SAP Business One

The Business Management Solution for Small and Midsize Enterprises

Solution Overview

SAP

The Best-Run Businesses Run SAP™

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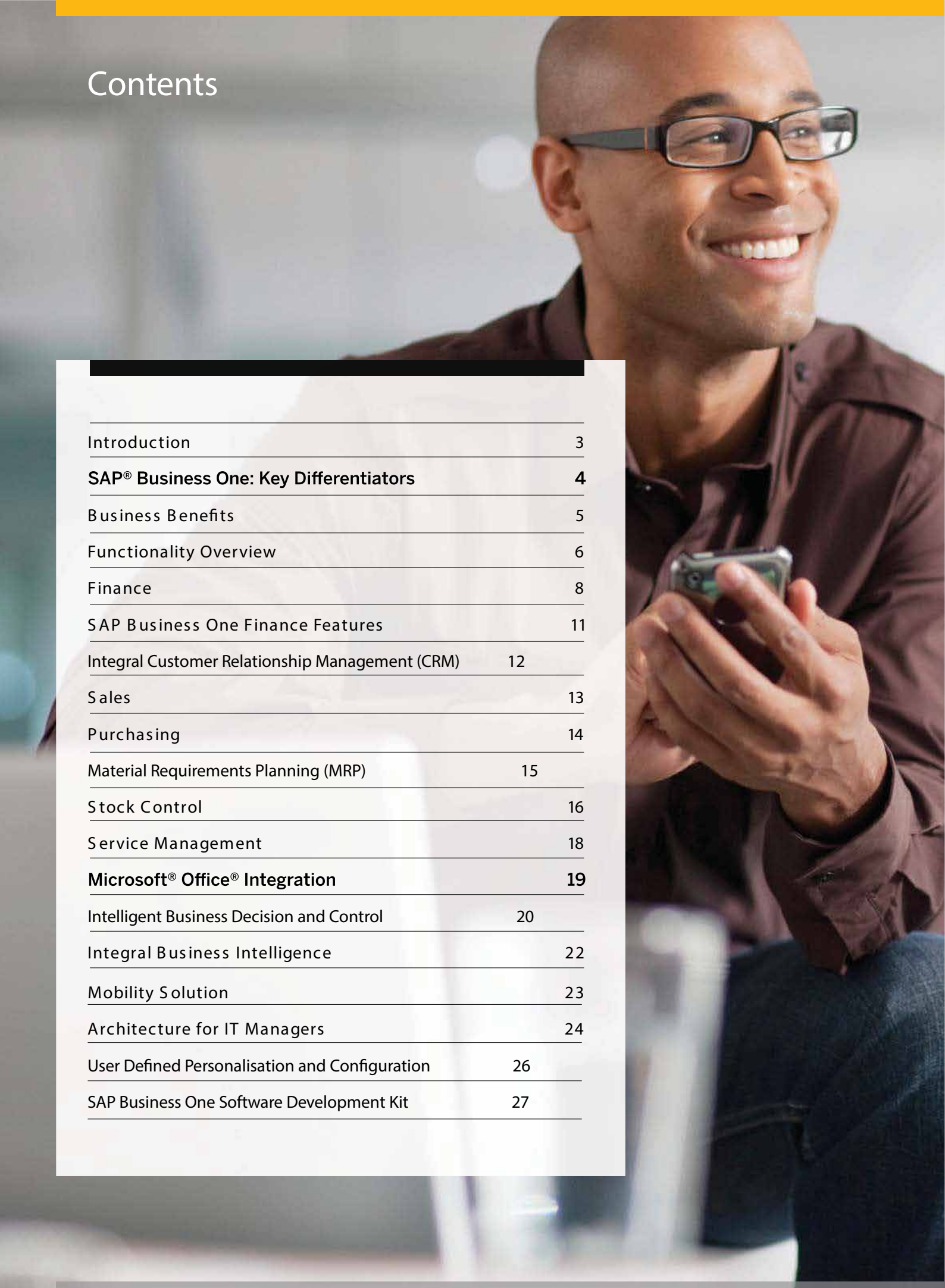

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Introduction

ABOUT SAP

SAP helps companies of all sizes and industries run better. From back office to boardroom, warehouse to storefront, desktop to mobile device, SAP empowers people and organisations to work together more efficiently and use business insight more effectively to stay ahead of the competition. We do this by extending the availability of software across on-premise installations, on-demand deployments, and mobile devices.

We believe that the power of our people, products, and partners unleashes growth and creates significant new value for our customers, SAP, and, ultimately, entire industries and the economy at large.

Our mission is to help companies of all sizes and industries to run better. Our vision is to help the world run better.

SAP is the market leader in enterprise application software and has a rich history of innovation and growth. SAP applications and services enable more than 109,000 customers in over 120 countries to operate profitably, adapt continuously, and grow sustainably.

EXECUTIVE SUMMARY

SAP® Business One is an affordable, easy-to implement, complete business management solution. Designed specifically for small and midsize enterprises it ensures company growth, helps increase profitability and control, and automates your business processes. This total solution comprises all the core functions you need to run your growing business including administration, financial accounting, banking, sales, purchasing, customer relationship management, stock control, manufacturing, management accounting and reporting. Managers and employees alike can process information more effectively, helping them make sound business decisions. Through one single system, business owners and managers can now get on-demand access to a true and unified picture of critical, up-to-the-minute business information across the entire organisation.

Through the SAP Business One Maintenance programme, your business will automatically get access to new functionality as the product develops. Additionally, if your business is a subsidiary, customer or supplier of a global organisation already benefiting from SAP enterprise software, you can take advantage of pre-configured integration. The touch-points include control of master data management (items, customers and suppliers), chart of accounts, consolidation of financial information and intercompany trading.

"I would recommend SAP Business One to any business of our size. People shy away from it, thinking it's for bigger companies, but it's not expensive and it's a comprehensive business tool for any company that really wants to understand how it is operating."

Philip Delaney, Managing Director, Dairyglen

SAP Business One: Key Differentiators

SAP Business One is a breakthrough in business management software - built from the ground up for gro wing small and midsiz e ent erpris es.

Personalised work centres
Unique customisable work centres for each user that help you:

- Access dashboard reports
- Provide one click a ccess to common r esources
- Embed personalised web pages
- Easily integr ate Microso ft® Outlook® e-mail using drag and drop

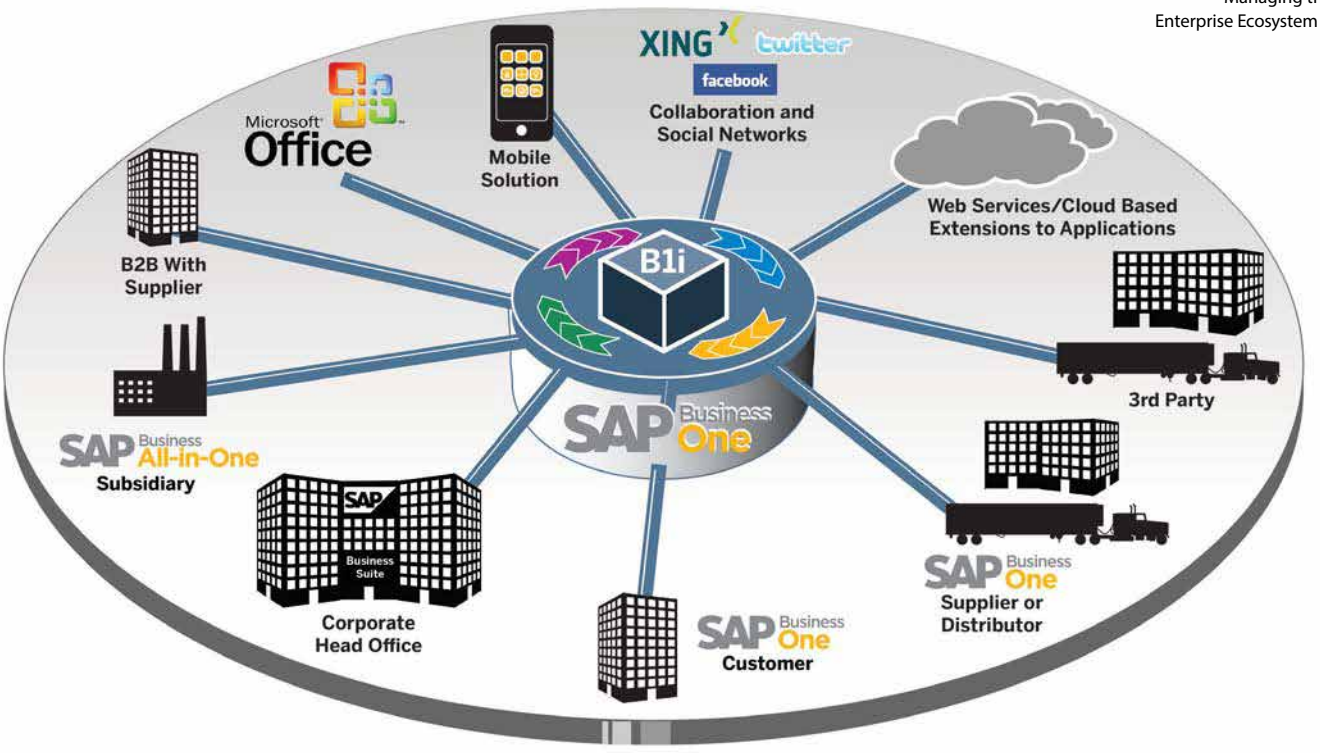
Integral customer relationship management (CRM)
SAP Business One is the only solution built for small and midsize busin esses that features built-in customer relationship management (CRM) to help users:

- Manage sales opportunities and conduct sales pipeline analysis
- Track customer and supplier profiles, contact information and account balances
- Support contract management and service planning
- Enable efficient customer support

Powerful reporting tools and analysis
Unique enquiry and reporting tools, fully integrated with SAP Crystal Reports® software, allow you to click on virtually any item in a report to see all the relevant details. From beginner to advanced user, SAP Business One provides the tools needed to access vital information.

Ecosystem
SAP Business One provides a flexible business platform that unlocks the potential of your ecosystem. From customers and suppliers to parent companies, mobile devices and Web services SAP Business One allows you to integrate each aspect of your business using SAP Business One Integration Technology.

Managing the Enterprise Ecosystem



Business Benefits

There's never been a better time to realise the benefits of SAP Business One. A best -in-class solution at the right pric e for your gro wing busin ess, it has the power to help you boost productivity, cut costs, seize opportunities and anticipate challenges as never before.

Increase revenue
Fast and easy access to real-time information anywhere in the system helps you identify new sales opportunities, bring new products to market quickly and provide business-building levels of customer support and service.

Reduce costs
Say goodbye to cos tly multiple upgrades and recurring customisation efforts to maintain system compatibility when you add new functions.

Run your business with just one business management solution
SAP Business One includes the following integral components: accounting, customer relationship management (CRM), sales, manufacturing, purchasing, banking and stock control.

Improve customer relationships
Integral customer relationship management arms your team with relevant compa ny-wide data for strong er sales and support to enhance customer satisfaction.

Maintain your IT solution as your company grows
Why put up with solutions your business will outgrow? Say goodbye to slow software performance, outdated information, limits on data storage and confining limits on the number of simultaneous users and locations.

Get clearer, instantaneous insights
Utilise up-to-the-minute dashboards to deliver revealing snapshots of key performance indicators, for unprecedented day-to-day control.

Get proactive business critical alerts
SAP Business One features the most powerful proactive business alert system ever developed for small and midsize enterpri ses.

Improve efficiency
One centralis ed data repo sitory dramatically boosts efficiency by providing the right information to the right people and eliminating redundant data entry.

Get access to local support
A worldwide network of qualified business partners provides unsurpassed local support.

Get up and running fast
Take advantage of tried and tested best practice business processes enabling easy implementation - and get up and running in just weeks.

Support multi-currency transactions
Business transactions can be conducted and reported in multiple currencies.

Get support for multilingual capability
Available in 27 languages, with full local legislative compliance in 40 countries and used in a further 34.

Integrate SAP Business One with Microsoft Office
SAP Business One is fully integrat ed with the Microso ft® Office® suite of produc ts, including Micr osoft O utlook, enabling seamless communication that can span your organisation and business functions. Departments can share contacts, appointments and tasks.

Integrate SAP Business One with SAP Business Suite
SAP Business One is seamlessly integrated with SAP Business Suite solutions and because it has an open architecture, it can be easily integrated with solutions from other software vendors. This open architecture allows you to realise all the extensive benefits of SAP software.

Functionality Overview

Overview of functional areas
SAP Business One is a comprehensive and versatile business management solution equipped with an easy-to-use interface and serves as the primary enterprise resource planning (ERP) application for your busin ess.

The solution provides all the administrative functions that let you customise and back-up data, define currency exchange rates, c onfigure permissions, alerts and access information from non-SAP software. In addition, it comprises 11 areas of functionality that help extend its capabilities far beyond its primary administrative function and enable it to streamline all your busin ess pro cesses. These areas of functionality include:

Finance
Handles all financial transactions including general ledger, account set up and maintenance, journal entries, foreign currency adjustments and budgeting.

Bank transactions
Takes care of all financial pro cessing such as cash re ceipts, cheque writing, bank transfers, deposits, advance payments, credit card payments and bank reconciliation.

Controlling
Define multi-dimensional cost centres and distribution rules to allocate costs and analyse your business by cost centre.

Sales
Helps create quotations, enter customer orders, set up deliveries, update stock balances and manage all invoices and accounts receivables.

Purchasing
Manages and maintains supplier transactions such as issuing purchase quotations and orders, updating stock numbers, calculating landed costs f or imported items , handling returns and credits and pr oces sing payments.

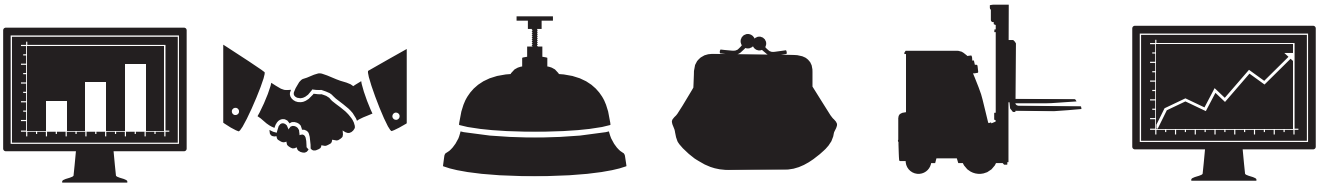
Integral customer relationship management
Controls all the information on your customers, resellers and suppliers including profiles, contact summaries, account balances and sales pipeline analysis.

"We have been able to establish a best practice approach across Europe with the same procedures in place for each country.
The reporting functionality of SAP Business One is very good – for example, I can now run a report on delivery times across the whole of Europe at the click of a button.
It is possible to get the information and reports required quickly and easily."

Michael Spatny, General Manager, Anritsu EMEA

SAP BUSINESS ONE FEATURES OVERVIEW*

Reporting and Data Navigation Capabilities
Underlying SAP Technologies (Drag & Relate, Alerts, User Interface Customisation)



Financials

- Chart of accounts
- Account segments
- Journal entries
- Journal vouchers
- Recurrent transactions
- Exchange rates in multiple currencies
- Financial reports
- Budget cost centres
- Sales tax calculations
- Multiple financial periods
- Deposits
- Cheques
- Credits
- Receipts
- Deferred payments

Sales

- Opportunities and pipeline management
- Contact management
- Quotations
- Orders
- Invoices
- Deliveries
- Returns
- Price lists in multiple currencies
- Client management
- Gross profit calculation
- Microsoft Office integration

Service

- Service contract management
- Service planning
- Tracking across multiple customer interactions
- Knowledge database
- Service call management

Purchase

- Purchase quotations
- Purchase orders
- Purchase deliveries
- Purchase returns
- Purchase credit notes
- Landed costs

Stock

- Item management
- Item queries
- Price lists
- Receipt to stock
- Release from stock
- Stock transactions
- Warehouse transfers
- Serial numbers tracking
- Batch management
- Pick and pack
- Kitting

Manufacturing

- Bill of materials
- Production orders
- Forecasting
- Materials resource planning wizard
- Recommendation reports

Software Development Kit and SAP Business One Integration Technology

Stock control
Handles stock levels , item management, price li sts, special price agreements, transfers between warehouses and stock transactions.

Materials requirements planning (MRP)
SAP Business One offers a simple yet powerful planning system that helps production planners or buyers schedule and manage items for production or purchasing based on a variety of criteria.

Reporting
Creates powerful reports for nearly every aspect of your business including customer and supplier debt, sales, cash flow, customer contact summaries, book-keeping, warehouse stock, financial statements, pricing, customer activity and more (via pre-defined reports or define-it-yourself queries). Integral SAP Crystal Reports provide more in-depth analysis and graphical reporting.

Service cycle management
Optimises the potential of your service departments, providing support for service operations, service contract management, service planning, tracking of customer interaction activities, customer support and management of sales opportunities.

Employee profiles
Provides staff management capabilities including employee details, contact information and absence reports.

* This is a non-exhaustive list

Finance

Handling International Financial Reporting Standards (IFRS)
As IFRS becomes more prevalent in small and midsize companies users are looking for simple ways to handle the challenges of using parallel general ledger accounts to support reporting in both local and IFRS standards. SAP Business One provides the functionality to support the need of recording and reporting transactions in parallel general ledger accounts and then provides the reports you need to create your financial statements in accordance with IFRS.

Multi-dimensional cost centres
SAP Business One allows the management of cost centres in multiple dimensions providing the ability to analyse financial information the way your business needs to. Businesses can easily structure their cost centre structure in hierarchies for sophisticated and accurate reporting.

Accounting
SAP Business One features a chart of accounts template for every country, which can be adapted to your business requirements. A user defined chart of accounts can be created to reflect your business.

Journal entries
The solution allows users to create new journal entries and search for existing ones. Note that most journal entries are posted automatically from the sales, purchasing and banking areas. In addition, users can automatically allocate each transaction to a project or a cost centre.

Journal vouchers
Users can save multiple manual journal entries to a batch and process simultaneously. This allows verification and collection of postings before they are entered in the general ledger.

Posting templates
Users can define general ledger (G/L) account assignment models, which saves time and helps avoid mistakes during the manual posting of journal entries.

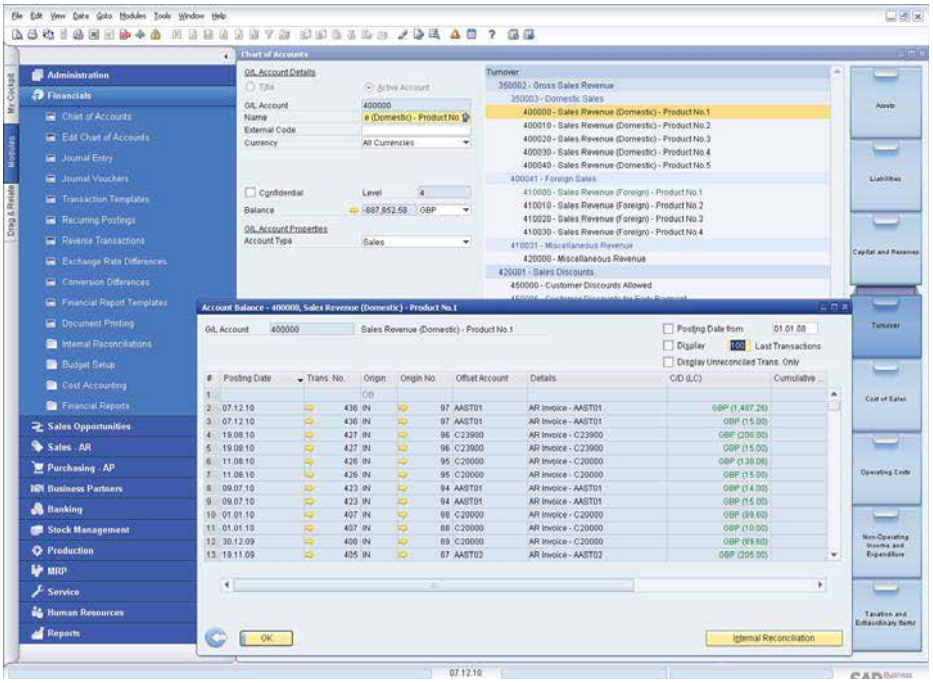
Recurring postings
Users can define their own postings for regular execution in accounting and specify a frequency for each recurring posting. In this case, the solution automatically reminds them to enter these postings.

Reversing journals
SAP Business One allows users to reverse month-end accruals postings automatically. By default, reversal of specified postings will occur on the first day of the following calendar month, but if necessary, users can specify a different reversing date for each posting.

Exchange rate differences

The solution lets users periodically evaluate their open items in foreign currencies, then identify differences and choose the appropriate correction transaction.

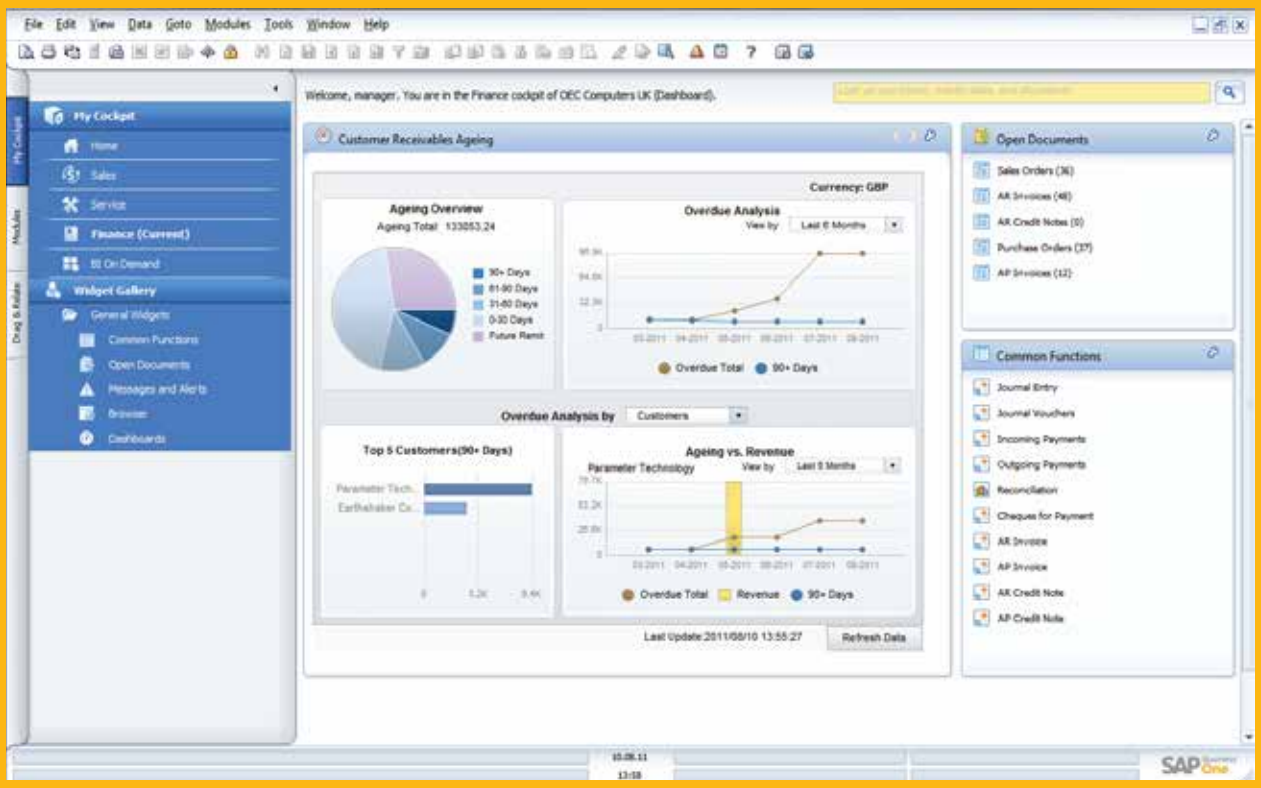
Financial report templates
Users can quickly and easily generate any number of financial report templates. A user can create templates for any purpose, such as additional profit and loss statements.



Complete Chart of Accounts

"SAP Business One is a very stable system and gives us the reporting time frame that we wanted. Month end is three times faster with less people to complete the operation. It used to take seventeen days to complete month end, it now takes five days and delivers improved reporting tools and documentation."

Stephen Trillo, IT Manager, Lotte Chemical (UK) Ltd.



Customer Ageing Analysis Dashboard

Budgets

This feature helps users define and manage budgets against accounts. Users can configure budget allocation methods, define budget figures in any currency (local, foreign or both), and display a summarised budget report that compares actual and planned figures. In addition, users can define an on-line alert that notifies them whenever a transaction is about to exceed a monthly or annual budget.

Define cost centre

This function allows users to de fine different cost c entres or departments. Users can allocate the corresponding revenue and cost accounts to a pre-defined cost c entre in the chart of accounts.

Define distribution rules

Based on defined costs and experience, us ers can define different distribution rules to characterise business activiti es, and then allocate a revenue or cost acc ount to the corresponding distribution rule.

Table for cost centres and distribution rules

This function allows users to display cost c entres and distribution rules in table form. All figures are displayed clearly and can be adjusted as ne cessary. Users can als o define additional cost centres and distribution rules here. Once all cost f actors have been defined, the system automatically alloc ates them to the individual cost c entres in each transaction, giving rapid access to det ailed cost information.

Cost c entre report

This profit and l oss stat ement is based on re venues and costs - both direct and indirect - as defined in the allocation rules, and it can be run for an y cost c entre. Use rs can cho ose between annual and monthly display format and compare the results with figures for the previous period.

SAP Business One Finance Features

REAL-TIME ACCOUNTING

Fully integrated financials
SAP Business One features fully integrated financial and banking management. When transactions are posted, the sof tware creates a journal entry in the general ledger. SAP Business One automates virtually all key transactions. No formal posting or batch processing is required.

High-speed drill-down
You can easily drill-down to information at the posting level. For example, while viewing the journal entry for a sales transaction, you can drill-down to see the chart of accounts information.

Complete chart of accounts
In the chart of accounts, you can drill-down on the balance field to see transactions that make up a particular balance.

MONTH-END CLOSING

Accelerated closing features
SAP Business One helps to accelerate the month-end close process. In the activity window, you can assign t asks to individuals or create reminders to accomplish certain aspects of the cl ose process.

Establishing control accounts
SAP Business One can identify accounts as control accounts. You can assign control accounts as default posting accounts for the increase or decrease to the customer or supplier b alances. This ensures synchronisation between the general ledger and the subsidiary ledger.

Posting templates
You can use pos ting templa tes to allocate costs or transactions for several departments based on fixed percentages. Recurring postings allow you to create transactions with fixed amounts. Reversing transactions allows the reversal date to default to the first day of the next month, or you can override this date if desired.

FINANCIAL REPORTING

Multi-level reports
Multi-level reporting is also enhanced by the flexibility provided in the configuration of the chart of accounts and multi-dimensional cost c entres.

Integrated reports
SAP Business One offers extensive integrated reporting tools for compiling busin ess, acc ounting, warehouse and financial reports, as well as account statements. You can export reports to a variety of different formats including Microso ft® Excel®, Microso ft® Word® and PDF.

XL Reporter tool
The XL Reporter tool provides real-time views of data within SAP Business One with all of the powers of Microso ft Excel for report formatting.

Integral Customer Relationship Management (CRM)

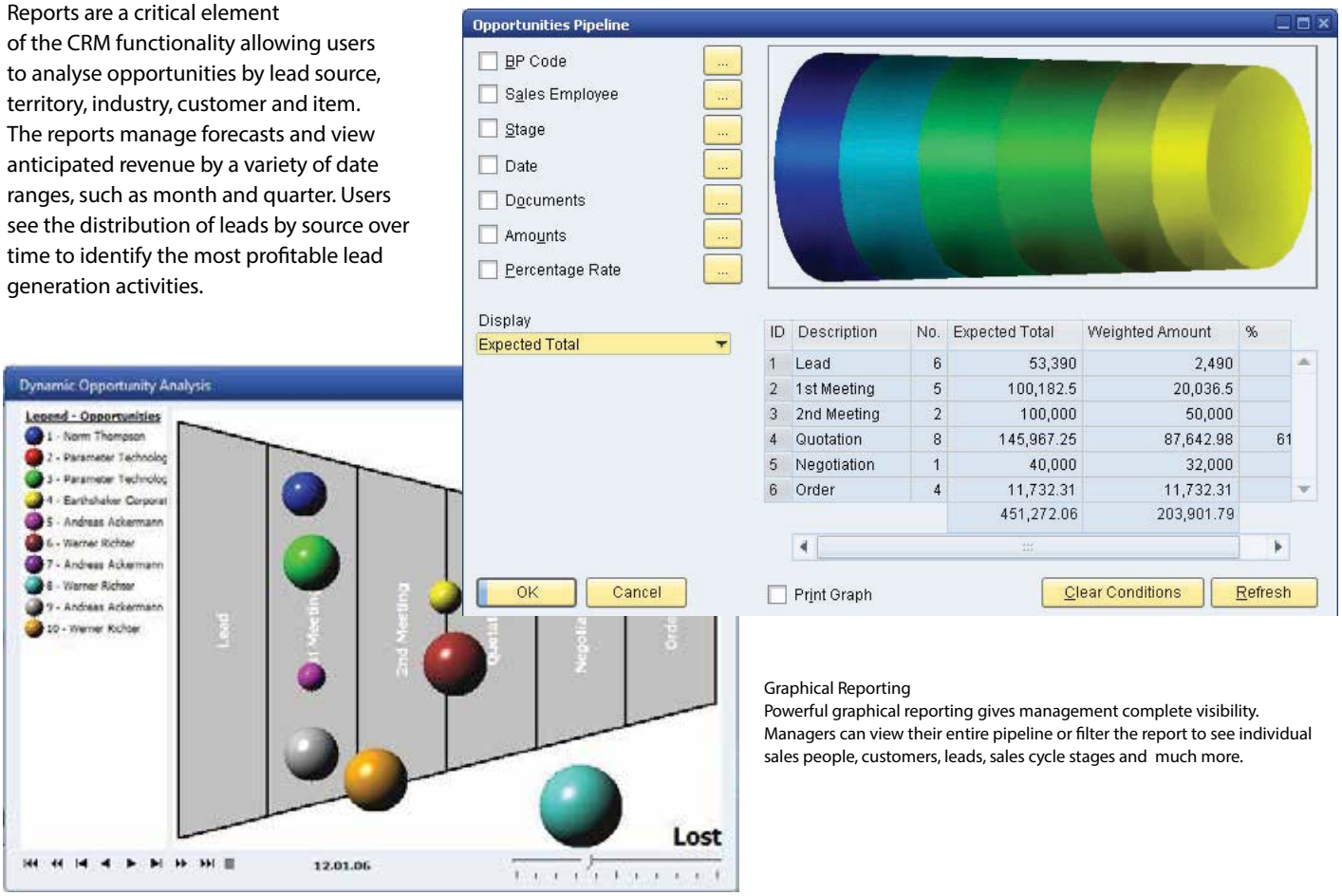
Complete sales and service management
SAP Business One delivers fully integral CRM functionality as part of the complete solution. This functionality ensures complete control of customer acquisition, retention, loyalty and profitability f or the busin ess. Tightly integrated features across marketing, sales and service provide end-to-end visibility of the complete customer lifecycle.

SAP Business One: CRM sales
The SAP Business One CRM sales cycle management functions record every sales opportunity across the customer lifecycle, from lead identification, through discovery, qualification, proposal, closure and ultimately through after-sale service and support. Integral CRM allows users to enter details of the opportunity, including the source, potential deal size, closing date, competitors and activities.

Key features and functionality

- Sales (Accounts Receivable): Helps create quotations, enter customer orders, set up deliveries, update stock balances and manage all invoices and accounts receivables
- Purchasing (Accounts Payable): Manages and maintains supplier transactions such as issuing purchase quotations and orders, updating stock numbers, calculating landed costs f or imported items , handling returns and credits and processing payments
- Business partners: Controls all information on customers, resellers and suppliers: including e-mail address, profiles, sales reports, activities with business partners, account balances and provides a calendar for user activities with search ca pability to find the ne cessary item

Reports are a critical element of the CRM functionality allowing users to analyse opportunities by lead source, territory, industry, customer and item. The reports manage forecasts and view anticipated revenue by a variety of date ranges, such as month and quarter. Users see the distribution of leads by source over time to identify the most profitable lead generation activities.



Graphical Reporting
Powerful graphical reporting gives management complete visibility. Managers can view their entire pipeline or filter the report to see individual sales people, customers, leads, sales cycle stages and much more.

Sales

Key sales analysis information through interactive dashboards

SAP Business One offers flexibility when creating the content for quotations or any marketing document. Different line types are supported, allowing users to create subtotals of previous lines. Users can insert free form text anywhere within the body of the document, as well as display recommended alternative items. Standard comments can be stored and re-used. Header and footer text can also be user-defined for each document. The gross profit can be calculated for each quotation. The last sales prices offered to a customer can be viewed easily. Once a quotation is created, users can export it to Microso ft Word with the click of a mouse.

Order
This feature simplifies sales order entry by giving the order taker full view of an item's stock position in multiple warehouses when a shortage ari ses. Av ailable to Promise functionality ensures the order taker can choose to order from a list of alternative items, or allow the item to be partially delivered. Orders can be created that support different delivery da tes and ship-to addr esses for each line item. Users can automatically create purchase orders from a sales order and drop ship them to the customer's site.

Delivery
The delivery function allows the shipping department to generate the ne cessary packaging document ation for all goods shipped to a customer. The built-in packaging pro cess f acilita tes the 'virtual' input of items into different packages during the delivery pr ocess. Users can store the delivery tracking number and a ccess the shipping status within the delivery note with a click of the mouse. Warehouse quantities are automatically updated when a delivery is made.

Returns
Users can easily handle returns without credit, or repair returns using the returns documents.

Accounts receivable (A/R) invoice
The invoice automatically creates a corresponding journal entry. As a result, users can create an automatic receipt if the customer pays part of the invoice immediately.

A/R invoice and payment
Users can create an invoice and receipt in one step using the same document.

A/R credit memo
When creating a credit memo for the customer - for example, for returned merchandise - users can easily import the required data from the original invoice or from any other sales and purchasing document.

Document printing
This function helps users print any sales and purchasing documents. Users can select by period, document number or document type.

Document Generation Wizard
This wizard allows users to group all existing sales documents in a single invoice for a given customer. The wizard is especially helpful to those who create a variety of orders and delivery notes over the course of the month but need a summarised invoice for each customer at the end of the month.

Document drafts
This feature allows users to print, edit and manage all documents that have been saved as drafts.

Dunning wizard
This powerful wizard handles multiple dunning letters per customer and maintains a dunning history for each customer. The wizard can be executed at regular intervals, such as monthly or weekly, to check all outst anding customer invoi ces. A series of dunning letters at different levels can be sent at pre-defined intervals. In addition, users can determine the method of calculating interest and dunning fees.

"We ship products worldwide and we have to make sure each shipment has the correct documentation. Previously we would have had to create all those documents manually. Now they can be produced directly from SAP Business One, saving time and effort."

Mark Johnson, Managing Director, Tacktick Limited

Purchasing

Request for Tendering
SAP Business One provides your business with the tools that it needs to handle your procurement process. A wizard guides you through the pro cess of r equesting quotations from your suppliers via the Web before managing their responses and your final decision.

Purchase order
SAP Business One enables users to order materials or services from suppliers. These orders update the available quantity of the ordered items and inform the warehouse manager of the expected delivery date. Users can split a single purchase order into multiple parts when, for example, items need to be shipped to multiple war ehouses. The split or revisions are required so that different packing slips and delivery notes can be created for each shipment. Each line item within a purchase order or an accounts payable (A/P) voucher can be shipped to, or specified as, a different warehouse location.

Goods receipt purchase order
This function allows users to receive a delivery at the warehouse or allocat e deliveries to multiple war ehouses. Goods receipts may be linked to a purchase order, and users can change the purchase order quantity versus the actual received quantity.

Goods returns
Supplier returns for repair or without credit can be handled using the goods returns document.

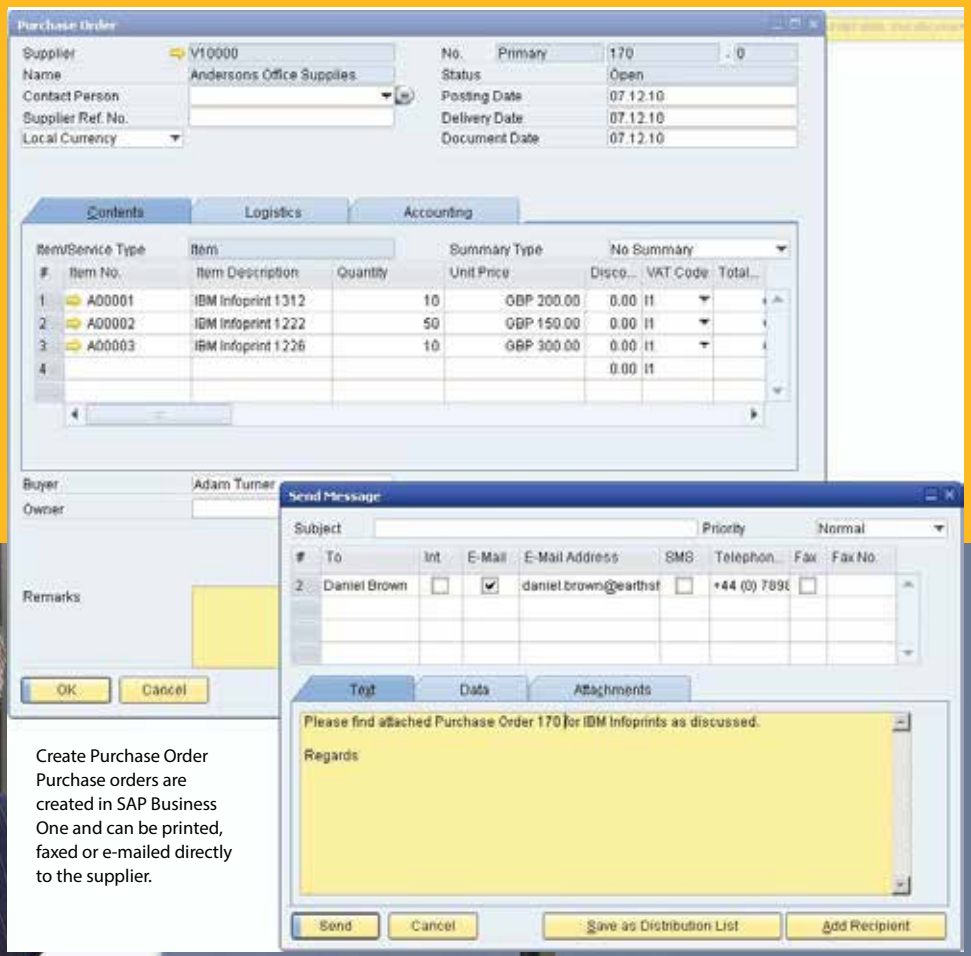
A/P invoice
When pro cessing supplier inv oices, SAP Business One also creates a journal entry. This information can be used to pr ocess subs equent payments to the supplier.

A/P credit memo
Through this function, the solution lets users issue a credit memo to the supplier for returned merchandise. The required data can easily be imported from the original invoice, as it is with any other sales and purchasing document.

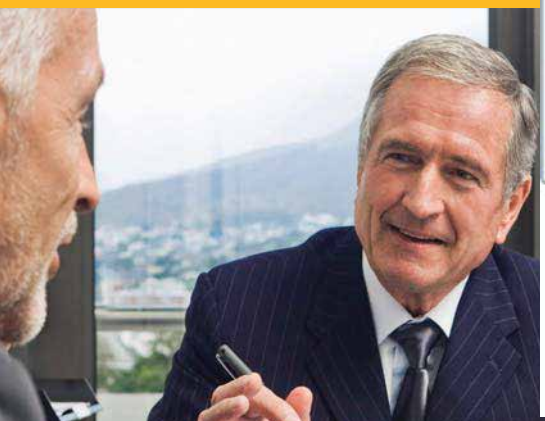
Landed costs
SAP Business One enables users to calculate the purchase price of imported merchandise. They can allocate the various landed cost elements (such as freight, insurance and customs duties) to the Freight on Board (FOB) costs of e ach item, updating its actual warehouse value.

Document drafts
This feature allows printing, editing and management of all purchasing documents that have been saved as drafts.

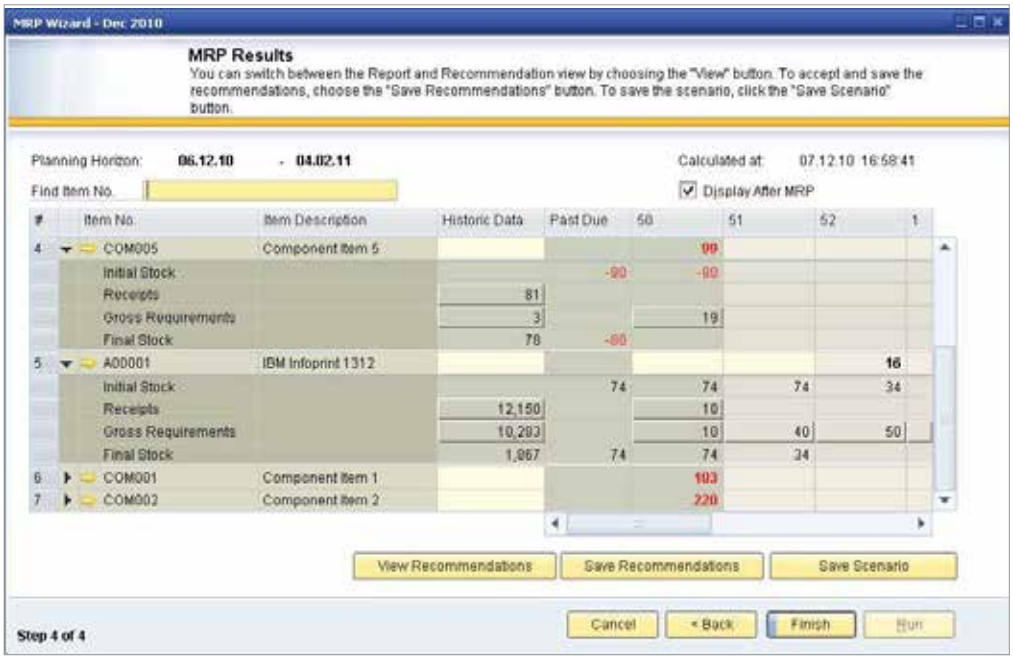
Document printing
This function helps users print all sales and purchasing documents. Users can select by period, document number or document type.



Create Purchase Order
Purchase orders are created in SAP Business One and can be printed, faxed or e-mailed directly to the supplier.



Material Requirements Planning (MRP)



MRP
A wizard helps you plan and optimise future material requirements and then both manage and execute purchasing and manufacturing recommendations and exceptions.

The MRP wizar d helps reduc e costs by considering both minimum order quantities and order multiples, helping users take advantage of say, purchase pricing breaks or standard production batch sizes.

SAP Business One offers a simple yet powerful planning system that helps production planners or buyers schedule and manage items for production or purchasing based on a variety of criteria.

Define forecasts
This feature allows users to predict demand based on forecasts, instead of relying solely on received orders. Forecast calculations help users foresee future demand for the product and adjust material planning accordingly. These demand forecasts can be used in the MRP wizard.

Planning wizard
The planning wizard takes users thr ough the pro cess of creating planning scenarios in five easy steps. Users define the planning horizon, which can be viewed in weeks or days. They can also opt to exclude non-working days from the production and purchase planning. Scenarios can be run for a range of items or item groups. The user selects the desired criteria in the scenario, such as existing stock levels, open purchase orders, sales orders, work orders, and stock that has reached its minimum level, as well as pr e-defined s ales forecasts.

Once a scenario is executed, the solution presents a recommendation to 'make' or 'buy' items in a recommendation report. Drill-down options are available to allow planners to view the net requirement calculations and view the actual documents driving the gross requirements. Exception warnings and visual queries are also available. These help users identify orders that need to be expedited. Planning scenarios can also be saved as 'simulations' - users can run a series of 'what if?' scenarios without impacting the recommendation report.

Order recommendation report
From the recommendation report, planners can automatically select recommended production orders and purchase orders for automatic creation. If an item needs to be outsourced, the system allows planners to easily convert a production order to a purchase order. Purchase orders to the same supplier can be optionally consolidated into one order, streamlining the purchasing pr ocess.

"We used to have disparate and siloed systems, but today, thanks to SAP Business One, we have end-to-end visibility of products from order entry through manufacturing, fitting, alterations and on to delivery. Having a reliable and transparent system increases confidence among partners and clinicians and reduces stress on patients."

Olive Gunning, Chief Operating Officer, Trulife

Stock Control

Stock capabilities
The stock capabilities of SAP Business One enable users to manage item master information and maintain serial and batch numbers, as well as pric e lists. Users c an also de fine alternative items, perform stock increase or decrease adjustments, revalue stock costs bas ed on current market values and perform cycle counts, as well as generating pick lists for open sales orders.

Item master data
This feature allows users to define production (make) items, purchase (buy) items, or non-stock items, including labour, travel or fixed assets. Default information - such as purchasing supplier, purchasing and selling unit of measure, as well as the tax status for an item - is maintained here. Stocked items can be maintained in multiple warehouses - the solution can also maintain the costs f or each item in e ach warehouse. SAP Business One also supports different stock valuation methods on a per item basis. The methods currently supported are standard cost, w eighted moving average and First In, First Out (FIFO). Planning data is also maintained within item master data. Users can define a procurement method (such as make or buy) as well as the order intervals in which to purchase an item (such as monthly, weekly or daily). They can also define the lot sizes in which to purchase items, as well as the minimum order quantity and average lead time.

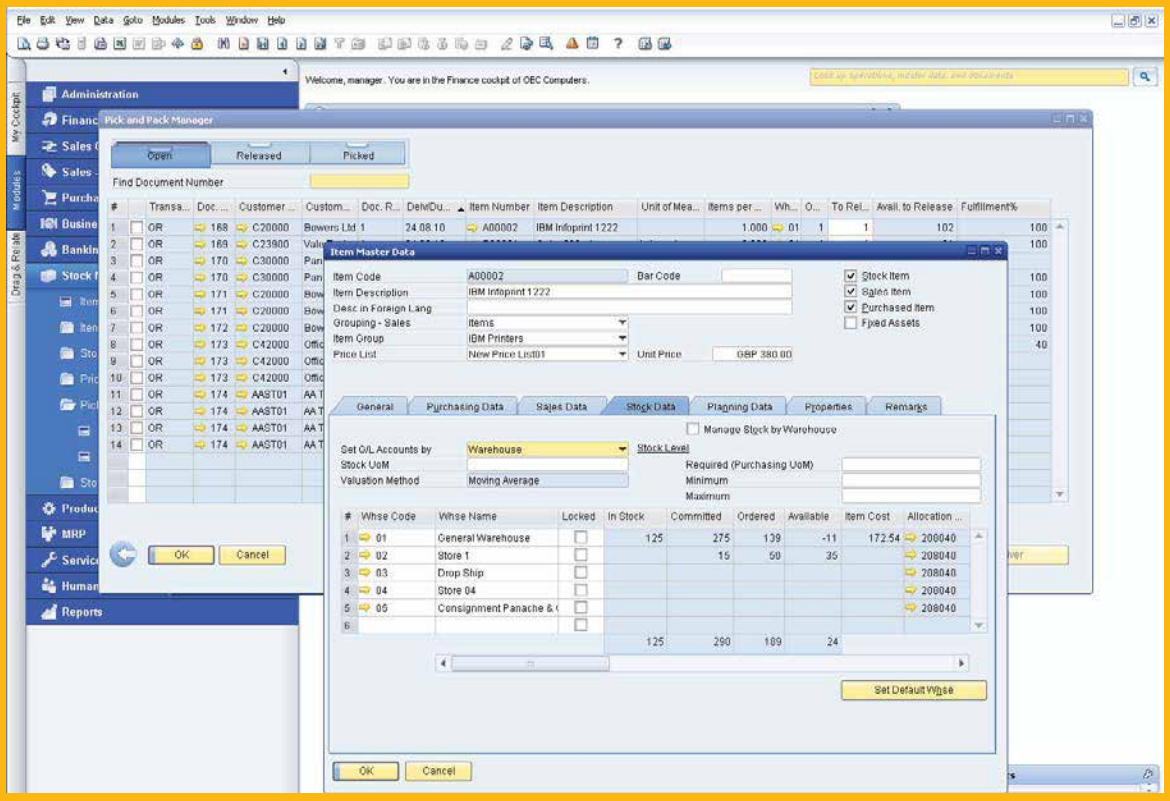
Serial numbers
Serial numbers can be automatically generated based on templa tes. They c an also be manually cr eated and assigned only on release of an item from stock or optionally on every transaction.

Batches
Users can assign batches to products and classify them by shelf life or any other freely de finable attribu tes. The batches can then be defined for these products in sales orders, delivery notes and stock movements.

Substitute items
This feature allows users to create a list of items that can be suggested to the customer as alternatives if the required item is not available. Substitutes can be ranked based on similarity of item, price or quantity.

"SAP Business One is now an integral part of our busin ess. As a growing SME it has been an essential part of supporting our confidence in approaching and trading with major national retail chains, purchasing from international suppliers and confidently planning our stock. The flexibility of reporting and user authorisations within the system has enabled us to tailor the software to our busin ess, rather than tailoring our business to the software."

Duncan Pratt-Thompson
Director: Scott Brothers



Pick and Pack Manager
Extensive drill-down capabilities include customer, item master data and originating document.

Define business partner catalogue number
This feature maintains a cross-reference table of supplier part numbers to stock part numbers. Supplier part numbers can be used on purchasing documents in lieu of stock part numbers.

Update stock method
Different situations or market conditions may require changes of the valuation method for your stock. With the update stock valuation method report, users can easily select items from a list and change the current valuation method to an alternative method.

Goods receipt and goods issue
These two functions enable users to record goods receipts and issues that are not directly related to a sales or purchasing document.

Stock transfer
This feature allows users to move stock between warehouses.

Stock posting
This function can be used to:
- Enter opening balances for stock items
- Update warehouse data in the system

Cycle counting system
In large warehouses, counting stock is often a continual process. This function streamlines the process by identifying when each item in stock is due to be counted. The alerts and reports produced help ensure that items of different levels of importance are counted as frequently as required.

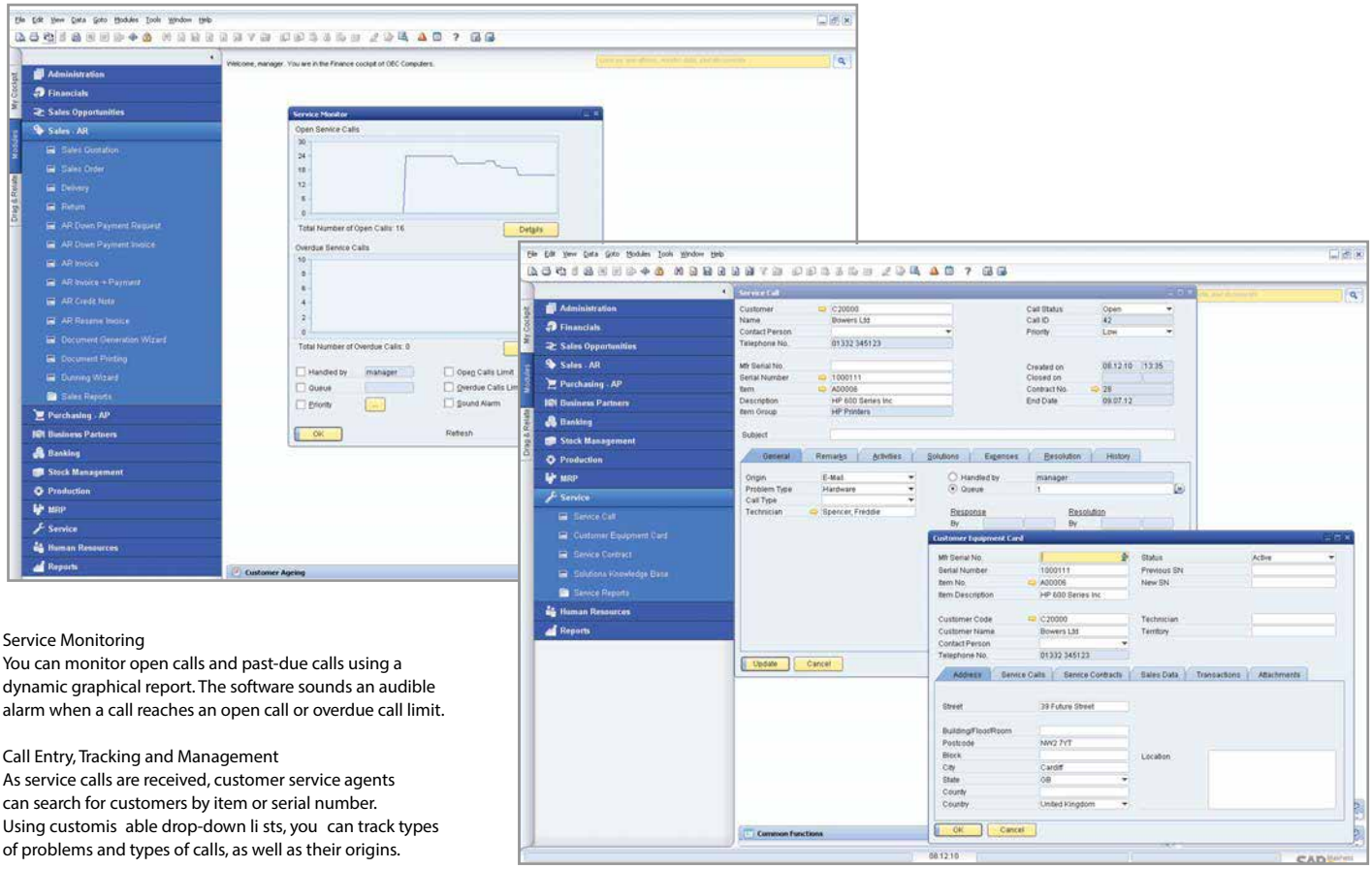
Material revaluation
This feature enables users to make changes to existing stock prices. This can be necessary when the current price of the material does not match the actual market price. In that case, the price is adjusted and an accounting change posted.

Price list
Users can define any number of price lists and link them with customers or suppliers. In addition, they can create dynamic links between price lists quickly and easily, updating the links automatically whenever the primary price list changes.

Special prices
Users can define special prices for individual customers or suppliers. They can also define quantity-specific prices that link to order volume and define a validity period for each price list. The validity period is adjusted automatically whenever the data changes. In addition, users can even define discounts based on different terms of payment.

Pick and pack manager
The pick and pack manager capabilities allow users to manage the picking and packing process within three queues. As sales orders are entered, they are displayed in the 'open' queue. Quantities can be marked as fully or partially released for picking. The 'released' queue displays all orders released for picking, it can be marked as fully picked or partially picked. Either within the 'open' or 'released' queues, users can automatically create pick lists per order or for a range of orders. Within the 'picked' queue, orders marked as picked can be displayed and selected for packing. The pick and pack manager offers a range of sorting options and flexibility to work with your picking and packing processes.

Service Management



Service Monitoring
You can monitor open calls and past-due calls using a dynamic graphical report. The software sounds an audible alarm when a call reaches an open call or overdue call limit.

Call Entry, Tracking and Management
As service calls are received, customer service agents can search for customers by item or serial number. Using customis able drop-down li sts, you can track types of problems and types of calls, as well as their origins.

Complete service management
SAP Business One delivers integral CRM functionality as part of the complete application. Tightly integrated features across marketing, sales and service provide end-to-end visibility of the complete customer lifecycle.

The integral CRM functionality ensures complete control of customer acquisition, retention, loyalty and profitability for the busin ess.

SAP Business One: CRM service
The service management capabilities help service departments provide support for service operations, service contract management, service planning, tracking of customer interaction activities, and customer support.

Key features and functionality

- Service contract: This feature allows users to create a regular support or warranty contract for items or services sold to a customer. The contract maint ains the start and end da tes, as well as specific terms of the contract, such as guaranteed response or resolution times
- Customer equipment card: This feature provides service technicians with detailed information about an item sold to a customer, such as a manufacturer's serial number, replacement serial number and all service call history. It also lists service contracts assigned to the item
- Customer equipment report: Shows all equipment and corresponding serial numbers sold to a customer or range of customers
- Service calls: Allows users to view all service calls entered in the system that were created, resolved, or closed on a specified date or within a range of dates. Users can restrict the report to only see service calls for a specific queue, technician, problem type, priority, item and call status. Users also can view only overdue calls
- Service calls by queue: Tracks all pending service calls in the queue. Maintains call history related to a particular incident. Various call statuses can be monitored, and calls can be assigned to individual technicians or maintained in a team queue
- Response time by assignee: Enables users to follow the interaction between a customer and service and to record the time ne cessary to respond to a single servic e call

Microsoft Office Integration

Microsoft Outlook
Microsoft O utlook integration for SAP Business One enables users to exchange and share data between SAP Business One and Micr osoft O utlook so that all team members are kept up-to-date about account developments and can proactively respond to business opportunities. This features:

Data synchronisation
A user can synchronise the following types of data in SAP Business One and Micr osoft Outlook:

- Calendar appointments
- Contacts
- Tasks

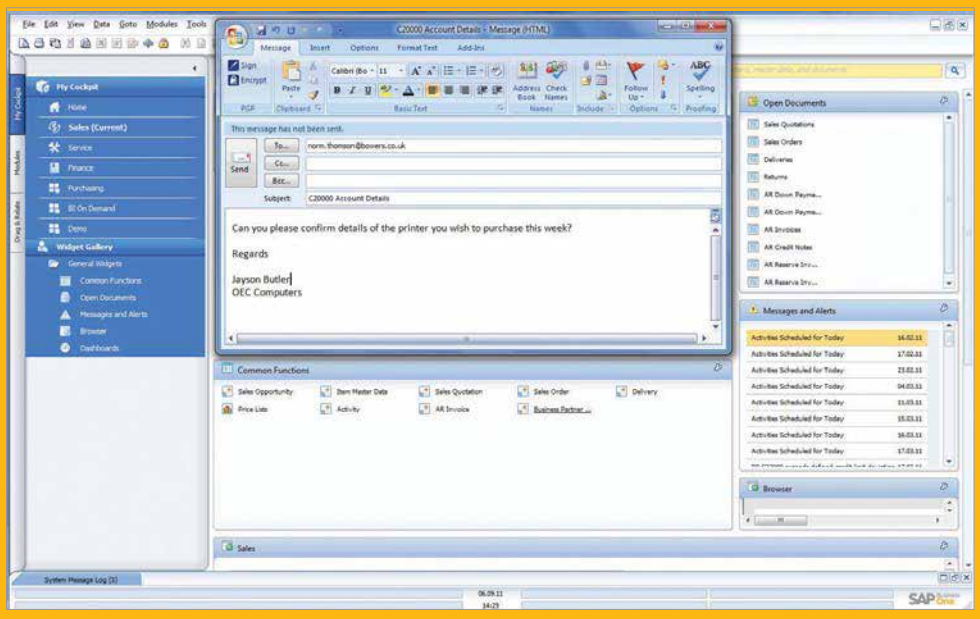
This feature allows users to schedule automatic synchronisation runs and resolve conflicts between items in the two systems. Users can also create snapshots of SAP Business One information and associate them with contacts in Microso ft Outlook.

Quotations
Users can import quotations from SAP Busin ess O ne into Microso ft Outlook and then display, edit and send them as e-mails. You can also create new quotations in Microso ft Outlook and save them automatically in SAP Business One.

E-mail integration
Microsoft O utlook integration allows users to:

- Save a Microso ft Outlook e-mail as an activity in SAP Business One
- Save the original e-mail text and the original file attachments as an attachment to an activity in SAP Business One
- Make follow-up and reminder settings for an activity

Connection to Microsoft Word and Microsoft Excel
Microsoft O utlook integration allows user s to connect to SAP Business One from Micr osoft Word and sav e a Micr osoft Word document as an activity in SAP Business One. The same function is available for Micr osoft Excel. Workbooks can be saved as activities with a business partner or contact person in SAP Business One.



E-mail Integration
Drag and drop received e-mails to easily create activities in SAP Business One

"With SAP Business One we can produce our accounts very quickly, very soon after month end. We also have limited the amount of manual input in generating information and its links to Microsoft products, such as Excel, allows us to churn out reports very rapidly and quickly."

Paul Rakkar, Group Financial Director, Time Out Ltd

Intelligent Business Decision and Control

Intelligent business decision and control

- Managers receive alerts that not only focus attention on a particular busin ess ev ent, but also trigger workflow pr ocesses to automatically take action
- Alerts are designed to notify a user of a discrepancy or an event they are monitoring within the organisation
- These alerts can provide internal (on-line) information according to each employee's role in the company. Each time a threshold is cr ossed an alert will trigger real time to the user that requ ested the notification
- Alert drill-down gives instant visibility on detailed information as to what triggered the alert, which enables fully-informed decisions
- Establish unique workflow pro cesses, including the approvals, procedures and steps that are automatically initiated, allowing managers to instantly respond to the event

Proactive management by exception

SAP Business One allows immediate notification and automatic response to important business events through user-programmable, workflow-based alerts. The system allows users to designate the activities they want to track and the acceptable range. When the system indicators fall out of range, the user (or whomever is designated) receives a notification allowing them to instantly respond to the event. Any breach of pre-set business policies triggers an immediate notification to the manager and initiates a workflow pr ocess to manage the event.

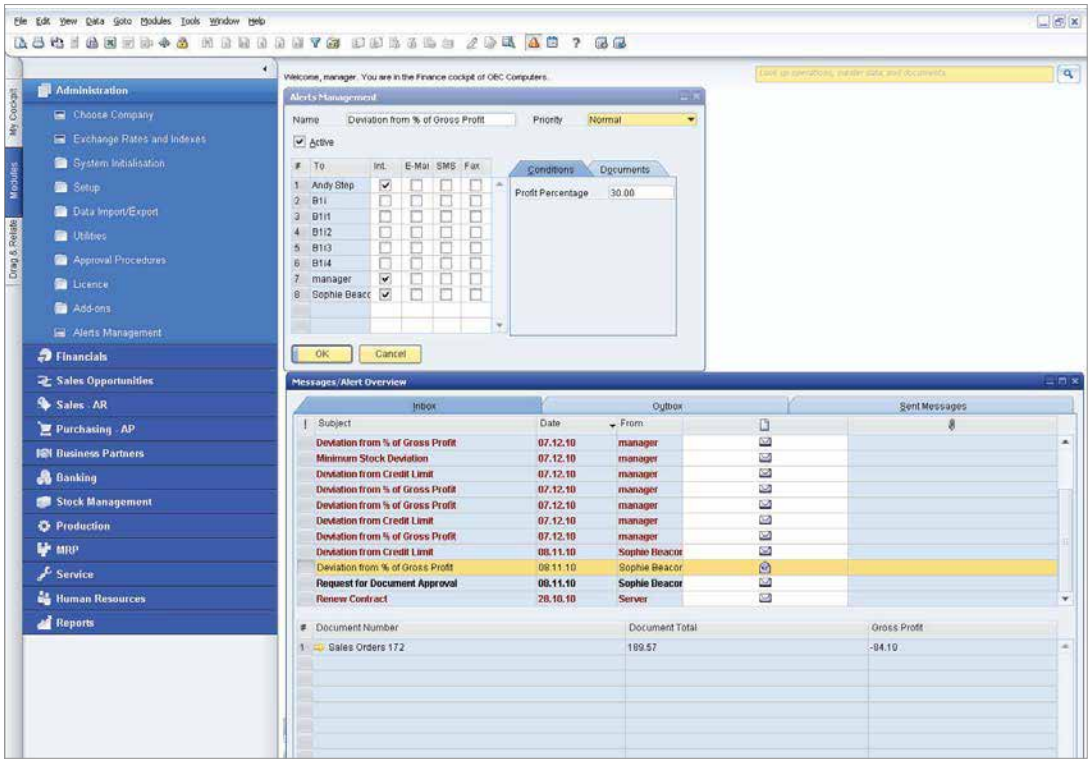
Quickly compose standard and ad hoc reports based on live data

XL Reporter allows users to quickly create ad-hoc reports for use with SAP Business One. The intuitive report composing functions provide the starting point for you to create reports using drag and drop features. A report definition wizard makes report creation effortless for virtually anyone. You can create custom queries of SAP Business One data with just a few mouse clicks. Once the system has generated the reports, you can drill-down on any piece of data to see underlying transactions. In addition, you can view and refresh live data while creating queries.

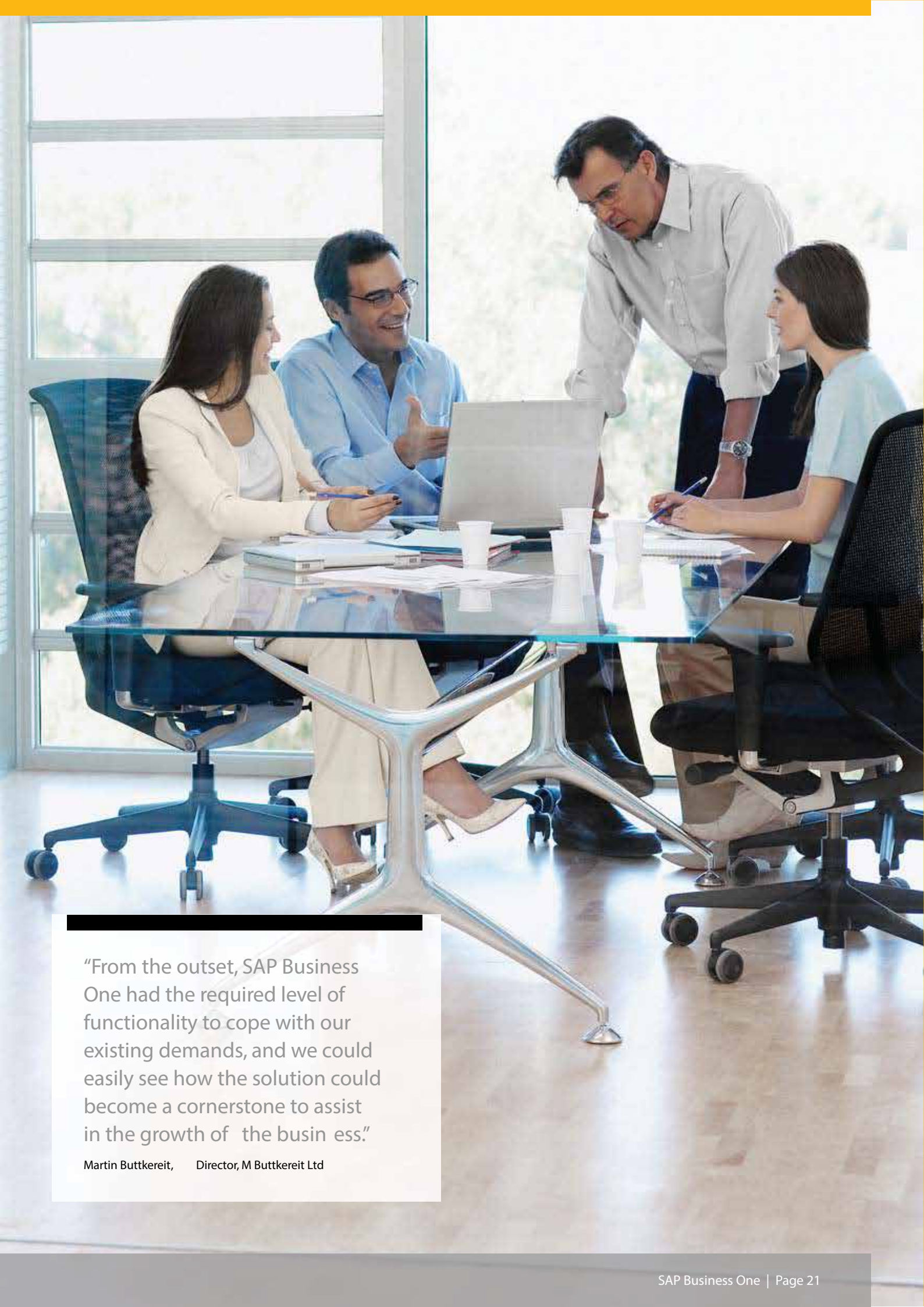
Organise your reports

With XL Reporter you can manage and organise report definitions, executed reports and report books.

Report-organising functions allow all reports to be refreshed at scheduled times. You can view and execute the reports within the main menu of SAP Business One, which simplifies report creation. For report distribution, you can package them into report books.



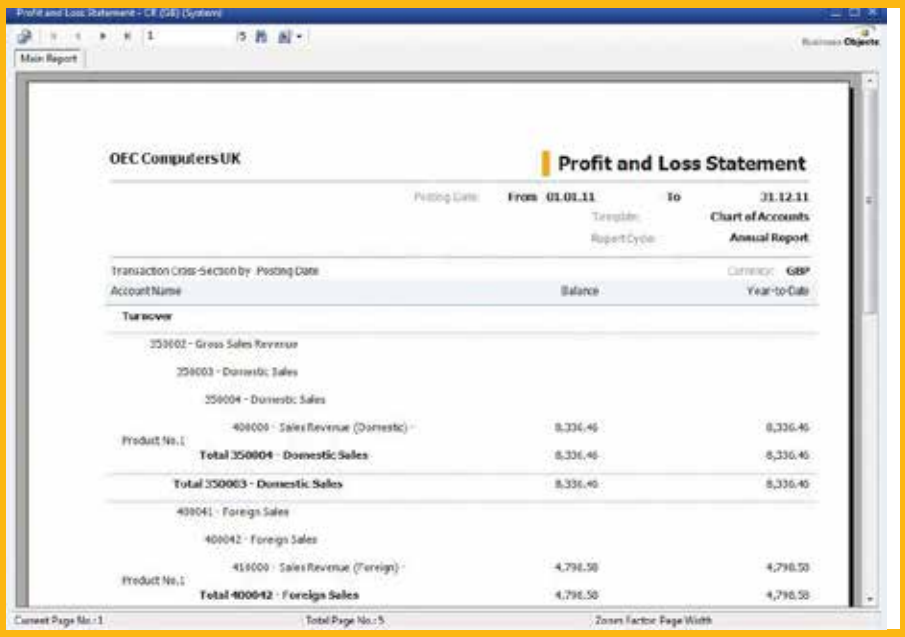
Management by Exception
SAP Business One features user-programmable, workflow-based alerts to notify you of important business events so you can respond immediately.



"From the outset, SAP Business One had the required level of functionality to cope with our existing demands, and we could easily see how the solution could become a cornerstone to assist in the growth of the busin ess."

Martin Buttkereit, Director, M Buttkereit Ltd

Integral Business Intelligence



The integral business intelligence capabilities of SAP Business One, including SAP Crystal Solutions offers the user choice and flexibility for their Business Intelligence requirements. Information can be derived from executing pre-defined reports or from generating custom reports, t ailored for the busin ess. This allows users to harness business-critical information and initiate corrective actions immediately.

SAP Business One provides an array of reports to aid analysis and decision making. These include accounting, enterprise, stock and financial reports as well as interactive dashboards. Users can e xport any report to Microso ft Excel with a click of the mouse.

Simple data navigation techniques enable users to easily retrieve the exact information needed, saving valuable time and enhancing the decision making process.

Drag & Relate
SAP Business One is the only solution that uses Drag & Relate to provide users at all levels with end-to-end visibility of complete operations and the ability to instantly understand key relationships and trans actions within the busin ess.

Query generator
This tool features point and shoot query generation for creating database queries and defining reports. The data from any field can be used to create a detailed or summary report. Once a query is defined, it can be saved in the query library for future use. The report editor can be used to refine and change existing queries.

Query wizard
This tool is similar to the query generator, but it allows users to generate queries using a wizard to step them through the pr ocess. This tool is helpful to users unfamiliar with SQL syntax who want to build queries.

Pre-defined reports
SAP Business One provides a series of pre-defined, built-in reports for each functional area of the application. Each report looks at specific areas of the business and users have the ability to customise the output. Once the report is generated users can deliver the report by print or e-mail and export it to a variety of different formats including Microsoft Exc el and PDF.

SAP Crystal Solutions - execute pre-defined reports or generate tailored reports for your business

SAP Crystal Solutions
Many small and midsize busin esses s truggle with the complexities of generating accurate and timely business information from company data. Integral SAP Crystal Reports in SAP Business One gives users comprehensive and accurate insight into the overall health of the company. As SAP Crystal Reports is seamlessly integrated in SAP Business One, it reports on all live data captured within the entire SAP Business One solution, including General Ledger, Accounts Receivable & Payable, Sales, Purchasing and Stock.

Generate accurate and timely reports
With SAP Crystal Reports, you can generate standard and custom reports, drill-down into the data and analyse it.

The tool has everything your business needs to create and execute powerful, graphical reports to enhance your control over reporting and budgeting work. Advanced report design options extend your ability to compose reports and work with standard Microsoft Exc el functions and interfa ces to facilitate report design.

Ensure rapid employee adoption with virtually no learning curve
Integrated SAP Crystal Reports within SAP Business One ensures users have an intuitive user interface that provides a meaningful view of the structure of your company data. Even users unfamiliar with Business Intelligence tools can create reports with drill-down capabilities in minutes with SAP Crystal Reports. From simple transaction detail reports to advanced financial statements and dashboards, users can generate reports whenever they are needed.

"After looking at a number of systems we chose SAP Business One, primarily because we could customise the solution to our needs. This provided us with greater flexibility to manage the varying requirements a business like ours has, and wasn't something we saw in many other packages."

Nick Carter, Technical Director, Raffenday

Mobility Solution

A large number of small and midsize businesses are utilising the technology provided by smartphones and tablets to run their businesses from any location, at any time. In order to stay connected to your business, SAP has created a mobile application which is now available. The application provides constant access to important data and key functionality of SAP Business One.

The SAP Business One mobile application allows you to check on inventory and customers, access reports, receive alerts and process approvals. The mobile application also provides real-time access to data and you can easily navigate, respond and trigger remote processes.

SAP Business One
Mobile Application

Key features include

- Alerts and approvals: Receive alerts on specific events, such as deviation from approved discounts, prices or credit limits. Process approval requests, generate remote actions and drill into relevant data or metrics to help ensure quick and efficient decision-making
- Real-time reports: Access built-in reports enabled by software that present key business information. Add customised reports and easily share report results via e-mail from the mobile device
- Customer and supplier data: Access and edit contact details, view historical activities and special prices. Contact or locate customer and partner records, create new ones and log new activities. All changes are automatically updated within the SAP Business One application on the backend
- Inventory monitoring: Check inventory levels and access detailed information about current products, including purchasing and sales price, available quantity, product specifications and item pictures

Architecture for IT Managers

Easy to manage server architecture
The SAP Business One application resides on servers that are part of the Micr osoft® W indows® Server platform.

The server architecture includes security, back-up and network a ccess protocols . Access c an be granted to users through wide area network (WAN) Terminal Services or Citrix XenApp technology to anywhere your organisation requires.

The SAP Business One environment uses standard database back-up procedures, eliminating the need for saving and transferring the database to another machine while providing immediate a ccess to critical busin ess information.

The streamlined SAP Business One architecture supports the Microsoft® SQL S erver database.

Simple, supported integrations with SAP Business One Integration Technology (B1i)
SAP Business One Integration Technology enables rapid and easy integration with components of the SAP Business Suite, SAP NetWeaver® technology platform or even other external applications. SAP Business One Integration for SAP NetWeaver is a best fit for customers who want to seamlessly integrate SAP Business One with components of the SAP Business Suite. This scenario typically arises in cases where the smaller business that runs SAP Business One is a subsidiary, branch office, vendor or other business affiliate of the larger entity with which it wishes to integrate. Seamless integration of SAP Business One with SAP solutions is a key part of the vision for SAP Business One, and alignment with the SAP NetWeaver strat egy is ess ential for achieving this goal.

Key benefits
- Ability to interface seamlessly and rapidly with an SAP (or other system) environment
- Ability to take advantage of the ongoing development of SAP Business One, SAP NetWeaver, SAP BusinessObjects™ Business Intelligence and SAP Business Suite components
- SAP's ability to pre-develop integration content for out-of-the-box usage, so that related costs will be reduced dramatically

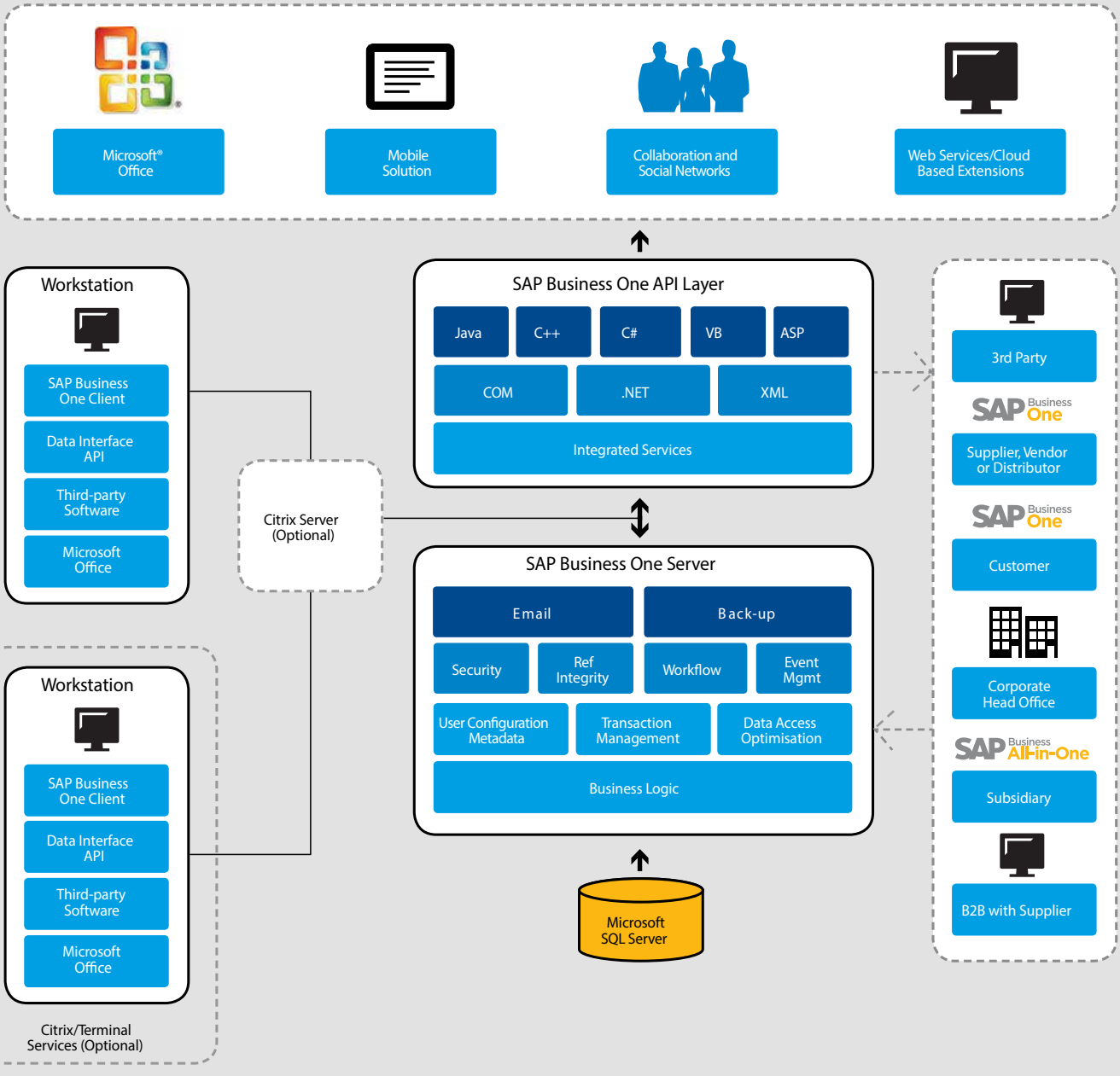
The SAP Business One API Layers
SAP Business One is equipped with an application programming interface (API) that is based on Component Object Model (COM) technology. You can use this API to enhance the functional scope of the solution or adapt it to meet your specific requirements. Developers can access the COM objects using programming languages, such as Visual Basic, C/C++, and Java.

Two different APIs are provided: one for the data interface and one for the user interface.

Data Interface API (DI-API)
The SAP Business One DI-API provides developers with an interface to the business logic and data access layers of the application thereby enabling them to enhance and extend it. This also provides opportunities to integrate SAP Business One tightly with other applications.

User Interface API (UI-API)
The SAP Business One UI-API provides objects and procedures for accessing the user interface of the application. This enables developers to extend existing parts of SAP Business One and create their own new functionality within the framework of the application.

Data Transfer Workbench (DTW)
The data transfer workbench tool migrates master and transaction data from legacy systems into SAP Business One. Pre-defined data file templates, provided in Microsoft Excel format, simplify the preparation of data for import.



Microsoft Outlook Integration

SAP Business One is fully integrated with Microsoft Outlook, enabling seamless communication that can span your organisation and business functions. Departments can share contacts, appointments, and tasks.

Integration with SAP Business Suite

SAP Business One is seamlessly integrated with SAP Business Suite solutions, and because it has an open architecture, it can be easily integrated with solutions from other software vendors. This open architecture allows you to realise all the extensive benefits of SAP software.

User Defined Personalisation and Configuration

SAP Business One gives users powerful tools to tailor forms, queries and reports to meet specific business needs allowing each business to run without advanced technical training. This allows users to configure s ettings to define exchange rates, set authorisation parameters, create internal mail/e-mail and data import/export functions.

In the administration capability, the key functions that can be configured include:

- User definitions: Chart of accounts, tax codes, sales employees, territories, projects, address formats, payment terms, supplier, customer, item and commission groups, warehouses, s ervice contract t emplates and queues, banks, payment methods and shipping methods
- Authorisations: Administrators can define what information users may a ccess. S ensitive documents have owners and, based on a user's relationship to the owner, they will be granted either full, read-only, or no a ccess. Access can be defined on whether the user is in the same team, department or branch, or has the same manager as the owner or is the owner's manager or a subordinate
- Various company general settings

User defined fields

Users can define their own fields in most areas of the solution, including items, business partners and documents. This enables them to manage the typical information required for many different business activities. They can also select user defined fields to enter various types of information, such as texts, addr esses, phone numbers, URLs, file att achmen ts, images and dr op-down lists.

User defined values

User defined values ensure that data from a pre-defined sear ch pro cess is reco rded for each field in the system (including user defined fields).

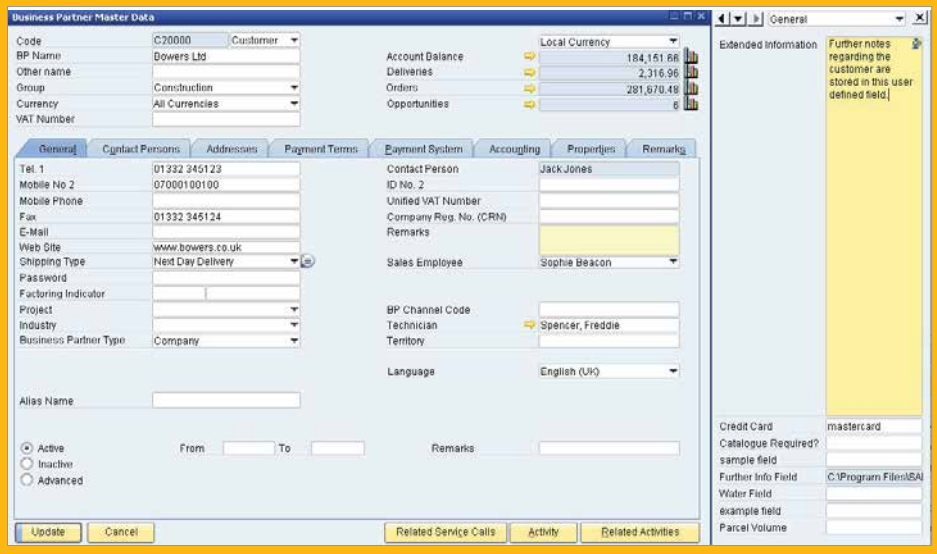
Possible uses for user defined values include:

- Automatic entry of values in fields, based on the use of related data in the system
- Entry of values in fields, based on pre-defined lists
- Automatic entry of values in fields, based on pre-defined queries (user defined)
- Definition of dependencies between system fields
- Display fields that can only be used for queries, such as user signature, creation date and balance of open cheques (for a business partner)

Open integration

SAP Business One provides the ability to cost -effectively grow with the needs of the business:

- It can be easily adapted to changing business requirements by power users without creating a heavy, on-going IT burden
- Users can save their preferences for forms, queries and reports, allowing embedded pr ocess models to directly mirror actual day-to-day business activities
- Easily integrate with other applications, thereby leveraging investments in existing systems or taking advantage of new technologies
- SAP Business One Architecture allows management by alerts to effect transactions and workflows downstream in other application
- Managers can implement changes to SAP Business One instantaneously, enabling the solution to quickly fit the way users run the busin ess, even when busin ess r equirements change
- Modifications transition to new versions of the solution with minimal effort, eliminating costs t ypically ass ociated with upgrades



Create User Defined Fields You can add an unlimited number of user defined fields to most forms in the system at the header or document level or at the row or detail level. You can select the type of field or the length of the field from a drop-down list. This function is controlled with authorisation codes; with the proper authorisation, you can add or change fields in just minutes.

SAP Business One Software Development Kit

Data Interface API

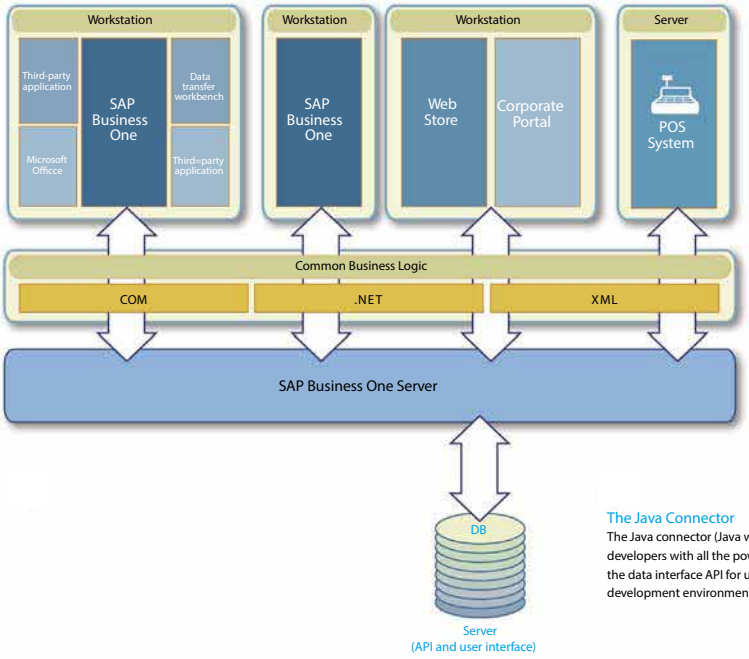
The data interface API is used to build real-time links between SAP Business One and third-party applications. By providing a programmatic interface to SAP Business One through a set of fully functional business objects, the data interface API gives you the power to connect applications and automate processes. Examples include custom point of sale (POS) system integration, HR service integration, and synchronisation with mobile devices.
The data interface API provides:

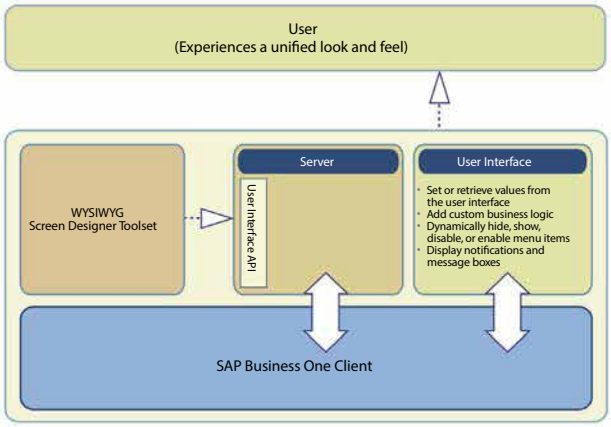
- Objects and methods to read, write, and update business objects directly
- Full object orientation, providing a powerful interface that requires minimal training
- Full access to master records, transactional data, system configuration, and user defined data
- Backward c ompatibility for a smooth upgrade process.

User Interface API

With the user interface API, developers can modify SAP Business One by creating new windows, redesigning existing windows, and adding menus or dialogue boxes. Modifications can be as simple as hiding or disabling a field or as complex as adding an entirely new custom module to SAP Business One.
The API:

- Allows you to create custom functionality within a single, integrated user interface
- Enables changes to business logic, as well as simple cosmetic modifications
- Enables developers to add new windows, menus, buttons, fields, and so on
- Provides programmatic notification of application events.





The Java Connector

The Java connector (Java wrapper) provides developers with all the power and flexibility of the data interface API for use in a Java development environment.

The SAP® Business One Software Development Kit (SDK) is a toolbox that c ontains programming interfa ces, s ample code, documentation and simple utilities.

The Software Development Kit allows programmers to easily interface external applications with SAP Business One or add custom functionality.

SAP Business One consists of a graphical user interface and a separate busin ess object layer. The SDK pr ovides full access to both the user interface (UI) layer and the business object layer (DI).

Key features of the SDK:

- Provides programmatic access to SAP Business One's business logic through an object-oriented layer
- Enables SAP partners and customers to extend and enhance the functionality of SAP Business One to fit their unique needs
- Can be used with a wide range of programming languages and tools - enabling developers to use technologies that are already familiar
- Provides strong backward compatibility, so that little or no re-work is required when upgrading to a new version of SAP Business One

Key components:

- Data Interface API: Interfacing external applications with SAP Business One
- User Interface API: Extending and customising the SAP Business One client application
- Screen Designer: Drag and drop interface for designing custom windows for SAP Business One
- Java Connector: Interfacing external applications with SAP Business One using the Java programming language
- Complete Documentation
- Sample Applications

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