SAP Business One 9.1 new features

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SAP Business One 9.1 - Overview

- Release to customer has started 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

![SAP Business One 9.1 features]

- Easier extension
- Quicker implementation
- Optimized SAP HANA adoption
- Completed localizations
- Enhanced lifecycle management
- Better cost structure
### Business logic and localization

- Enhanced production module (resources and BoM enhancements)
- Inventory item cost valuation based on serial or batch number
- Display balances for goods receipt POs and purchase orders in BP master data
- Enablement of negative payments in payment wizard
- Multiple branches function splits transactions by business unit
- Rounded-off functions (G/L account determination, Multiple Unit of Measurement, Price Lists, Bin Location, Pick and Pack, and more)
- Fixed assets enhancements
- Bank Statement processing for additional localizations
- Localization enhancements and legal compliance
- Default values

### Infrastructure and architecture

- Permission group authorizations
- Performance improvements
- Security enhancements
- Hiding business functions
- Configurable UI framework
- Copy and paste between SAP Business One grids and MS Excel
- Simplified e-mail and printing process

### Lifecycle management and support

- Remote support platform 3.1

### Reporting and analytics

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

### Extensibility/SDK

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

### 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 – New action types for Dashboards and Key Performance Indicators (KPIs)
- Supplementary dashboards can easily be created via the Pervasive Analytics Designer (Advanced Dashboards)
- 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)

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

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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

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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

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Multiple Branches
Manage Business by Branches in one Database/Localization

Core Features

- Create sales and purchasing transaction for a dedicated branch.
- Reporting by branch, e.g. profit and loss statement per branch.
- Warehouse management per branch.
- Restrict usage of business partners by branch.
- All financial transactions will be separated by branches.

Benefits

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

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

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**MRP**

**Additional Data Sources**

**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

**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

Easier Migration

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
Maximum Weight Allocation Restriction
In Bin Locations

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 be 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

**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
Price List Enhancements

Copy Price Reduction on Unit of Measure level

Enhancements
- 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

Benefits
- Easy management of pricing updates

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Pick and Pack Enhancements
For Optimized Pick Processes

**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
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
Bank Statement Processing – BSP

House Bank Account

- Open Transactions
- G/L account

External Bank Statement

- Import/Manually type
- Transaction

- Automates the handling of bank statement transactions.
- Designed for businesses that intensively use direct bank transfer for outgoing and incoming payments.

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Bank statement processing supports the following scenarios:

- Creating, posting, and internal reconciliation of those business partner incoming and outgoing payments made by direct debit or bank transfer and not already entered in SAP Business One.
- Posting and internal reconciliation of interim accounts used in payments with the payment means of bank transfer (via either the payment wizard or manual payment).
- Posting and external reconciliation of bank debits and credits, for example, bank handling charges and interest payments.
- External reconciliation of transactions already posted in SAP Business One, for example, by manual payments or the payment wizard.
Default Values
for Accelerated Implementation

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

* Modules 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:
- Supports MS Windows 8/ Windows Server 2012
- 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:
- The Remote Support Platform (RSP) support available for SAP Business One on both the SAP HANA database and on Microsoft SQL Server
- RSP processes and reports adapted for the 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

* RSP will not support backup, healing task and DB upload tasks for HANA Databases
Infrastructure and architecture
Permission Groups
Role-Based User Administration

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
**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 UI Framework
Adapt UIs to the Needs of End Users

Enhancements
- UI templates allow adaptation of standard UIs
  → Option to hide, inactivate, and relocate fields
- Administrator can assign UI templates to end users
- Each end user can personalize UIs himself

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
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
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

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)
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 use
Based on HTML5 technology

Enhancements
- New cockpit based on HTML5
- Predefined cockpits for sales, purchasing, finance and inventory
- Workbench Widget (see next slide)
- New “Count Widget” – counts sales orders not delivered, open A/R invoices, purchase orders not received, open A/P invoices, open inventory transfer requests. Create new Count Widgets based on user defined queries
- New “Recently Updated Widget” which reflects new and updated master data, marketing documents, chart of accounts and many more types of information

Benefits
- Simplifies access to information
- Improves user experience due to HTML5 technology

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Workbench

New widget to cover most of the daily operation

Enhancements

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

Benefits

- Guides user through key business processes
- Provides easy access to related functions
Pervasive analytics – Insight to action
Enhanced feature set for Pervasive Analytics Dashboards and KPIs

Enhancements

- Ability to relate business actions to pervasive dashboards and KPIs
- Available action types:
  - Open SAP B1 Window to open B1 forms, such as Master Data
  - Trigger Enterprise Search
  - Link to SAP B1 Window, to show dashboard in sidebar
  - Open Advanced Dashboard (see next slide for a description of advanced dashboards)

Benefits

- Drill down into business details
- Translate insights into actions
Enhancements

- Ability to create supplementary dashboards to display related data for 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 related business analysis and KPIs
Service layer that exposes business objects by Web service
Access system and partner business objects via easy-to-use OData protocol

**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**
- Increased data throughput due to parallel processing
- Simplified landscape and lightweight, web-based development
- Easy development of mobile applications
- Capability to extend extreme applications to address complex business needs
THANK YOU FOR PARTICIPATING

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