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# Goals



- **Improve Business Performance**
- **Provide better tools using out of the box features**
- **Save development time and complexity**



# Agenda

- **Selected 9.1 Features**
- **Streamline Accounting Processes**
- **Shortcut Features**
- **Alerts & Approvals**
- **FMS & SP**
- **Audience Tips - Q&A**



# Selected 9.1 Features

## Benefits:

- Reduced effort for user administration
- Improve user experience and productivity

## Features:

- UI Configuration
  - Move Fields
  - User Assignment
  - Hiding Business Functions
- Production – byproduct
- Copy Paste from and to Excel
- Maximize Grid
- Remember Messages Preferences
- Documents Batch Emailing & Printing



# Accounting/Financial Tips

## Benefits:

- Minimize redundant data entry
- Time Saver

## Features:

- Reconciliation in SAP
- Recurring Posting & Template
- Recurring Transactions
- General Ledger & Save Selection
- Reference field links
- Documents cancelation
- Credit Memo - Without Qty Posting
- Split Customer or Vendor Line in Payments
- Reconcile Multiple BP's
- Preview of journal entry



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# Shortcut Features

- **Shortcut Tips**

- Shortcut Allocation – F's
- Right Click shortcuts
- Select layout and print
- Refresh Icon

- **Query Tips**

- Copy Data in a query
- Drag & Relate
- Summary
- Filters & Sorting

- **General Tips**

- Change Log & Access Log
- Copy Form Settings
- Procurement Wizard – By Document or By Line
- Relationship Map
- CTRL+TAB



# Alerts & Approvals

## Benefits:

- Push instead of pull
- Reduce paperwork
- Make people accountable
- Help manage your people
- Closer relationships with customers
- Improve company credibility
- Information visibility
- Automation

## Examples:

- Quotation Alert
- Approval of sales order, credit limit



# Formatted Search & Stored Procedures

## Benefits:

- Data Validation
- Improve Consistency of Data
- Improve Reporting
- Improve company credibility
- Automation and reduction of data entry

## Examples:

- FMS – SO – Open sales orders. YDT sales in SO.
- Mandatory Customer Ref Number





# Useful Links

- Free SAP Business One Queries:  
<http://wiki.scn.sap.com/wiki/display/B1/SAP+B1+SQL+Tips+and+Tricks>
- SAP Business One Idea Place:  
<https://ideaplace.brightidea.com/ct/s.bix?c=5E7C8A57-8FB9-4C04-9571-9B61022802BA>
- SAP Customer Portal:  
<https://websmp202.sap-ag.de/smb/sbocustomer>
- SAP Business One LinkedIn page:  
[http://www.linkedin.com/groups?gid=114094&trk=hb\\_side\\_g](http://www.linkedin.com/groups?gid=114094&trk=hb_side_g)



# Audience Tips



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# Stay Connected

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