

SAP Business One How-To Guide



PUBLIC

How to Display Relationship Maps

Release Family 8.8

Applicable Release:

SAP Business One 8.81 PL05 and higher

All Countries

English

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Relationship Map

This document shows how to use relationship maps in the following business areas:

- Sales
- Purchasing
- Inventory
- Production*
- Banking
- Service*

You can use relationship maps to visualize the relationships between business objects in SAP Business One, such as:

- Chains of documents in sales and purchasing:
For example, you can copy a sales order for a particular customer into a delivery note and the delivery note into the invoice, and so on.
- Sales or purchasing documents and related postings, such as journal entries or internal reconciliations
- Sales or purchasing documents and their related payments
- Landed costs and the related items*
- Items and the bills of materials (BOM) they are contained in*
- BOMs included within other BOMs, that is, BOMs and their parent items
- Production orders and the related items*
- Service calls and the related expenses*

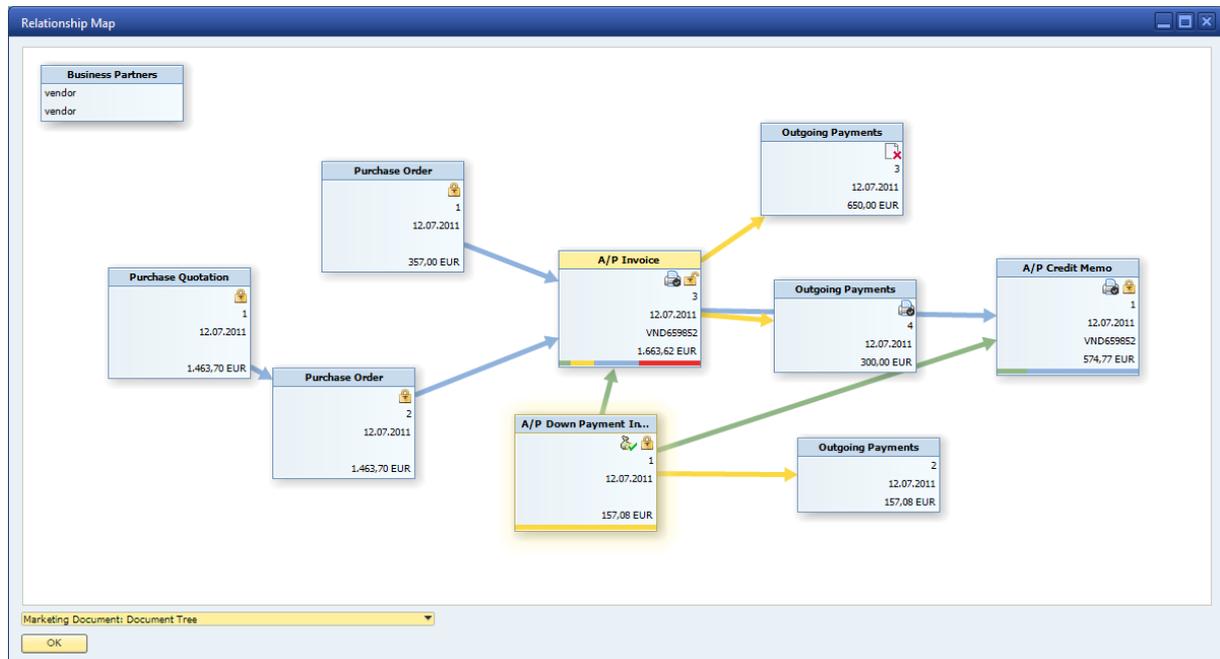


Example

Manager John Miller is on his way out to a social gathering, at which he will meet one of his customers who ordered a large quantity of goods from his company. John knows that there are several orders and invoices related to the deal. Since he is pressed for time and not familiar with the reporting functions, he does not want to use a report to check on the status of the invoices. Instead, he uses a relationship map to display all documents related to the deal and quickly gets an overview of the invoices that have been paid.

* Available as of SAP Business One 8.81 PL07

The figure below shows a relationship map of an A/P invoice.



You can use different views and starting points to display the desired information. Depending on the view and starting point, the relationship map shows the following information:

- Document type
- Document number
- Posting date
- Business partner reference number
- Document total
- Balance due

The balance due is displayed as a colored bar. The following colors are used:

- Green: Gross amount linked as down payment
- Yellow: Gross amount paid
- Blue: Gross amount copied into the next document in the chain
- Red: Balance due
- Item description
- Item number

Viewing Relationships Between Business Objects

You can view relationships between business objects from the sales and purchasing areas, inventory, production, banking, and service. Your starting point determines the default view displayed.

Prerequisite

You are authorized to view the relationship map. To check, see *Administration* → *System Initialization* → *Authorizations* → *General Authorizations* → *General*.



Note

You must have read-only or full authorization for the document type or business object to be able to view the full information on the relevant object. Otherwise, the object is grayed out.

Procedure

1. Go to one of the starting points listed in the table.

To display...	Starting Point	Default View	...switch to the following view:
All documents, business partners, production orders, and service calls related to a sales document.	Any sales document	<i>Marketing Document: Document Tree</i>	N/A
All documents, business partners, and landed costs related to a purchasing document.	Any purchasing document	<i>Marketing Document: Document Tree</i>	N/A
All postings related to a sales or purchasing document	Any sales or purchasing document	<i>Marketing Document: Document Tree</i>	<i>Marketing Document: Posting Details</i>
All documents related to the payment and the related business partner.	Incoming payment Outgoing payment	<i>Payment: Documents</i>	N/A
The item master data record and the bills of materials that the item is included in.	Item Master Data	<i>Item: BOMs</i>	N/A
The bill of materials, the item master data contained in it, and parent items.	Bill of Materials	<i>Item: BOMs</i>	N/A

To display...	Starting Point	Default View	...switch to the following view:
The sales order, business partner and issues for production related to a production order.	Production Order [*]	<i>Production: Production Tree</i>	N/A
The items master data and business partner related to a production order.	Production Order [*]	<i>Production: Production Tree</i>	<i>Production: Related Items</i>
The expenses and business partner related to a service call.	Service Call [*]	<i>Service Calls: Service Expenses</i>	N/A
The sales and purchasing documents, landed costs and business partner related to a landed costs document.	Landed Costs [*]	<i>Landed Costs: Landed Costs Tree</i>	N/A
The item master data and business partner related to a landed costs document.	Landed Costs [*]	<i>Landed Costs: Landed Costs Tree</i>	<i>Landed Costs: Related Items</i>

2. To start the relationship map, choose one of the following options:

- Right-click the business object, for example, the sales document or payment, and choose *Relationship Map* from the context menu.
- From the menu bar, choose *Goto* → *Relationship Map*.

Result

The relationship map opens in the default view for your starting point. If required, you can change the view by choosing another option from the dropdown list below the map.

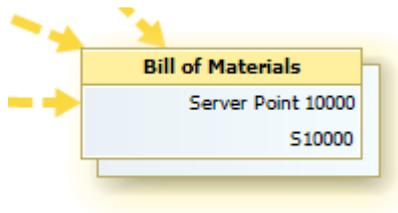


Note

In the *Item: BOMs* view, the business objects are displayed as grouped BOMs and the parent item master data. The reason is that these two objects are connected and connection between an item and its BOM is shown.

To illustrate, see the following figure:

^{*} Available as of SAP Business One 8.81 PL07



When you choose CTRL + double-click the grouped data, the following is displayed:

The diagram shows two boxes: 'Bill of Materials' (containing 'Server Point 10000' and 'S10000') and 'Item Master Data' (containing 'Server Point 10000' and 'S10000'). Yellow arrows point to both boxes from the left and top-left. A red arrow points from the 'S10000' field in the 'Bill of Materials' box to the 'Item Master Data' box. Below this is a screenshot of the SAP 'Bill of Materials' window.

Bill of Materials

Product No. X Quantity Warehouse Price List BOM Type Distr. Rule Project

#	Item No.	Item Description	Quantity	UoM	Warehouse	Issue Method	Price List
1	A00001	IBM Infoprint 1312	1		01	Backflush	Precio d
2	P10001	PC - P4 2.4G DDR 512M 4	1		01	Backflush	Precio d
3	L10001	Labor Hours Production	1		01	Backflush	Precio d
4							Precio d

Product Price

OK Cancel

Legend

The following table explains the symbols used within the relationship map and their purpose.

View	Symbol	Description
<i>Marketing Document: Document Tree</i>	Blue arrow	Documents are based on one another
<i>Marketing Document: Posting Details</i>	Green arrow	Down payment linked to document
	Yellow arrow	Document paid by payment or reconciliation
<i>Marketing Document: Document Tree</i>	Green bar	Down payment linked to an invoice or credit memo
<i>Marketing Document: Posting Details</i>	Yellow bar	Document was paid by payment or reconciliation
<i>Marketing Document: Items</i>	Red bar	Represents the unpaid part of the document total
<i>Marketing Document: Items</i>	Yellow arrow	Item included in documents
<i>Item: BOM – Including Parent Items</i>	Dashed line arrow	Relationship between parent and child items
<i>Item: BOM – Including Parent Items</i>	Solid line arrow	Relationship between two or more bills of materials (BOM)
Any*		<i>Open</i> – Document is open
		<i>Closed</i> – Document is closed
		<i>Canceled</i> – Document has been canceled
		<i>Printed</i> – Document has been printed
		<i>Paid</i> – Document has been paid
		<i>Not Authorized</i> – You are not authorized to display the document

* Available as of SAP Business One 8.81 PL07

Additional Activities

After opening the relationship map you can do the following:

User Action	Description
Choosing a view from the dropdown list	Opens a different view
Right-clicking a business object and choosing a view from the context menu	Opens a different view
Double-clicking document	Opens the document
CTRL + double-clicking grouped documents	Expands grouped documents or items
CTRL + double-clicking single documents	Takes the selected document as a starting point and rearranges the document chain with the selected document as the focal point.
Scrolling the mouse wheel	Zooms in and out of the document chain
Choosing the <i>Show More...</i> button	For performance reasons, the initial display is limited to 20 objects. When you choose this button, you can view all business objects related to the original object.

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