

SAP Business One 9.1 Highlights

June 2014

Customer



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Objective of this Presentation

Purpose

This presentation is intended to provide a solid overview of new developed functional highlights, related to

- SAP Business One 9.1
- SAP Business One 9.1, version for SAP HANA

The highlight presentation describes the highlights and business benefits.

This presentation is targeted for use by SAP employees, SAP Business One partner and SAP customer.

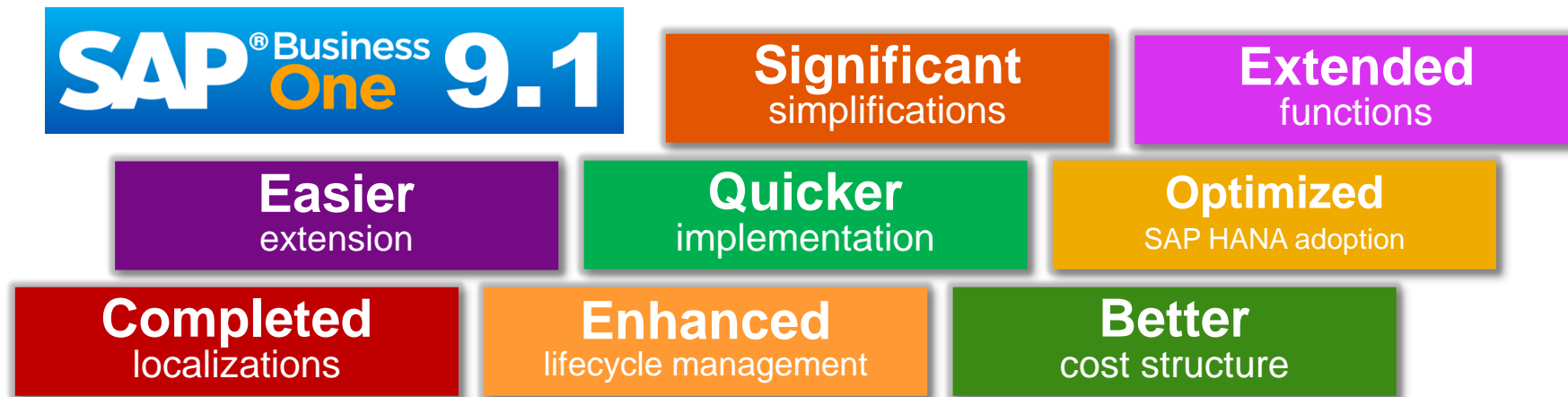
Complementary resources

For information regarding future directions, refer to Solution Road map.

For more information related to this release, refer to Ramp-up Knowledge Transfer materials and product documentation.

SAP Business One 9.1 - Overview

- Planned new versions: SAP Business One 9.1 and SAP Business One 9.1, version for SAP HANA
- Release to customer is currently planned for end of Q2 2014
- One common code base for SAP HANA database and Microsoft SQL Server
- Focus on functional improvements and simplifications of implementing, operating, and using SAP Business One



Business logic and localization

- Enhanced production module
- Inventory item cost valuation based on serial or batch number
- Multiple branches function splits transactions by business unit
- Project enhancements (initially for Russia)
- Rounded-off functions (selected 9.0 topics)
- Fixed assets enhancements
- Extended tax reporting
- Localization enhancements and legal compliance
- Default values

Reporting and analytics

- SAP Crystal Reports 2013
- Default settings and report layout (selected countries)

Lifecycle management and support

- Remote Support Platform for SAP HANA

Extensibility/SDK

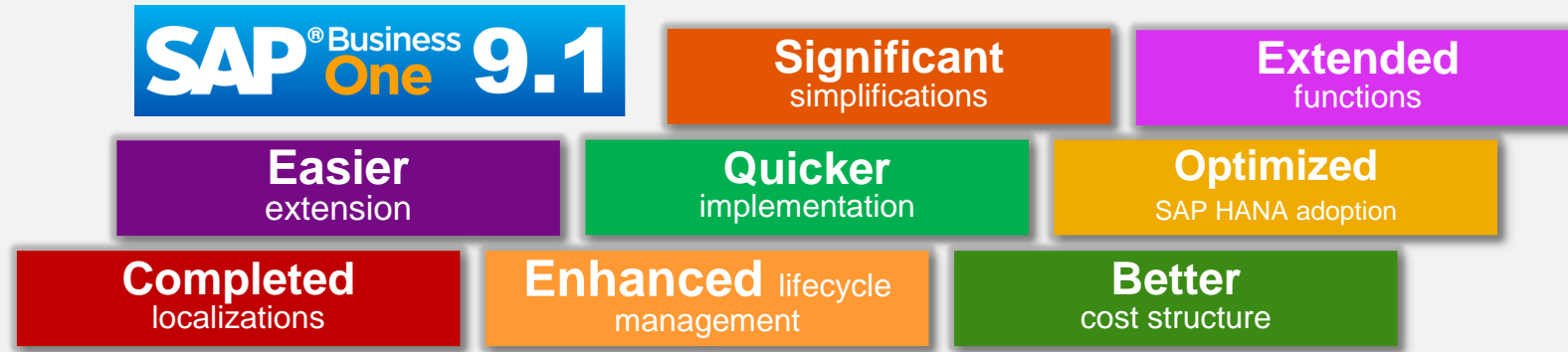
- Additional DI/UI objects and services
- Enhanced lifecycle management for extensions
- SAP Business One studio and workflow enhancements

Infrastructure and architecture

- Permission group authorizations
- Performance improvements
- Security enhancements
- Hiding business functions
- Configurable framework
- Importing from Excel
- Simplified e-mail and printing process

Specific to SAP Business One 9.1, version for SAP HANA

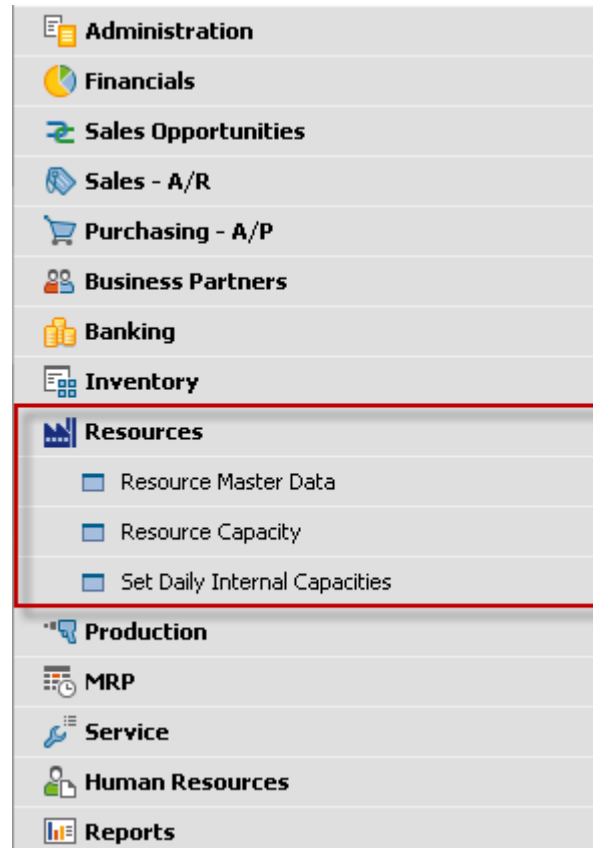
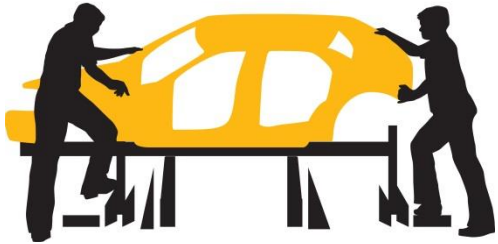
- Service layer that exposes business objects by Web service
- Role-based work center for analytics and simplified system use (based on HTML5)
- Pervasive analytics – key performance indicator (KPI) and insight to action
- Performance optimization (transactional and reporting)
- Extreme application framework enhancement for partners
- Supported by remote support platform



»»» Business logic and localization

Enhanced Production Module

New Resources Module



Enhancements

- New module to manage and plan resource capacity
- Ability to capture machine, labor or other resources with associated costs
- Linked to fixed assets and employee data
- Accounts to be used defined in advanced account determination

Benefits

- Visibility of available capacity to avoid bottlenecks and optimize production plan
- Resource costs are included in the final product cost

Enhanced Production Module

Bill of Materials (BoM)

The screenshot displays the SAP Bill of Materials (BoM) interface. The main window, titled 'Bill of Materials', shows a table with columns: #, Type, No., Description, Quantity, and Uo... The table lists components for 'LeMon 4029 Printer'. A red box highlights the 'Type' dropdown menu, which is open, showing options: Item, Resource, and Text. Below the main window, a smaller dialog box titled 'Bill of Materials - Component Management - Selection Criteria' is open. It has a 'Management Task' dropdown set to 'Add BOM Lines'. The dialog contains sections for 'Select BOMs' and 'Select BOM Lines to Add'. The 'BOM Line Details to Be Added' section is highlighted with a red box and contains fields for Quantity (5.000), Additional Quantity (1.000), Warehouse, Issue Method, and WIP Account. An arrow points from the 'Type' dropdown in the main window to the 'Item' option in the 'Select BOM Lines to Add' section of the dialog.

#	Type	No.	Description	Quantity	Uo...
1	Item	LM4029MC	Memory Chip	2	
2	Item	LM4029D	LeMon 4029 500 sheet paper c	1	
3	Item	LM4029PH	LeMon 4029 Printer Head	1	
4	Item	LM4029PS	LeMon 4029 Printer Power Su	1	
5	Item	LM4029SB	LeMon 4029 Printer System Bc	1	
6	Item				

Management Task: Add BOM Lines

Select BOMs

BOM Product No.	From	P10003	To	P10004
BOM Item Group	From	PC	To	PC
BOM Type		Production		
BOM Warehouse No.	From		To	
BOM Distr. Rule	From		To	
BOM Project	From		To	

Select BOM Lines to Add

Item	From		To	
------	------	--	----	--

BOM Line Details to Be Added

Quantity	5.000
Additional Quantity	1.000
Warehouse	
Issue Method	
WIP Account	

Enhancements

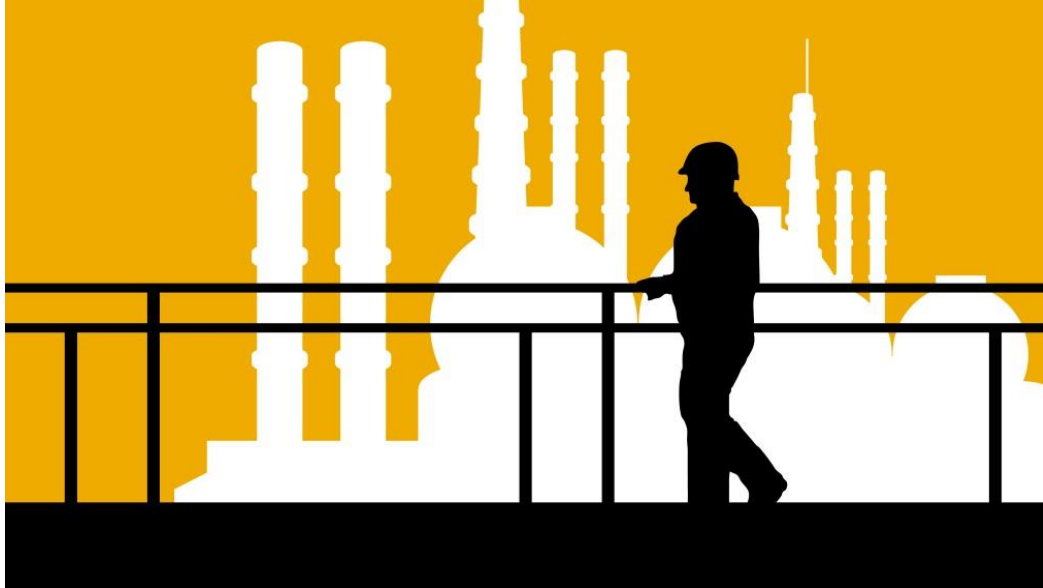
- New line item types in BoM: resource, text
- Option to group line items based on process flow
- Option to mass update BoMs: add/remove lines
- Values in identical UDFs carried over from BoM to production order

Benefits

- Process orientated BoM structure
- Easy maintenance of BoM

Enhanced Production Module

Production Process



Enhancements

- Possibility to edit production order to match the production process flow
- Additional line types inherited from BoM
- Option to include additional quantities e.g. required for production process setup
- Ability to define WIP account on row level

Benefits

- Tailored production order structure reflecting production process
- Precise WIP data
- More accurate planning data
- Ability to share instructions via production order

Inventory Item Cost Valuation

Based on serial and batch



Enhancements

- New valuation method available for serial numbered and batch-managed items
- The cost of an item is managed on the serial or batch number level

Benefits

- Cost variances can be reflected in the product profitability
- Profitability can be calculated for a specific serial number or batch

Multiple Branches

Manage Business by Branches in one Database/Localization



Benefits

- Manage business by branches*, in one DB/Localization
e.g. product lines, business units, market segment, stores
- increased transparency

Enhancements

- Ability to create transactions for separate branches in one database.
- Centralized stock management per branch.
- Bank transactions can be managed from the same database with centralized payment capability.
- All financial transactions will be separated by branches.
- Option to have different document numbering per branch.
- Separate accounting setup and G/L account determination per branch within one chart of accounts.
- Customer receivables aging and vendor liabilities aging per branch.
- Possibility to assign branches to business partners.

* Notice: The Multiple Branches function is designed for branches which are not legal entities. If the branches are legal entities, the intercompany integration solution for SAP Business One is recommended.

MRP

Additional Data Sources

The image shows two screenshots of the MRP Wizard - Demo9.0 and MRP Wizard - Demo9.1 interfaces, comparing the 'Documents Data Source' screen. The top screenshot (9.0) shows a basic configuration with checkboxes for various data sources and a single 'Inventory Level' dropdown. The bottom screenshot (9.1) shows several enhancements: a 'Time Range' section with radio buttons for 'Within Planning Horizon' and 'Include Historical Data'; a 'Sources of Demand and Supply to Be Included in MRP Calculation' section with checkboxes for Purchase Request, Purchase Quotations, Purchase Orders, Blanket Purchase Agreements, Sales Quotations, Sales Orders, Blanket Sales Agreements, Production Orders, Inventory Transfer Requests, Recurring Order Transactions, Reserve Invoices, and Restrict Reserve Invoices; a 'Recommendations' section with radio buttons for 'Purchase', 'Purchase Requests', and 'Purchase Orders'; a 'Forecast' section with a dropdown menu showing 'Required', 'Minimum', 'Maximum', and 'Minimum - Maximum'; a 'Generate to Default Warehouse for Item' radio button; and a 'Generate to Warehouse with the Demand' radio button. The bottom screenshot also includes a 'Save Scenario' button and a 'Run' button.

MRP Wizard - Demo9.0

Documents Data Source
Define the data sources as well as the documents to include in the MRP calculation.

Time Range
☒ Within Planning Horizon
☐ Include Historical Data

Sources of Demand and Supply to Be Included in MRP Calculation
☒ Purchase Orders
☒ Blanket Purchase Agreements
☒ Sales Orders
☒ Blanket Sales Agreements
☒ Production Orders
☐ Inventory Transfer Requests
☐ Recurring Order Transactions
☐ Reserve Invoices
☐ Restrict Purchase Orders
☐ Restrict Sales Orders
☐ Restrict Production Orders
☐ Restrict Reserve Invoices

Inventory Level
Forecast

Recommendations
☒ Purchase
☒ Purchase Requests
☐ Purchase Orders
☒ Production Orders
☐ Inventory Transfer Requests

Step 5 of 6

MRP Wizard - Demo9.1

Documents Data Source
Define the data sources as well as the documents to include in the MRP calculation.

Time Range
☒ Within Planning Horizon
☐ Include Historical Data

Sources of Demand and Supply to Be Included in MRP Calculation
☐ Purchase Request
☐ Purchase Quotations
☒ Purchase Orders
☒ Blanket Purchase Agreements
☐ Sales Quotations
☒ Sales Orders
☒ Blanket Sales Agreements
☒ Production Orders
☐ Inventory Transfer Requests
☐ Recurring Order Transactions
☐ Reserve Invoices
☐ Restrict Purchase Request
☐ Restrict Purchase Quotations
☐ Restrict Purchase Orders
☐ Restrict Purchase Agreements
☐ Restrict Sales Quotations
☐ Restrict Sales Orders
☐ Restrict Sales Agreements
☐ Restrict Production Orders
☐ Restrict Transfer Requests
☐ Restrict Reserve Invoices

Inventory Level
Forecast

Recommendations
☒ Purchase
☒ Purchase Requests
☐ Purchase Orders
☒ Production Orders
☐ Inventory Transfer Requests

Generate to Default Warehouse for Item
☐ Generate to Warehouse with the Demand

Save Scenario

Step 5 of 6
Cancel Back Next Run

Enhancements

- Introduction of field Component Warehouse in Item Master Data, Planning Tab
- Possibility to select Component Warehouse for make items in Item Master Data, Planning Tab
- Additional selection criteria for documents to be included in MRP
- Option to set Inventory Level to Maximum if inventory quantity is less than minimum
- Option to select multiple MRP forecasts for MRP recommendations > selection screen will open
- in addition, MRP forecasts support zero-quantity items
- Option to change the Order Type in the Order Recommendation

Benefits

- Ability to more flexibly optimize MRP execution
- More possibilities to optimize the MRP process

Blanket Agreement Enhancements

More Selection Criteria

The image shows two SAP windows. The top window, titled 'Blanket Agreement Fulfillment Report - Selection Crit...', has tabs for 'Items' and 'Vendors'. Under the 'Items' tab, there are fields for 'Agreement Method' (set to 'Items Method'), 'Agreement No.' (From/To), 'Item Code' (From/To), 'Item Group' (set to 'All'), and 'Properties' (set to 'Ignore'). The bottom window, titled 'Draft Sales Blanket Agreement', contains fields for 'BP Code' (C20000), 'BP Name' (Maxi-Teq), 'Contact Person' (Max Teq), 'Telephone No.' (555-0137), and 'E-Mail' (max.teq@maxi-teq.sap.com). It also has fields for 'No.' (Primary), 'Agreement Method' (Items Method), 'Start Date' (05/08/2014), 'End Date', 'Termination Date', and 'Signing Date' (05/08/2014). The 'Description' field is empty. Below these fields are tabs for 'General', 'Details', 'Documents', 'Attachments', and 'Recurring Transactions'. The 'General' tab is active, showing 'Agreement Type' (General), 'Status' (Draft), 'Payment Terms' (set to 'Incoming BT 02'), 'Payment Method' (set to 'Incoming BT 02'), 'Settlement Probability %' (0.000), 'Owner', 'Renewal' (unchecked), and 'Reminder' (Day(s)). The 'Remarks' field is empty. Both windows have 'OK' and 'Cancel' buttons.

Enhancements

- Possibility to run the blanket agreement fulfillment report by: item group, item properties, vendor group, vendors properties
- Authorizations moved to sales AR and Purchasing AP - scope expanded
- Option to select payment method in the blanket agreement – applied when drawn

Benefits

- Better usability
- User role based access control

Advanced G/L Account Determination

User Interface Improvement

[illegible]

Enhancements

- Ability to export the preview display of the 'Advanced G/L Account Determination Rules' form to Excel
- Added Determination Criteria button to the Advanced G/L Account Determination rules form

Benefits

- Easier investigation, reading and cross checking of the expected rules before migration

G/L Account Determination

Period Selection: 2014

Navigation: Sales | Purchasing | General | Inventory | **Resources** | WIP Mapping

#	Type of Account	Account Code	Account Name	Advanced Rules
	Inventory Account	13400000-01-001-01	Inventory - Finished Goods (HO, USA, GA)	
	Cost of Goods Sold Account	51100000-01-001-01	COGS - Domestic (HO, USA, GA)	

Maximum Weight Allocation Restriction In Bin Locations

Bin Location Master Data

Warehouse: 05 Aisle: A1 Shelf: S1 Level: L1
Bin Location Code: 05-A1-S1-L1

Bin Location Properties

Inactive: ☐
Receiving Bin Location: ☒ Exclude from Auto. Alloc. on Issue: ☐
Description:
Item Weight: 29.501kg Item Qty: 19.667
No. of Items: 1 No. of Batches/Serials:
Alternative Sort Code:
Minimum Qty:
Maximum Weight: 30kg Bar Code:
Maximum Qty:
Item Restrictions: Specific Item Group Batch Restrictions: None Transaction Restrictions: None

Item Master Data

Item No.: Manual R00002
Description: Printer Paper A4 Recycled
Foreign Name:
Item Type: Items
Item Group: Items
UoM Group: Paper
Price List: Base Price

General Purchasing Data Sales Data Inventory Data

Set Inv. Method By: Warehouse
UoM Code: Pack
UoM Name: Pack
Weight: 2.5kg

Enhancements

- Postings of goods to bin locations can be restricted by weight
- A maximum weight can be defined for each bin location
- The weight per UoM is defined per item

Benefits

- Control weight restrictions of bin locations
- Avoid weight overload and risk of accidents

Weight Factor for Unit Conversion

For Simplified Unit of Measure Setup

Group Definition - Screws, bolts, nails - Setup 9.0

#	Alt. Qty	Alt. UoM	=	Base Qty	Base UoM
1	1	Carton	=	1	Carton
2	10	Kilograms Screws	=	1	Carton
3	12	Kilograms Bolts	=	1	Carton
4	22	Pound Screws	=	1	Carton
5	26.45	Pound Bolts	=	1	Carton

Item Master Data

Item No. Manual 200007

Description Screws

Foreign Name

Item Type Items

Item Group Items

UoM Group ⇒ Screws, bolts, nails

Price List Base Price

General **Purchasing Data** **Sales Data** **Inventory Data**

Set Inv. Method By Warehouse

UoM Code Carton

UoM Name Carton

Weight 10kg

Item Master Data

Item No. Manual 200008

Description Bolts

Foreign Name

Item Type Items

Item Group Items

UoM Group ⇒ Screws, bolts, nails

Price List Base Price

General **Purchasing Data** **Sales Data** **Inventory Data**

Set Inv. Method By Warehouse

UoM Code Carton

UoM Name Carton

Weight 12kg

Group Definition - Screws, bolts, nails - Setup 9.1

#	Alt. Qty	Alt. UoM	Weight Factor	=	Base Qty	Base UoM
1	1	Carton		=	1	Carton
2	1	Kilograms	kg	=	1	Carton
3	1	Pound	Lb	=	1	Carton
4				=		Carton

mg

g

kg

Oz

Lb

T

Enhancements

- New weight field for UoM conversion in item master inventory tab
- UoM conversion can use item weight
- Use case example:
If a company sells several items by weight, but manages them in a different UoM in the inventory, the UoM Group definition can be simplified
- Further, UoM Conversion can use an item UDF in the same way

Benefits

- Reduced effort with a simplified UoM setup

Copy Price Reduction on Unit of Measure level

Copy UoM Reduce By - Selection Criteria

Copy From

Price List

Regular Sales Price

Item No.

R00001

UoM Code

Multiple

...

Copy To

Price List

Regular Sales Price

...

UoM Group

Paper

...

Item No.

From

To

Item Group

All

...

Properties

Ignore

☐ Replace All UoM Prices

☐ Update Only Existing UoM Prices

☐ Add New UoM Prices Without Updating Existing Prices

☒ Add New UoM Prices and Update Existing Prices

☒ Only Copy to UoM with "Auto" Selected

Update

Cancel

Preview

- Possibility to mass update prices in price list
- UoM items in a price list can be copied to UoM items in any other price lists

- Easy management of pricing updates

Pick and Pack Enhancements

For Optimized Pick Processes

The screenshot displays the SAP Production Order interface. At the top, the 'Production Order' header shows fields for Type (Standard), Status (Planned), Product No. (LM4029), Product Description (LeMon 4029 Printer), Planned Quantity (5), and Warehouse (01). Below this, a table lists components with columns for #, Type, No., Description, Base, Planned, and Issue. A context menu is open over the table, with 'Generate Pick List' and 'View Pick Lists' highlighted. The 'Pick List Generation Wizard' dialog is also visible, showing 'Pick List Generation Parameters' and a section for 'Split Pick Lists By' with checkboxes for Business Partner, Document Type, Document, Item Group, Item, Warehouse, Aisle, Shelf, and Level.

Production Order

Type: Standard
Status: Planned
Product No.: LM4029
Product Description: LeMon 4029 Printer
Planned Quantity: 5
Warehouse: 01

Components

#	Type	No.	Description	Base	Planned	Issue
1	Item	LM4029MC	Memory Chip	2	10	
2	Item	LM4029D	LeMon 4029 500 sheet	1	5	
3	Item	LM4029PH	LeMon 4029 Printer H	1	5	
4	Item					
5	Item					
6	Item					

Pick List Generation Wizard

Pick List Generation Parameters
Select the parameters you want to use to split the pick lists. In addition, select the method by which the items are automatically allocated from the bin locations in the pick lists.

Split Pick Lists By

- ☐ Business Partner
- ☐ Document Type
- ☐ Document
- ☐ Item Group
- ☐ Item
- ☐ Warehouse
- ☐ Aisle
- ☐ Shelf
- ☐ Level

Enhancements

- Generate and view pick lists via context menu in A/R reserve invoices, inventory transfer requests, and production orders
- Additional parameters for splitting in the Pick List Generation Wizard

Benefits

- Start picking process directly from document
- More flexibility to handle pick processes

Fixed Assets

Cost Center Support



Enhancements

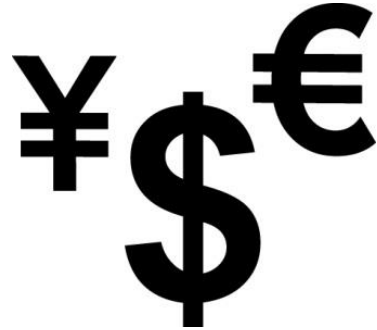
- Cost center information supported in A/R documents and fixed assets sales documents
- Cost center and project information automatically populated in documents from fixed assets master data
- Ability to cancel depreciation runs
- Transfers within an asset class – possibility to select between zero out postings and no postings

Benefits

- More easily track internal costs for your fixed assets
- Automate the recording of cost information

Extended Tax Reporting

Advanced Solution to Tax Reporting



Enhancements

- **BAS Codes Setup** offers a range of options in designing structure and rules for specific tax declarations
- Existing functionality enabled in more localizations (CY, FR, AT, IT, PA, JP, PL, HU, CH, SE, DK, KR, FI, NO, SE, ZA, CN)

Benefits

- Automatically includes new postings in reports you have created and saved
- Offers users and partners the capability to build financial and tax reports from scratch by referring to financial objects such as tax codes, G/L accounts, ad-hoc manual inputs and formulas
- Provides easy & precise tracking of documents reported to authorities
- Can be used as a base for electronic reporting

Default Values for Accelerated Implementation

Numbering Series - Setup

Select Series Type for Setup: Document

#	Name	Number			String		Remarks	Group	Period Ind.	Cancellation	Lock	Digital Series
		First No.	Next No.	Last No.	Prefix	Suffix						
1	AR Inv	1	1	199999				1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	AR CrMe	200000	200000	259999				1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	OtSaInv	260000	260000	289999				1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	OtSaCM	290000	290000	299999				1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	AP Inv	300000	300000	399999				1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	AP CrMe	400000	400000	459999				1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	OtPuInv	460000	460000	489999				1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	OtPuCM	490000	490000	499999				1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9	BankTr	500000	500000	559999				1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10	PettyCTr	560000	560000	599999				1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11	MIS Tr	600000	600000	699999				1	▼ Default ▼	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Display Series Linked to Selected Period(s) Indicator: All Periods

OK Cancel

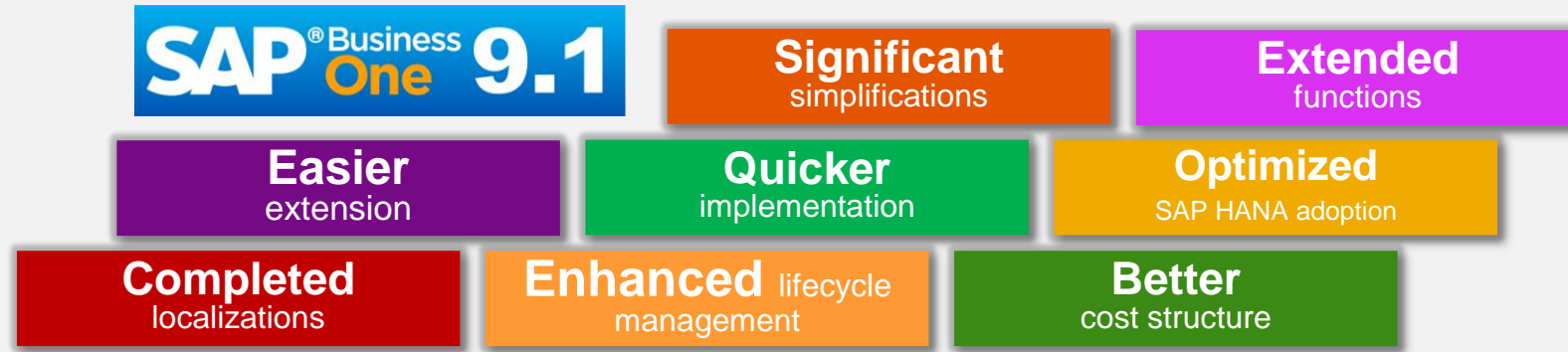
Enhancements

- New chart of accounts + determination rules + simplified UI template for small businesses in the US*
- New chart of accounts + determination rules + simplified UI template for small businesses in Mexico*
- Document numbering defaults for Belgium

Benefits

- Accelerated implementation for small businesses in selected countries

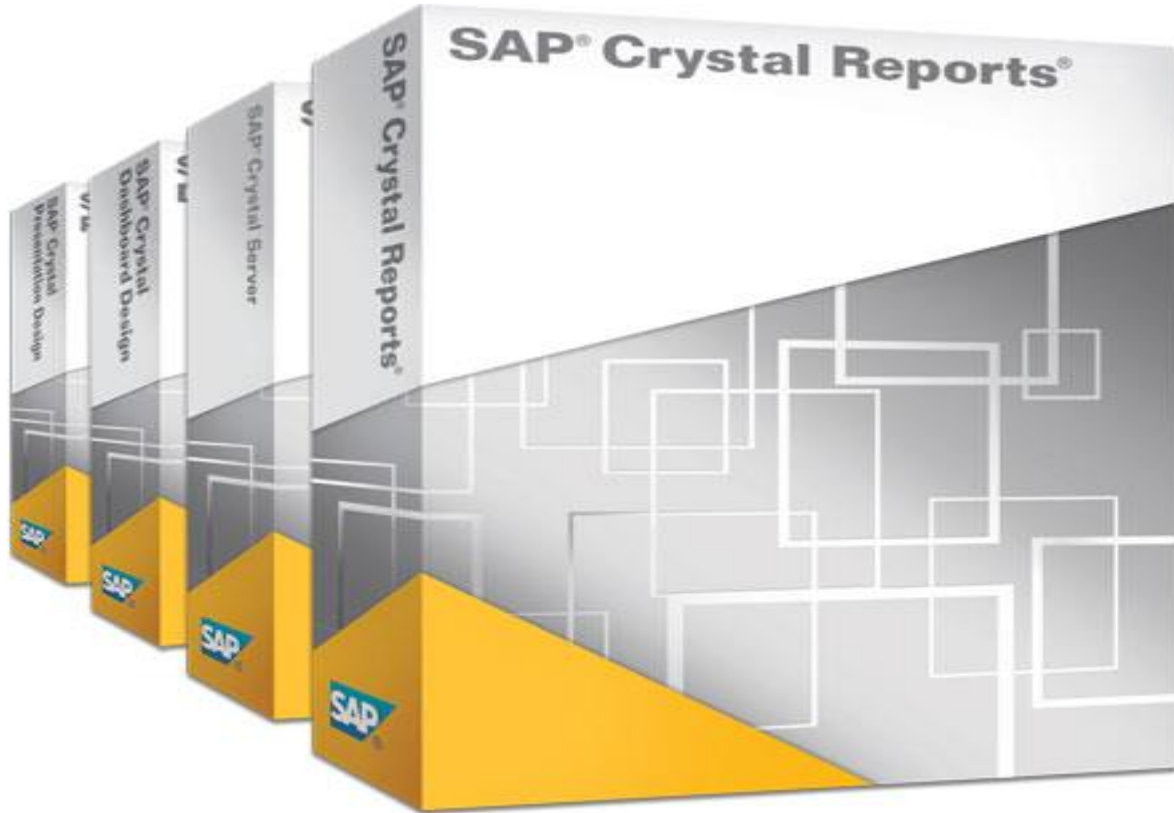
* Notice: available at ramp-up start



»»» Reporting and analytics

SAP Crystal Reports 2013

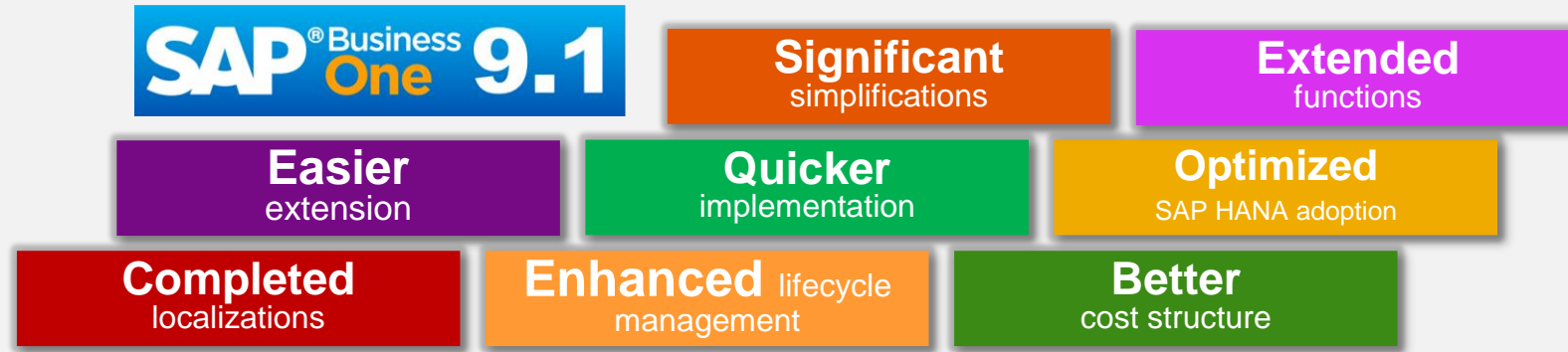
Further Enrichments to support Partner and Customer



Enhancements

What's new in SAP Crystal Reports products:

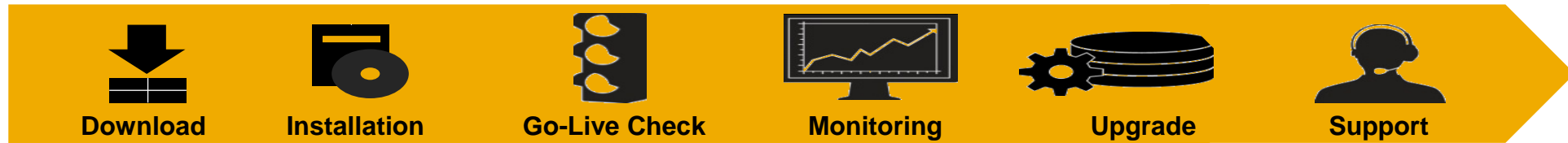
- Streamlined report design
- Improvements to data sources
- Mobile and viewer support
- OEM and developer features



»»» Lifecycle management and support

Lifecycle Management

Remote Support Platform for SAP HANA

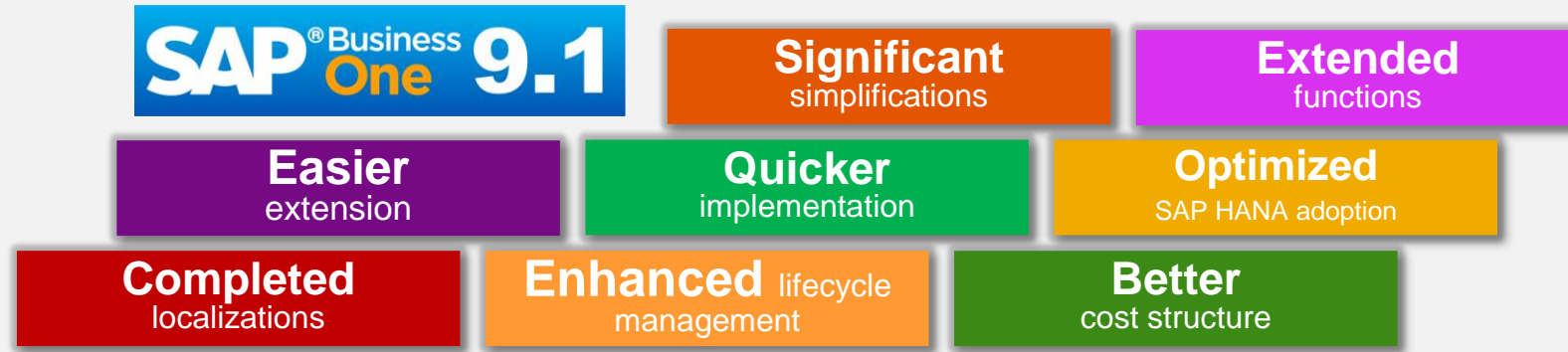


Enhancements:

- RSP supports both SAP Business One on SAP HANA database and on Microsoft SQL Server
- RSP processes and reports adapted to SAP HANA database

Benefits:

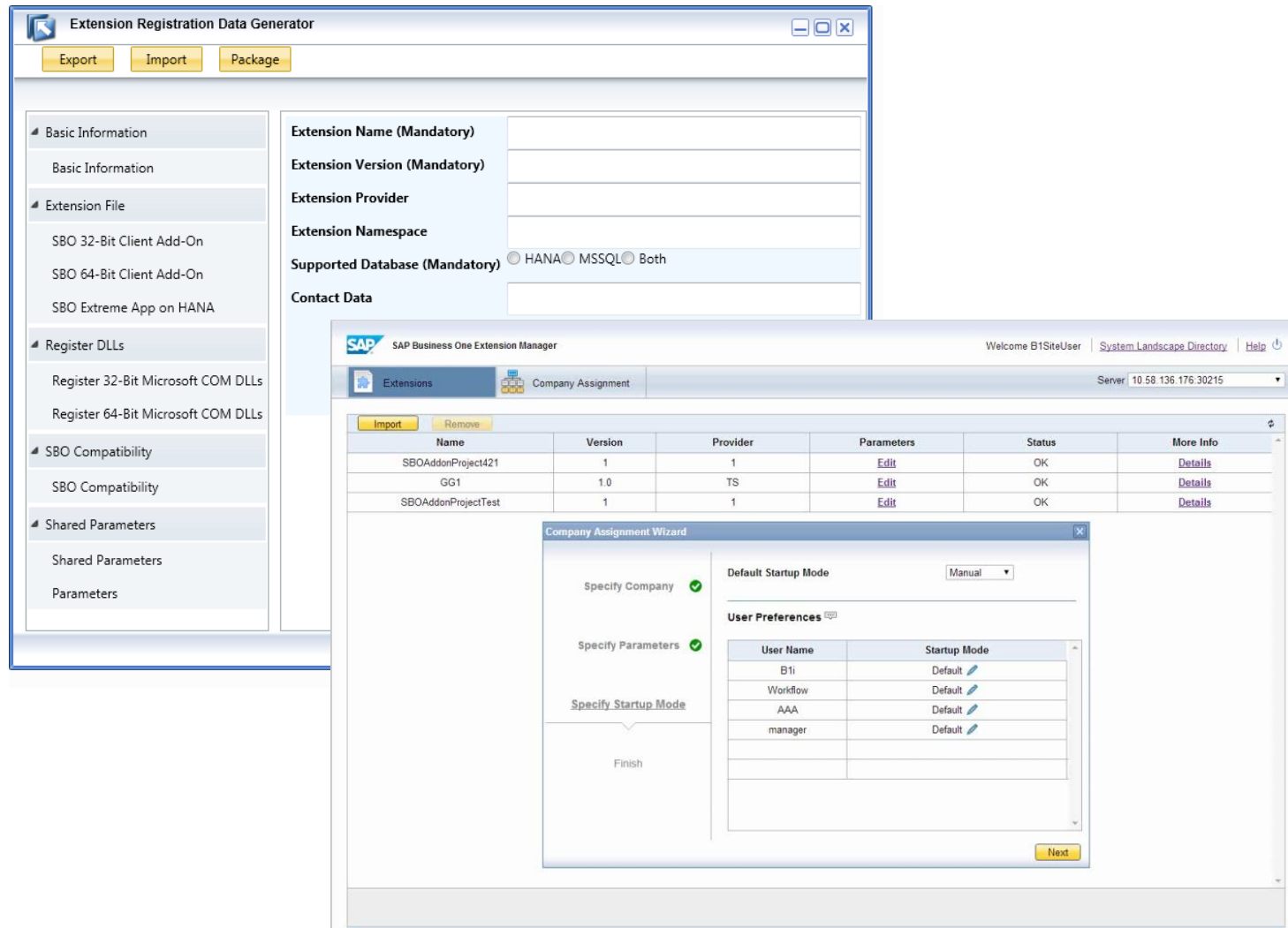
- Reduced TCO for customers and partners due to automation, faster installation and reliable upgrades as well as simplified landscape management (supportability and maintainability)
- Less time and money spent on maintenance and support



Extensibility / SDK

Enhanced lifecycle management for extensions

New light-weight approach for Add-On deployment

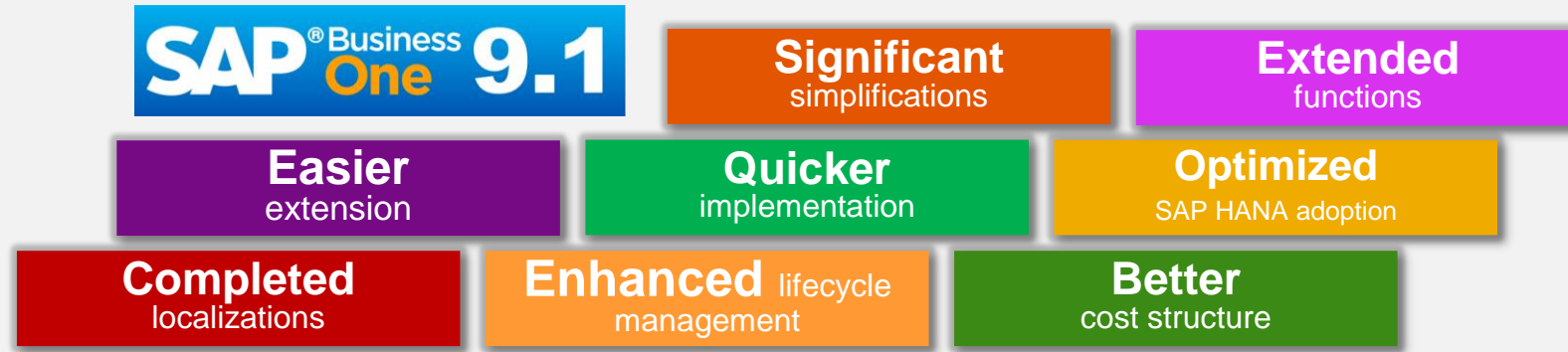


Enhancements

- Add-Ons are no longer required to use InstallShield or equivalent 3rd party tools to do lifecycle management. It is now managed end-to-end by SAP Business One
- Combine different Add-On binaries for 32/64 bit as well as related Extreme App in one Extension package
- Remote deployment & management via Extension Manager platform
- Integrated development experiences with SAP Business One Studio

Benefits

- Simplified extension development & lifecycle management including add-ons & extreme apps
- Remote control the extension lifecycle management easily without end-user interaction or system administration privilege



»»» Infrastructure and architecture

Permission Groups

Role-Based User Administration

The screenshot displays two SAP interface windows. The top window, titled 'Permission Groups', features a 'Create Group' button, input fields for 'Name' (Sales) and 'Description' (Sales), and a 'Users' table. The bottom window, titled 'Authorizations', shows a list of 'Users' on the left, a 'Permission Groups' list in the middle, and a 'Find' table on the right.

Permission Groups Window:

- Create Group** button
- Name:** Sales
- Description:** Sales
- Users Table:**

#	User Code	User Name	Department
1	brad	Brad Thompson	Sales
2	merlina	Merlina Francis	Purchase
3	mary	Mary Heske	Logistic
4			

Authorizations Window:

- Users List:** Finance, Sales, Purchase, Inventory
- Permission Groups List:** Finance, Sales, Purchase, Inventory
- Find Table:**

Subject	Authorization
General	Various Authorizations
Customization Tools	No Authorization
Administration	Various Authorizations
Financials	Various Authorizations
Sales Opportunities	No Authorization
Sales - A/R	Various Authorizations
Blanket Agreement	No Authorization
Sales Quotation	Full Authorization
Sales Order	Full Authorization
Delivery	Read-Only
Return	Read-Only
A/R Down Payment Invoice	Full Authorization
A/R Invoice	Read-Only
A/R Invoice + Payment	No Authorization
A/R Credit Memo	Read-Only
A/R Reserve Invoice	No Authorization
Recurring Transactions	No Authorization
Document Generation Wizard	No Authorization
Document Draft	Full Authorization

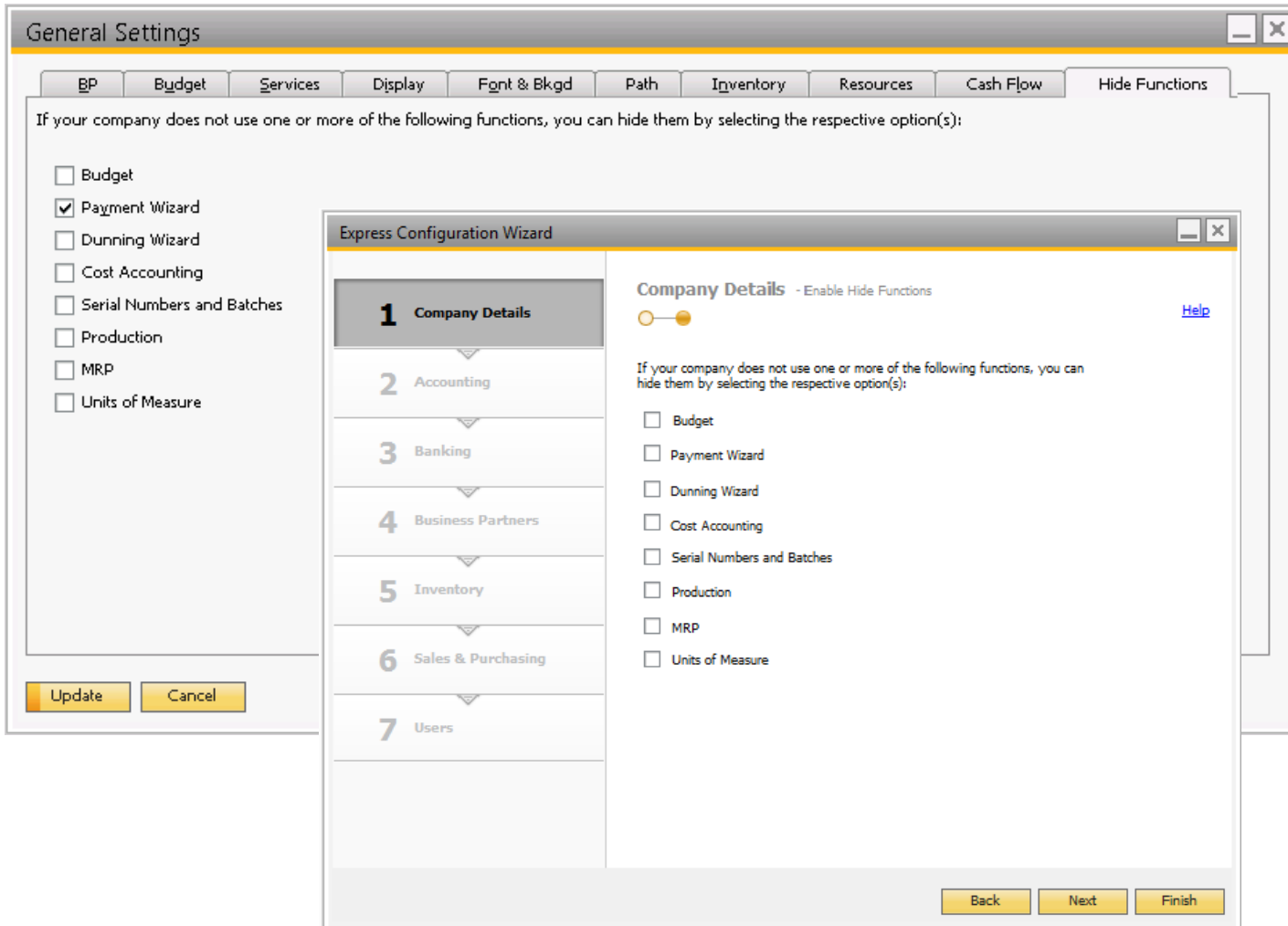
Enhancements

- Permission groups enable customers to define role-based authorizations in SAP Business One
- Administrators can create permission groups containing sets of general authorizations
- A user can be assigned to one or multiple groups

Benefits

- Reduced effort for user administration

Hiding Business Functions For Faster Implementation



Enhancements

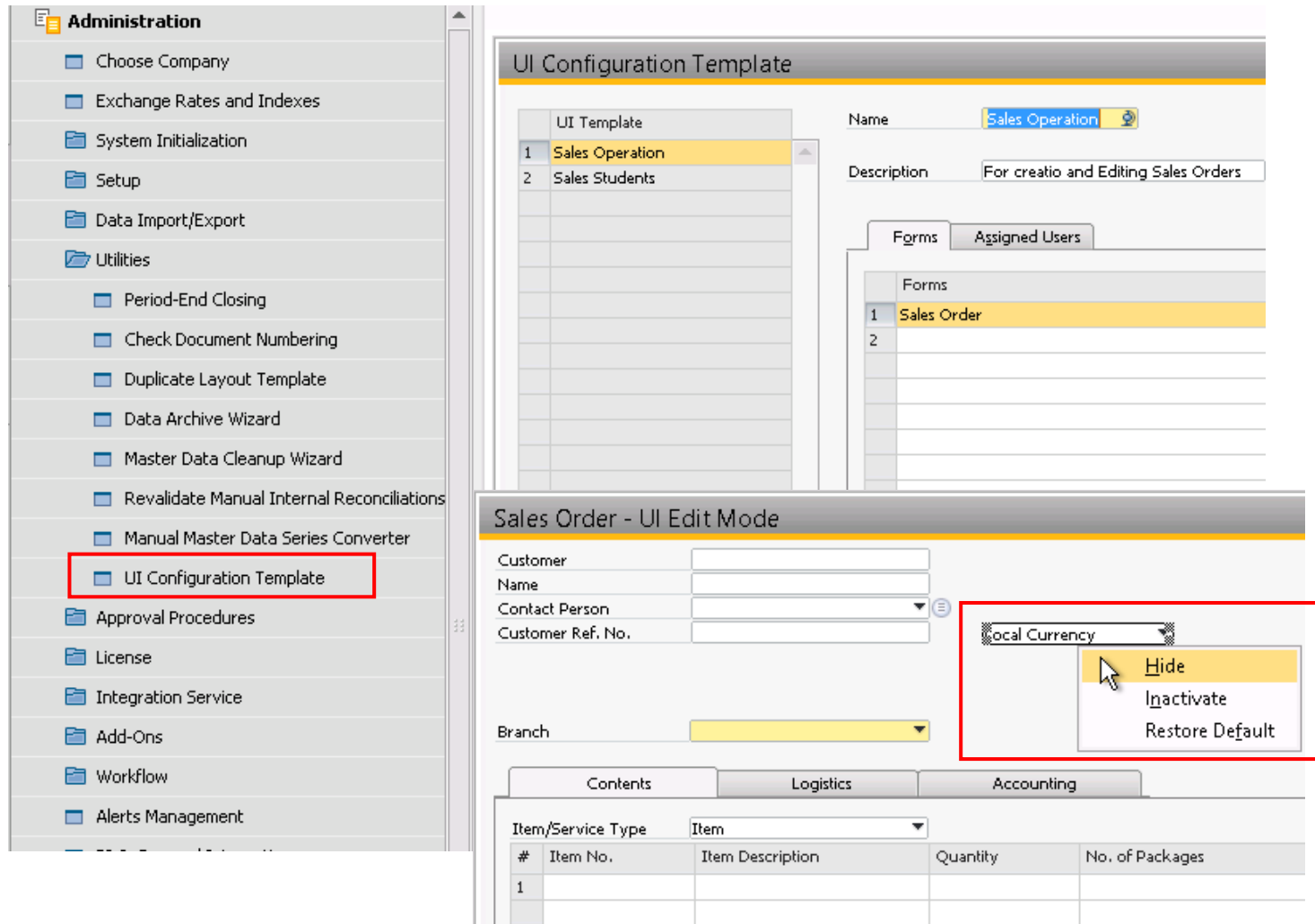
- Option to remove unused functions from the user interface at company level, such as:
 - Budget
 - Payment Wizard
 - Dunning Wizard
 - Cost Accounting
 - Serial Numbers and Batches
 - Production
 - MRP
 - Units of Measures
- Company level settings changeable at any time
- Configuration via Express Configuration Wizard or General Settings

Benefits

- Switching off complete business functions makes implementation faster.

Configurable framework to hide UI items

Adaptable UIs for Simplification



Enhancements

- Option to hide, inactivate and relocate fields
- Configurable UI templates which can be assigned at the company and user level
- Personalized adaptation by user possible

Benefits

- Simplified UIs improve user experience and productivity
- Further refinement of the authorization concept: A user can only view or edit information on their own authorization

Data Import via Excel

More option and fields supported

9.0

Import from Excel

Data Type to Import: BP

Use Data Template

Column	Field
A	BP Code
B	BP Name
C	
D	
E	
F	
G	
H	
I	
J	
K	
L	
M	

☒ Update Existing Records

OK Cancel

9.1

Import from Excel

Data Type to Import: Business Partner

File to Import

Map the File Columns to the Object Fields

Column in File	Field in Object
A	BP Code
B	BP Name
C	BP Currency
D	BP Type
E	
F	
G	
H	
I	
J	
K	
L	
M	

Import Method

☒ Add New Records and Update Existing Records

☐ Add New Records Without Updating Existing Records

☐ Update Existing Records Without Adding New Records

Mapping

Use Data Template

Save as Template

Clear Mapping

OK Cancel

Enhancements

- Import changes without adding new records
- Additional fields for BPs and items including object properties and UDFs are supported

Benefits

- More data import and integration scenarios can be covered by the Excel import tool, including migration

Maximize Grid

Simply enlarge

The screenshot shows the SAP Sales Order form. The 'Contents' tab is active, displaying a table of items. A context menu is open over the table, and the 'Maximize/Restore Grid' option is highlighted with a red box. A large yellow arrow points from this option to a second screenshot of the same form, where the grid is maximized to fill the available space.

Sales Order

Customer: C23900
Name: Mikrochips GmbH
Contact Person: Herbert Mayer
Customer Ref. No.:
BP Currency: EUR

Branch:

Contents | Logistics | Accounting | Attachments

#	Item No.	Item Description	Quantity	Unit Price	Disc
1	A00004	Rainbow Farbdrucker 5.0	3	82,50 EUR	
2	A00005	Rainbow Farb	3	93,50 EUR	
3	A00006	Rainbow 1200	3	115,50 EUR	
4	B10000	Etikettendrucker	4	71,50 EUR	
5	C00001	Motherboard	3	60,50 EUR	
6	C00002	Motherboard	3	71,50 EUR	
7	C00003	Quadcore Pro	3	187,00 EUR	
8	C00004	PC Gehäuse m	1	49,50 EUR	

Sales Employee: Kolman Winfried
Owner: Leitner, Robert

Context Menu:

- Cut
- Copy
- Copy Table
- Paste
- Delete
- Maximize/Restore Grid**
- Add Row
- Delete Row
- Duplicate Row
- List of Items
- Row Details...

Maximized Grid:

#	Item No.	Item Description	Quantity	Unit Price	Discount %	Tax Code	Total (LC)
1	A00004	Rainbow Farbdrucker 5.0	3	82,50 EUR	0,0000	A2	247,50 EUR
2	A00005	Rainbow Farbdrucker 7.5	3	93,50 EUR	0,0000	A2	280,50 EUR
3	A00006	Rainbow 1200 Laserdrucker	3	115,50 EUR	0,0000	A2	346,50 EUR
4	B10000	Etikettendrucker	4	71,50 EUR	0,0000	A2	286,00 EUR
5	C00001	Motherboard BTX	3	60,50 EUR	0,0000	A2	181,50 EUR
6	C00002	Motherboard MicroATX	3	71,50 EUR	0,0000	A2	214,50 EUR
7	C00003	Quadcore Prozessor 3,4 GHz	3	187,00 EUR	0,0000	A2	561,00 EUR
8	C00004	PC Gehäuse mit Netzteil	1	49,50 EUR	0,0000	A2	49,50 EUR
9	C00005	WLAN-Karte	1	22,00 EUR	0,0000	A2	22,00 EUR
10							

Enhancements

- Ability to maximize the grid to the whole form size or switch it back to the normal size by just one click

Benefits

- Improve user experience for documents with high number of items

Copy & Paste between SAP Business One Grids and Excel

For Editing Data in Excel

The screenshot shows the SAP Business One Sales Order grid. The 'Contents' tab is active, displaying a table with columns: #, Item No., Quantity, No. of Packages, Unit Price, and Discount %. The data is as follows:

#	Item No.	Quantity	No. of Packages	Unit Price	Discount %
1	A00001	9	9.000	110.00 CAN	
2	A00002	8			
3	A00003	7			
4					

A context menu is open over the grid, with the 'Copy Table' option highlighted. An arrow points from this option to an Excel spreadsheet. The Excel spreadsheet shows the copied data in a table with columns: Item No., Quantity, Unit Price, Discount %, Tax Code, Total (Doc), and Sales Person. The data is as follows:

	A	B	C	D	E	F	G
	Item No.	Quantity	Unit Price	Discount %	Tax Code	Total (Doc)	Sales Person
1	A00001	9	110.00 CAN	0.000	Exempt	990.00 CAN	Brad T
2	A00002	8	240.00 CAN	0.000	Exempt	1,920.00 CAN	Brad T
3	A00003	7	89.00 CAN	0.000	Exempt	623.00 CAN	Brad T
4				0.000			Brad T

Enhancements

- Copy complete transaction item table to Excel
- Paste a selected table area from Excel to SAP Business One transaction item table

Benefits

- Enable end user to edit large table data in their familiar UI (Excel)

Simplified E-Mail and Printing

Scope Enhancements

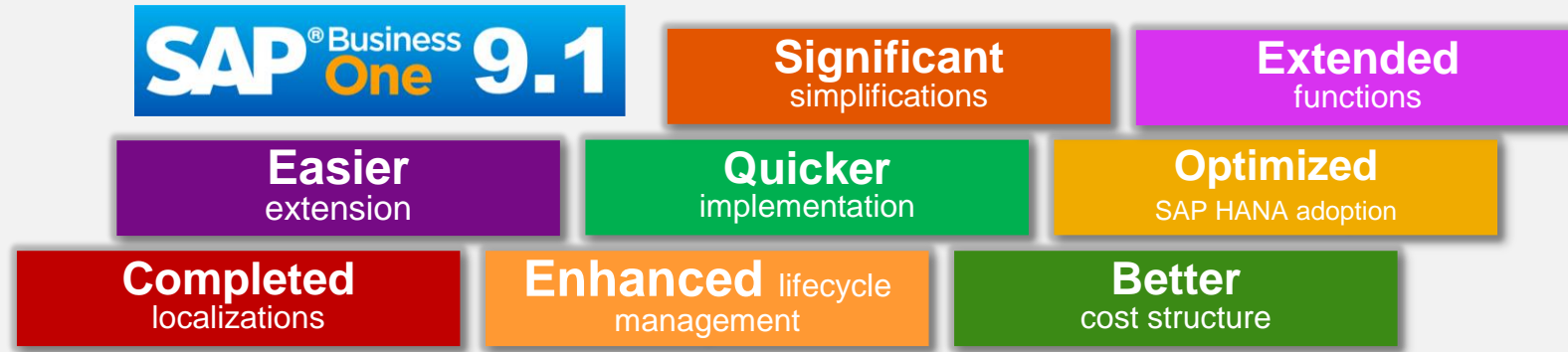
The screenshot displays two SAP interface windows. The 'Print Preferences' window on the left has the 'General' tab selected. Under 'When Adding Document:', the checkboxes for 'E-Mail Document' and 'Export to PDF' are checked and highlighted with a red box. The 'Business Partner Master Data' window on the right shows the 'General' tab for business partner 'Max Teq'. The 'E-Mail Group' dropdown is set to 'Accounting' and is also highlighted with a red box. Below the main data fields, there are sections for 'E-Mail Subject' and 'E-Mail Body', each with a text area and a list of predefined texts, both highlighted with red boxes. The 'E-Mail Subject' list includes 'Purchase Request', 'Sales Quotation', 'Sales Order', 'Delivery', 'Returns', 'A/R Down Payment', 'A/R Invoice', and 'A/R Credit Memo'. The 'E-Mail Body' list includes 'Purchase Request', 'Purchase Quotation', 'Purchase Order', 'Goods Receipt PO', 'Goods Return', 'A/P Down Payment', 'A/P Invoice', 'A/P Credit Memo', 'Landed Costs', 'Incoming Payment', 'Deposit', 'Outgoing Payment', 'Postdated Deposit', 'Check for Payment', 'Journal Entry', 'Journal Voucher', 'Goods Receipt', 'Goods Issue', 'Inventory Transfer Request', 'Inventory Transfer', 'Production Order', 'Inventory Revaluation', 'Pick List', 'Inventory Counting', 'Inventory Posting', and 'Inventory Opening Balances'.

Enhancements

- Option to assign business partner contacts to an e-mail group.
E.g., you could create an e-mail group for “accounting” so that SAP Business One can send e-mails to a department instead of just one contact.
- Two new output methods available when adding a marketing document: Send e-mail and export to PDF
- Ability to maintain a default e-mail subject and body for each document (static text only)
- Ability to send selected documents from a list as e-mails to recipients

Benefits

- More options for sending documents to partners via e-mail

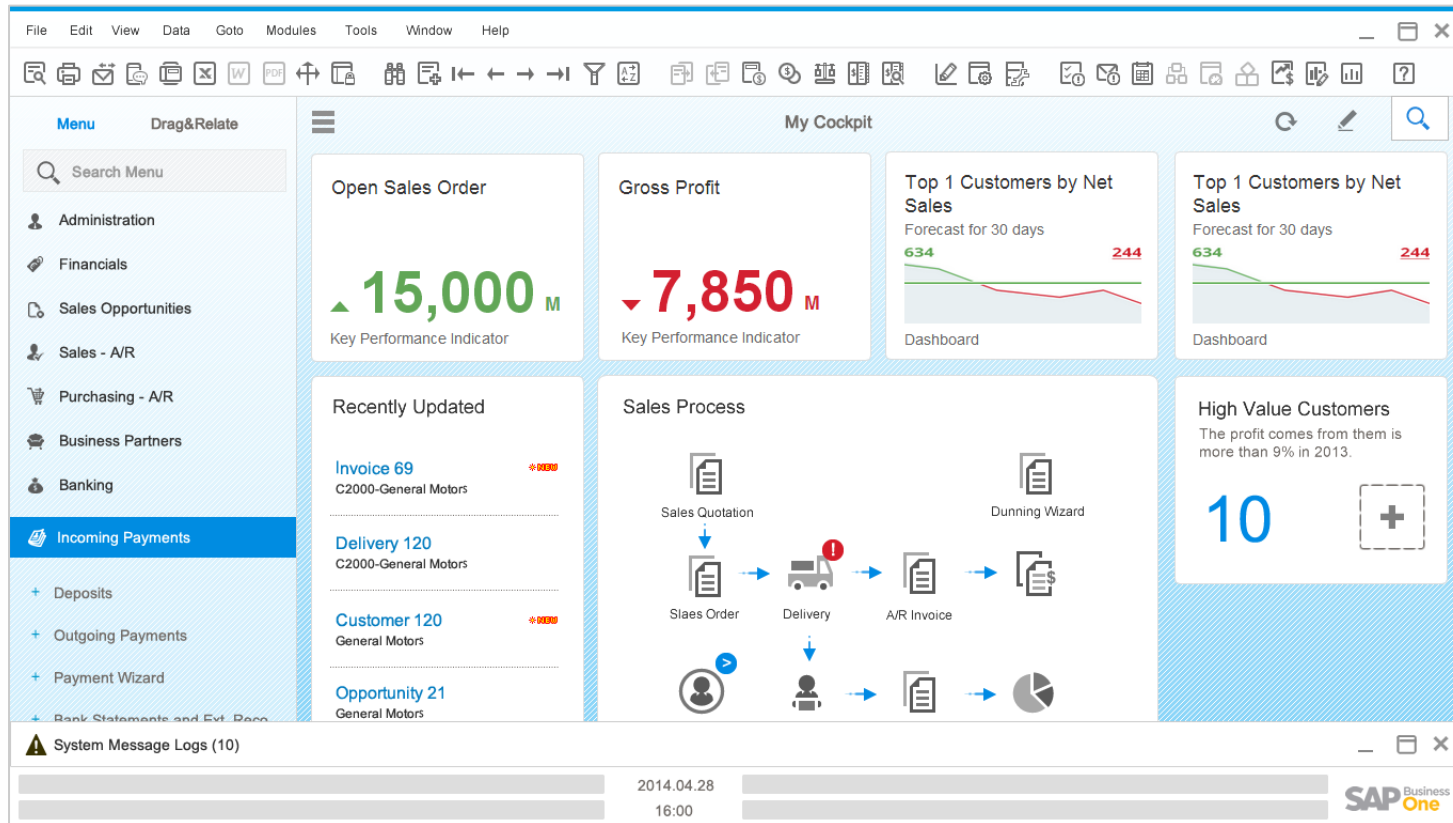


»»» Specific to SAP Business One 9.1, version for SAP HANA

New Role-based cockpit for analytics and simplified system

Based on HTML5 technology

Version for
SAP HANA only



Enhancements

- New cockpit, based on HTML5
- Predefined cockpits for sales, purchase, finance and inventory
- Workbench Widget (see next slide)
- Widget: Count – Counts Sales Orders not delivered, open A/R Invoices, Purchase Orders not received, open A/P Invoices, open Inventory Transfer requests
- Widget: Recently Updated, which reflects new and updated master data, marketing documents, chart of accounts and many more types of information

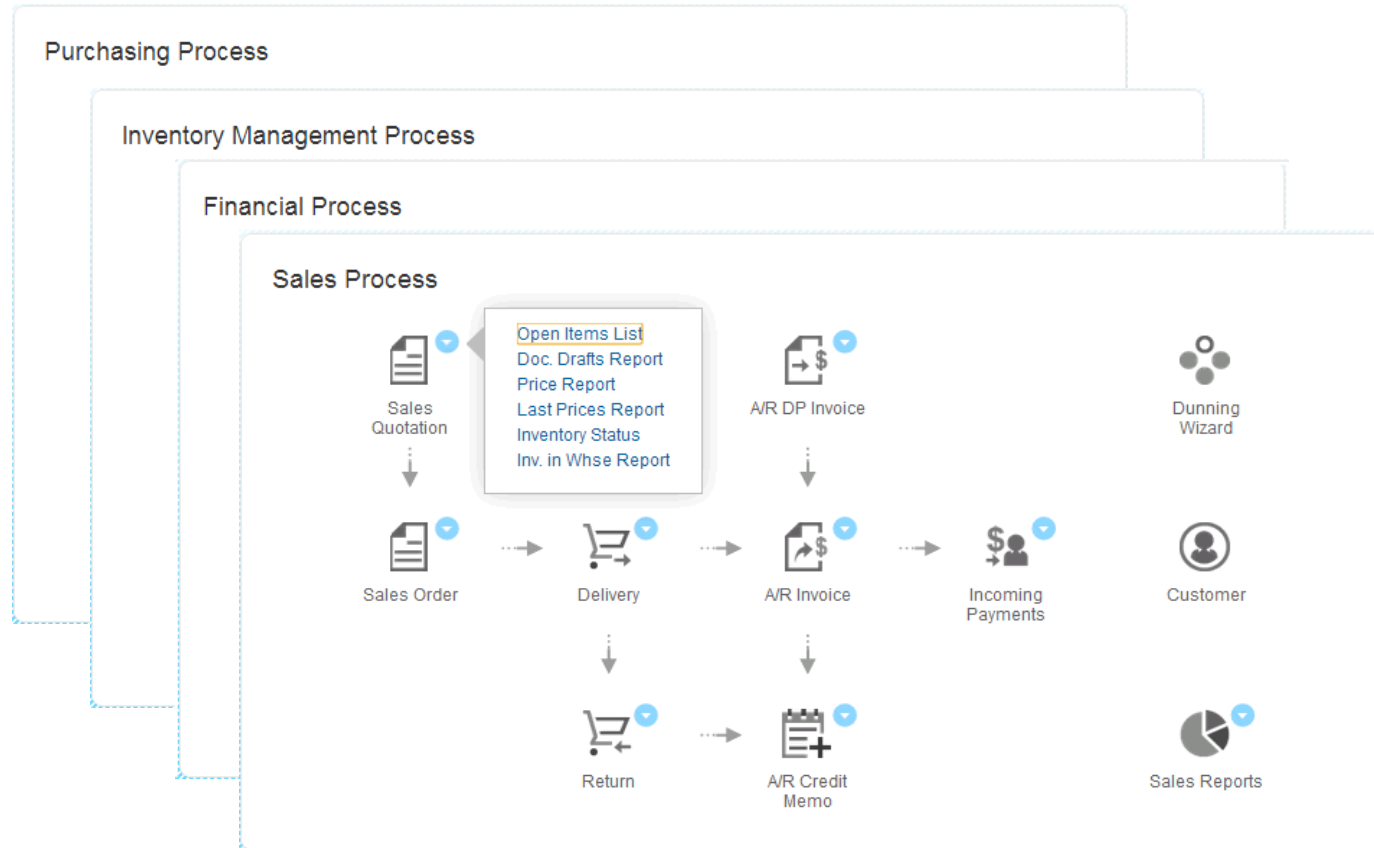
Benefits

- Simplifies access to information
- Increase user experience due to HTML5 technology

Workbench

New widget to cover most of the daily operation

Version for
SAP HANA only



Enhancements

- Process widget to create and manage documents for:
 - Sales
 - Purchasing
 - Inventory management
 - Financials

Benefits

- Guide user through key business processes
- Easy access to related functions

Pervasive analytics – Insight to action

Enhanced feature set for Pervasive Analytics Dashboards and KPIs

Version for
SAP HANA only

The image shows the 'Edit Action (Dashboard)' dialog box and a dashboard bar chart. The dialog box has a sidebar with four action types: 'Open SAP B1 Window' (selected), 'Trigger Enterprise Search', 'Link to SAP B1 Window', and 'Open Advanced Dashboard'. The main area shows 'Action Name' as 'Open SAP B1 Window 1', 'Target SAP B1 Window' as 'Business Partner Master Data', and 'Data Binding' with a 'Dashboard Field' 'Customer Code' mapped to a 'Target SAP B1 Window Item' 'BP Code'. Below the dialog is a dashboard bar chart with a red box highlighting a context menu triggered by a right-click on a column. The menu options are 'Open BP Form', 'Open ES', 'Customer 360', 'Inventory 360', and 'Financial 360'. A red arrow points from the text 'Action List triggered by right click the column' to the menu.

Category	Value
4	8,000
5	5,000
6	6,000
7	7,000
8	10,000
9	9,000
10	11,000
11	12,000
12	10,000
1	13,000
2	12,000
3	14,000

Enhancements

- Ability to relate business actions to pervasive dashboards and KPIs
- Available action types:
 - Open SAP B1 Window to open B1 forms e.g. Master Data
 - Trigger Enterprise Search to start an enterprise search
 - Link to SAP B1 Window, to show dashboard in sidebar
 - Open Advanced Dashboard will open an advanced dashboard (see next slide)

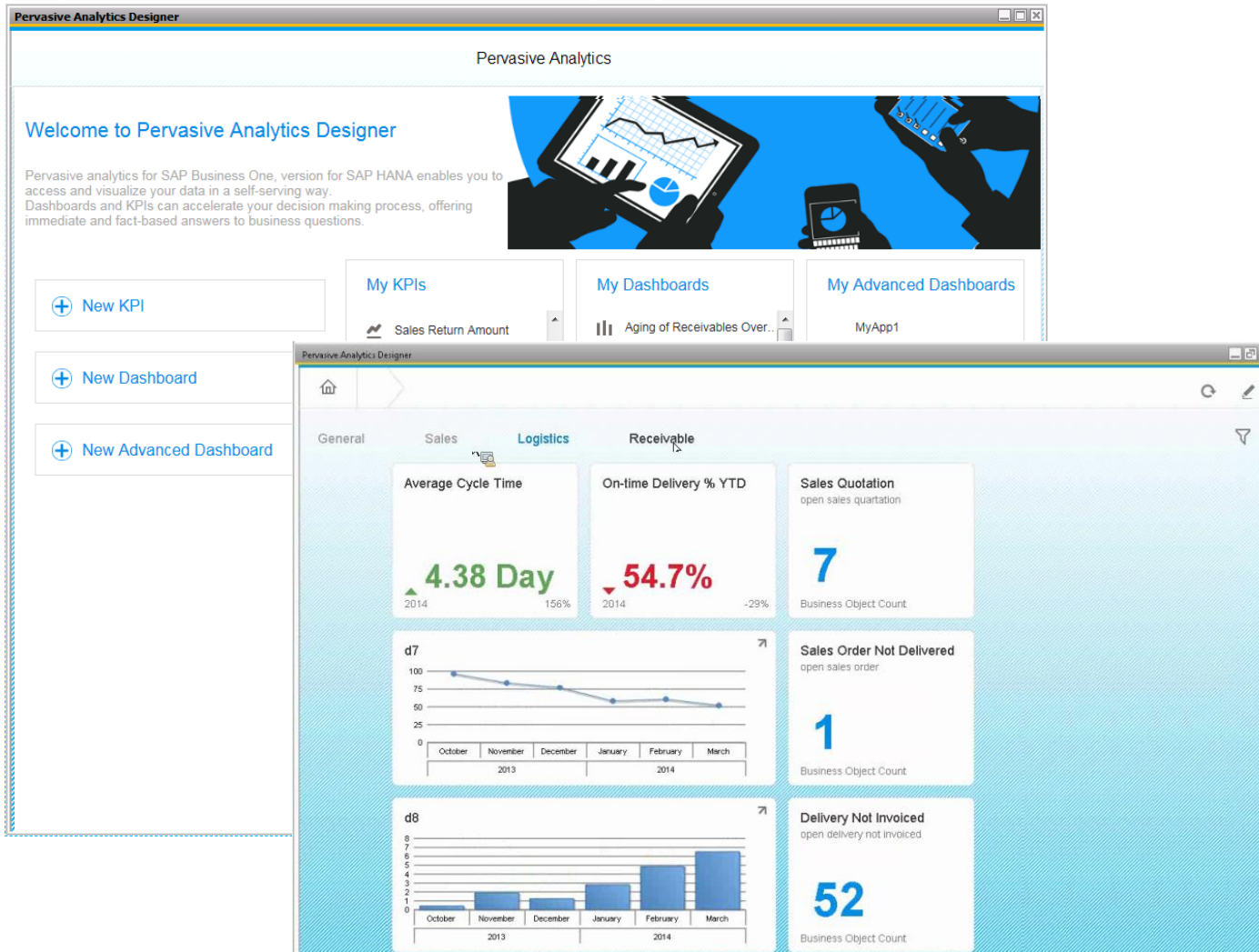
Benefits

- Drill down into business details
- Translate insights into actions

Pervasive analytics – Advanced Dashboards

Supplementary Dashboard to display related, critical data

Version for
SAP HANA only



Enhancements

- Ability to create supplementary dashboards to display further related data of pervasive dashboards or KPI widgets
- Add filters to break down the displayed results
- Display critical data grouped on a dedicated dashboard

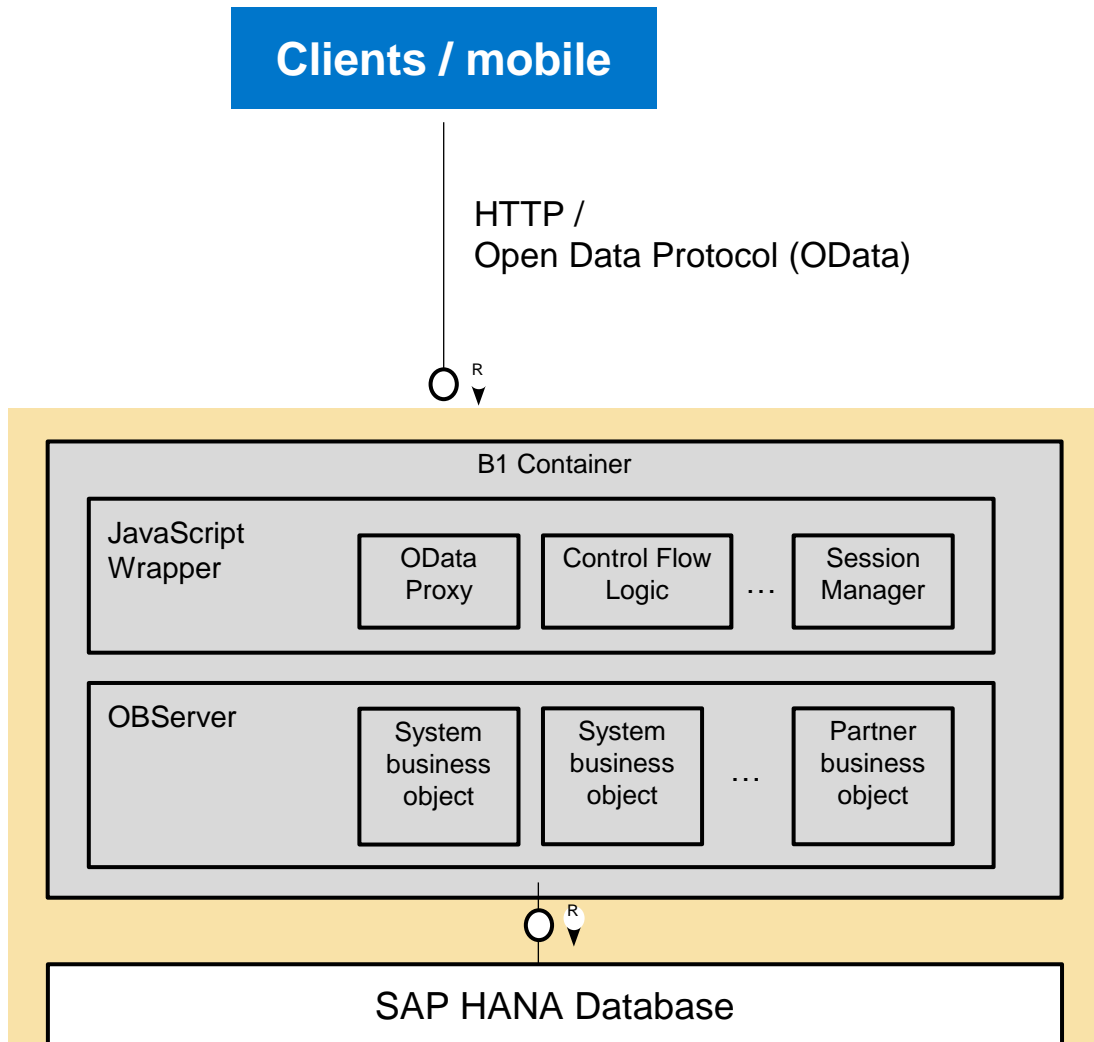
Benefits

- Quick access to extended business KPIs and business figures

Service layer that exposes business objects by Web service

Access system and partner business objects via easy-to-use OData protocol

Version for
SAP HANA only



Enhancements

- SAP Business One service layer provides server-side web access to system and partner business objects via easy-to-use OData protocol
- New state of the art technology to read and write data through HTML5 technology
- Parallel processing
- Well-defined APIs with similar objects and functional coverage compared to DI API
- High Availability support (auto restore session)

Benefits

- Increase data throughput due to parallel processing
- Simplified landscape and light-weight, web-based development
- Easy development of mobile applications
- Extend Extreme Applications capability to address complex business needs

NOTE: Additional cost may apply



Thank you

Contact for feedback: SAPBusinessOne@sap.com