



Newsletter Vol. 44 - Introduction

Softengine News is dedicated to keeping you up to date with the latest information regarding SAP Business One systems, Softengine solutions and Best Business Practices.

What's New?

Spotlight on Product – SAP Business One 8.82 Release Highlights

With the 8.82 release, SAP continues to demonstrate its commitment to addressing specific product needs requested by small and mid-size enterprise (SME) businesses. The latest version offers new capabilities for campaign management and material requirements planning, as well as business partner, infrastructure and inventory enhancements.

The following describes major functional enhancements and modifications implemented in SAP Business One 8.82.

- **Extension of customer relationship management (CRM) functionality.** Powerful CRM functionality enables businesses to create, maintain and analyze multi-channel marketing campaign information. Businesses can manage the entire life cycle of a campaign by creating and maintaining target groups, using the campaign generation wizard, managing the campaign data, generating leads and sales opportunities directly from a campaign, and analyzing results based on the campaign list report.
- **Greater control and visibility over serial managed items.** Users can allocate serial numbers to items for sales orders, accounts receivable reserve invoices and inventory transfer requests – allowing for better control, greater visibility and increased flexibility with inventory allocations.
- **Pick and pack process simplification.** Serial and batch numbers can be allocated to items throughout the pick and pack process. Businesses achieve better management and support for back-order functionality. Deliveries are automatically created and invoices can be manually developed. Customers benefit from cost savings due to efficient consolidation of deliveries and streamlined selecting operations.
- **Powerful and flexible material requirements planning (MRP) processes.** The enhanced MRP module has a more powerful and flexible MRP wizard, informative recommendation reports, new options for calendar week display and improved forecasting capabilities. The new inventory transfer request document recommends transfer between warehouses before initiating purchase or production orders. Businesses have greater control over MRP parameters and can better plan inventory levels with sophisticated calculation capabilities.
- **Effective long-term business planning.** Businesses can now record blanket agreements to reflect long-term sales or purchasing agreements that have been negotiated with business partners. Sales and purchasing documents can be linked to blanket agreements and used as a basis for expected revenue forecasts, quantity reservation and capacity planning. Furthermore, blanket agreements are involved in cash-flow calculations, MRP runs and the procurement process.

- **Simplified configuration.** The new express configuration wizard guides users through the essential settings in the various application areas and allows them to compare configuration settings that have been previously saved in order to detect changes to the configuration that may cause errors.
- **Automatic System Reconciliation of Interim Accounts.** SAP Business One now automatically reconciles the following interim accounts: Allocation Account, Expense Clearing Account, Stock in Transit Account, WIP Inventory Account, Deferred Tax Account¹, Down Payment Interim Account, Down Payment Clearing Account.
- **Bank Statement Processing (BSP) Enhancements.** You can now import bank statements automatically into SAP Business One.
- **Posting Dunning Fees and Interest Automatically.** SAP Business One 8.82 now supports the complete dunning process from end to end. Using the dunning wizard run, you can automatically create service invoices to post dunning fees and interest that your company may charge for overdue payments.
- **Credit Memos without Inventory Movement.** You can create A/R and A/P credit memos that do not involve inventory movement, for example, if the delivered goods were damaged or destroyed during shipment and are therefore not returned. For this purpose, the A/R and the A/P credit memo windows contain the new Without Inv. Movement checkbox.
- **Credit Memos for Reserve Invoices.** You can credit customers for A/R reserve invoices for which items have already been delivered. In SAP Business One, you can use the Copy To and Copy From functions to copy an A/R reserve invoice into an A/R credit memo. Similarly, you can record a credit by vendors for A/P reserve invoices for which items have been returned. You can also use the Copy To and Copy From functions to copy an A/P reserve invoice into an A/P credit memo.
- **Posting Date for Goods Receipt POs and Goods Returns.** When you are closing a goods receipt PO or a goods return document, you can now specify a date other than the Current System Date or the Original Document Date as the posting date.
- **Blanket Agreements.** SAP Business One 8.82 allows you to record blanket agreements to reflect long-term sales or purchasing agreements that you have negotiated with your business partners. You can create two types of blanket agreements: general blanket agreements (for example, to obtain a special bonus at year-end or to achieve a defined turnover with the business partner), specific blanket agreements used to obtain a special discount for the individual sales or purchasing transaction. They are also used to determine a delivery schedule, for example, by defining the intervals that certain quantities of goods should be delivered. You can link sales and purchasing documents to blanket agreements used as a basis for expected revenue forecasts, quantity reservation, and capacity planning. Furthermore, blanket agreements are involved in cash flow calculations and MRP runs.
- **Campaign Management.** SAP Business One allows you to create, maintain, and analyze your marketing event information using the campaign management function. You can manage a promotional campaign by: creating and maintaining target groups, creating a campaign using the Campaign Generation Wizard, managing the campaign data, generating leads and sales opportunities directly from a campaign, analyzing campaigns based on the Campaign List report.
- **Master Data Cleanup.** In SAP Business One 8.82, master data cleanup provides administrators and power users an easy way to remove or deactivate master data that is not required anymore for the operations of the company. It provides also a log for the batch removal and deactivation process. With this enhancement, users are able to clear a range of high-volume used master data, including items, business partners, G/L accounts, projects, profit centers, and distribution rules, either by physically removing the master data or by deactivating it, without compromising the business logic integrity.
- **Business Partner (Customer, Vendor, Lead) and Item Master Data Series.** The master data series permits users to define number series for customer, vendor and item master data. Assisting in auto-assignment of master data numbers during creation, results in higher efficiency in maintaining, tracing and managing master data records.
- **Make to Order.** SAP Business One 8.82 supports a demand-driven production approach, allowing a product to be scheduled and built based on a confirmed order received from a customer. To create a production order based on a sales order, you can use the procurement confirmation wizard, which guides you through the document creation process step by step. You can start the wizard by choosing the Procurement Document checkbox on the sales

order, or directly from the Production module in the SAP Business One main menu. In addition, in the production order you can see which sales order the document is related to.

- **Search Box.** You can now use the SAP Business One search box without enabling the cockpit function. Using the search box you can easily perform the following searches in SAP Business One: Menu search (Locate window-level menus so that you will not have to navigate in the Main Menu to find a window), Data search (Locate items, business partners, and documents using the search box.)
- **Purchasing Cockpit.** SAP Business One 8.82 provides a predefined purchasing cockpit that helps you to view and search purchasing data, and to organize and perform purchasing-related activities.
- **Cash Flow Forecast Dashboard.** The Cash Flow Forecast dashboard forecasts your company's future cash on hand based on your transaction documents. Having cash account details lets you arrange payments in advance. By drilling down to period details, you are able to view large periodic incoming and outgoing transactions by business partners or by employees and you can easily identify key payments and partners.
- **Purchase Orders Dashboard.** You can use the Purchase Orders dashboard to monitor open purchase orders. Using the filter, you are able to view open purchase orders by vendor, item, or buyer. Using the dashboard, you can easily identify overdue purchase orders and orders that have a close due date.
- **Purchase Quotations Dashboard.** You can use the Purchase Quotations dashboard to monitor open purchase quotations. Using the filter, you are able to view open purchase quotations by selected vendor, item, buyer, and valid date. Using the dashboard, you can easily observe how vendors have responded to your quotations. For quotations with a response, you can proceed to compare quotations and close quotations.
- **Calendar Displays Service Calls.** You can now schedule service calls and view service calls directly in the SAP Business One 8.82 Calendar. A new Scheduling tab is added to the Service Call window for you to schedule the service call. You have the option to display a service call in the Calendar. A new checkbox Display Scheduled Service Calls is added to the Activities Overview - Selection Criteria window. You can now view the list of scheduled activities with the list of the scheduled service calls. You can see the scheduled task activities in the Calendar.

Upgrade Path

Upgrading to 8.82 and staying on maintenance provides you access to the latest patches, support packs and new versions, as well as to legal compliancy updates and improved support for legal compliancy, and more. A Fast and Well-tested Upgrade Process can often be completed in about a week, including training on the new features. The SAP/Softengine Upgrade Process provides our clients with a standard and documented upgrade methodology. Upgrade Phases:

- Upgrade Preparation
- Technical Upgrade Process
- Testing, Troubleshooting and Training
- Go-Live with SAP Business One 8.82

For more information about upgrading to SAP Business One 8.82, please contact Barry Lederman: 818.704.7000, blederman@softengineusa.com.

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