

# SAP Business One 9.2

## Release Highlights

April 2016

PUBLIC



SAP

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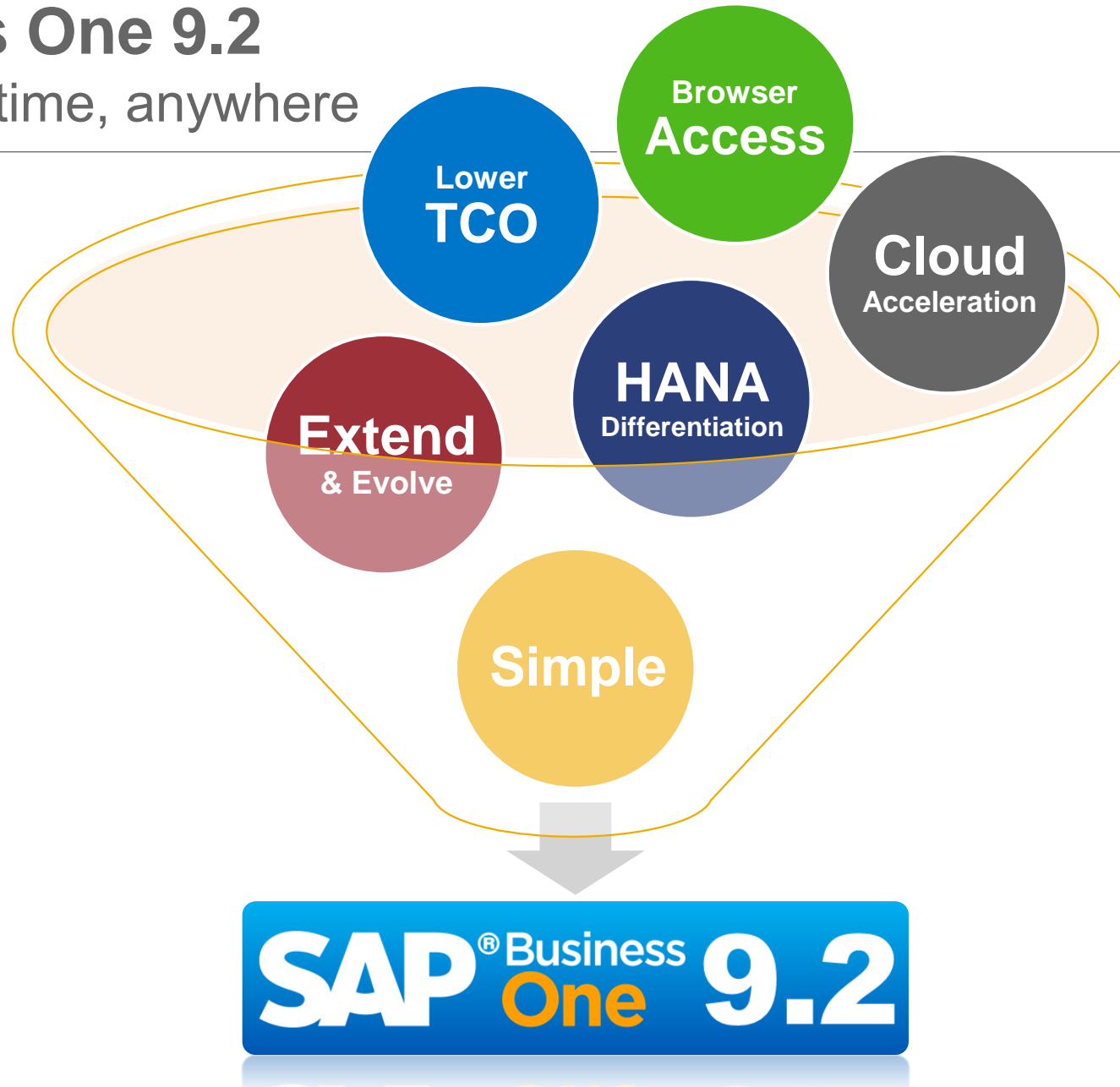
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# SAP Business One 9.2

Run simple... anytime, anywhere



# SAP Business One 9.2

## Highlights (1/2)



### Administration

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Gross Freight



### Business Intelligence



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Interactive Analysis Report Designer  
(Based on Microsoft Excel)



New Predefined KPIs



Interactive Analysis Reports Designer



Intelligent Forecast

# SAP Business One 9.2

## Highlights (2/2)



### Inventory | Distribution

Price Update Wizard

Pick & Pack Updates

Item Cost Standard Valuation

UoM Restriction for Bin Locations

Stock Counting Print Preview

Inventory Posting & Opening Balances



### MRP | Production

MRP Wizard

Forecasts

Production Updates



### Lifecycle Management

Remote Support Platform 3.2

Simplified Setup Wizard

SAP Business One Package



Server Components Setup Wizard

On-Premise Support User

Logging & Tracing Updates



### Platform | Extensibility

Browser Access

DI/UI objects and feature enhancement

UDO, UDF, UDT related improvements



# Administration

SAP Business One 9.2

# Extension of Field Lengths



The screenshot displays two SAP screens. The top screen is 'Item Master Data' with the 'Item No.' field highlighted in red, containing the value '12345678909876543210123456'. The bottom screen is 'Sales Order' with a table showing item details. The 'Item No.' and 'BP Catalogue No.' fields in the table are highlighted with a red box.

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

## Feature

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

## Benefit

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

# Electronic Document Framework



The screenshot displays the SAP A/R Invoice interface. The 'Contents' tab is active, showing a table with columns: #, Item No., BP Catalog No., Quantity, Unit Price, Disc..., Tax Code, and Total (LC). The table contains one row with Item No. P10001, BP Catalog No. 912.50, Quantity 1, Unit Price 912.50, and Tax Code 01. Below the table, the 'Sales Employee' field is set to Bill Levine, and the 'Owner' is Thompson, Brad. A red arrow points from the 'Add' button at the bottom left of the invoice window to the 'XML\_Output' folder in Windows Explorer. The folder contains one file named '13\_001\_000357\_19112015' of type 'XML File'. A Notepad window is open, showing the XML content of this file.

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

## Feature

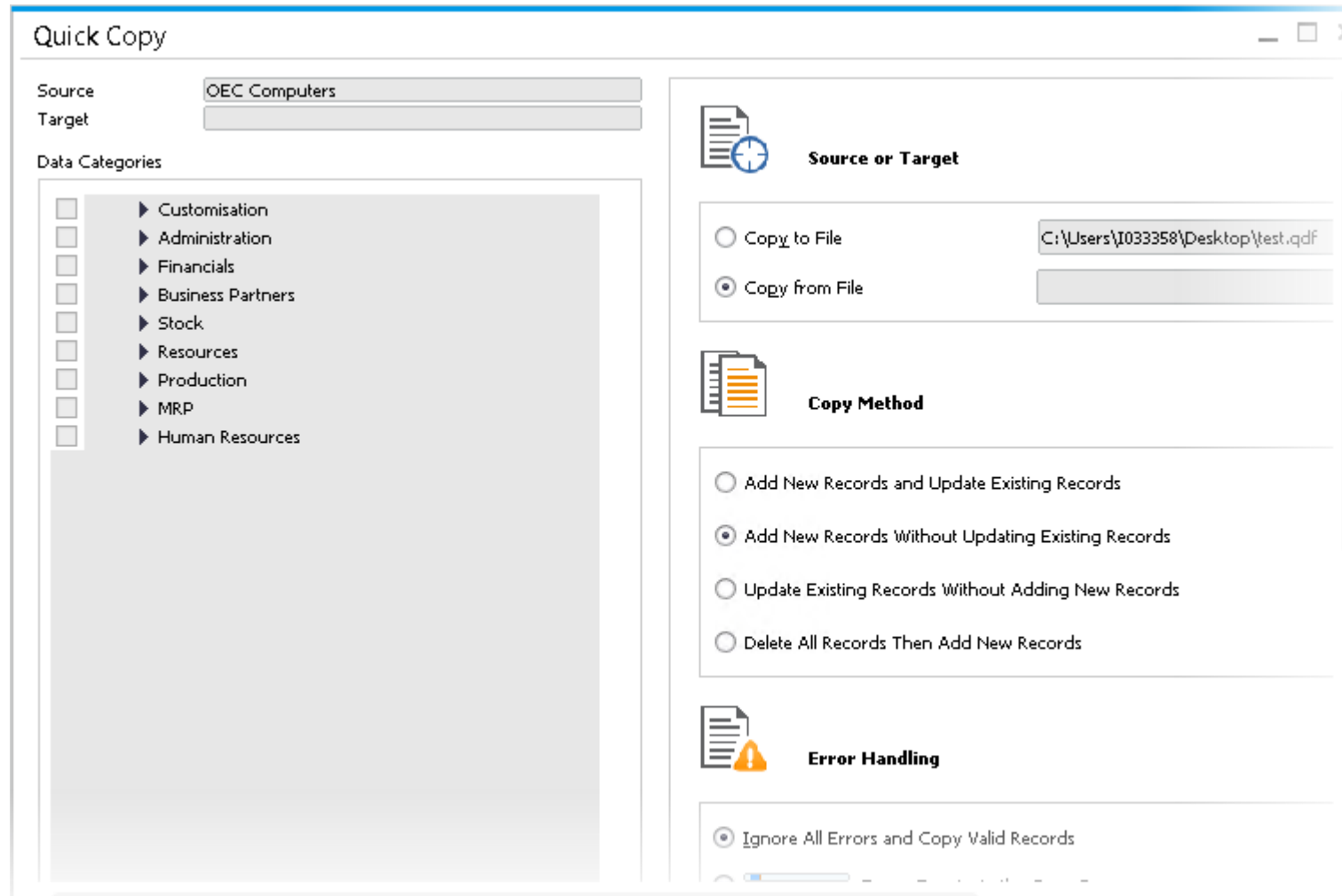
- Creation of outbound documents in electronic format saved to a folder.
- Supported transactions: A/R marketing documents
- Utilization of Electronic File Manager to define mapping and output format which can be adjusted according to requirements.
- Template provided via SAP note for a quick start in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

## Benefit

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



# Quick Copy



## Feature

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

## Benefit

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

# Business Partner Data Ownership (1/2)



**Business Partner Master Data**

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

**General Settings**

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

**List of Employees**

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

## Feature

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

# Business Partner Data Ownership (2/2)



Data Ownership Authorizations

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

OK Cancel Full Authorization Read Only No Authorization

Data Ownership Sharing Options

Documents Business Partner Windows

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

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

Update Cancel

Data Ownership Sharing Options

Documents Business Partner Windows

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

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

Update Cancel

## Feature

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

## Benefit

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



The screenshot shows the SAP Business One Job Service configuration interface. At the top, there is a header with the SAP logo and the text 'SAP Business One Job Service'. Below this is a navigation bar with 'Job Service Configuration' selected. Underneath, there are two tabs: 'Mail Settings' and 'Alert Settings', with 'Alert Settings' being the active tab. The main content area is divided into two sections. The first section is for 'SAP Business One User', where the user 'AlertSvc' is selected, and its status is 'RUNNING' with a 'Stop' button. A 'Save' button is also present. The second section is for 'Database Server', showing the IP address '10.55.83.215:30015' and a 'Save' button. Below this is a table titled 'Company Databases' with columns for 'Company Name', 'Database Name', 'Localization', and 'Version'. Two rows are listed: 'OEC Computers Deutschland' (SBODEMODE, DE, 920001) and 'OEC Computers UK' (SBODEMOGB, GB, 920001), with the latter selected via a checkbox.

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

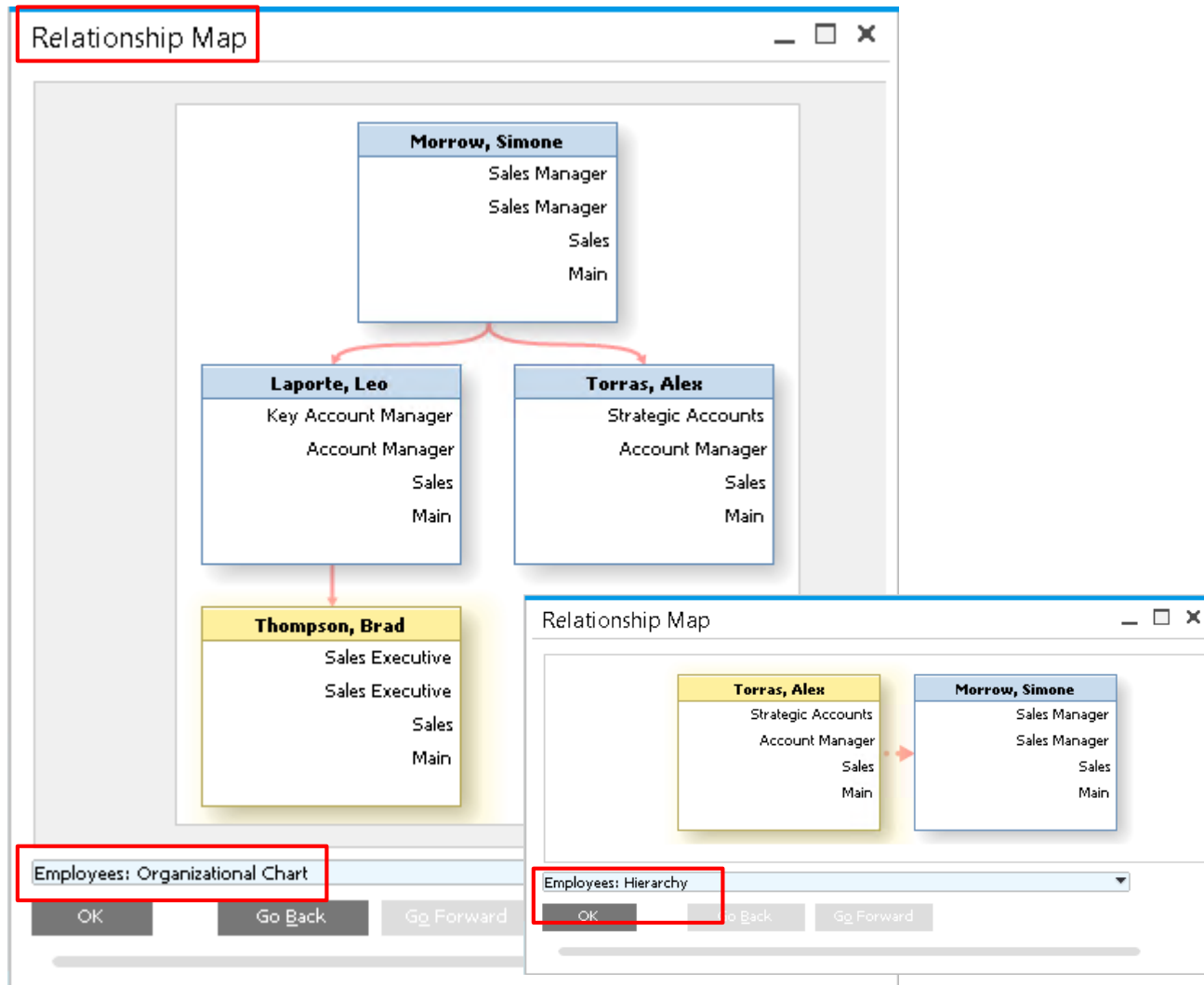
## Feature

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

## Benefit

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

# Human Resources Relationship Map



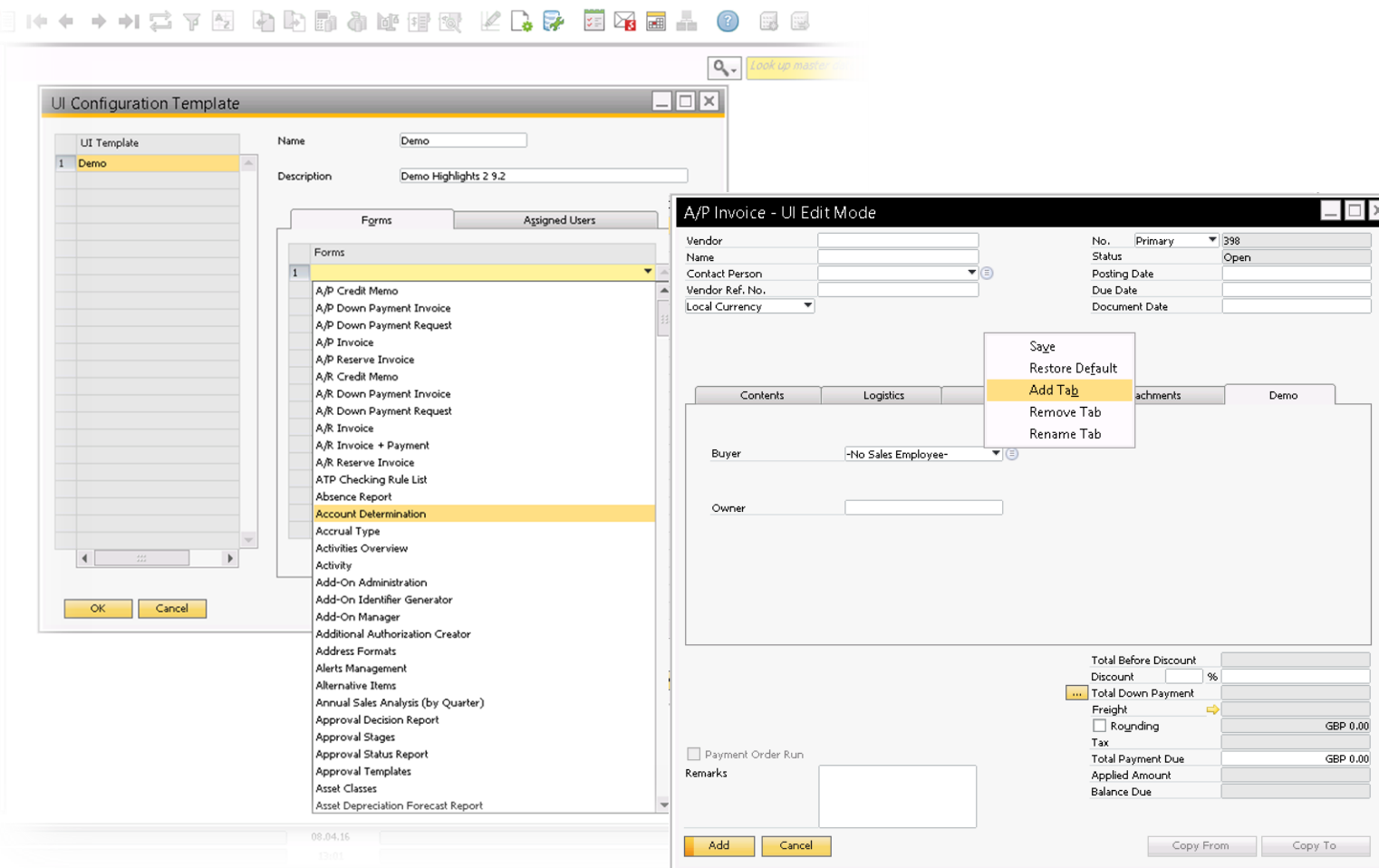
## Feature

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

## Benefit

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

# Enhancement in Configurable UI Framework



## Enhancement

- All SAP Business One Forms can be configured
- Assignment templates to Super Users is supported
- Add additional tab

## Benefit

- Simplified UIs improve user experience and productivity



Feature	Description
<b>Approval Procedure</b>	Sometimes a document that has already been approved needs to be updated. If the user requires approval to update the document, the approval process will be initiated again to approve any changes made prior to adding the document to the system.
<b>Import from Excel</b>	You can now import the following data types from Microsoft Excel into SAP Business One; Prices Lists & Business Partner catalogue numbers.
<b>ENTER Key as a TAB key</b>	You can now use the ENTER key on the numeric keypad as the TAB key to move between fields for faster data entry. Furthermore, the DOT key on the numeric keypad can be used as the separator you defined on the Display tab in the General Settings window. You can also disable the document operations (Add, Update, OK) by the main ENTER key.
<b>License Mechanism</b>	The license mechanism now prevents users from logging into the same company with the same user code which is already logged in for Indirect Users and Browser Access. You can either cancel your logon or confirm your logon (which will lock out the other user using the user account).



Feature	Description
<b>License Server</b>	License server based on https is now fully integrated into the System Landscape Directory. No additional license file is needed on further servers to support a high availability landscape.





# Financial Management

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# Align Postings of Journal Entries with Marketing Documents



**A/R Invoice**

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

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

Contents | Logistics | Accounting

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

Sales Employee: Sales Manager  
Owner:  
Payment Order Run:  
Remarks:

**Journal Entry Preview**

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

Origin: IN  
Origin No.: 357  
Trans. No.:  
Template Type:  
Template:  
Indicator:  
Project:

Blanket Agreement:

Expand Editing Mode

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

Close  Display in FC  Display in SC

## Feature

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

## Benefit

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

# IFRS Enhancements



**Delivery**

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

No. Primary: 384  
Status: Open  
Posting Date: 04.09.15  
Delivery Date: 04.09.15  
Document Date: 04.09.15

Contents: Logistics  
Journal Remark: Deliveries - C20000  
BP Project:  
Payment Terms: 2P10Net30  
Payment Method: Incoming BT  
Indicator:  
Federal Tax ID: GB566678929  
Order Number:  
Manually Recalculate Due Date: 0 Months + 30 Days  
Cash Discount Date Offset:  
 Use Shipped Goods Account

Sales Employee: Sales Manager  
Owner: Butler, Jaysor

Remarks:

**Edit Chart of Accounts**

**G/L Account Details**

Title  Active Account

GL Account: 99200000-01-001-01  
Account Name: Deferred Tax (HO, USA, GA)

Level: 4

**G/L Account Location**

Drawer: ar  
Parent Article: 10  
Loc. in Drawer: After 99100000-0

**Chart of Accounts**

**G/L Account Details**

Title  Active Account

GL Account: 1000000000000000  
Name: Updated Assets  
External Code:  
Currency:  
Level: 1

**Updated Assets**

- 90002 - Share Capital
- 90003 - Called Up
- 90004 - Called Up
- 100000 - Called Up Capital Not Paid
- 100001 - Not Called Up
- 100002 - Not Called Up
- 100010 - Uncalled Share Capital
- 100011 - Fixed Assets
- 100012 - Intangible Assets
- 100013 - Formation Expenses
- 101000 - Capitalised Formation Expenses
- 101010 - Capitalised Business Expansion Costs
- 101500 - Accumulated Depreciation - Capitalised Formation Exp.

Updated Assets  
Liabilities  
Capital and Reserves  
Turnover

## Feature

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

## Benefit

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

# Fixed Assets - Virtual Item



**Asset Master Data**

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

Inventory Item  
 Sales Item  
 Purchase Item  
 Virtual Item  
 Enforce Serial Numbers

**A/P Invoice**

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

No. Primary 404  
Status  
Posting  
Due D.  
Docum

**Capitalization**

Origin PU Origin No. 404  
Depreciation Area \*  
Reference

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

**Asset Serial Numbers - Setup**

Rows from Documents

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

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

## Feature

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

## Prerequisite

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

## Benefit

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

# Checks for Payment - Authorization



Checks for Payment

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

## Feature

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

Find

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

## Benefit


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



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

# Financial Management



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



# Project Management

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# Project Management



Project

Project Type  External  Internal

BP Code → C20000

BP Name PC Welt GmbH & Co.KG

Contact Person Christian Gander

Territory

Sales Employee Hermann Ludger

Owner → Leitner, Robert

Project with Phases

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

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

## Feature

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

## Benefit

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



# **Sales | Purchasing | Service**

**SAP Business One 9.2**



# Re-open Sales/Purchase Order Process



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

## Feature

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

## Benefit

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

# Campaign Management



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

Two dialog boxes are overlaid on the wizard:

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

## Feature

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

## Benefit

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

# Extended Service Module



Service Call

**Service Call Type**

Sales  Purchasing

Business Partner Code → S10000

Business Partner Name Servicepartner

Contact Person Müller

General Business Partner Remarks Activities Solutions

Ship To Lieferadresse Karlsruhe Str. 185  
68219 Mannheim GERMANY

Bill To Rechnungsempfänger Karlsruhe Str. 185  
68219 Mannheim GERMANY

Territory

Add Cancel

## Feature

- Support vendors in Service Module for:
  - Service Calls
  - Service Contracts
  - Customer Equipment Cards
- New tab for Business Partner data in Service Call to capture most relevant BP information. This can be edited, but does not update BP Master Data.

## Benefit

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

# Document Linking SAP Note 2273995



The screenshot displays the SAP A/R Invoice interface. The 'Accounting' tab is active, showing a table of referenced documents:

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

The 'Relationship Map' window is overlaid, showing a diagram of document relationships:

- Business Partners:** C23900 (Parameter Technology)
- Sales Order:** 373 (26.04.16) and 374 (26.04.16)
- Sales Quotation:** 366 (26.04.16) with value GBP 528.75
- A/R Invoice:** 362 (26.04.16) with value GBP 1,057.50

Red dashed arrows indicate the following relationships:

- Sales Order 373 is linked to A/R Invoice 362.
- Sales Order 374 is linked to A/R Invoice 362.
- Sales Quotation 366 is linked to A/R Invoice 362.

The 'Marketing Document: Referenced Documents' dropdown is highlighted at the bottom of the Relationship Map window.

## Feature

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

## Benefit

- Link documents to another – better transparency on related transactions

# Preferred Single Bin Allocation

## SAP Note 2264012



Warehouses - Setup

Warehouse Code: 05 Warehouse Name: Bin Warehouse

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

Bin Loc. Code Separator: -

No. of Bin Locations: 73

Default Bin Location: 05-A1-S1-L1

Enforce Default Bin Loc.

Auto Alloc. on Issue: Single Choice

Auto Alloc. on Receipt:

- Receive Up to Max. Qty
- Receive Up to Max. Weight

Enable Receiving Bin Locations

Receive Items By: Bin Location Code Order

Restrict Receipts to Empty Bin Locations

Receive up to: Maximum Qty

Tax Office:

Address Name 2:

Address Name 3:

OK Cancel

### Feature

- Possibility to issue items from a preferred single bin

### Benefit

- Faster issuing thanks to single location



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



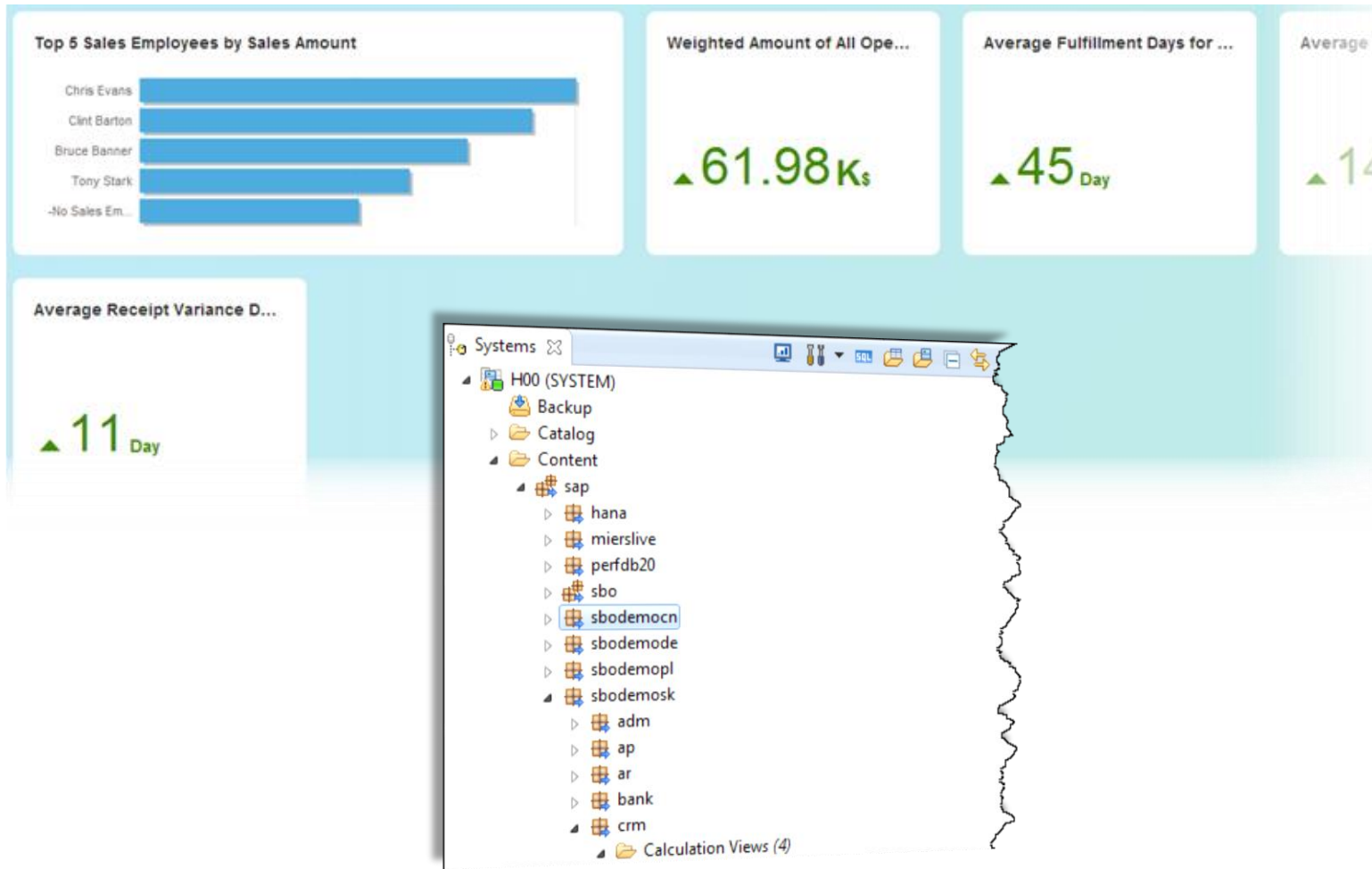


# Business Intelligence

SAP Business One 9.2



# HANA Model Content



## Feature

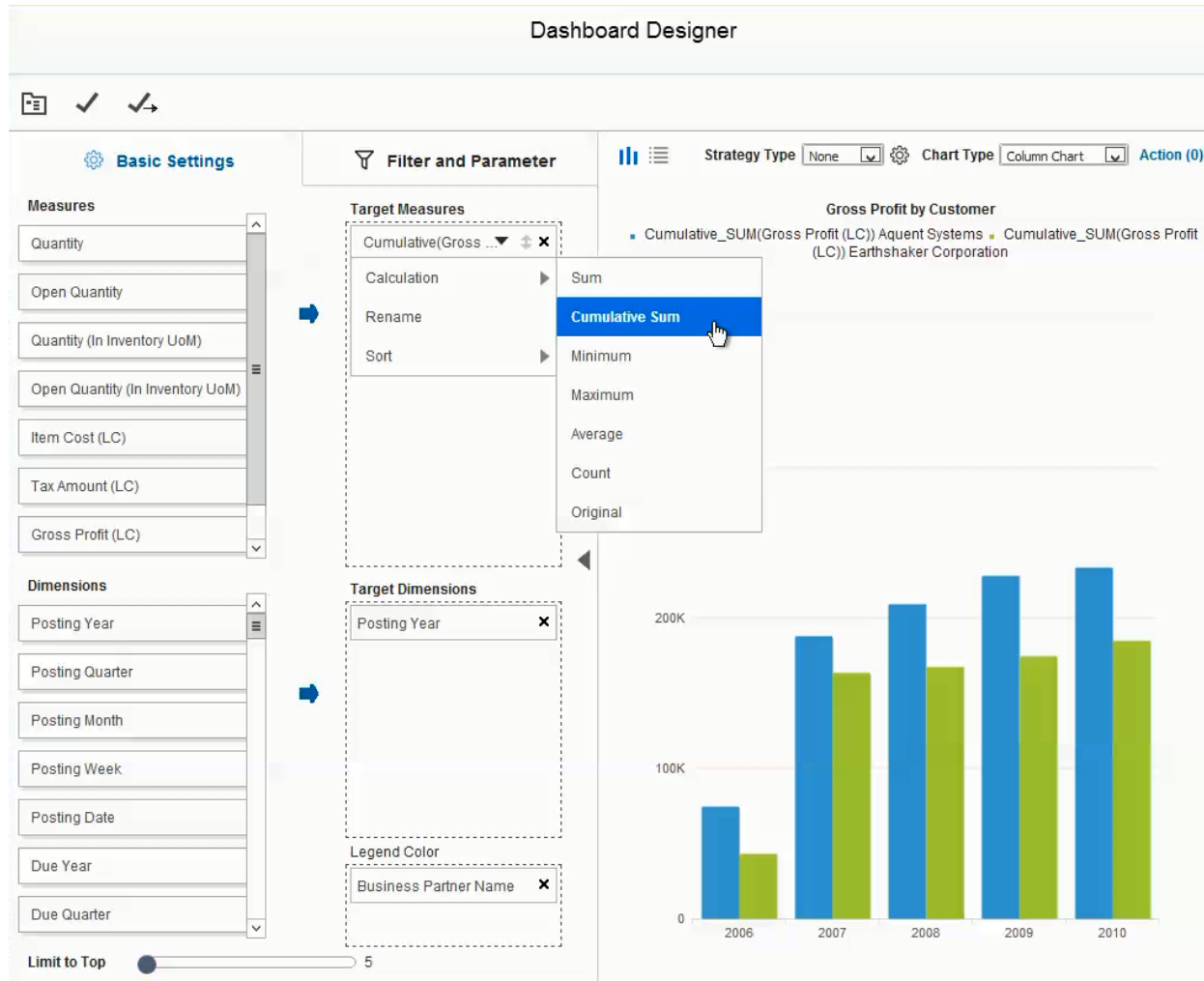
### Enhanced Semantic Layers:

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

## Benefit

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

# Pervasive Analytics Designer



## Feature

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

## Benefit

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

# Filter Editor in Pervasive Analytics Designer



## Enhancement

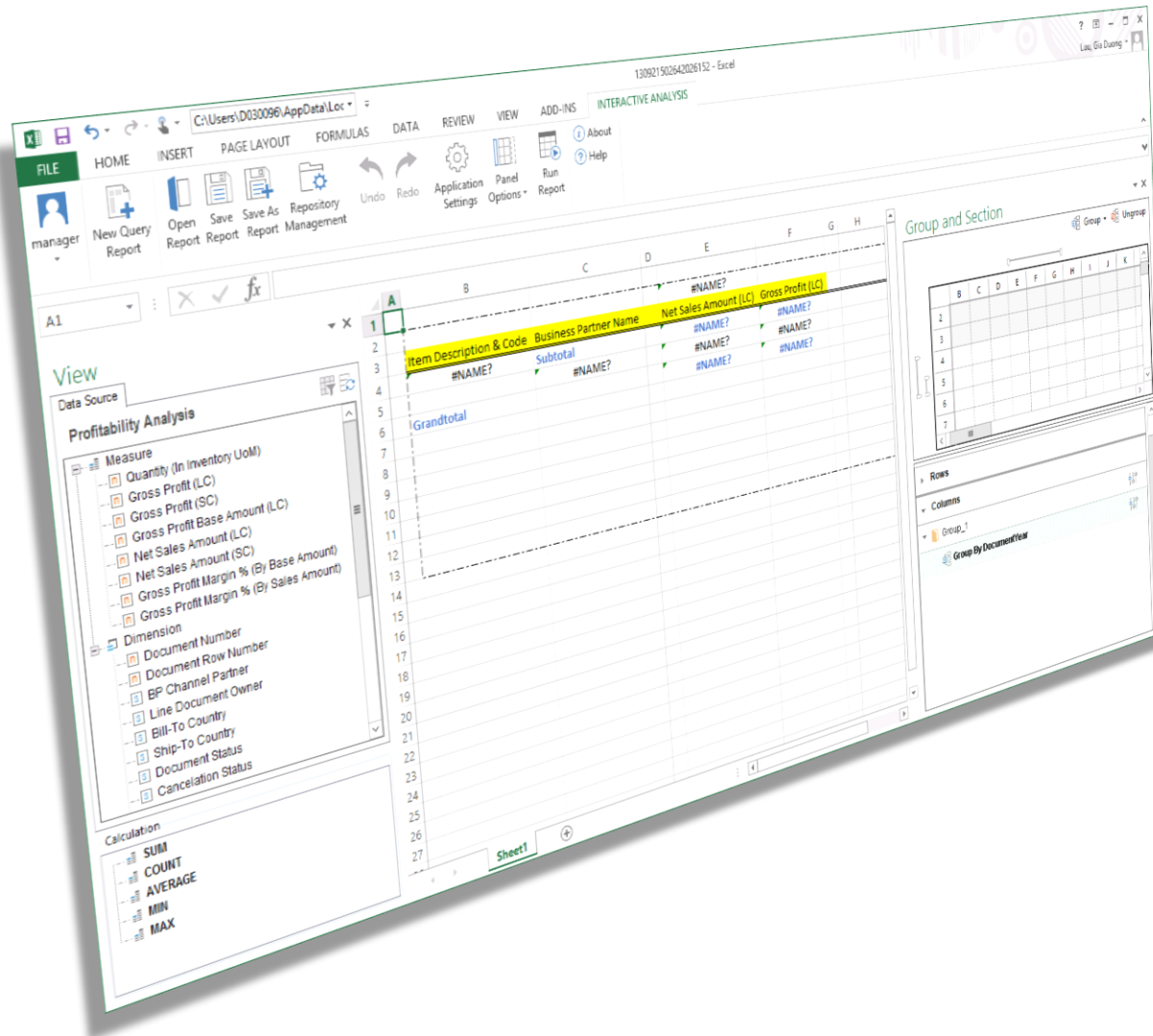
- Dynamic time range can be set in filter
- Filter parameter “current user” can be applied

## Benefit

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

# Excel Reports

built with Interactive Analysis Report Designer



## Feature

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

## Benefits

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

# Excel Reports Designer



The screenshot shows the SAP Excel Reports Designer interface. The ribbon includes FILE, HOME, INSERT, PAGE LAYOUT, FORMULAS, DATA, REVIEW, VIEW, ADD-INS, and INTERACTIVE ANALYSIS. The main workspace is a grid with columns A-H and rows 1-22. Annotations include:

- basic functions**: A green box pointing to the ribbon's 'DATA' and 'FORMULAS' tabs.
- Data source**: A green box pointing to the 'Data Source' pane on the left, which shows a 'Profitability Analysis' measure tree.
- working area**: A green box pointing to the main grid area.
- grouping**: A green box pointing to the 'Group and Section' pane on the right, which shows a grid with columns B-K and rows 2-7.
- Calculation types e.g. subtotals**: A green box pointing to the 'Calculation' pane at the bottom left, which lists functions like SUM, COUNT, AVERAGE, MIN, and MAX.
- sort & filter**: A green box pointing to the 'Rows' and 'Columns' panes on the right, which show 'Group By DocumentYear'.

Two blue arrows labeled 'Drag & drop' indicate the interaction between the 'Data source' and 'Calculation' panes with the main grid.

# Excel Reports

## Preview in Designer



130921554482399356 - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ADD-INS INTERACTIVE ANALYSIS

manager New Query Report Open Report Save Report Save As Report Repository Management Undo Redo Application Settings Panel Options Run Report About Help

Data Source

Profitability Analysis

- Measure
  - Quantity (In Inventory UoM)
  - Gross Profit (LC)
  - Gross Profit (SC)
  - Gross Profit Base Amount (LC)
  - Net Sales Amount (LC)
  - Net Sales Amount (SC)
  - Gross Profit Margin % (By Base A
  - Gross Profit Margin % (By Sales A
- Dimension
  - Document Number
  - Document Row Number
  - BP Channel Partner
  - Line Document Owner
  - Bill-To Country

2

3 Item Description & Code Business Partner Name

4 #NAME? Subtotal

5

6 Grandtotal #NAME?

7

8

9

10

11

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15

16

17

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130921544173555073 - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW ADD-INS

Luu, Gia Duong

G18

			2006	2007	2008			
	Item Description & Code	Business Partner Name	Net Sales Amount (LC)	Gross Profit (LC)	Net Sales Amount (LC)	Gross Profit (LC)	Net Sales Amount (LC)	Gross Profit (LC)
4	J.B. Officeprint 1111 (A00	Subtotal	50475	16345,5	80375	25838,98	12750	5860,68
5		ADA Technologies	2250	571,5	15625	3885,46	1875	726,78
6		Andreas Ackermann						
7		Aquent Systems			875	492,26	2625	1476,78
8		Earthshaker Corporation	8250	2095,5	625	242,26		
9		Mashina Corporation	9375	2381,25	13750	3339,6	1875	726,78
10		Maxi-Teq	6750	2553,75	18750	7191,38	2250	1101,78
11		Microchips	2250	571,5	8625	2366,22	1875	726,78
12		One Time Customer			2625	1125		
13		Parameter Technology	12150	4596,75	7500	2768	2250	1101,78
14		SG Electronics	9450	3575,25	12000	4428,8		
15		Web Customer						
16		Werner Richter						
17	J.B. Officeprint 1186 (A00	Subtotal	107662,5	35545,24	95812,5	30196,98	19800	9540,47
18		ADA Technologies	8437,5	1998,45	12750	3130,26		
19		Andreas Ackermann						
20		Aquent Systems	16537,5	7522,83	2100	1207,86	3937,5	2264,76
21		Earthshaker Corporation	10125	2398,14				
22		Mashina Corporation	9000	2131,68	32625	8129,58	2812,5	1139,76
23		Maxi-Teq	10125	3685,95	18900	7495,98		
24		Microchips	12937,5	3064,39	16312,5	4472,1	4500	1823,58
25		One Time Customer			13125	5761,2		
26		Parameter Technology	25650	9337,74			5175	2610,11
27		SG Electronics	14850	5406,06			3375	1702,26
28		Web Customer						
29		Werner Richter						

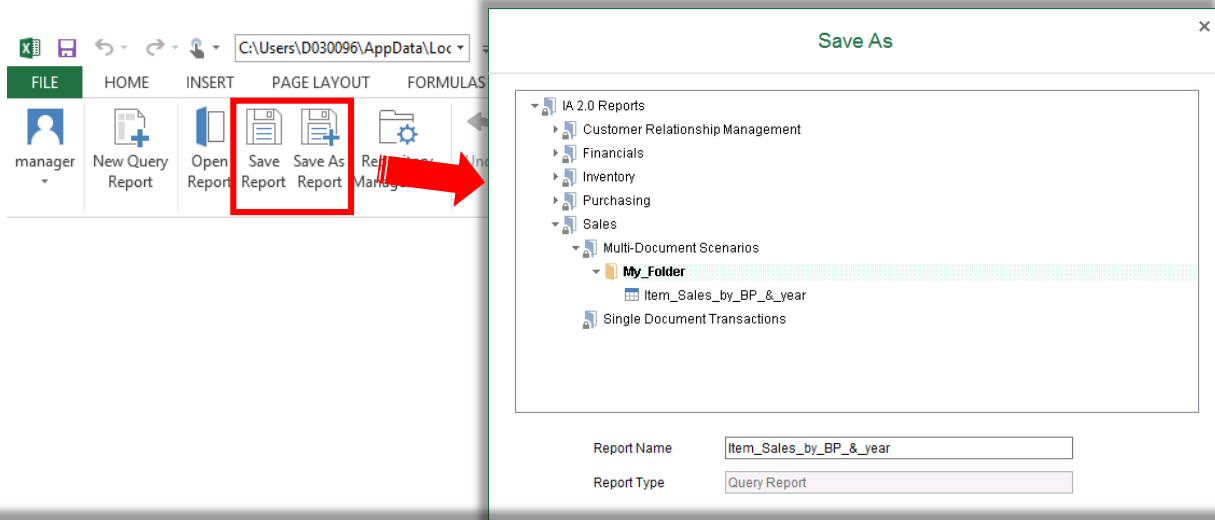
Sheet1

# Excel Reports

Saved Reports can be opened from SAP Business One



Design Time



Run Time

Item Description & Code	Business Partner Name	Net Sales Amount (LC)	Gross Profit (LC)	Net Sales Amount (LC)	Gross Profit (LC)	Net Sales Amount (LC)	Gross Profit (LC)
J.B. Officeprint 1111 (A00) Subtotal		50475	16345,5	80375	25838,98	12750	5860,68
ADA Technologies		2250	571,5	15625	3885,46	1875	726,78
Andreas Ackermann				875	492,26	2625	1476,78
Aquent Systems				625	242,26		
Earthshaker Corporation		8250	2095,5				
Mashina Corporation		9375	2381,25	13750	3339,6	1875	726,78
Maxi-Teq		6750	2583,75	18750	7191,38	2250	1101,78
Microchips		2250	571,5	8625	2866,22	1875	726,78
One Time Customer				2625	1125		
Parameter Technology		12150	4596,75	7500	2768	2250	1101,78
SG Electronics		9450	3575,25	12000	4428,8		
Web Customer							
Werner Richter							
J.B. Officeprint 1186 (A00) Subtotal		107662,5	35545,24	95812,5	30196,98	19800	9540,47
ADA Technologies		8437,5	1998,43	12750	3130,26		
Andreas Ackermann							
Aquent Systems		16537,5	7522,83	2100	1207,86	3937,5	2264,76
Earthshaker Corporation		10125	2398,14				
Mashina Corporation		9000	2131,68	32625	8129,58	2812,5	1139,76
Maxi-Teq		10125	3685,95	18900	7495,98		
Microchips		12937,5	3064,39	16312,5	4472,1	4500	1823,58
One Time Customer				13125	5761,2		
Parameter Technology		25650	9337,74			5175	2610,11
SG Electronics		14850	5406,06			3375	1702,26
Web Customer							
Werner Richter							



# Excel Reports

## Parameters



### Enhancement

Parameters can be defined

→ end user will be able to limit the report outcome

### Benefit

- User can focus on analyzing only relevant data
  - Lower data volume to be transferred
- increased performance

# Intelligent Forecast



Forecasts

Forecast Code: Forecast  
Forecast Name: Forecast  
Start Date: 01.06.2015

Intelligent Forecast

Configuration

Order History

Select Item By: Item  
Item No. From: 01 To: 10  
Item Group: [Empty]

Forecast Algorithm

Algorithm: Auto

Forecast Value (Forecast Period: 6 months 2015.06.01--2015.12.31)

Item	Warehouse	02.2015 Quantity	02.2015 Quantity	02.2015 Quantity	02.2015 Quantity	02.2015 Quantity	02.2015 Quantity	02.2015 Quantity
01	01	899	899	899	899	899	899	899
02	01	899	899	899	899	899	899	899
03	01	899	899	899	899	899	899	899

Forecast Value (Forecast Period: 6 months 2015.06.01--2015.12.31)

Max History Period: 100 Months  
current algorithm: TES

Line Chart: Past Data (blue), Forecast Start (yellow), Forecast End (orange)

## Feature

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

## Benefit

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



# Inventory | Distribution

SAP Business One 9.2



# Prices Update Wizard



The screenshot shows the SAP Prices Update Wizard interface. The left sidebar contains a navigation menu with categories like Inventory, Price Lists, and Special Prices. The main window is titled 'Prices Update Wizard' and is in the 'Simulation' step. It displays a table of simulation results for item A00001 (J.B. Officeprint 1420) across various price lists and currencies.

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

## Feature

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

## Benefit

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

# Bin Locations - Unit of Measure Restriction



The screenshot shows the SAP Bin Location Master Data form. The 'UoM Restrictions' dropdown menu is highlighted with a red box, showing the following options: None, Specific UoM, Single UoM Only, Specific UoM Group, and Single UoM Group Only. The 'UoM' field is set to '6Pack'. Other fields include Warehouse (05), Aisle (A1), Shelf (S1), Level (L1), Bin Location Code (05-A1-S1-L1), and Item Qty (310).

## Feature

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

## Benefit

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

# Pick & Pack



**Pick and Pack Manager - Selection Criteria**

Status:  Group By:

Manage:  Sales Orders  Reserve Invoices  
 Production Orders  Inventory Transfer Requests

Production Order No.:   
 Delivery/Due Date:   
 Customer:   
 Fulfillment %:

Type:   
 Item:   
 Resource:

Warehouses:

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

Sort By:

**Pick and Pack Manager**

Open Released Picked

Find Document Number:

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

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

## Feature

### Pick and Pack Selection Criteria:

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

### Pick and Pack Manager:

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

## Benefit

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

# Item Cost Standard Valuation



Inventory Revaluation

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

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

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

FIFO Layers

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

Remarks:   
Journal Remark: Inventory Revaluation

## Feature

- Setting standard valuation of item cost now only possible via Inventory Revaluation.
- No longer possible to set item cost via Item Master Data in Add or Update mode > when adding new items with standard valuation method, Inventory Revaluation window will open automatically.

## Considerations

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

## Benefits

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

# Inventory | Distribution



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





# MRP | Production

SAP Business One 9.2



# Material Resource Planning (1/2)



The image shows two overlapping dialog boxes from the SAP MRP Wizard. The top dialog, 'Items list - selection criteria', has the following fields: 'Item No. From' and 'To' (text boxes), 'Group' (dropdown menu set to 'All'), 'Item Properties' (text box set to 'Ignore'), and a checked checkbox for 'Expanded Selection Criteria'. Below this, there are several dropdown menus, with the first one, 'Preferred Supplier', highlighted by a red box. The bottom dialog, 'Items List - Update Selected Items', has an 'Update Option' section with two radio buttons: 'Update with Specific Values' (selected) and 'Update with Values from Item Master Data'. Below this are several checkboxes for MRP parameters: 'MRP Procurement Method' (checkbox), 'MRP Component Warehouse' (checked), 'MRP Order Interval' (checkbox), 'MRP Order Multiple' (checkbox), 'MRP Minimum Order Qty' (checkbox), 'MRP Lead Time' (checkbox), and 'MRP Tolerance Days' (checkbox). To the right of these checkboxes are corresponding input fields. The 'MRP Component Warehouse' field is a dropdown menu with 'From Bill of Materials Line' selected, and this selection is also highlighted by a blue box.

## Feature

### MRP Wizard Updates:

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

## Benefit

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

# Material Resource Planning (2/2)



Forecasts

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

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

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

Buttons: OK, Cancel, Generate Forecast

## Feature

Forecasting:

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

## Benefit

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

# Production - Standard Cost (1/2)



**Item Master Data**

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

Bar Code  
 Unit Price  
 Primary Curre

General Purchasing Data Sales Data Inventory Data Planning Data Production Data

Phantom Item  
 Issue Method Backflush

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

Production Std Cost GBP 12.00  
 Include in Production Std Cost Rollup

**Production Std Cost Update - Selection Criteria**

Update Production Standard Cost from Current Valuation Cost

Item No. From To  
 Item Group All  
 Item Properties Ignore

OK Cancel

**Production Std Cost Rollup - Selection Criteria**

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

OK Cancel

**Bill of Materials**

Product No. 10013  
 Product Description Custom Computer  
 BOM Type Production  
 Production Std Cost GBP 846.00  
 Planned Average Production Size 10.00

Quantity 1 Warehouse 01  
 Price List Base Price  
 Distr. Rule  
 Project

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

## Feature

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

## Benefit

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

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



Production Order

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

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

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

Remarks:   
 OK Cancel

Resource Master Data

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

General Capacity Data Planning Data Fixe

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

## Feature

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

## Benefit

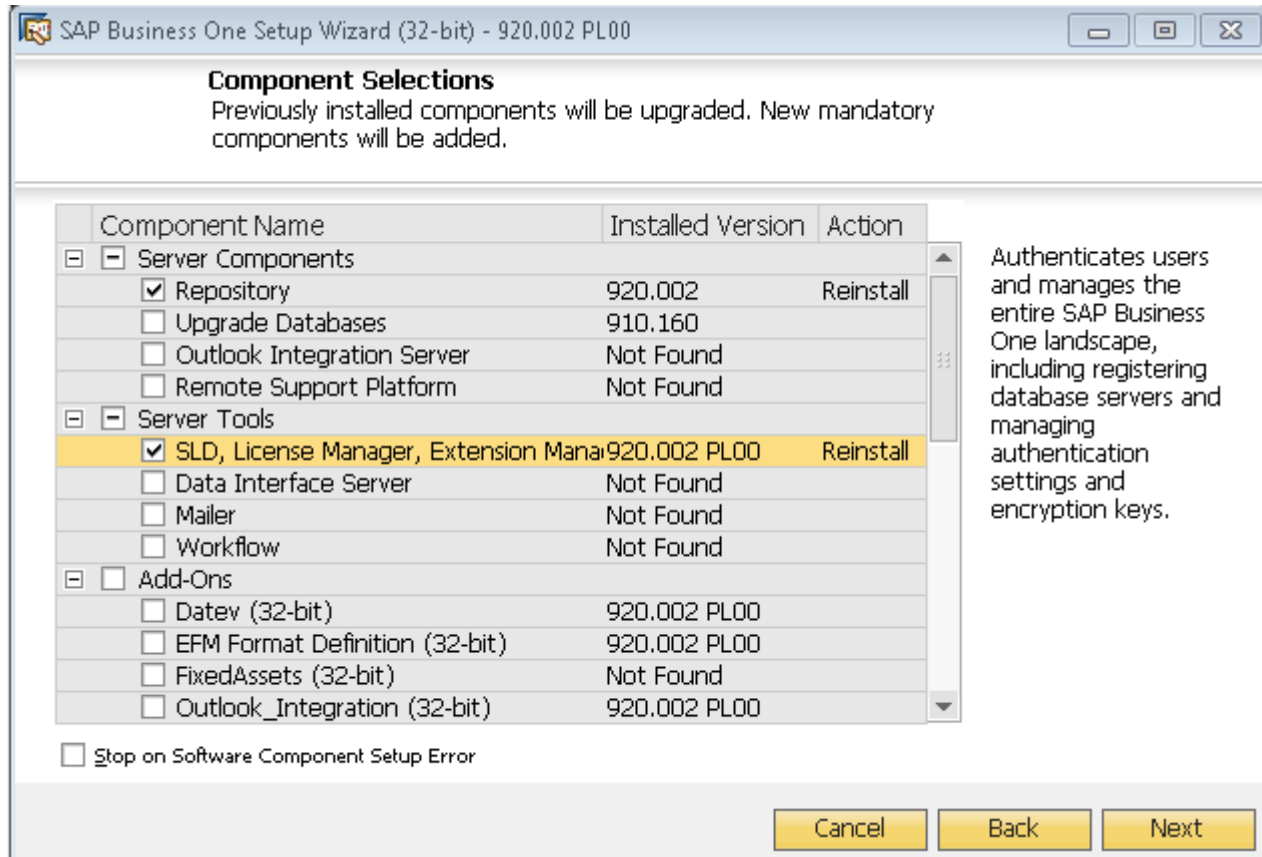
- Greater visibility of individual components required for consumption.
- More easily plan allocation of items/resources across multiple production runs.



# Lifecycle Management

SAP Business One 9.2

# Installation & Upgrade Simplification



## Feature

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

## Benefit

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

# Logging & Tracing



The screenshot displays the SAP Business One user interface. On the left is the 'Main Menu' with categories like Administration, Financials, Opportunities, Sales - AR, Purchasing - AP, Business Partners, Banking, Stock Management, Resources, Production, and MRP. The 'Administration' menu is expanded, showing options such as 'Choose Company', 'Exchange Rates and Indexes', 'Time Sheet', 'System Initialization', 'Setup', 'Data Import/Export', 'Utilities', 'Approval Procedures', 'Licence', 'Integration Service', 'Add-ons', 'Workflow', and 'Alerts Management'. In the center, the 'Logger Settings' dialog box is open, showing 'Business Information Level' set to 'Errors Only' and 'System Information Level' set to 'Custom'. Below these are options to 'Restore Default Settings', 'Apply changes to this machine', and 'Apply changes to all machines'. The 'Log File Max Size' is set to 5 MB and 'Log Folder Max Size' is set to 90 MB. The 'Log Files Location' is 'C:\ProgramData\SAP\SAP Business One\Log\SAP Business One\SAPAdmin\Bu...'. At the bottom of the dialog are 'Open Folder' and 'Clean Log Folder' buttons. In the foreground, an 'Open' file dialog is open, showing a list of log files in the 'SAPAdmin > BusinessOne' folder. The list includes files like 'Client.AuditLogger.20150812\_170522.pid32...' and 'Client.b3logger.20150812\_170542.pid3280.I...'. The 'File name' field is empty, and the file type is set to 'All Files (\*.\*)'.

## Feature

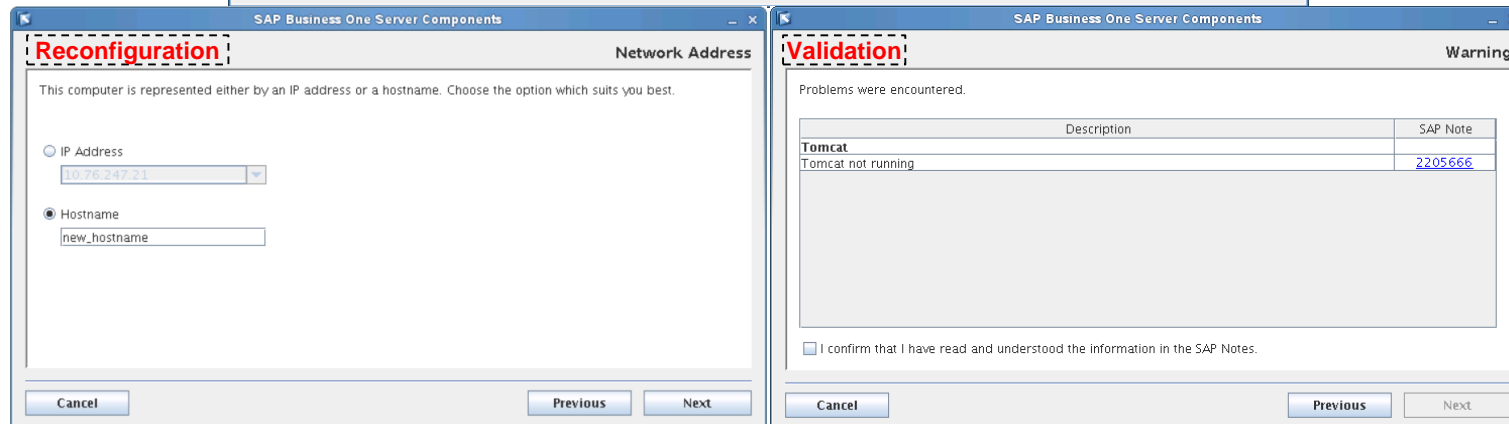
- Improved log file management with central access to support information.
- New logging and tracing objects added to MS SQL Server trace.
- Improved logger settings enabling full logging to record messages of all client issues.

## Benefit

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



# HANA Server Components & Setup Wizard



## Feature

### Server Components Setup Wizard:

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

### Reconfiguration mode:

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

### Validation mode:

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

# Remote Support Platform 3.2

## Communication with New SAP backend via Technical User



**Configuration**

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

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

**Enable SAP Channel**

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

S-User: S00 [Info icon]

Password: [Masked] [Info icon]

**Test Connection**

**Approvals**

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

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

### Feature

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

### Benefits

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

# Remote Support Platform 3.2

## Central Task Management in the RSP Studio



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

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

**Task Details**

Document General

Document:

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

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

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

### Feature

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

### Benefit

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

# Remote Support Platform 3.2

## Landscape Synchronization with System Landscape Directory



The screenshot shows the 'Remote Support Platform for SAP Business One' interface. The main window is titled 'Configuration' and has tabs for 'Server', 'SLD', and 'Databases'. The 'SLD' tab is active, showing a checkbox for 'Synchronize Company Database Information from System Landscape Directory' which is checked. Below this, there are input fields for 'Server' (http://kvs\_rds:1080/sld/sld0100.svc), 'User Name' (B1SiteUser), and 'Password' (masked with dots). A 'Test Connection' button is next to the password field. Below these fields, there is a section for 'RSP Public Server' with input fields for 'Host Name' and 'Port' (48802). A 'Save' button is at the bottom right of the configuration window. The background shows a task list with columns for GUID and Name, and a 'Task Configuration' section with a 'Document' field.

### Feature

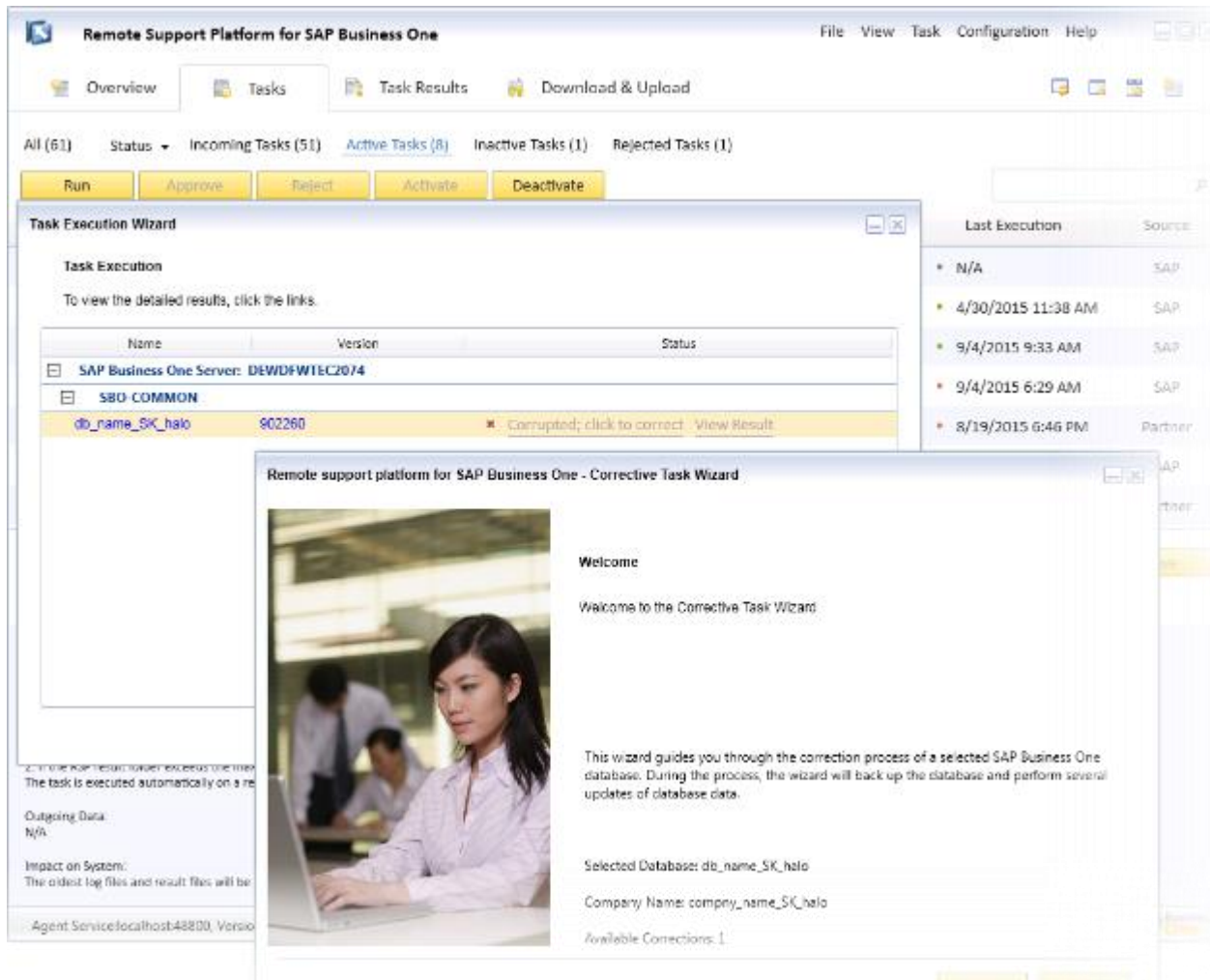
- Synchronize company database information from System Landscape Directory (SLD) in RSP 3.2.

### Benefits

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

# Remote Support Platform 3.2

## SAP Business One, version for SAP HANA



### Feature

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

### Benefit

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







# Platform | Extensibility

SAP Business One 9.2



# Browser Access



The screenshot displays the SAP Business One web interface. The left sidebar contains navigation menus for Administration, Financials, Sales Opportunities, Sales - A/R, Sales Reports, Purchasing - A/P, Business Partners, Banking, Inventory, Resources, and Production. The main content area is divided into several panels:

- Business Partner Master Data:** Shows fields for Code (C01), Name (Customer 01), Foreign Name, Group (Customers), Currency (US Dollar), Federal Tax ID, Account Balance, Deliveries, Orders, and Opportunities.
- Sales Analysis by Customer (Annual):** A table with columns for Customer Code, Customer Name, A/R Invoice, Total A/R Invoice, Gross Profit, Gross Profit %, and Total Open IN. Below the table is a 3D bar chart showing Gross Profit and Gross Profit % for five customer codes.
- INVOICE:** Displays invoice details including Document Number (99), Document Date (05/12/15), Page (1/2), Customer No., Federal Tax ID, and a table of items with columns for Quantity, UoM, Price, Tax %, and Total.

## Feature

- Securely access SAP Business One from a Browser.
- Supports hybrid mode:
  - Users have the choice to use the SAP Business One client in Microsoft Windows Desktop or Browser Access mode.

## Benefit

- No need to install and upgrade client software.
- Simpler lifecycle management with minimized eco-system effort.
- Lower overall total cost of ownership.
- Access securely from any location with a compatible browser.



# Hybrid Infrastructure for Browser Access



## Existing Remote Access Mode\*

Remote Desktop Client



Remote Desktop Service

opens a SAP Business One session using MS Windows user interface



## New Browser Access Mode

Web Browser\*\* HTML5 UI

https request

Browser Access Dispatcher

opens a SAP Business One session using web user interface

SAP Business One Client  
Web UI Server  
Web UI Engine

UI-API  
Add-ons

Company Database  
(SAP HANA or MS SQL)



### Notes:

\*Required for some use cases where limitations exist -> see SAP Notes: [2194215](#), [2194233](#).

# User Defined Fields and System Tables



The screenshot shows the SAP Activity window for a 'Phone Call' activity. The 'General' tab is active, and a red box highlights the 'Goods Receipt' and 'Goods Return' fields, which are user-defined fields. The 'Field Data' dialog box is open, showing the configuration for the 'Goods\_Receipt' field. The field is linked to the 'Accounts' system object, specifically the 'OACT - Accounts' table. The field is alphanumeric, 15 characters long, and has a regular structure. The validation is set to 'Linked to Entities'. The dialog box also includes options for 'Link to System Object', 'Set Linked Table', 'Link to UDO', 'Set Default Value for Field', and 'Mandatory Field'.

Field Name	Value
Goods Receipt	428
Goods Return	9

Title	Description
Goods_Receipt	Goods Receipt

Type	Length
Alphanumeric	15

Structure
Regular

Validation
Linked to Entities

Link to System Object
<input checked="" type="radio"/> Link to System Object
<input type="radio"/> Set Linked Table
<input type="radio"/> Link to UDO

Set Default Value for Field
<input type="checkbox"/> Set Default Value for Field

Mandatory Field
<input type="checkbox"/> Mandatory Field

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

## Feature

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

## Benefit

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



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



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



# Thank you

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