



Long Business Systems, Inc. (LBSi)

Management Software Solutions

We help businesses manage for success

Cleveland – Columbus – Cincinnati - Pittsburgh

THE BEST-RUN BUSINESSES RUN SAP



What's new in 8.82?



In general release now.....

- ❖ SAP continues to add functionality to Business One product
- ❖ All under the annual support & maintenance fee
- ❖ Completed 2 months ahead of schedule
- ❖ Twice as many live customers than planned
- ❖ Five times more shipments than planned

THE BEST-RUN BUSINESSES RUN SAP



Sales & Purchasing



- ❖ Credit Memos without Inventory Movement
 - Create AR & AP Credit memos for items without affecting inventory
 - Checkbox lets you decide whether to affect inventory
- ❖ Post Dunning Fees and Interest Automatically
 - Supports complete Dunning process from end to end
 - Automatically create service invoices for Dunning fees and interest
- ❖ Date Options for Closing Goods Receipt PO and Goods Returns
 - Specify a date other than Current System Date or Original Document Date
- ❖ Use “Copy From” and “Copy To” to credit Reserve Invoices
 - Create credit memos for AR Reserve Invoices for items delivered
 - Create credit memos for AP Reserve Invoices for items returned



Sales & Purchasing



❖ Credit Memos without Inventory Movement

- Create AR & AP Credit memos for items without affecting inventory
- Checkbox lets you decide whether to affect inventory

A/R Credit Memo

Customer	➔ C70000	No.	Primary	5
Name	Aquent Systems	Status		Closed
Contact Person	➔ Troy Brown	Posting Date		03/12/12
Customer Ref. No.		Due Date		03/12/12
Local Currency		Document Date		03/12/12

Contents Logistics Accounting Attachments

Item/Service Type Item Summary Type No Summary

#	Without Qty ...	Item No.	Item Description	Quantity	Unit Price	Total (LC)
1	<input checked="" type="checkbox"/>	➔ A00006	HP 600 Series Inc	10	\$ 400.00	\$ 4,000

Business Partners



❖ Blanket Agreements

- Create blanket agreements to show long term sales and purchasing agreements
- Link sales and purchasing documents to blanket agreements
- Consider blanket agreements in MRP runs and Cash Flow calculations

❖ Activity Enhancement

- Duplicate BP activity
- Define monthly and annual reoccurring activities on any day
- Assign activities to employees that are not users
- Drag and drop Outlook email to activity

❖ Display employee activities, absence and education on calendar

❖ Connection between employee master, users & sales employee/buyers

❖ Campaign Management



Business Partners



❖ Blanket Agreements

- General agreement: obtain year end bonus or track defined \$\$ amounts
- Specific: obtain special discounts for items
- Get reminders to for blanket renewals

Status	Approved
Owner	Vicki
<input checked="" type="checkbox"/> Renewal	
Reminder	30 Day(s)

Blanket Agreement

BP Code	→ C40000	Agreement No.	2
BP Name	Earthshaker Corporation	Start Date	03/01/12
Contact Person	→ Bob McKensly	End Date	12/31/12
Telephone No.	(225) 632-3332	Termination Date	
E-Mail	bob.makensly@earthshake		
Description	IBM Printer Blanket		

General | **Items** | Documents | Attachments

#	Item No.	Item Description	Item Group	Planned QTY	Unit Price	Cumulative QTY	Cumulative Amount	Open QTY	Open Amount
1	→ A00001	IBM Infoprint 1312	IBM Printers	900	\$ 400.00	100	\$ 40,000.00	800	\$ 320,000.00
2									
				900		100	\$ 40,000.00	800	\$ 320,000.00

OK Cancel

Inventory



❖ Allocate batch or serial numbers to Sales Orders

- View status of the allocation
- Modify your selections – select and deselect
- Print Pick List with serial and batch details

❖ Pick and Pack Enhancements

- Allocate serial and batch numbers
- Create deliveries and AR Invoices
- Filter sales orders and user defined fields

❖ Inventory Transfer Request document

- Will be considered in MRP planning



Inventory

- ❖ Allocate batch or serial numbers to Sales Orders
 - View status of the allocation
 - Modify your selections – select and deselect

Sales Order

Customer	→ C40000	No.	Primary	154
Name	Earthshaker Corporation	Status	Open	
Contact Person	→ Bob McKensly	Posting Date	03/13/12	
Purchase Order	89632	Ship By Date	04/30/12	
Local Currency		Document Date	03/13/12	

Contents Logistics Accounting Attachments

Item/Service Type Item Summary Type No Summary

#	Item No.	Item Description	Quantity	UOM	Unit Price	Total	Del. Date	Whse
1	→ A00006	HP 600 Series Inc	10	EA	\$ 400.00	\$ 4,000.00	04/30/12	→ 01

Serial Number Transactions Report

Serial Numbers

#	Item No.	Item Description	Serial Number	Lot Number	Admissio...	Whse Code	Location	Status	Details
1	→ A00006	HP 600 Series Inc	→ 00166	→	08/23/11	→ 01		Allocated	
2	→ A00006	HP 600 Series Inc	→ 00167	→	08/23/11	→ 01		Allocated	
3	→ A00006	HP 600 Series Inc	→ 00168	→	08/23/11	→ 01		Allocated	
4	→ A00006	HP 600 Series Inc	→ 00169	→	08/23/11	→ 01		Allocated	
5	→ A00006	HP 600 Series Inc	→ 00170	→	08/23/11	→ 01		Allocated	

Transactions for Serial Number: **00166**

#	Document	Doc. R...	Date	Whse Code	G/L Acct/BP ...	G/L Acct/BP Name	Direction	Allocated
1	→ OR 154	1	03/13/12	→ 01	→ C40000	→ Earthshaker Corporation	Allocation	

Inventory



❖ Inventory Transfer Request document

- Will show transfer affect (allocation) on committed and ordered quantities
- “Copy to” function to Inventory Transfer for actual movement transactions

Inventory Transfer Request

Business Partner:
Name:
Contact Person:
Ship to:

No. Primary: 1
Status: Open
Posting Date: 03/13/12
Due Date: 03/15/12
Document Date: 03/13/12

From Warehouse: 01
Price List: Last Purchase Price

Contents | Attachments

#	Item No.	Item Description	To Warehouse	Quantity	In Stock	Unit of Me...
1	➔ A00001	IBM Infoprint 1312	➔ 02	1,000	1,800	EA
2						

Sales Employee: Sophie Klogg
Journal Remarks: Inventory Transfer Requests -

Remarks: Ship to West Coast on Thurs. truck run

OK Cancel Copy To

MRP



❖ Enhanced Forecast

- Enabled forecast generation based on sales history
- Scale up/down buttons to adjust forecasted quantities

❖ MRP Wizard

- More document sources: blanket agreements, recurring transactions, transfer requests
- Enhanced item and warehouse selection

❖ Order Recommendation Report

- Right click menus for reports
- Purchase quotation selection



Financial / Banking



❖ Payment Wizard Enhancements

- Simpler and easier to use
- Sort and find transactions
- Simulate a payment summary before execution

❖ Automatic System Reconciliation of Interim Accounts

- Allocation account, Expense Clearing Account, Stock in Transit Account

❖ Automatic Import of Bank Statements



Cockpits



❖ Purchasing Cockpit

- Predefined cockpit to help you search and organize purchasing data

❖ Cash Flow Forecast Dashboard

- Forecast your company's future cash flow position

❖ Purchase Orders Dashboard

- Monitor open purchase orders; search, filter, track past due

❖ Purchase Quotation Dashboard

- Monitor open purchase orders; search, filter, track how vendors have responded

❖ Dashboard Parameters

- Define and monitor parameters; single, quarterly, monthly, multiple



Other Enhancements



❖ Master Data Clean-up

- Easy way to remove clean-up master data no longer needed
- Provides log for batch removal and deactivation process

❖ Create Production Orders from Sales Orders

- Use Procurement Wizard to create Production Orders and reference to SO's

❖ Use SAP search box without enabling Cockpits

❖ Schedule and view Service Calls

- New scheduling tab and option to display in calendar
- Display Service Calls in Activities Overview window



Suggestions for Enhancements



- ❖ You can submit your ideas and suggestions to SAP
- ❖ Go to: <https://cw.sdn.sap.com/cw/community/ideas/sme/b1>

The screenshot shows the SAP Idea Place interface. At the top, there is a navigation bar with the SAP logo and 'Idea Place SAP Community Network'. On the right, it says 'Welcome, Vicki Smith | Sign Out | Quick Tour | FAQ'. Below this is a secondary navigation bar with buttons for 'Submit an Idea', 'All Ideas...', 'My Idea Place', and 'Request a Session', along with a search box labeled 'Search Idea Place'. The main content area is titled 'SAP Business One' and includes a welcome message for Vicki Smith with a 'Log off' button. The central section contains instructions for submitting ideas, including a 'Submit an Idea' button highlighted with a red border. To the right, 'Session Statistics' shows 200 Comments, 217 Ideas, and 98 Contributors. At the bottom, there is a search box for 'All SAP Business One Ideas'.





Thank you for taking time to participate in the SAP Business One User Group Meeting.

Please take a few minutes to respond to our survey and provide us with feedback and suggestions going forward.

- We are always looking for new clients to work with. And we would like to find more clients and partners like you – companies that are engaged, smart, and focused on their future.
- Can you help us out by referring LBSi to someone who could benefit from our services?





Next Meetings:

- Tuesday, Apr. 10, 2012
 - Price Lists
- Tuesday, May 8, 2012
 - TBA – Give us your ideas





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SAP[®] Certified
Associate

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