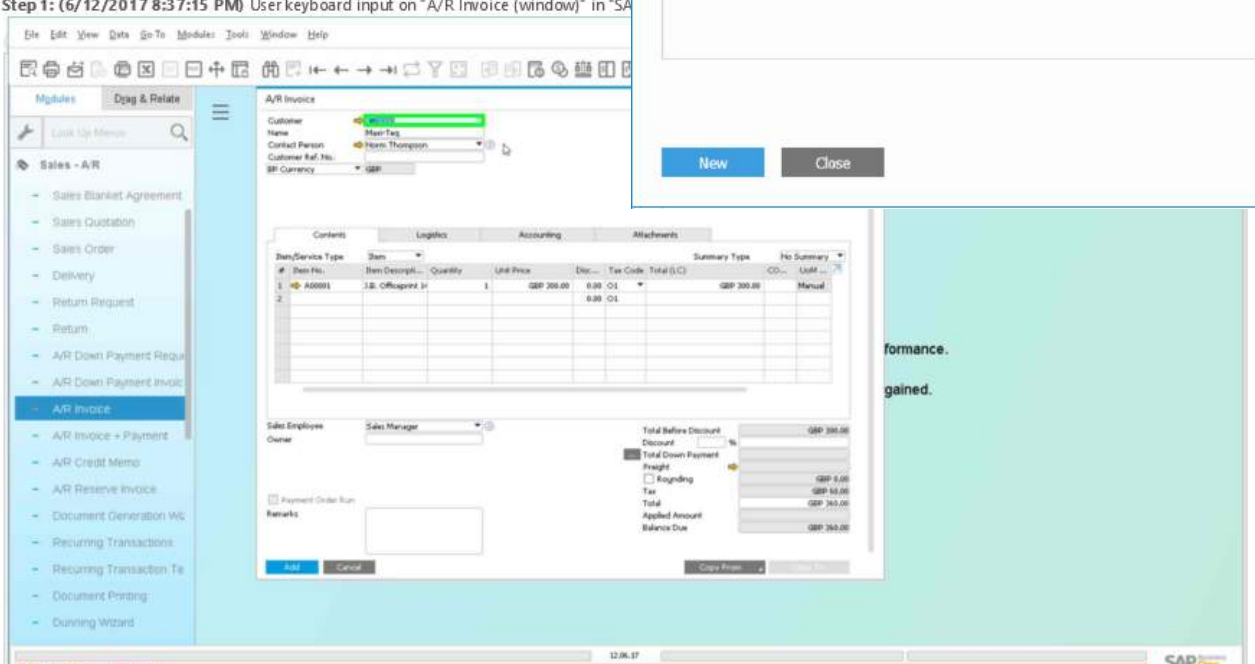
- The steps below accurately describe the recording.
- There is no information below or on any screenshots that you do not want others to see.

Passwords or any other text you typed were not recorded, except for function and shortcut keys that you used. You can do the following:

- [Review the recorded steps](#)
- [Review the recorded steps as a slide show](#)
- [Review the additional details](#)

Steps

Step 1: (6/12/2017 8:37:15 PM) User keyboard input on "A/R Invoice (window)" in "SA



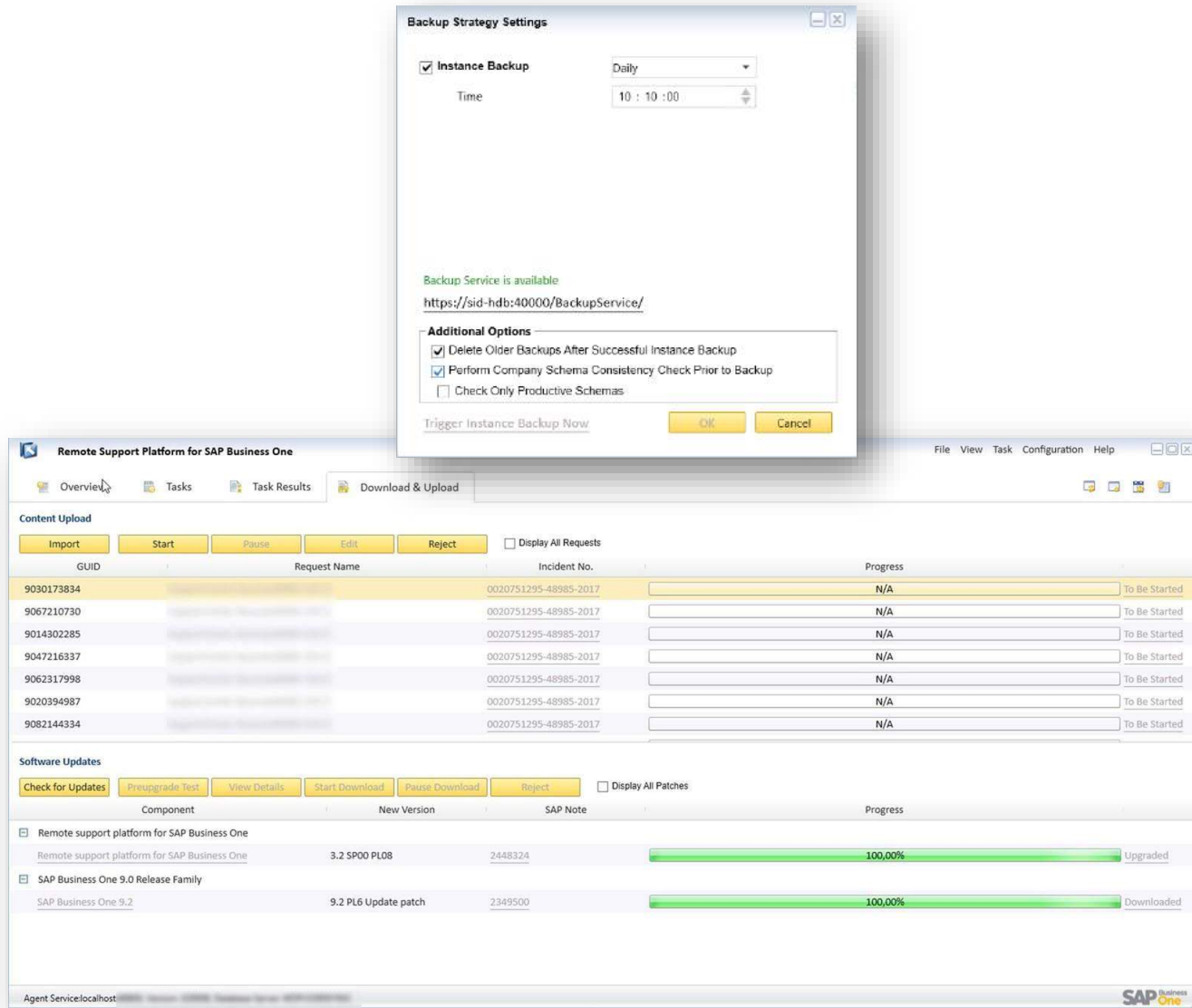
Feature

- Instantly record a problem inside SAP Business One Client
- Document all taken steps as screenshots with text
- E-mail report including issue description and file path to Partner WebDAV is sent to partner by the Remote Support Platform

Benefit

- Provides accurate issue description to SAP Partner
- Reports problems internally to get direct support from colleagues within the company

Remote Support Platform 3.2



Latest Features

- Schema Consistency Check enforcement to Instance Backup feature
 - RSP Task 2315090 performs SAP HANA schema consistency checks described in SAP Note [2116157](#)
 - Ability to run on productive databases only
 - Ability to get email notification about status change
- Simplified Content Upload Requests (CUR) for upload of GoToAssist recordings
 - No need to email the Content Upload request and encryption key.

Benefits

- Consistency check strategy
- Quicker and more effective support

Note: As of SAP Business One 9.3, RSP's versioning is de-coupled from SAP Business One's versioning. RSP 3.2 patches will be delivered together with SAP Business One 9.3, thus allowing a flexible software delivery of RSP.

Thank you.

SAP Global SME Business Unit | Rollout Services

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