SAP Solution in Detail
SAP Business One

STREAMLINE YOUR BUSINESS, ACCELERATE YOUR GROWTH

A SINGLE, AFFORDABLE APPLICATION EXCLUSIVELY FOR SMALL BUSINESSES

The SAP® Business One application provides a single, affordable solution for managing your entire business – from sales and customer relationships to financials and operations. With SAP Business One, small businesses like yours can streamline operations, act on timely and complete information, and accelerate profitable growth.

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You want to focus on growing your business, but you have to deal constantly with everyday operational details, ad hoc requests for information, and nonstop competitive moves. When your sales, accounting, and operational processes are not seamlessly connected, you will inevitably experience bottlenecks and productivity will suffer. Multiple systems translate into additional work – such as duplicate data entries – which can evolve into errors and delays. When critical business information, such as customer records or inventory levels, resides in different systems or locations, response times can lag and create customer dissatisfaction. On top of all that, competitors make it hard to find and keep customers.

To maintain an edge, you need to streamline processes and find better ways to access the right information to make the best business decisions. If you can effectively track and then access all customer-related information, for example, you can service your customers more personally and more intelligently at every point of contact – locking in their loyalty (and repeat business). And if you can accurately monitor and manage revenue and expenses, you will be positioned to optimize cash flow, increasing your financial strength and the flexibility to respond quickly when business opportunities arise.

SAP® BUSINESS ONE
COMPLETELY INTEGRATED MANAGEMENT FUNCTIONS

The SAP® Business One application is a single, comprehensive solution that provides functionality for every process you need to run your entire business. Unlike niche solutions, SAP Business One supports integrated management functions, including financials, sales, customers, e-commerce, inventory, and operations. SAP Business One is designed specifically for small businesses, which means it's quick to install, simple to maintain, and most important, easy to use.

Streamline Your Entire Business with a Single Application

By integrating all critical business functions, SAP Business One supports sales, customer relationship management (CRM), purchasing, inventory, operations, financials, and HR. Business information captured in a single system is instantly accessible across the organization, eliminating duplicate data entry, related errors, and subsequent costs. Workflow-based alerts trigger auto-response when important business events occur, so you can monitor and focus on those that are most critical. When freed from constantly reacting to day-to-day minutiae, you can spend more time driving your business forward.

Strengthen Customer Relationships and Loyalty

SAP Business One enables you to manage sales force automation and customer service and support – all seamlessly integrated with other business functions across the company. Built-in e-commerce and support for online stores allow you to create an online presence, open new sales channels, and broaden your customer base. With SAP Business One you can analyze customers using data from sales, operations, and finance to identify ways to serve them faster and better.

"SAP Business One lets us see our business at any point in time. We can see the real-time status of every order in any warehouse. There's no more guesswork. We are a fashion company and have to be nimble, so this has had a big impact on our business."

Richard Haugen, Chief Operating Officer, Yak Pak Inc.

Act on Instant and Complete Information

SAP Business One captures critical data across sales, customers, operations, and financials in a single application for immediate access and use. Intuitive Microsoft Excel–based reports allow you to click through relevant data and get answers quickly. Your managers can track revenues, costs, and profit margins so they can assess business performance and determine how to improve it. And because you can use Web-based tools, you and your sales team can access customer information from anywhere at any time, meaning you can be more responsive to customer needs.

Adapt to Meet Your Changing Needs

SAP Business One is easy to set up and configure, and as your business grows, you can adapt and customize SAP Business One to meet your changing needs. For instance, you can use any of more than 450 solutions, many of them industry specific, that have been built on top of the SAP Business One application by our software solution partners. This way, you can customize and extend SAP Business One to meet your specific business and industry challenges.

DESIGNED EXCLUSIVELY FOR SMALL BUSINESSES

AN AFFORDABLE SOLUTION FROM THE INDUSTRY LEADER

Drawing on more than 35 years of SAP business management software experience, SAP Business One is an affordable, award-winning product built exclusively for small businesses. As a complete, integrated software application, SAP Business One eliminates the cost and hassle of integrating multiple stand-alone applications. Its intuitive interface and vast configurability minimize IT complexities for implementation and ongoing maintenance.

SAP Business One Key Functionality

The following summarizes the key areas where SAP Business One can support your business.

Accounting and Financials

SAP Business One helps you manage your general ledger, journals, budgets, and accounts payable (A/P) and receivable (A/R). You can conduct all your banking activities, including processing payments by check, cash, and credit card, as well as reconcile various accounts and create financial reports for profit and loss, cash flow, and aging. You can also update account postings when relevant business events occur.

Sales and Customers

With SAP Business One you can manage and maintain customer contacts with full Microsoft Outlook synchroni-

SAP® Business One Key Functionality				
Accounting and Financials	**Sales and Customers**	**E-Commerce and Web Store**	**Purchasing and Operations**	**Inventory and Distribution**
▪ General ledger and journal entries ▪ Cost accounting ▪ Budget and project management ▪ Banking and statements ▪ Payment processing and reconciliation ▪ Financial statement and reporting ▪ Sales tax and VAT ▪ Multicurrency support	▪ Opportunities and pipeline management ▪ Customer and prospect contact and activity management ▪ Sales quotations and orders ▪ Sales and pipeline forecast ▪ Web-based customer relationship management ▪ Service contact management ▪ Service call management entry and tracking	▪ Online products catalogs ▪ Web store integrated with inventory ▪ Online shopping card ▪ E-mail and promotional campaigns ▪ Payment, tax, shipping, and handling	▪ Purchase proposals ▪ Purchase orders and deliveries ▪ Goods receipts and returns ▪ A/P invoice and credit notes ▪ Bills of material (BOMs) ▪ Production orders ▪ Forecasting and material requirements planning (MRP)	▪ Items management, items queries ▪ Receipt to stock, release from stock, and stock transactions ▪ Warehouse transfer and serial numbers ▪ Inventory revaluation ▪ Customer and vendor catalog ▪ Price lists and special pricing ▪ Batch management ▪ Pick and pack
Reporting and Administration				
▪ Microsoft Excel–based reporting ▪ Data migration workbench, user-defined fields, application programming interface (API), and SAP Business One Software Development Kit ▪ Payroll accounting ▪ Employee directory and administration, employee time				

zation. This means increased sales effectiveness and stronger customer relationships. Create quotes, enter orders, and provide better customer service from the office or online. Track sales opportunities and activities from first contact to close of sale; initiate marketing campaigns by using templates for mass e-mails; provide support for customer service, service contracts, and warranties; and access customer and sales information over the Web.

E-Commerce and Web Store

Creating an online presence will help you level the playing field against larger competitors by allowing you to reach a broader customer base. With SAP Business One, you can design, build, and configure online stores using customizable templates and tools. These tools enable you to manage online catalogs and integrate negotiated, customer-specific price lists; use promotional techniques such as discounts and coupons; and automatically synchronize all online orders and inventory.

Purchasing and Operations

Every small business needs a systematic approach to managing the procurement process, from creating purchase orders to paying vendors. SAP Business One helps coordinate the complete order-to-pay cycle, including receipts, invoices, and returns. You can also plan material requirements for production, control bills of material, and replenish inventory automatically.

Inventory and Distribution

SAP Business One enables you to manage your inventory and operations – including quotes, sales orders, shipping, and billing. You can perform inventory counts, monitor stock, and track transfers in real time and across multiple warehouses. You can also run real-time inventory updates, inventory valuation, availability checks, and pick-and-pack processes.

To maintain an edge, you need to streamline processes and find better ways to access the right information to make the best business decisions. If you can effectively track and then access all customer-related information, for example, you can service your customers more personally and more intelligently at every point of contact – locking in their loyalty (and repeat business).

Reporting and Administration

With SAP Business One, you can capture all critical business data across sales, customers, operations, and financials in a single source for immediate access. Powerful "drag and relate" and Microsoft Excel–based reporting features allow you to click through relevant data and get complete information instantly, so you can make better-informed decisions.

Accounting and Financials

With support for multiple currencies, budgeting, and bank reconciliation, SAP Business One delivers financial management functionality that enables your enterprise to be more efficient and more productive.

SAP Business One Financial Management Features

SAP Business One supports financial management in the following ways.

Accounting – Create charts for any country using a chart-of-accounts template, which you can adapt to fit your unique business needs; define individual charts of up to 10 segments, if needed, to support reporting requirements.

Journal entries – Benefit from functionality that automatically posts journal entries from the sales, purchasing, and banking areas and also creates new journal entries. You can search for existing entries and automatically allocate each transaction to a project or a profit center.

Journal vouchers – Save multiple manual journal entries to a batch and process them simultaneously. This allows you to verify and collect postings before they are entered into the general ledger.

"I've had extensive experience with five major manufacturing resource planning systems, and I can tell you that SAP Business One . . . stacks up very well against the best of them, even though it targets smaller companies. It is very flexible and is much more reasonably priced."

Lou Giovannone, Group Controller, Fagerdala USA Inc.

Posting templates – Define general ledger account templates to save time and help avoid mistakes during the manual posting of journal entries.

Recurring postings – Define your own postings for regular execution in accounting and specify a frequency for each recurring posting. With recurring postings, the application automatically reminds you to post your transactions.

Reversing journals – Reverse month-end accruals automatically. By default, reversal of specified postings occurs on the first day of the next month, but SAP Business One allows users to specify a different reversing date for each posting, if desired.

Exchange rate differences – Periodically evaluate your open items in foreign currencies to identify differences and choose the appropriate correction transaction.

Financial report templates – Quickly and easily generate unlimited financial report templates, such as additional profit-and-loss statements, to suit every business need.

Banking – Track all banking processes, from cash receipts and check writing to deposits, advance payments, credit card payments, and account reconciliation.

Budgets – Define and manage budgets against general ledger accounts. Configure budget allocation methods; define budget figures in any currency (local, foreign, or both); and display a summarized budget report that compares actual and planned figures. With SAP Business One, you can create an online alert that notifies you if a transaction exceeds the monthly or annual budgeted limit.

Profit center – Define different profit centers or departments and allocate corresponding revenue and cost accounts to a predesignated profit center in the chart of accounts.

Profit center report – Run a profit-and-loss statement based on revenues and costs – both direct and indirect – as defined in the allocation rules. You can run it for any profit center, choose between annual and monthly display formats, and compare the results with figures for the previous period.

Distribution rules – Define different distribution rules to characterize business activities and then allocate revenue or cost accounts to the corresponding distribution rule.

Real-Time Accounting

SAP Business One supports real-time accounting with the following.

Fully integrated financials – Automate key financial and banking management activities with fully integrated functionality. When you run a transaction, the software automatically posts a journal entry in the general ledger so you don't have to perform additional posting or batch processing.

Quick drill down – 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 chart-of-accounts information.

Complete chart of accounts – Drill down on the balance field to see transactions that make up a specific balance.

Month-End Closing

SAP Business One offers functionality to support month-end closing.

Accelerated closing – Accelerate month-end closings by assigning tasks to individuals or creating reminders to manage various aspects of the closing via the activity window.

Control accounts – Identify accounts as control accounts and assign them as default posting accounts for the increase or decrease to customer or vendor balances. This ensures synchronization between the general ledger and the subsidiary ledgers.

Posting templates – Use posting templates to allocate costs or transactions across several departments based on fixed percentages. Recurring postings allow you to create transactions with fixed amounts.

Reversing transactions – Use this feature to reverse transactions automatically and post on a user-defined reversal date.

Financial Reporting

SAP Business One offers the following financial reporting functionality.

Multilevel reports – Create a general ledger account structure that improves your reporting. Multilevel reporting is enhanced by the flexibility provided in the account segmentation feature of SAP Business One.

Integrated reports – Compile business, accounting, warehouse, and financial reports, as well as account statements, and export reports to Microsoft Excel and Microsoft Word.

XL Reporter tool – Access real-time views of critical business data within SAP Business One and make use of all the functionality of Microsoft Excel for front-end report formatting.

Customer Relationship Management

SAP Business One delivers comprehensive, integrated sales and service functionality, ensuring total control of customer acquisition, retention, and profitability for your business. Tightly integrated features across marketing, sales, and service provide end-to-end visibility for the entire customer life cycle.

CRM Sales

Record every sales opportunity, from lead identification of the customer through discovery, qualification, proposal, closing, and aftersales service and support. You can even enter details of the opportunity, including the source, potential deal size, closing date, competitors, and activities.

CRM features include the following:

- Sales (accounts receivable) – Create price quotes, record customer orders, set up deliveries, update inventory balances, and manage all invoices and accounts receivable.
- Purchasing (accounts payable) – Manage and maintain supplier transactions, including issuing purchase orders, updating inventory quantities, calculating the landed cost value of imported items, and handling returns and credits.
- Business partner master record – Manage all information about customers, resellers, and suppliers, including e-mail addresses, profiles, sales reports, activities with business partners, and account balances. Use the calendar to track your activities and perform keyword searches to find specific items in the calendar.
- Reporting – Analyze opportunities by lead source, territory, industry, customer, and item. The reports show forecasts and anticipated revenue by various date ranges, such as month and quarter. You can view distribution of leads by source over time to identify the most profitable lead-generation activities.
- Campaign and prospect management – Import thousands of prospects from Microsoft Excel files or other standard file formats, such as comma-separated value (CSV) files, and then manage and follow up on activities. Add prospects to e-mail campaign lists, contact lists, and newsletters. Target prospects or business partners with e-mail and cold-call campaigns. Create the campaign, implement the campaign, and track the results.
- Web-based access – Use the power of the Internet to enable your distributed sales team and service team to stay connected and focused with Web-based access to SAP Business One. Features include sales order management, product selection and viewing, activity and task management, account management, opportunities management, prospect management, product catalog management, service order management, and campaign management.
- Dynamic reports – Obtain a unique, time-phased view of business data with the dynamic opportunity-analysis report, which enables you to easily spot trends, patterns, and behaviors of sales opportunities and personnel.

Sales

SAP Business One offers flexible business document development, including quotations. Not only are different line types supported, allowing you to create subtotals of previous lines, but you can insert free-form text anywhere within the body of the document, as well as display recommended alternative items. You can also store and reuse standard comments and define header and footer text for each document. Additionally, you can calculate gross profit for each quotation, easily review the sales price history, and, once you create a quotation, quickly and seamlessly export it to Microsoft Word.

SAP Business One Sales Features

SAP Business One offers the following sales management functionality.

Order – Simplify entry of sales orders by accessing item availability information across multiple warehouses. When a shortage arises, choose to order from a list of alternative items or allow the item quantity to be partially delivered. Orders can support different delivery dates and ship-to addresses for each line item, and you can automatically create purchase orders from a sales order and drop-ship the items to the customer's site.

Delivery – Generate packaging documentation for all goods shipped to a customer. The built-in packaging function facilitates the "virtual input" of items into different parcels when a delivery is created. You can store the delivery tracking number and access the shipping status within the delivery note with the click of a mouse. The software automatically updates warehouse quantities when you make a delivery.

A/R invoice – Automatically create a corresponding journal entry with each invoice. As a result, you can create an automatic receipt if the customer chooses to pay only part of the invoice.

A/R invoice and payment – Create an invoice and receipt in one step by using information from the same document.

A/R credit memo – Easily import data from the original invoice when creating a credit memo for returned merchandise.

Document printing – Select period, document number, or document type to print sales and purchasing records.

Document drafts – Print, edit, and manage all documents that have been saved as drafts.

Document generation wizard – Group all existing sales documents in a single invoice for any given customer. You can create a variety of orders and delivery notes over the course of the month and create summarized invoices for each customer at the end of the month.

Collection wizard – Manage multiple collection letters per customer and maintain a collection history for each customer. Execute the wizard at regular intervals, such as monthly or weekly, to check for outstanding customer invoices, and send a series of collection letters at different levels at predefined intervals. In addition, you can specify the method of calculating interest and collection fees.

E-commerce – Sell and market your products and services online with seamless integration into SAP Business One. Leverage a highly scalable Web store with customizable themes and shopping carts; support for multiple stores (business to consumer and business to business); powerful catalog and integrated inventory management; customer acquisition and self-service functionality; strong analytics, including dashboards and a customizable report builder; and support for business-to-business and business-to-consumer activities.

Purchasing

You can manage and maintain supplier-related activities with SAP Business One.

SAP Business One Purchasing Features

SAP Business One offers the following purchasing management functionality.

Purchase order – When you order materials or services from suppliers, you can create purchase orders and print, mail, fax, or e-mail them directly to the supplier. A purchase order updates the available quantity of the ordered items and informs the warehouse manager of the expected delivery date. In addition, you can split a single purchase order into multiple parts when, for example, items need to be shipped to multiple warehouses.

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Goods receipt purchase order – Decide whether you would like to receive deliveries at one warehouse or multiple warehouses. Goods receipts may be linked to a purchase order, which means that the purchase order quantity can change if the quantity received does not match the original order amount.

A/P invoice – Process payments to suppliers by acting on journal entries the software automatically generates when you process supplier invoices.

A/P credit memo – Issue a credit memo to any supplier for returned merchandise. You can easily draw the data required for that credit memo from the original invoice.

Landed costs – Calculate the purchase price of merchandise by allocating the various landed-cost elements (such as freight, insurance, and customs duties) to the FOB cost of each item. The actual warehouse value of merchandise updates automatically.

Document drafts and printing – Edit and manage all purchasing documents that have been saved as drafts and print them (including drafts) by period, document number, or document type.

Material Requirements Planning

SAP Business One offers a simple yet powerful planning function to help you schedule and manage items that will be produced or purchased using a variety of criteria.

SAP Business One Material Requirements Planning Features

SAP Business One offers the following material requirements planning (MRP) functionality.

Forecasts – You can predict demand based on forecasting metrics – not solely on history and received orders – by using the demand forecasts in the MRP wizard. Forecast calculations help you anticipate demand for your product and adjust material planning accordingly.

MRP wizard – Arrange for and optimize future material requirements; manage and execute purchasing and manufacturing recommendations and exceptions. By considering both minimum order quantities and order multiples, you can take advantage of purchase price breaks or standard production lot sizes and thereby reduce costs. The wizard generates a recommendation report that offers advice to either make or purchase items. Numerous drill-down options allow easy viewing of the net requirement calculations and the actual documents driving the gross requirements.

Order recommendation report – Automatically create production orders and purchase orders based on information in a recommendation report. If an item needs to be outsourced, you can easily convert a production order to a purchase order. You can also consolidate purchase orders to the same supplier into one order, further streamlining the purchasing process.

Inventory Control

Manage item master data, serial numbers, and price lists, as well as define alternative items, perform inventory increase or decrease adjustments, execute cycle counts, and generate pick lists for open sales orders.

SAP Business One Inventory Control Features

SAP Business One offers the following inventory control functionality.

Item master data – Define production items (make), purchase items (buy), and noninventory items (labor and travel, for example) while maintaining default information such as purchasing supplier, purchasing and selling unit of measure, and tax status for each item. You can maintain inventoried items in multiple warehouses with differing associated costs depending on location. SAP Business One supports a number of inventory valuation methods, including standard cost, weighted moving average, and FIFO methods. You can define a procurement method (such as make or buy) as well as order intervals in which to purchase an item (monthly, weekly, or daily, for instance). You can also define the lot sizes in which to purchase items, the minimum order quantity, and the average lead time. You can then use this information in conjunction with the MRP functionality.

Serial numbers – Automatically or manually generate serial numbers using templates.

"Clearly, we needed a solution that would streamline our business operations, give us tighter financial control over each business and event, and provide better business planning metrics. SAP Business One provides the answer."

Malcolm Carradus, Group Finance Director, Terrapinn Holdings Ltd.

Lots – Assign lots to products and classify them by any freely definable attribute (shelf life, for example), then define the lots for these products in sales orders, delivery notes, and inventory movements.

Substitute items – Create a list of alternative items when a customer's selection is not available, ranking substitute items based on similarity of item, price, or quantity.

Business partner catalog number – Maintain a cross-referenced table of customer and supplier part numbers to inventory part numbers. You can use customer part numbers on purchasing documents in lieu of inventory part numbers.

Goods receipt and goods issue – Record goods receipts and issues that are not directly related to a sales or purchasing document.

Inventory transfer – Move inventory among warehouses.

Inventory posting – Enter opening balances for inventory items and update warehouse data.

Cycle inventory counting – Streamline inventory counting by identifying when each item in inventory 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.

Price list – Define a variety of price lists and link them to customers or suppliers. Quickly and easily create dynamic links between price lists, which are updated automatically whenever the primary price list changes.

Special prices – Define special prices for individual customers or suppliers, quantity-specific prices pegged to order volume, and a validity period for each price.

Pick and pack manager – Manage the picking and packing process within multiple queues. As sales orders are

entered, they are displayed in the "open" queue and can be marked as either fully or partially released for picking. The "released" queue displays all orders released for picking, which you can mark as fully or partially picked. Within either the open or released queues, you can automatically create pick lists for an order or range of orders. This feature offers extensive drill-down functionality that includes customer and item master data as well as originating documents.

Customer Service and Support

SAP Business One delivers CRM functionality as part of the application, ensuring full control of customer acquisition, retention, loyalty, and profitability for your business. Tightly integrated functions across marketing, sales, and service provide end-to-end visibility for the complete life cycle.

Service call functions provide support for service operations, service contract management, service planning, customer interaction activity tracking, customer support, and management of sales opportunities.

SAP Business One Customer Service and Support Features

SAP Business One offers the following service and support functionality.

Service contracts – Create a regular support or warranty contract for items or services sold to a customer. The contract maintains the start and end dates as well as specific contract terms, which could include guaranteed response or resolution times.

Customer equipment cards – Maintain detailed information about an item sold to a customer, such as a manufacturer's serial number, replacement serial number, and service call history. Cards also list service contracts assigned to the specific item.

Customer equipment report – View all equipment and corresponding serial numbers sold to a customer or range of customers.

Service calls – Review information about all service calls that were created, resolved, or closed on a specified date or within a range of dates. You can restrict the report to see service calls for a specific queue, technician, problem type, priority, item, or call status. You can choose whether to include a view of overdue calls.

Service calls in the queue – Track and maintain service calls by reviewing the call history related to a particular event. You can monitor the status of a call and assign it to individual technicians or maintain them in a team queue.

Response time by assignee – Follow the communication between a customer and the service department and track the time needed to properly respond to a single service call.

Reporting

You can create reports and initiate corrective actions immediately. The reporting function supports accounting reports, inventory reports, financial reports, and reports to aid in decision making. Not only can you export any report generated to Microsoft Excel, but data extraction is effortless thanks to simple data navigation. You can execute internal and external reconciliation with exception reporting, which is useful when trying to close your books and preparing reports.

SAP Business One Reporting Features

SAP Business One provides you with end-to-end visibility of your business operations with a "drag and relate" feature that also helps you instantly understand key relationships and transactions within the business.

A query generator allows users to intuitively create database inquiries and define reports. You can use the data from any field to create a report at either the detailed or the summary level. Once you define a query, you can save it in the query library for future use. If needed, you can use a report editor to refine and change any existing queries.

The query wizard is similar to the query generator, but in this case you are guided step by step through the process of generating queries. This tool is helpful if you want to build queries but are unfamiliar with Structured Query Language (SQL) syntax.

Predefined reports – SAP Business One provides a large number of predefined reports for each functional area. You can generate reports for a specific functional area in your business and customize the output to suit your needs. You can also print, e-mail, or export any report to Microsoft Excel. For a complete list of predefined reports, see the "Predefined Reports" section.

Microsoft Excel–based reporting (XL Reporter) – Many small businesses struggle with the complexities of generating accurate and timely financial reports from company data. The XL Reporter tool in SAP Business One enables you to get comprehensive and accurate insight into the financial status of your company. Because XL Reporter is integrated with SAP Business One, it reports on live data drawn from a variety of sources, including general ledger, receivables, payables, sales, purchasing, inventory, and any user-defined fields.

XL Reporter tool features – You can perform the following activities with the XL Reporter tool.

Generate accurate and timely reports – The XL Reporter tool has everything your business needs to create and execute reports in an easy-to-use graphical environment – with point-and-click and drag-and-drop utilities that enhance your control over reporting and budgeting activities. You can generate standard and ad hoc reports, drill down into data, and then analyze the information.

Compose standard and ad hoc reports – A definition wizard makes report creation effortless. Anyone in your company can create custom queries of SAP Business One data with just a few mouse clicks. Once a report has been generated, you can drill down on any piece of data to see underlying transactions. You can also view and refresh data while creating queries.

Quickly access profit-and-loss details – Get a summary of actual and forecasted operating profit by period to help you easily uncover trends.

Create total company dashboards – Instantly view and graph critical company performance metrics such as sales, inventory movement, and top-performing customers. You can view performance on any chart and click on any cell to drill down to data that will help you choose appropriate actions associated with the metric. In addition, you can quickly assess your financial performance and future outlook.

Speed adoption and limit the learning curve – Quickly learn how to use the XL Reporter tool via an intuitive and familiar interface that accesses Microsoft Excel and provides a metadata layer that limits exposure to technical tables and field structures. You can easily generate meaningful reports, from simple transaction detail reports to advanced financial statements and dashboards. Using the tool's drag-and-drop utility, even novices can quickly create reports with drill-down functions.

Organize your reports – Manage and organize report definitions, executed reports, and report books. You can view and execute reports within the main menu of SAP Business One, which simplifies report execution. For report distribution, you can bundle and e-mail reports using a scheduler.

Design custom reports – Work with standard Microsoft Excel functions and interfaces to extend your ability to compose reports with advanced report design options. It's easy to create custom parameters, formulas, and layouts from scratch.

Simplify report generation – You can access company data and generate the appropriate reports, from ad hoc reports to detailed financial statements, as needed.

Predefined Reports

SAP Business One provides the following predefined reports for each functional area:

- Accounting
  - Aging reports
  - Company reports
  - Comparative reports
  - Budget reports
- Sales opportunities
  - Opportunities
  - Stage analysis
  - Opportunities pipeline
  - Opportunity forecast and forecast over time
  - Won and lost opportunities
  - Open and closed opportunities
  - Lead distribution over time
- Sales and purchasing
  - Open items list
  - Sales analysis
  - Purchase analysis
- Business partners
  - Activities overview
  - Inactive customers
  - Collection history

- Production
  - Open work order
  - Bills of material
- Service
  - Service calls
  - Service calls by queue
  - Response time by assignee
  - Average closure time
  - Service contracts
  - Customer equipment report
  - Service monitor
  - Service calls
  - Open service calls
  - Overdue service calls
- Inventory
  - Item list
  - Last prices
  - Inactive items
  - Inventory posting list by item
  - Inventory status
  - Inventory in warehouse
  - Inventory valuation
  - Serial number transaction
  - Batch (lot) number

Microsoft Outlook Integration

SAP Business One integrates with Microsoft Outlook, enabling you to exchange and share data to keep all parties up to date about account developments and business opportunities.

Data synchronization – Synchronize calendar appointments, contacts, and tasks between SAP Business One and Microsoft Outlook. This function allows you to schedule automatic synchronization runs and resolve any outstanding conflicts that may occur across the two applications by creating snapshots of SAP Business One information and linking them to contacts in Microsoft Outlook.

Quotations – You can import quotations from SAP Business One into Microsoft Outlook and then display, edit, and send them as e-mails. You can also create new quotations in Microsoft Outlook and save them in SAP Business One.

E-mail integration – You can perform the following functions through Microsoft Outlook integration:

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

Connection to Microsoft Word and Microsoft Excel – Microsoft Outlook integration allows you to connect to SAP Business One from Microsoft Word and save a Microsoft Word document as an activity in SAP Business One. The same function is available for Microsoft Excel. You can save workbooks as activities associated with a business partner or contact person in SAP Business One.

Easy Configuration and Personalization

The SAP Business One application resides on a single server that integrates seamlessly with the standard Microsoft Windows platform.

The streamlined SAP Business One architecture supports the following databases:

- Microsoft SQL Server
- IBM DB2 Express Edition

Single-Server Architecture

Server architecture includes security, backup, and network access protocols. Access is granted via a wide-area network terminal service or dial-up network connectivity. The SAP Business One environment uses standard database backup procedures, eliminating the need for saving and transferring the database from one machine to another while still providing immediate access to critical business information (see Figure 1).

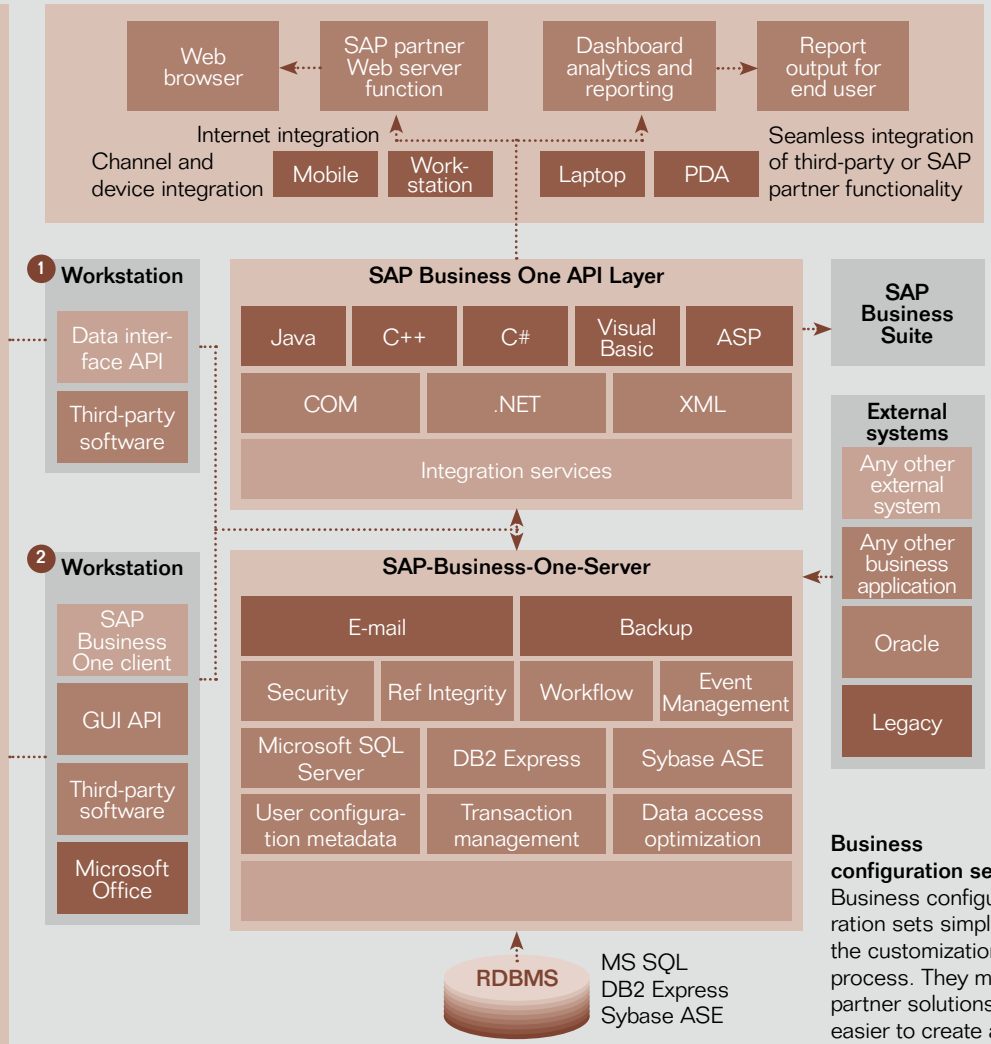
The SAP® Business One Single-Server API Layers
SAP® Business One is equipped with an application programming interface (API) that is based on component object model (COM) technology. You can use this API to enhance the functional scope of the application or adapt it to meet your specific requirements.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

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

Data Interface API
Using the data interface API, developers can extend SAP Business One by adding windows, changing existing windows, and modifying the behavior of the application to fit unique business requirements.

User Interface API
The user interface API supplies objects and procedures for accessing input fields, check boxes, internal system events, and much more.

The objects and procedures supplied by the user interface include the following:
- Application: Establishes the connection to SAP Business One
- Form: Represents a window within SAP Business One
- Item: Enables the processing of dialog boxes and alters their contents, as well as their position, size, or visibility
- Check box: Processes check boxes
- Matrix: Stands for a table in a window
- ItemEvent: Processes events
- MenuItem: Activates individual menu items
- MenuEvent: Influences an event process



Business configuration sets
Business configuration sets simplify the customization process. They make partner solutions easier to create and maintain. You can reuse settings for a certain function or an entire business process.

Figure 1: Single-Server Architecture

	Server	Workstation
Operating System	Microsoft Windows 2003 Server R2 Standard/Enterprise 32 Bit/64 Bit Microsoft Windows 2003 Server SP2 Standard/Enterprise 32 Bit/64 Bit Microsoft Windows Small Business Server 2003 R2 Standard/Premium Microsoft Windows Small Business Server 2003 SP1 Standard/Premium	Microsoft Windows XP SP2 Professional, 32 Bit Microsoft Windows Vista Business/Enterprise/ Ultimate, 32 Bit
CPU	Microsoft SQL Server 1x Intel Pentium IV IBM DB2 UDB Express Edition 1x Intel Pentium IV	1x Intel Pentium III (or equivalent) or higher
RAM	Microsoft SQL Server 1 GB IBM DB2 UDB Express Edition 1 GB	256 MB
Hard Disk Free Space	Microsoft SQL Server system partition 0.5 GB/data partition 2 GB IBM DB2 UDB Express Edition system partition 0.5 GB/data partition 2 GB	512 MB
CD-ROM	Drive 24x or higher	24x or higher
Display	640 x 480 with 256 colors or higher	800 x 600 with 24-bit color or higher
Database	Microsoft SQL Server 2005 SP2 IBM DB2 UDB Express Edition Version 9.1 FP2	Microsoft IE 6.0 SP1 Microsoft Data Access Components 2.6 (MDAC) or higher
Software	Microsoft IE 6.0 SP1 Microsoft Data Access Components (MDAC) 2.6 or higher for Windows 2003 Server For IBM DB2 Microsoft .NET SDK Windows 2000	

1

Data Transfer Workbench
The data transfer workbench tool migrates master and transaction data from legacy systems into SAP Business One. Predefined data file templates simplify the preparation of data for import.

2

Microsoft Outlook Integration
SAP Business One is fully integrated with Microsoft Outlook, enabling seamless communication that can span your organization 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 applications, and because it has an open architecture, it can be easily integrated with applications from independent software vendors. This open architecture allows you to realize all the extensive benefits of SAP software.

Migration to SAP Business Suite
SAP offers a migration path from SAP Business One to the SAP Business Suite family of business applications so small subsidiaries can interface with parent companies. It can also support dramatic growth — up to thousands of employees.

The SAP NetWeaver® Technology Platform
The SAP NetWeaver technology platform helps you obtain more business value from your existing IT investments and deploy an enterprise service-oriented architecture.

User-Defined Personalization and Configuration

SAP Business One gives you powerful tools to tailor forms, queries, and reports to meet specific business requirements without the need for specialized technical training. You can configure settings to define exchange rates, set authorization parameters, and create import and export functions for internal mail, e-mail, and data.

SAP Business One Configuration Features

SAP Business One offers the following extensive configuration functionality:

- **Company selection** – Various basic settings
- **Initialization and general preferences** – Company data and general settings
- **User definitions** – Chart of accounts, tax codes, sales employees, territories, projects, address formats, payment terms, suppliers, customers, items and commission groups, warehouses, service contract templates and queues, banks, payment methods, and shipping methods
- **Authorizations** – Controlled information access (full, read only, or no access); access granted based on team, department, or branch
- **Definition of exchange rates** – The basis for all reports and recorded data
- **Utilities** – Data backup, automated processes, and data import and export
- **Recovery** – Data administration and retrieval
- **Alert functions** – Personal profile definition for warning messages
- **Send message** – Internal user, customer, and supplier
- **Opening balances** – For general ledger account and business partner
- **Master data record** – Maintained for the entire application
- **Business partner files** – Contain the master data record of a customer or supplier
- **Bills of material** – Product trees representing the header and covering the individual materials assigned
- **Sales or purchasing document** – Documents for the header line and document lines containing the individual items that are assigned
- **Journal entries** – By title or description

Address Changing Business Needs

SAP Business One can be adapted in the following ways to meet your changing business requirements without creating a heavy, ongoing IT burden:

- Save preferences for forms, queries, and reports, allowing embedded process models to directly mirror actual day-to-day business activities
- Integrate other applications, thereby leveraging your technology investment
- Control transactions and workflows through alert functionality
- Implement changes to SAP Business One immediately so you can quickly adapt the application to variations and alterations
- Integrate modifications into new versions of the application with minimal effort, eliminating costs typically associated with upgrades

User-Defined Fields

Define your own fields inside data object windows for business partners, orders, inventory specifications, and like items. You can select user-defined fields for various types of information, such as texts, addresses, phone numbers, URLs, file attachments, images, and drop-down lists. These fields automatically follow your database when you upgrade.

Formatted Searches

Record values for each field in the application, including user-defined fields, from a predefined search process. You can use formatted searches in the following situations:

- Automatic entry of values in fields based on one of the following:
  - Use of different objects in the application
  - Predefined lists
  - Predefined queries (user defined)
- Definition of dependencies between application fields
- Display of fields used only for queries, such as user signature, creation date, and balance of open checks (for a business partner)

Alerts and Approvals

You can set up immediate notifications and automatic responses to important business events through user-programmable, workflow-based alerts. Designate the events you want to track and define ranges for acceptable tolerances and limits connected to these events and then, when indicators fall out of the predetermined range set for the event, you will receive a notification to which you can respond. Any breach of business policy generates an immediate notification to the manager and initiates a workflow process to manage the event.

SAP Business One Alerts and Approvals Features

The following details functionality for automated alerts and approvals.

Proactive management by exception – Be alerted automatically about important business events (eliminating the need for you to monitor activities manually). Alerts enable you to:

- Notify employees of a discrepancy or an event you are monitoring within the organization
- Provide internal (online) information associated with each employee's role in the company (Each time a threshold is crossed, an alert could be triggered in real time to the user that requested such notification.)
- Drill down to gain instant visibility on information detailing the alert's characteristics, which can help you make informed decisions regarding future actions associated with the event
- Inform managers about particular business events and trigger workflow processes
- Respond instantly to alerts generated as part of workflow processes, approval procedures, and automatically initiated actions

Software Development Kit

SAP Business One Software Development Kit (SAP Business One SDK) is a toolbox that contains programming interfaces, sample code, documentation, and simple utilities. The kit allows programmers to easily interface external applications with SAP Business One or to add custom functionality. SAP Business One consists of a graphical user interface and a separate business object layer. The SAP Business One SDK provides full access to both the user interface layer and the business object layer (see Figure 2).

By seamlessly integrating sales, customers, financials, and operations, SAP solutions give you the cross-company visibility you need to make decisions based on real-time information. Armed with insight into every aspect of your business, you can easily monitor performance, eliminate inefficiencies, and, most important, identify profitable opportunities.

SAP Business One SDK Features

The software development kit offers the following features:

- Provides programmatic access to SAP Business One 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
- Supports a wide range of programming languages and tools, enabling developers to use familiar technologies and applications
- Provides strong backward compatibility, so that little or no rework is required during upgrades to a new version of SAP Business One

SAP Business One SDK Components

The following key components are part of the software development kit:

- Application programming interface (API) for the data interface – For integrating external applications with SAP Business One
- API for the user interface – For extending and customizing the SAP Business One client applications
- Screen designer with drag-and-drop interface – For designing custom windows for SAP Business One
- Java connector – For interfacing external applications with SAP Business One using the Java programming language
- Complete documentation
- Sample applications

1 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 synchronization with mobile devices.

The data interface API provides the following:

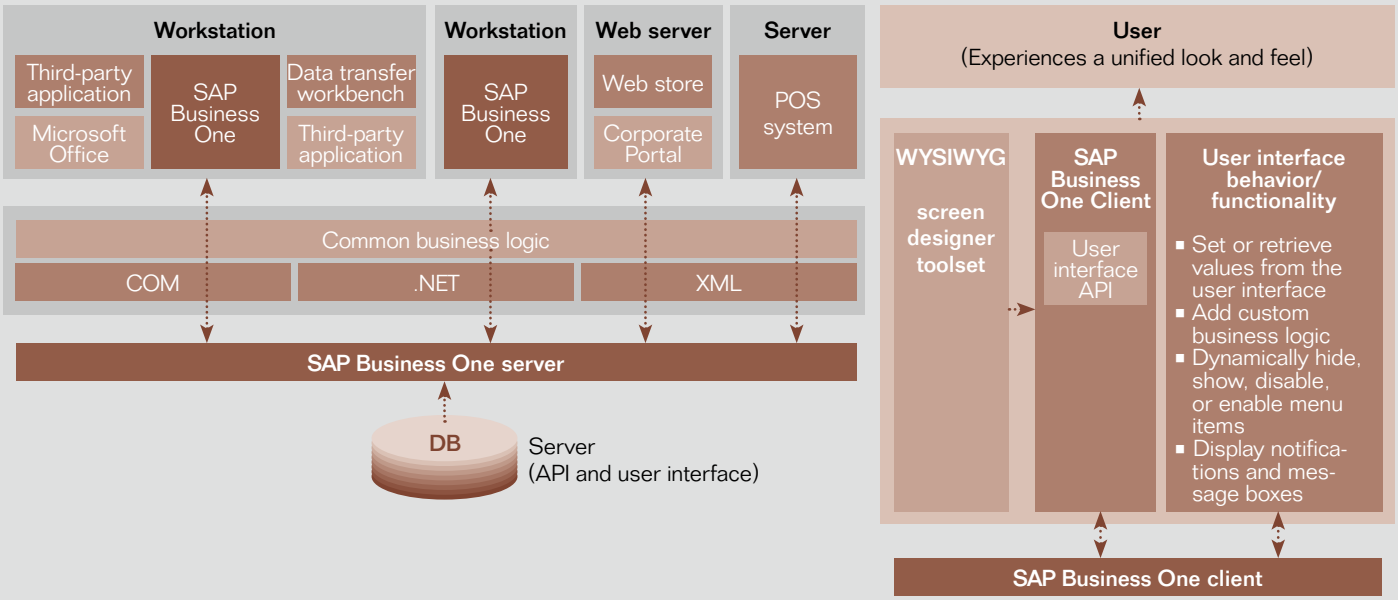
- Objects and methods to read, write, and update business objects directly
- Full object orientation, providing a powerful interface that requires minimal training
- Full access to master records, transactional data, system configuration, and user-defined data
- Backward compatibility for a smooth upgrade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

2 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 dialog 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 does the following:

- 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



3 Platforms and System Requirements

SAP Business One runs on Microsoft Windows 2000. SAP strongly recommends that you install the latest support packages for the operating system.

4 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.

Figure 2: SAP Business One Software Development Kit

SAP SOLUTIONS FOR SMALL BUSINESSES AND MIDSIZE COMPANIES

TRUSTED BY THOUSANDS OF BUSINESSES WORLDWIDE

SAP Business One is part of a portfolio of SAP solutions for small businesses and midsize companies, which also includes the SAP Business All-in-One application and the SAP Business ByDesign™ solution. When it comes to the widely varying needs of small businesses and midsize companies, SAP solutions provide the best fit for your specific business, IT, and workforce requirements.

By seamlessly integrating sales, customers, financials, and operations, SAP solutions give you the cross-company visibility you need to make decisions based on real-time information. Armed with insight into every aspect of your business, you can easily monitor performance, eliminate inefficiencies, and, most important, identify profitable opportunities. With a standardized, proven solution from SAP at a predictable cost, small and midsize companies can streamline operations, act instantly on complete information, and accelerate profitable growth.

Trusted by more than 18,500 customers worldwide, SAP Business One offers the benefit of our broad industry experience and that of our partners. It's the right solution to help companies like yours stay ahead of the competition.

> "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, allow us to churn out reports very rapidly and quickly."
>
> **Paul Rakkar**
> Group Financial Controller
> Time Out Group Ltd.

Learn More

Available today in more than 20 languages and in more than 40 countries, SAP Business One is delivered by a worldwide network of business partners that leverage SAP's global knowledge to provide local service and support. For information on how the power and simplicity of SAP Business One is the best fit for your business, visit www.sap.com/solutions/sme/businessone.

QUICK FACTS

www.sap.com/contactsap

Summary

Designed specifically for small businesses, the SAP® Business One application provides a single, affordable solution for managing your entire business, including financials, sales, customer relationships, and operations. Streamline your end-to-end operations, gain instant access to complete information, and accelerate profitable growth.

Challenges

- Find time to focus on growing your business
- Access the right information to make key decisions
- Build and maintain closer customer relationships
- Minimize duplicate data entries, errors, and delays
- Optimize cash flow for business needs

Supported Business Processes and Software Functions

- Accounting and financials – Manage your general ledger, journals, budgets, and accounts receivable and payable
- Sales and customer relationship management – Manage and maintain customer contacts
- E-commerce – Create an online presence, manage an online store, update online catalogs
- Purchasing and operations – Manage the entire procurement process
- Inventory and distribution – Manage sales orders, perform inventory counts, and control warehouse operations
- Reporting and administration – Create reports that help you monitor your business and make informed decisions

Business Benefits

- **More time to focus on growing your business** thanks to streamlined operations
- **Faster response to customer needs** with instant access to complete information for immediate action
- **Strengthened bottom line** with a single, integrated system that eliminates redundant data entry and errors, improving process efficiency and reducing costs and delays
- **Closer customer relationships** through centralized information that makes it easier to manage customer communication and sales and service contracts
- **Reduced costs** with an easy-to-use application that minimizes the need for employee training and accommodates the changing requirements of your business by allowing for easy integration with other industry-specific applications

For More Information

Call your SAP representative or visit us online at www.sap.com/solutions/sme/businessone.

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