



Version: Preview Release

SAP Business One 9.3

Release Highlights

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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*

Scheduled Batch Transactions for Payments

Electronic File Layout Templates



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

SAP Business One Components

Embedded Incident Reporting

System Landscape Directory Enhancements

Remote Support Platform 3.2 Updates



Administration

SAP Business One 9.3



Authorization Simplification



The image shows a screenshot of the SAP authorization configuration interface. On the left, a navigation tree under 'Setup' shows 'User Groups' highlighted. The main window is 'User Groups', where a group named 'Finance' is being configured. The 'Select Type' dropdown is set to 'Authorisation', and the 'Group Type' is 'Authorisation'. The 'Active From' and 'To' dates are set to '01.06.17' and '30.06.17' respectively. Below this, a table lists users assigned to the group:

#	User Code	User Name	Department	From	To
1	Kora	Kora Dean	General		
2	Vicky	Vicky Purchas	General	05.06.17	09.06.17
3					

Below the 'User Groups' window is the 'Users - Setup' window, which is used to create or modify users. It shows fields for 'User Code', 'User Name', 'E-Mail', 'Branch', 'Department', and 'Groups'. The 'Copy Form Settings' button is highlighted, which opens a dialog box for copying form settings to a group.

The 'Copy Form Settings' dialog box has a 'Groups' tab selected, showing a table of groups:

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

Below the table, there are checkboxes for 'User Preferences', 'Message Preferences', and 'Tgoltip Preview Preferences', all of which are checked. The 'Copy' button is highlighted.

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

Set Commission by

Sales Employees
 Items
 Customers

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

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

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

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 draft document with status Pending/Approved and initiating the approval process again.
- Enable updating a previously approved document and initiating the approval process again.

Benefit

- 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 Support User

User Code: mark
User Name: mark

Defaults:

General Services **FontBkgd**

Bind with Microsoft Windows Account: []
Employee: []
E-Mail: []
Mobile Phone: []
Mobile Device ID: []
Fax: []
Branch: Main
Department: General
Groups: []
Password: []
 Password Never Expires
 Change Password at Next Logon
 Locked

OK Cancel Copy Form Settings

User Defaults

Code: [] Description: []

General Defaults **FontBkgd** Print Credit Cards Path

Skin Style: Fiori
Color: Classic
Language: []
Font: []
Font Size: []
Preview: AaBbYyZz - abc

Background: []
Browse...

Image Display: Centralized

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 Font & Background 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 displays three overlapping SAP windows. The top window, 'Import from Excel', shows a dropdown menu for 'Data Type to Import' with 'Journal Entry' selected. The middle window, 'Authorizations', shows a tree view with 'Data Import' expanded and 'Import from Excel' highlighted. The bottom window, 'Serial Numbers - Setup', shows a table with one row of data and an 'Import From Excel...' button highlighted.

#	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

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

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.

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: [empty]

Origin: [empty], Origin No.: [empty], Trans. No.: [empty], Template Type: [empty], Template: [empty], Indicator: [empty], Project: [empty]

Trans. Code: [empty], Ref. 1: [empty], Ref. 2: [empty], Ref. 3: [empty]

Blanket Agreement: [empty]

Fixed Exchange Rate
 Reverse
 Adj. Trans. (Period 13)
 EU Report
 Automatic Tax
 Manage Deferred Tax
 Manage WTax

G/L Acct/BP Code: [empty], G/L Acct/BP Name: [empty], Ref. 1: [empty], Ref. 2: [empty], Ref. 3: [empty], Offset Account: [empty]

Debit (FC): [empty], Credit (FC): [empty], Debit: [empty], Credit: [empty], Debit (SC): [empty], Credit (SC): [empty]

Posting Date: 12.05.17, Due Date: 12.05.17, Doc. Date: 12.05.17, Project: [empty], Tax Group: [empty], Distr. Rule: [empty], Remarks: [empty]

Primary Form Item: [empty]

#	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	

Display in FC
 Display in SC

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 £					
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 - Goodi					
01.01.17	110000	Freehold Land					

Business Partners Opening Balance

Opening Balance Account: 100000, 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 Technolog	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			



Change Log Cleanup Utility



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 Resou			
<input type="checkbox"/>		Employee Master Data		

Execute Cancel

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

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

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.

Quick Copy



Quick Copy

Source: OEC Computers UK
Target:

Data Categories

- Customization
- Administration
- Financials
- Business Partners
- Inventory
- Resources
- Production
- MRP
- Human Resources

Source or Target

- Copy to File
- Copy from File
- Copy to Company: OEC Computers UK(dewdfth12415:30015)

Copy Method

- Add New Records and Update Existing Records
- Add New Records Without Updating Existing Records
- Update Existing Records Without Adding New Records
- Delete All Records Then Add New Records

Error Handling

- Ignore All Errors and Copy Valid Records
- Errors Terminate the Copy Process

If Target Records Are Missing UDFs

Copy Options

- When Copying Objects with Accounts
- When Copying Empty Fields
- Force Backup Before Starting Copy Process
- Allow Copying When Multiple Connections to the Database Exist Copy Process

Note: To ensure data integrity, it is recommended that you avoid copying while there are multiple connections to the data

Choose Company

User ID: Password: Change User

Log on with Current Domain User

Current Server: HANADB dewdfth12415:30015

Database: SBODEMOGB

Companies on 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

Find By: Company Name Database Name

OK Cancel

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



The image shows two screenshots of the SAP Business One license information interface. The top screenshot is a window titled 'License Information' with a close button. It features a header image of a woman working at a desk. Below the image is the SAP Business One logo. The main text reads: 'This software is licensed to SAP AG [REDACTED] (0000 [REDACTED]) - Production system - Expires on 04.01.19.' Below this, there is a warning: 'Attention, if your company has not licensed SAP Business One, you are not authorized to use this software.' A paragraph of fine print follows: '"Test system" and "Development system" cannot be used for Productive use. If you have any questions about your license, please contact your SAP partner. Alternatively, you can use this email address: sapb1licensing@sap.com. Please note that use of the relevant license rights represents a copyright infringement and that SAP reserves the right to take legal action in order to protect its interests.'

The bottom screenshot is a smaller, floating version of the same license information window. It contains the same text as the top screenshot, but with a 'View All' link at the bottom right. The SAP Business One logo is also present at the bottom of this window.

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



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

Return Request

Customer: C20000 No.: Primary 1
 Name: Maxi-Teq Status: Closed
 Contact Person: Norm Thompson Posting Date: 10.05.17
 Customer Ref. No.: Due Date: 10.05.17
 Local Currency: Document Date: 10.05.17

#	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.: Manual A00001 Inventory Item
 Description: J.B. Officeprint 1420 Sales Item
 Foreign Name: Purchase Item

Item Type: Items
 Item Group: J.B. Printers
 UoM Group: Manual Bar Code: Manual
 Price List: Base Price Unit Price: Primary Curn GBP 200.00 Manual

Inventory Data

Set Inv. Method By: Warehouse Manage Inventory by Warehouse
 UoM Name: Inventory Level:
 Weight: Required (Purchasing UoM):
 Minimum:
 Maximum:

Valuation Method: Moving Average

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

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

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

Doc. No.	Customer Code	Customer Name	Customer Ref. No.	Due Date	Amd

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

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.

Service Call Related Documents Details

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

Items

#	Item No.

Labor and Tr

#	Item No.

Document Type

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

Add

Cancel



Gross Price Mode



Company Details

Business Partner Master Data

Code: Manual C30000 Customer

Name: Microchips

Local Currency: Local Currency

Account Balance: 2,142.00

Deliveries: 2,159.90

Orders: 14,585.66

Opportunities: 3

Foreign Name:

Group: Large Accounts

Currency: British Pound

Federal Tax ID: GB566678935

Price Mode: Gross

Price List: Gross Price

Enable Separate Net and Gross Price Mode:

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

A/R Invoice

Customer: C30000

Name: Microchips

Contact Person: Judy Brown

Customer Ref. No.:

Local Currency:

Price Mode: Gross

#	Item No.	Item Descripti...	Quantity	Unit Price	Gross Price	Tax Code	Disc...	Gross Price af...	Gross Total (LC)
1	A00001	J.B. Officeprint 14	1	GBP 200.00	GBP 240.00	O1	10.00	GBP 216.00	GBP 216.00
2	A00002	J.B. Officeprint 11	1	GBP 100.00	GBP 120.00	O1	5.00	GBP 114.00	GBP 114.00
3	A00003	J.B. Officeprint 11	1	GBP 150.00	GBP 180.00	O1	0.00	GBP 180.00	GBP 180.00

Gross Price

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

Price Lists (1/2)



Item Master Data

Item No. Manual R00010 Inventory Item
 Description Nail Sales Item
 Foreign Name Purchase Item
 Item Type Items
 Item Group Hardware
 UoM Group Hardware
 Price List Base Price

Bar Code Each
 Unit Price Primary Curr GBP 1.00 Box
 Pricing Unit Box

Set Inv. Method By Warehouse
 UoM Code Each
 UoM Name Eac
 Weight
 Inventory Counting UoM Code
 Inventory Counting UoM Name
 Items per Counting Unit 1 Each
 Valuation Method Moving Average

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

Manage Inventory by Warehouse

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 Net

#	Item No.	Item Description	Base Price List	F..	Base Price	Price	Ma...	Inventory UoM	Pricing Unit
60	P10002	PC - P4 2.4G, DDR 1	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	TR00001	Travel Expense per 1	Base Price	1	GBP 200.00	GBP 200.00	<input type="checkbox"/>	Manual	Manual
71	Z000001	Tablet PC 64GB Black	Base Price	1	GBP 700.00	GBP 700.00	<input type="checkbox"/>	Manual	Manual
72	Z000002	Tablet PC 64GB Whit	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:
 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: ...

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

Effective Discount Groups: Lowest Discount
 Effective Price: Highest Price

Business Partner Bank:
 Bank Country:
 Bank Name: Barclays
 Bank Code: 33445577
 Account:
 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	<input checked="" type="checkbox"/>
2			Regular Sales Price		0.00	Price - Pri.		<input checked="" type="checkbox"/>

Active From 01.05.17 To 31.05.17

OK Cancel Add Items Copy Discounts

Feature

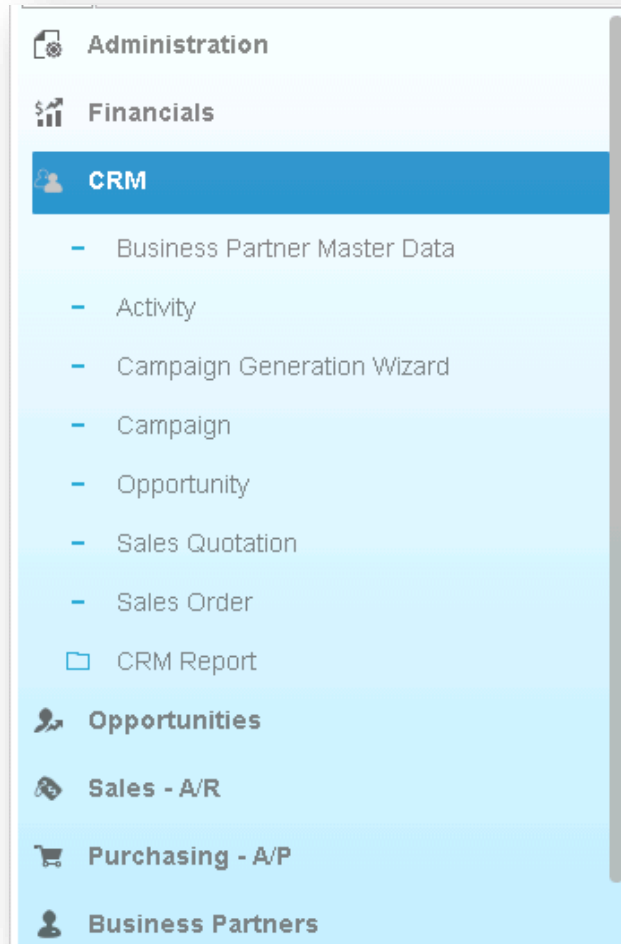
- Pricing hierarchy per BP – options to override the existing logic for selecting effective prices by applying the highest/lowest price per BP.
- Special prices can be limited by an active period.

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 details for a 'Phone Call' activity. The 'Assigned To' field is set to 'Recipient List' and 'Management Team'. The 'Assigned By' field is 'Jayson Butler'. The activity is scheduled for 17.05.17 from 17:29 to 17:44, with a duration of 15 minutes.
- 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 their handlers:

Number	Start Date	Start Time	Handled By	Activity	Recurrence	BP Name	Contact Person	St...
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				→ C239							
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 | Status: On Hold
 Ignore Prices Specified in Blanket Agreement
 Payment Terms: 2P10Net30 | Owner: |
 Payment Method: Incoming BT | Renewal
 Shipping Type: Fedex EM | Reminder: Day(s)
 Settlement Probability %: 0.00
 Remarks:

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 Pa... Warning
- Enable Multiple Scheduling for S... Block Posting

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.

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



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	You can import XML electronic AP documents with possibility to define import formats per document type using Electronic File Manager (EFM). 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.	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

Level: 5

Turnover	1
350002 - Gross Sales Revenue	2
350003 - Domestic Sales	3
350004 - Domestic Sales	4
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
400040 - Sales Revenue (Domestic) -	10
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

OK Cancel Account Details

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 Expe
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

Account Balance Allowed From: To:
 Cost Accounting Adjustment Only
 Allow Multiple Linking to Financial Templates

Relevant to Budget
 Permit Other VAT Group
 Exchange Rate Differences
 Rate Conversion

Document Settings

General | Per Document | E! 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
 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: , Fixed Exchange Rate: , Reverse: , Adj. Trans. (Period 13): , E&J Report:

Blanket Agreement:

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

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

#	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							

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	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 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:

Blanket Agreement:

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

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

#	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

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 Adju									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 options: 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 the SAP Payment Wizard interface. The main window, titled "Payment Wizard", shows a "Payment Run Summary and Printing" section. The summary indicates that 0 payment orders, 1 payment, 0 checks, and 1 bank transfer were added. The "Document and Report Printing" section lists various reports with checkboxes, including "Outgoing Payments", "Incoming Payments", "Non-Included Transactions", "Country Summary", "Currency Summary", "BP Summary", "Payment Method Summary", "Bank Account Summary", and "Payment Summary". A "Print" button is located at the bottom right of this section.

An inset window titled "Payment Engine" is shown in the foreground. It displays a log of a production run, including steps like "Start Payment Engine", "Handling outgoing payment...", "Check payment for bank Barclays", and "Production Run finished successfully". The window has buttons for "Create Files", "Cancel", and "OK".

At the bottom of the wizard, a "Step 8 of 8" indicator is visible, along with buttons for "Bank File", "Cancel", "< Back", and "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". To view an executed 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 B1 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



The screenshot shows the SAP Document Journal window with a table of transactions. A mouse cursor points to the 'G/L Acct/BP Code' column. Below it, the 'EFM Report Form : [Document Journal into TXT]' dialog is open, showing the 'Output File Name' field set to 'C:\Users\Administrator\AppData\Local\Temp\Output.txt' and a 'Result File' button. An 'Error / Message Log' window is also visible, showing a successful export process. Finally, a Notepad window displays the generated XML output file.

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	Prim					
4	2359	25.08.16	Prim					
5	2360	25.08.16	Prim					

```

||CashflowausbetrieblichenTätigkeiten||0,00|0,00|
|EinzahlungenvonKunden(+)||0,00|0,00|
|ZahlungenvonKundenfürRechnungen|1|-200,00|0,00|
|AnzahlungenvonKunden|2|0,00|-500,00|
|EinkaufsgutschriftenvonLieferanten|3|-9.000,00|
|AuszahlungenanLieferanten(-)||0,00|0,00|
|ZahlungenfürRechnungenanLieferanten|4|-59.500,00|
|AnzahlungenanLieferanten|5|0,00|0,00|
|VerkaufsgutschriftenanKunden|6|0,00|0,00|
|AuszahlungenfürMiete/Strom/Telefon(-)||0,00|0,00|
|AuszahlungenfürMiete|7|0,00|0,00|
|AuszahlungenfürStrom|8|0,00|0,00|
|AuszahlungenfürTelefon|9|0,00|0,00|
|AuszahlungenanBeschäftigte(-)||0,00|0,00|
|ZahlungenanBeschäftigte,z.B.Löhne|10|0,00|0,00|
|AnderebetrieblicheZahlungen(+/-)||0,00|0,00|
|AnderebetrieblicheZahlungen|11|0,00|0,00|
|AuslaufenderGeschäftstätigkeitenwirtschafteteZa
|AbzüglichgezahlterSteuern(-)||-68.800,00|-1.800,
|GezahlteKörperschaftsteuer|12|0,00|-700,00|
|GezahlteUmsatzsteuer|13|-100,00|0,00|
|AbzüglichgezahlterZinsen(-)||-68.800,00|-1.800,
  
```

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.

Overview	Subprojects	Stages	Summary	Remarks
	1	Phase 1 - Server 1 In		
	2	Phase 2 - Server 2 In		
	3	Phase 3 - Printer Inst		

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 Window:

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				11.07.16	15.07.16	0.0
	Performance and co	Monitori	Monitoring				15.07.16	28.07.16	0.0
Phase 2 - Server 2 Installati	Finishing Stage	Project	End of P						
	Definition/Planning	Planning	Planning						
	Performance and co	Installati	Installati						
	Performance and co	Monitori	Monitori						
	Finishing Stage	Project	End of P						

Time Sheet Report Window:

Project No.: 2
 Subproject No.:
 Stage:
 Project Name:
 Subproject Name:
 Description:
 OK Cancel

Time Recording					
#	Subpr...	Subproject Name	Stage	User/Employee	Date

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: Delivery
Target Doc. Type: Item
Target Doc. Series: Primary
Customer: C20000

Financial Project: SPI-C23900
Project No.: 2
Subproject No.: 3
Stage: (2-3-1)

Source Types

<input checked="" type="checkbox"/> Include open AP Documents	<input checked="" type="checkbox"/> Include closed Work Orders
<input checked="" type="checkbox"/> Include open AR Documents	<input checked="" type="checkbox"/> Include Recorded Times
<input type="radio"/> Sales Quotations (0)	<input checked="" type="checkbox"/> Include Project Activities
<input type="radio"/> Sales Orders (0)	
<input type="radio"/> Res. Invoice (0)	

Posting Date: [] []
Delivery Date: [] []

Step 1 of 3

Cancel Back Next Finish

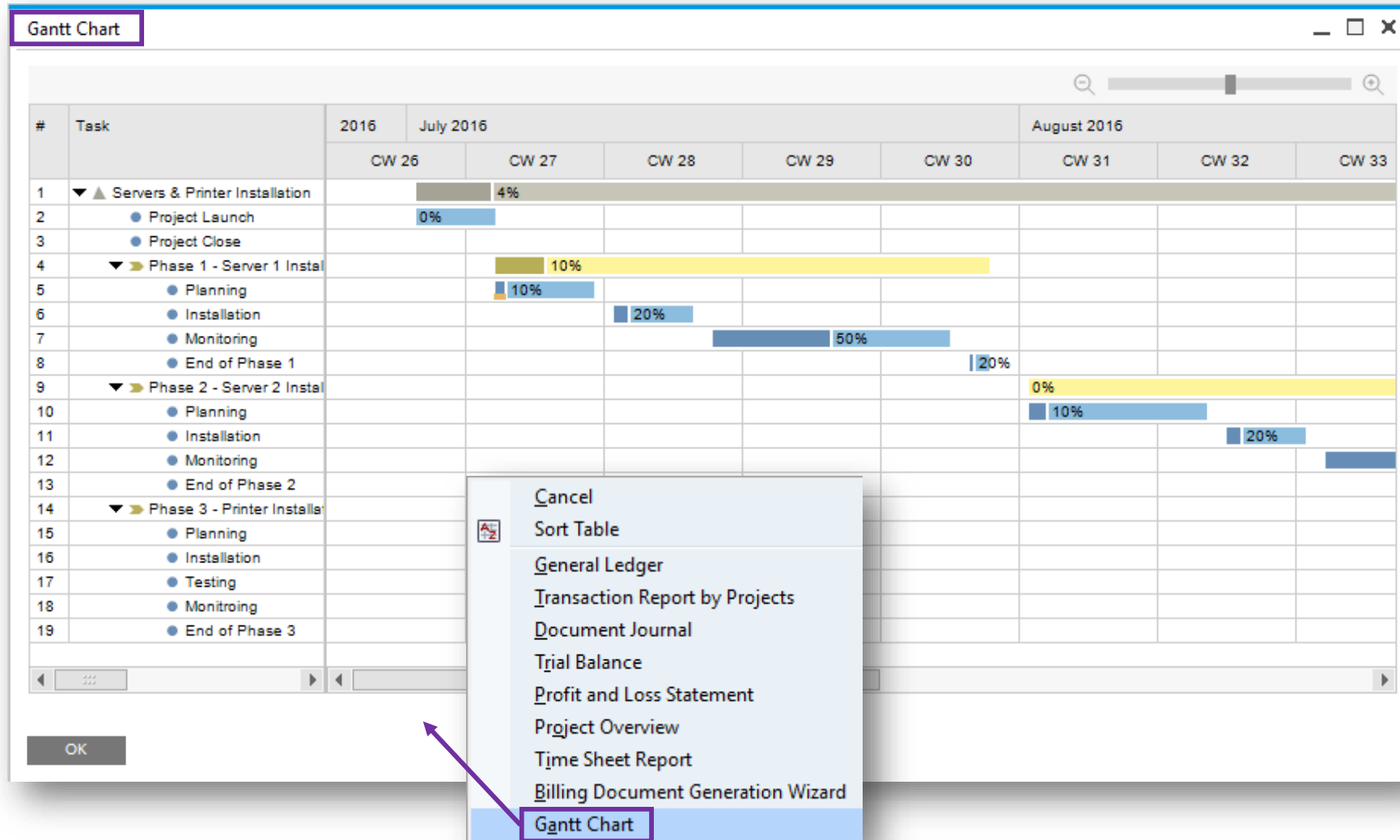
Feature

- 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 Internal To 13.07.17

Warehouse Code From Ordered To

Resource No. From Committed To R300007

Resource Group From Consumed 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 (1/2)



#	Type	No.	Description	Route Sequence	Planned Qty	Issued	Avail...	UoM ...	UoM ...	Wareho...	Issue Method	Start Date	End Date
1	Route Stag		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	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						

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 (2/2)



The screenshot displays the 'Pick Pack and Production Manager' window. The main table lists production orders with columns for #, Item, 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, and Production Priority. A 'Selection Criteria' dialog box is overlaid, allowing users to filter the data based on various attributes.

Pick Pack and Production Manager - Selection Criteria

Status: Open | Group By: None

Manage: Sales Orders | Reserve Invoices | Production Orders | Inventory Transfer Requests

Production Order No. [] From [] To []

Start Date [] From [] To []

Delivery/Due Date [] From [] To []

Priority [] From [] To []

Type [] From [] To []

Item [] From [] To []

Resource [] From [] To []

Route Stage [] From [] To []

Route Sequence [] From [] To []

Production Order Status [] From [] To []

Customer [] From [] To []

Fulfillment % [0.00] From [] To [100.00]

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	

Sort By: Delivery/Due Date

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
Description Printer Label version 93
Foreign Name
Item Type Items
Item Group Items
UoM Group Paper
Price List Regular Sales Price
Inventory Item
Sales Item
Purchase Item
Bar Code
Unit Price Primary Curr GBP 7.50 Pack
Pricing Unit 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

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

Batch Number Selection

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

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

#	Batch	Selected Qty
1	BAT01	3

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

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 by using Google Chrome 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 screenshots illustrate the following features:

- Favourite Reports:** A dedicated tab for reports marked as favorites, such as 'Annual Sales Analysis (by Quarter)' and 'Sales Opportunities Report'.
- Report Configuration:** A detailed view for configuring a report, including:
 - Report Parameters:** Selection of report format (PDF, Excel, HTML).
 - Frequency and Time Range:** Configuration of trigger task frequency (e.g., 1 week) and start/end times.
 - Keep History For:** Options to keep the last 20 records, always, or never.
 - Send Result by Email:** Fields for email recipient and CC.
- Report Running History:** A table providing an overview of report execution:

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



Welcome, Jayson Butler. You are in cockpit of OEC.Computers.UK.

Sales Process

```
graph TD
    SQ[Sales Quotation] --> SO[Sales Order]
    SO --> D[Delivery]
    D --> RI[A/R Invoice]
    RI --> ARI[A/R DP Invoice]
    RI --> A/R Credit Memo
    ARI --> IP[Incoming Payments]
    D --> R[Return]
```

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

Update My Cockpit

Save As Template

OK Cancel

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 dialog boxes. The background window is titled "Cockpit Management - Setup" and 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 foreground window is titled "User Groups" and is in the "Create Group" mode. It shows the following configuration:

- Name: Sales
- Description: Sales
- Group Type: Authorization
- Cockpit Template: Sales

The "Users" table in the foreground dialog is as follows:

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

Feature

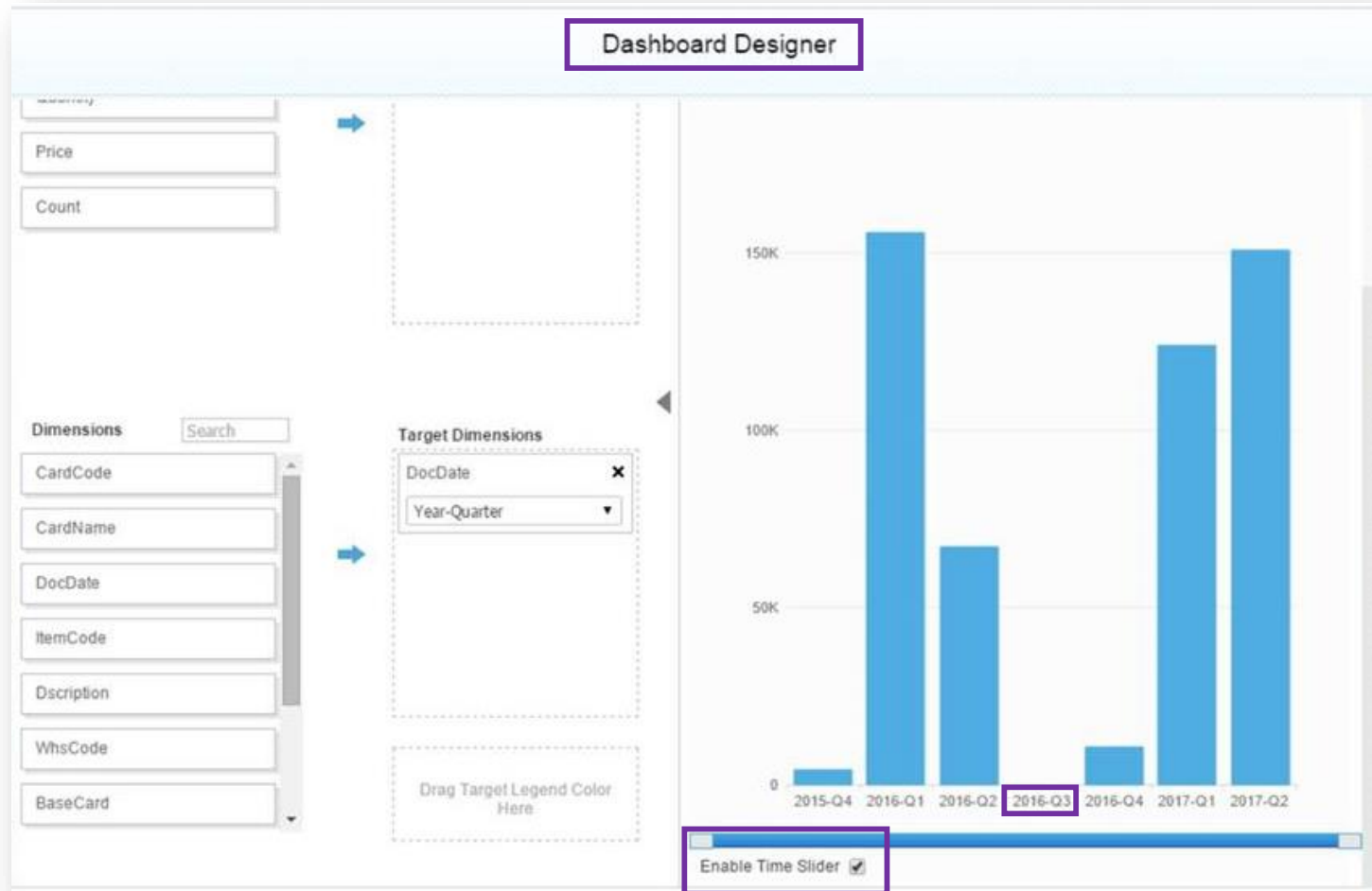
- Newly created Cockpit Templates can be published to all users
- To do this special authorization is necessary
- Cockpit template can be assigned by a power user to special user groups
- For each system authorization group a default Cockpit Template is available
- Only one template can be assigned to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



SAP Business One Workflow Manager

Welcome, B1SiteUser | [System Landscape Directory](#) | [Help](#)

Workflow Settings | Template Assignments | Template Activations

SAP Business One Server: dewdfth12415:30015

Workflow Service

[Restart](#)

Status: Running

Workflow Companies (13)

[Set Password](#)

Activate	Database Name	Company Name	Database Type	Version	User Name	Data Access	Detailed Information
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	
<input type="checkbox"/>					Workflow	Password Not Set	

Set Password

Database Name: SBODEMOGB

Company Name: OEC Computers UK

Database Type: HANADB

Version: 930000

User Name: Workflow

User Password: ****

[Update](#) [Cancel](#)

Workflow Configurations

[Save](#)

Log Type: Information Debug Error Warning

Log File Size: 5 MBs

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



The screenshot shows the 'General Settings' dialog box in SAP. The 'Enable Company Specific Mailer Configuration' section is highlighted with a red box. This section includes the following fields and options:

- 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

Other visible settings in the dialog include:

- 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 (selected), 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).

Buttons at the bottom: Update, Cancel.

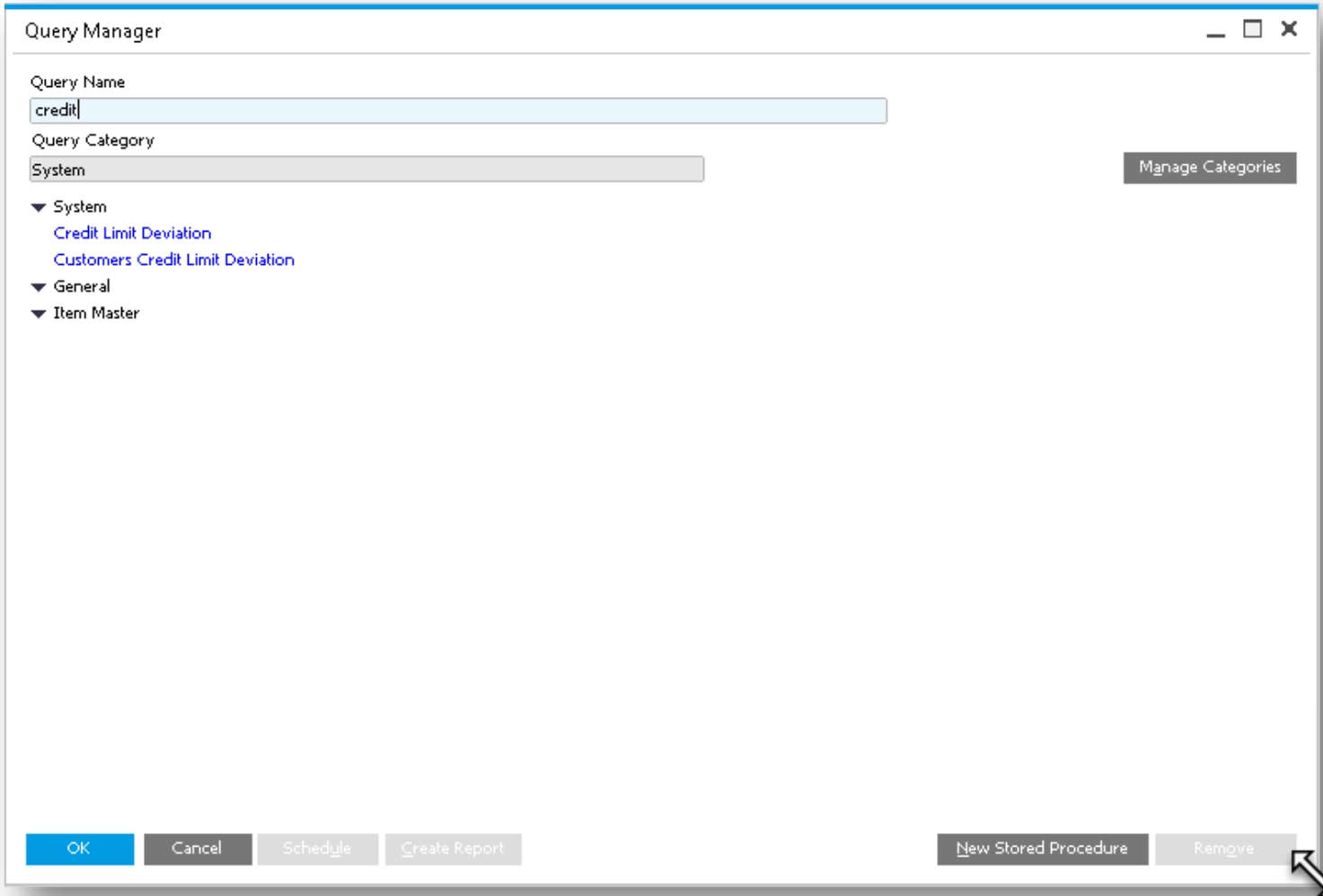
Feature

- 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



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 make it available on Linux. 
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.
Optimized Login Connection	Connect method optimization



Lifecycle Management

SAP Business One 9.3



SAP Business One Components



The screenshot displays the SAP System Landscape Directory (SLD) interface. At the top, it shows 'System Landscape Directory' with 'SLD Version: 930000' and 'Welcome, B1SiteUser'. The main navigation bar includes 'DB Instances and Companies', 'Logical Machines', 'Components', 'Services', 'Security', and 'Global Settings'. The 'Logical Machines' section shows a table with one machine: 169.254.209.29, Running, Undefined B1 version, 5.4% CPU utilization, 15.77% Memory utilization, null Description, Online Agent status, and 9.30.000 PL00 SLD Agent version. A 'Selection of components' dialog box is open, listing components under 'Landscape management' and 'Implementation tools'. The 'Implementation tools' section includes SAP Business One Client, SAP Business One Client (64bit), Data Interface API, and Data Interface API (64bit). The 'B1 Components' section at the bottom left shows 'SLD Agent' as 'Deployed External'. The 'B1 CD Repository Version' is 9.30.000. A 'Result/Log' table shows 'null'.

Alias	Machine Status	B1 version	CPU utilization	Memory utilization	Description	Agent status	SLD Agent version
169.254.209.29	Running	Undefined B1 version	5.4%	15.77%	null	Online	9.30.000 PL00

Component	Version
System Landscape Directory	9.30.000 PL00
Extension Manager	9.30.000 PL00
License Manager	9.30.000 PL00
Job Service	9.30.000 PL00
Workflow	9.30.000 PL00
DI Server	9.30.000 PL00
Implementation tools	
SAP Business One Client	9.30.000 PL00
SAP Business One Client (64bit)	9.30.000 PL00
Data Interface API	9.30.000 PL00
Data Interface API (64bit)	9.30.000 PL00

Component Type	Deployment Status
SLD Agent	Deployed External

B1 CD Repository Version: 9.30.000

Result/Log
null

Feature

- Register MS Windows and SUSE Linux machines to B1 landscape.
- Install and upgrade B1 components on registered machines, remotely.
 - Server Repository (SBO-Common)
 - Demo Databases
 - B1 client and DI API

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 "SAP Bu

The screenshot shows the SAP Business One Issue Recorder interface. It features a 'Recorded Scenarios' table with the following data:

Title	Created	Folder Name	Size
<input type="checkbox"/> Due date missing	6/12/2017 8:33:27 PM	20170612_203327_Due date missing_1	999 KB

Buttons for 'Report' and 'Delete' are located above the table. Below the table are 'New' and 'Close' buttons. The background shows a screenshot of the SAP A/R Invoice window with a 'Due date missing' error message.

Feature

- Instantly record a problem inside SAP Business One Client.
- Document all steps as screenshots with issue description, system information and optional attachments.
- Report the issue via E-mail or to Partner via company's centralized repository and Remote Support Platform to Partner WebDAV.

Benefit

- Provides accurate issue descriptions to SAP Partners for investigation.
- Reports problems internally to obtain direct support from colleagues within the company.

Remote Support Platform 3.2



The screenshot displays the Remote Support Platform for SAP Business One interface. A 'Backup Strategy Settings' dialog box is open, showing the following configuration:

- Instance Backup: Daily
- Time: 10 : 10 :00
- Backup Service is available: <https://sid-hdb:40000/BackupService/>
- Additional Options:
 - Delete Older Backups After Successful Instance Backup
 - Perform Company Schema Consistency Check Prior to Backup
 - Check Only Productive Schemas
- Buttons: Trigger Instance Backup Now, OK, Cancel

The main interface shows two sections:

Content Upload

GUID	Request Name	Incident No.	Progress	
9030173834		0020751295-48985-2017	N/A	To Be Started
9067210730		0020751295-48985-2017	N/A	To Be Started
9014302285		0020751295-48985-2017	N/A	To Be Started
9047216337		0020751295-48985-2017	N/A	To Be Started
9062317998		0020751295-48985-2017	N/A	To Be Started
9020394987		0020751295-48985-2017	N/A	To Be Started
9082144334		0020751295-48985-2017	N/A	To Be Started

Software Updates

Component	New Version	SAP Note	Progress	
Remote support platform for SAP Business One				
Remote support platform for SAP Business One	3.2 SPO0 PL08	2448324	100,00%	Upgraded
SAP Business One 9.0 Release Family				
SAP Business One 9.2	9.2 PL6 Update patch	2349500	100,00%	Downloaded

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.

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