Outlook to Release 9.3 and 9.2 Recent Enhancements

April, 2017

SAP SMB Innovation summit 2017 – Fort Lauderdale
Feedback Loop with Partners
Making SAP Business One Better Together

Bring market needs into the product & Deliver the right solution to the market

- Within Early Adoption stage
- At Acceptance Testing
- During pilot stage
- At review of planned solutions with key partners
- Ongoing Input such as Idea Place, Partner and Customer meetings, events

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Demo

Optimizing Production and Project Management in SAP Business One 9.3

*SAP Business One 9.3 release is still in development stage. Delivered functionality might be different from shown in this presentation
Resource in Marketing Documents (9.2 PL 06)

**Feature**
- Ability to use a Non-Inventory item as a Resource by linking it to a Resource
- Once linked usage of the Non-Inventory Item on AR and AP Marketing Documents will impact Resource Capacity

**Benefit**
- Ability to buy and sell Resources
- Will enable businesses supplying resource based services to more comprehensively manage their resources
Feature
- In the Open Items List you can select multiple production orders, choose the "Change Status" button and assign the selected documents the required status

Benefit
- Increased productivity and enhanced usability
Production Routing (9.3)

Feature
- Ability to add Route Stages to BoMs and Production Orders
- Once added production stages can be scheduled and managed

Benefit
- Ability to plan, execute and manage basic route based production
- A significant enhancement for all businesses with a light production requirement

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Project Management (9.3)

Feature
- The Project Overview form displays the whole project and its structure in one table, and includes a new time sheet report
- New Billing Wizard enables to recharge costs or bill the project
- The stage ID is supported by marketing documents and time sheet
- Additional project related information is added to the Activity form, in addition, user can set activity is relevant for project billing

Benefit
- These enhancements provide the users with inclusive overview of projects as well as detailed information related to each project
- The time sheet, and the project-supporting enhancements marketing documents and activity increase productivity and transparency
- The billing wizard streamlines the standard billing or milestone billing process and helps improving efficiency

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Gantt Chart (9.3)

Feature
- The Gantt Chart visualizes the project as a whole, providing the user the ability to see the big picture and zoom in to the small details

Benefit
- More transparency, increased productivity, and enhanced usability

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Driving Sales in SAP Business One 9.3

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**CRM Enhancements (9.3)**

**Feature**
- New module “CRM” is added under the financials module, listing all the functions related to CRM

**Benefit**
- Enhances usability and increases productivity

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CRM Enhancements (9.3)

Feature
- Activity can be assigned to multiple users/employees; respective recipient lists can be created and maintained for this purpose

Benefit
- Increases efficiency as the need to create the same activity multiple times and assign it to one user/employee each time is saved

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CRM Enhancements (9.2 PL03)

Feature
- Enable deactivation of activities' types and subjects
- Enable remove and reopen closed activities
- Enhance 'You Can Also' Functionality:
  - Support service document for vendors
  - Copy selected contact person to follow-up documents

Benefit
- Enables more efficient and simpler usage of Activities
Feature

- New setting enables you to change the structure of the service call so it supports recording multiple scheduling in a single service call.

Benefit

- Supports cases where follow up activities for a given service call are required. This setup increases productivity, improves tracking and saves the need to create additional service call in case follow up is required.
RMA - Return Material Agreement (9.3)

**Feature**
- SAP Business One supports Return Material Agreement process. Users can create pre-step of the return document, enter the agreed quantities, prices, and return reason before the goods is actually returned.

**Benefit**
- Enables management and tracking of the return process
- Increased transparency

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Price List Enhancements (9.3)

**Feature**
- Enables the user to define price per unit, e.g. price per 1000 units of a given item
- Pricing hierarchy per BP - enables the user to overwrite the existing logic for selecting default prices, and apply the highest/lowest price per BP
- Enables the user to limit special prices validity by date range

**Benefit**
- More flexible and fine-tuned pricing functionality, increases productivity and simplifies customization

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Enjoy Your SAP Business One 9.2 Even More
Implementation Tasks Enhancements (9.2 PL03)

Feature
- The Implementation Tasks window is a single point of entry for launching various tools required during the implementation project.

Benefit
- Enhanced usability and greater efficiency throughout the implementation process.
Implementation Project Enhancements (9.2 PL03)

Feature
- Supports configuration steps including functions introduced in 9.2
- Include steps for SAP HANA and Cloud deployment

Benefit
- More comprehensive tool that supports various implementation scenarios
Tooltip Preview (9.2 PL05)

**Feature**
- The tooltip preview enables you to display relevant data by mouse hover according to your needs.
- You can define which data will be displayed, including user-defined fields, in Administration → System Initialization → Tooltip Preview.

**Benefit**
- Enhanced usability and efficiency - no need to click the link arrow.
- Increased productivity as you can customize which data will be displayed.
Allow Cash Account Only on Cash Payments (9.2 PL05)

**Feature**
- New settings enable to force using cash accounts when generating incoming or outgoing payment for payment means cash

**Benefit**
- Helps avoiding cases of using non-cash accounts for cash payments
- Increases accuracy of financial reports
Enhanced Recurring Transactions (9.2 PL 05)

Feature
- The Recurrence Date parameter is extended and when choosing a daily recurrence period more days are available for selection
- When opening the Recurring Transactions for Business Partner window from within the BP master data you can filter the list and display only the not executed transactions

Benefit
- Provides additional flexibility and enables defining templates that best fit the business needs
- Enhances usability and increases clarity of future transactions
Master Data Enhancements (9.2 PL05)

Feature

- The fields “Country of Birth”, “Date of Birth”, “Gender”, “Profession”, and “City of Birth” are added to the contact persons tab in all localizations
- Cost Center field is added to Employee Master Data, in all localizations enabling the user to assign the relevant cost center to each employee

Benefit

- Supports maintaining important data related to the ongoing business activity
- Increases clarity and accuracy of costs allocation in the business
Live Collaboration for Business Users (9.2 PL06)

Feature
- Enables sending instance messages between SAP Business One users. Users can also share documents within the chat.

Benefit
- Increases productivity and workflow, contributes to the day to day work efficiency.
Vendor - Customer Connection (9.2 PL 06)

**Feature**
- Vendor-Customer 1:1 Connection - Enables create symmetrical relationship between customer and vendor and reflect this link in dunning wizard, aging reports and internal reconciliation

**Benefit**
- Increase transparency of business activity in cases where a customer is also a vendor and vice versa
- Increases productivity as the user receives at a glance a clear picture about the sum of the activities on both sides
Browser Access Enhancements

Feature
- Browser Access solution is available from within iPad (9.2 PL 04)
- Relationship Map is made available to Browser Access users (9.2 PL 05)
- The “server side printing” solution allows users to print single document directly (without first creating a PDF) as well as to print multiple documents in one go. Depends on the customer, infrastructure set up and additional 3rd party cloud printing service might be needed (9.2 PL 06)
- Copying from MS Excel to SAP Business One is supported (9.2 PL 04)

Benefit
- These enhancements increase productivity and promote browser access towards becoming a complete SAP Business One solution on the cloud
Feature

- Customer 360 - new dashboard, available from within the customer master data showing lots of up-to-date valuable information about the specific customer
- The dashboard is divided into four tabs organizing the data according to different aspects

Benefit

- Receiving the complete info about the customer within a click enables real-time decision making based on the most accurate information
- Displaying the data in four tabs increases accuracy and user productivity
Order Recommendation (9.2 PL 04)

Feature

- Product recommendations are displayed in the sidebar of sales order and sales quotation for a customer.
- Recommendations are based on association rules generated from the buying history of the given customer and similar customer.
- Logon to https://<Server Address>:<Port>/PredictiveAnalysis in a web browser in order to refresh data or schedule an automatic update.

Benefit

- Ability to drive sales growth by expanding customer footprint.
- Automatic update of product recommendations thought new scheduling functionality.
Feature

- **Input Parameter** – define parameters to dynamically filter data in excel report designer. There are two types of parameters: the data source parameter and the report parameter (PL01)

- **Time Functions** - This feature enables you to retrieve dates and financial period codes dynamically as a list based on your available statistics in the database, and to filter your data with the dates and financial period codes it retrieves (PL04)

Benefit

- Dynamic filtering of data
Demo

More Reasons To Look Forward To SAP Business One 9.3

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Approval Procedure Enhancements (9.3)

**Feature**

- Enable updating draft with the statuses Pending and Approved

**Benefit**

- Saves the document generator the need to cancel approval process and start a new one when identifying the pending approval process draft or the approved draft is incorrect and has to be updated

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Import from Excel Enhancements (9.3)

Feature
- You can import from Excel Journal Entries, Opening Balances, and Serial and Batch numbers

Benefit
- The import process becomes simpler and more efficient, no need to use DTW for importing these objects

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User Setup & User Default Enhancements (9.3)

Feature

- The User – Setup form is enhanced to include various user-specific options, that previously used to be in the General Settings form
- New icon on the toolbar enables users to access their user setup form and personalize it
- The User Defaults form is extended and includes Font & Background tab

Benefit

- Better accuracy and clarity of company level settings vs. user-level settings
- Enhanced usability – all users gain access rights to their own personal preferences (subject to authorizations)
- Better coverage of user defaults settings, enables more efficient implementation

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Blanket Agreement Enhancements (9.3)

**Feature**

- Determine fixed exchange rate in blanket agreement when BP currency is foreign currency and blanket agreement is managed on the document header
- Enable updating planned amount, planned quantity, and price in blanket agreement that is linked to other documents
- Add committed/ordered qty/amount to Details Tab
- Control the deviation from blanket agreement planned amount or planned quantity

**Benefit**

- Required when fixed exchange rate is one of blanket agreement terms.
- Increases flexibility and productivity - user can update the blanket agreement terms instead of creating new one
- Enables to track committed/ordered qty/amount in blanket agreement which is not delivered yet
- Ability to have a better control over the purchasing process by blocking deviation from blanket agreement Planned Amount or deviation from planned qty when required.

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Gross Price Enhancement (9.3)

Feature

- New setting enables to define whether to apply gross or net price calculation in documents
  - “Gross” simulates the working method of entering the total amount first and the tax and other components are calculated afterward, while “Net” considers the net price and calculates all other components based on that.
  - Relevant settings are added to “Company Details”, “Business Partner Master Data”, price lists, marketing documents etc.

Benefit

- Supports retail businesses
- Streamlined gross price calculation method

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It's All About Integration
**Feature**
- New functionality is introduced to SAP Business One enables businesses to integrate with SAP Localization Hub tax service
- When activated, the Tax Service will be primarily used in case there is matching rate according to the document and business partner properties

**Benefit**
- Supports VAT calculation for 75+ countries
- Withholding tax determination and computation
- Supports deferred tax, deductibility and other financial relevant indicators
- Multi-currency and time bound tax rate support
- Faster roll-out and adoption
- Single source to determine and compute tax
- Pre-delivered and perpetually updated tax configuration content
- Lower costs by reducing maintenance efforts to keep systems updated
Concur Integration Support (9.2 PL 07)

Feature
- Upon activation and initial configuration, an integration of SAP Business One and Concur is available, using specific B1i scenario

Benefit
- Answers the requirement of most of SAP Business One customers to have Travel Expense Solution for their employees
- Provides a great upsell opportunity as we have with Concur the perfect solution for the SAP Business One market segment
To Conclude …
SAP Business One is Moving Forward
Thank you
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