



## **SAP BUSINESS ONE**

### **BEST ERP SOLUTION FOR SMALL AND MEDIUM ENTERPRISES**

Looking for a complete, yet cost effective software solution capable of supporting all of your end to end business activities? 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 can streamline operations, act on timely and complete information, and accelerate profitable growth.

You want to focus on growing your business, but you have to constantly deal 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.

## Streamline all business activities using one integrated solution

### **The SAP Business One Solution**

SAP Business One is a single, comprehensive solution that provides 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 System**

By integrating all critical business functions, SAP Business One provides sales, customers, purchasing, inventory, operations, financials, and HR support. 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 minutia, you can spend more time driving your business forward.

### **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 take advantage of the over 450 solutions, many of them industry-specific, that have been built on top of the Business One platform by our Software Solution Partners (SSP) to help you customize and extend Business One to meet your specific business and industry challenges.



### **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.

### **Act on Instant and Complete Information**

SAP Business One captures critical data across sales, customers, operations, and financials in a single system for immediate access and use. Intuitive 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.

### **Designed Exclusively for Small Businesses**

Drawing on SAP's 35 years of business management software experience, SAP Business One is an affordable, awarding-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 minimizes IT complexities for implementation and ongoing maintenance.

## SAP Business One includes:

### Financial Accounting

### Transactions

### Sales & Distribution

### Purchasing

### Outlook Integration

### Sales Opportunity Management

### Business Partner Management

### Service Management

### Materials Requirements Planning (MRP)

### Warehouse Management

### Reporting



## SAP Business One - Financial accounting

SAP Business One's Financial Accounting module provides tools and reports that will help you in managing the financial activities of your small business. These tools include:

**Chart of accounts** - enables you to label all accounts and define hierarchical relationships.

**Journal entries** - enables you to enter and locate manual journal entries and automatically allocate each transaction to a project or account.

**Transaction templates** - saves time and reduces the chance of error when entering manual journal entries.

**Recurrent journal transactions** - allows you to establish a custom set of recurrent transactions, including automatic frequency reminders.

**Exchange rate differences** - conveniently adjusts foreign currency accounts to your local currency.

**Trial balance report** - shows account balances and transactions, allowing you to see all financial reports in the currency and detail you specify.

**Profit and loss report** - displays income and expenses in the straightforward way used by accountants.

**Balance sheet** - shows assets and liabilities in the straightforward way used by accountants.

**Comparative reports** - allows all reports to be compared by month, quarter, year or other period.

**Budget** - lets you define and track your budget in any currency, and view a summarizing budget report, enabling you to compare actual versus planned figures.

**Financial reports designer** - lets you build an unlimited number of financial reporting templates.

## SAP Business One – Sales & Distribution

SAP Business One's sales and distribution tools help you manage your entire sales cycle – manage everything from price quotes and invoicing to payments.

**Quotation** - allows you to automatically issue a price quote to customers, measure gross profit for the quotation, update stock levels, and report the customer's current balance.

**Order entry** - enables you to enter customer orders, automatically reserve the item ordered, and notify your warehouse of the delivery date.

**Delivery notes** - enables you to order merchandise related to a quotation and update stock balances.

**Returns** - lets you record stock entry returned from clients.

**Invoicing** - automatically creates the invoice and records the stock and journal transactions, while issuing an automatic receipt in case customers are paying any part of their bill instantly.

**Credit notes** - lets you credit customer for any reason, including customer returns.

**Reserve invoicing** - allows you to issue an invoice without changing the stock balances.

**Auto summary wizard** - summarizes into one invoice all former accounts receivable documents related to all customers.

**Drafts** - gives you the ability to print, edit, and manage documents that were saved as drafts.

## SAP Business One – Purchasing

SAP Business One's Purchasing software enables you to manage and maintain every aspect of your vendor relationships.

### SAP Business One's capabilities include:

**Purchase order** - allows you to issue a purchase order to vendors for materials or services, update the available amount for the items ordered, and notify the warehouse manager of the expected delivery date.

**Purchase delivery note** - updates the actual in-stock amount without affecting the vendor's account balance.

**Purchase return** - records goods returned to suppliers.

**Purchase invoice** - records supplier invoices and simultaneously records a stock entry.

**Purchase credit note** - credits suppliers upon return of goods, or for any other reason that would require such credit.

**Import** - calculates the landed value of imported goods and helps allocate different types of costs and expenses such as shipping, insurance, and customs.

## SAP Business One - Outlook Integration

SAP Business One's Outlook integration gives you seamless integration and synchronized communications between SAP Business One and Outlook, Microsoft's personal information manager and communications program.

Outlook provides an integrated solution for managing and organizing e-mail messages, schedules, tasks, notes, contacts, and other information. With SAP Business One, your employees can synchronize calendars, contacts, tasks—even integrated quotation management. They can also capture and access all relevant customer, partner, and vendor information. And they benefit from seamless communication that spans departments, business functions, and the entire organization.

SAP Business One delivers:

**Data synchronization** - provides a broad range of synchronization options and allows users to schedule synchronization activities.

**Save e-mail as activity** - allows users to choose manual association when automated association is unsuccessful; provides alias lists for multiple e-mail addresses.

**Usability** - streamlines employee productivity through context-sensitive menus, a synchronization preview window, and an Outlook "speed bar" that makes it fast and easy to access frequently used functions.

## SAP Business One - Sales Opportunity Management

SAP Business One's sales opportunity management software records every sales opportunity, from the first phone call to the successful close of a transaction. Users can enter various details concerning the opportunity, including the source, potential, closing date, competitors, and activities. As soon as the first relevant quotation is created, users can link it with the opportunity to simplify later tracking and analysis.

### SAP Business One delivers:

**Reports** - allow you to analyze opportunities by lead source, territory, industry, customer and item.

**Forecasts** - enables you to manage forecasts and view anticipated revenue by a variety of date ranges, such as month and quarter.

**Lead distribution** - lets you view the distribution of leads by source over time to identify the most profitable lead generation activities.

**Activities calendar** - offers a highly configurable scheduling tool that shows activity types, covers workdays, hours, and holidays, allows multiple users to access the same calendar, and provides a team dashboard calendar.

**Service module** - addresses queues and territory management, allowing you to define team queues, view service calls by queue, and manage territory hierarchies; covers service call activities, enabling you to return serialized items for re-shipment, create credit memos from service calls, and monitor response and resolution times.

**Usability** - streamlines employee productivity through easy-to-use tools and features such as a win/loss opportunity table, open/closed opportunities, forecast reporting, and new fields such as territory, project, sales channel, source, owner, and number of open activities

## SAP Business One - Business Partners Management

SAP Business One's business partner management software allows you to track and manage vital information about your clients and vendors.

### SAP Business One's capabilities include:

**Cards management** - records all information about clients and vendors, including addresses, contact records, account balances and more.

**Contacts-Records** telephone calls, meetings, or any interactions between you and your client or vendor.

**Opening balances** - manages opening balances of customers and vendors.

**Contacts summary** - displays your open customer contact records.

**Sales opportunity** - records any sales opportunity, from first call to successful closure.

**Opportunity analysis** - reports on opportunities in three main dimensions: by customer, per item, and per agent.

**Sales pipe graph** - displays a dynamic sales funnel that shows all sales stages from lead to order, enabling you to view a detailed report at each stage.

## SAP Business One - Service Management

SAP Business One's service management optimizes the potential of your service department, providing support for service operations, service contract management, service planning, tracking of customer interaction activities, and customer support.

### SAP Business One's capabilities include:

**Service call** - enables users to manage, track, and resolve customer questions and deal with item-related problems.

**Customer equipment card** - provides service technicians with detailed information about an item sold to a customer, such as a manufacturer's serial number, replacement serial number, and all service call history.

**Service contract** - allows users to create a regular support or warranty contract for items or services sold to a customer.

**Rate tables** - allows you to enter your foreign currency rates and indexes or auto download rates from the Web, which can then be used in reports and data entry

**Knowledge base** - helps service reps resolve problems and optimizes their performance.

**Service reports** - enable users to view and analyze data related to service contracts, customer equipment, and service calls.

## SAP Business One - Material Requirements Planning

SAP Business One's material requirements planning (MRP) manages MRP through a wizard-based process. This process enables users to define a planning scenario in five easy steps and predict demand based on forecasts.

### SAP Business One's capabilities include:

**Define forecasts** - allows users to predict demand based on forecasts, foresee future demand for the product, and adjust material planning accordingly

**Planning wizard** - steps users through the creation of planning scenarios in five easy steps. Users define the planning horizon, which can be viewed in weeks or days. Scenarios can be run for a range of items or item groups. The user selects the desired criteria in the scenario, such as existing stock levels, open purchase orders, sales orders, work orders, and inventory that reached its minimum stock level, as well as predefined sales forecasts. Once a scenario is executed, the solution presents a make-or-buy recommendation. Drill-down options allow planners to view the net requirement calculations and view the actual documents driving the gross requirements. Exception warnings and visual cues help users identify orders that need to be expedited.

**Order recommendation report** - allows planners to automatically select recommended production orders and purchase orders for automatic creation; if an item needs to be outsourced, planners can easily convert a production order to a purchase order.

## SAP Business One - Warehouse management

SAP Business One's warehouse management delivers the tools and processes you need to manage stock merchandise, including:

**Item management** - manages all item information, including name and code, barcode, trademark, measures, prices, and even the item's picture.

**Item query** - gives you a quick view of item details.

**Price lists** - lets you define as many price lists as you need and associate them with each customer or vendor.

**Special prices** - records prices for unique customers or from unique vendors and enables you to set quantity-sensitive prices that change according to quantities purchased.

**General receipt/release from stock** - allows you to record a stock entry or release not connected directly to an AP/AR document.

Transfer between warehouses - enables you to record all transfers between warehouses.

**Stock transactions** - maintains opening balances for stock items and updates stocktaking data.

## SAP Business One – Reporting

SAP Business One provides advanced reporting tools capable of effectively managing your information, while providing invaluable insight into your business. Such tools include:

**To do lists** - enables management to get updates on all business issues, including unpaid invoices, open price quotes or orders, missing items, and more. It also features a link to Microsoft Word that enables you to build a set of letters for each obliged customer.

**Customers/suppliers debts aging** – enables you to view customer and supplier debts, sort and divide by their age, view detailed reports for each customer, and use a link to Microsoft Word to generate a full status report of all customer debts.

**Sales analysis** – lets you to analyze your sales in three key dimensions: by customer, by item and by agent. It also lets you create cross-sectioning between these dimensions to obtain clearer view with a report that automatically generates charts to display the data graphically and lets you drill down to a detailed level

## About Cogniscent Business Solutions

Cogniscent is a software implementation and consulting firm that is proud to be partnered with **SAP** to deliver effective business management solutions to clients nationwide. We help small, mid-sized & large businesses select, learn, and deploy their technology for maximum productivity and profitability.

**For any Queries call Customer Info Center at : 0120 4247990**

For more information about SAP Business One, login to [www.sap.com](http://www.sap.com)

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