

SAP Business One



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SAP Business One 10.0
Web Client - Business Partner master data
October 2024

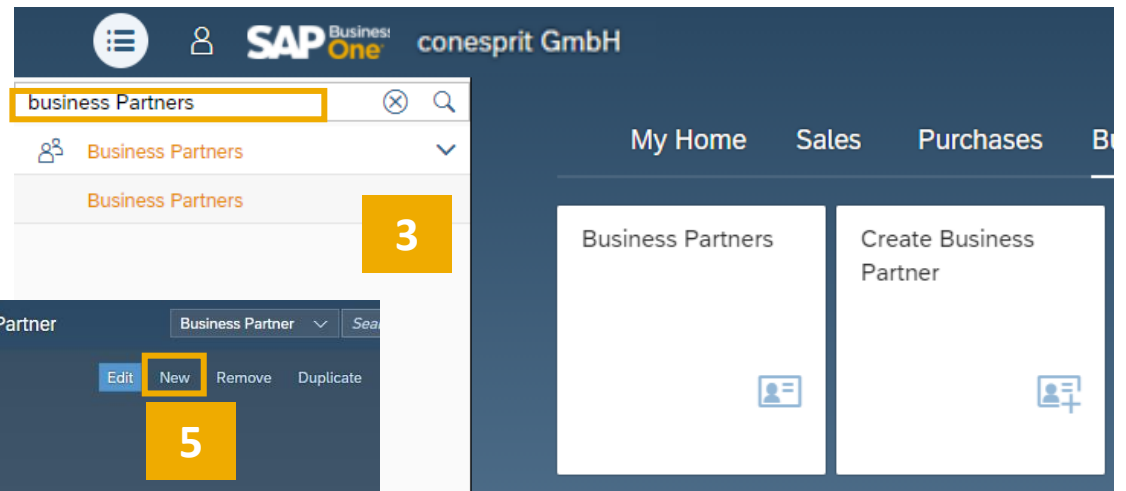
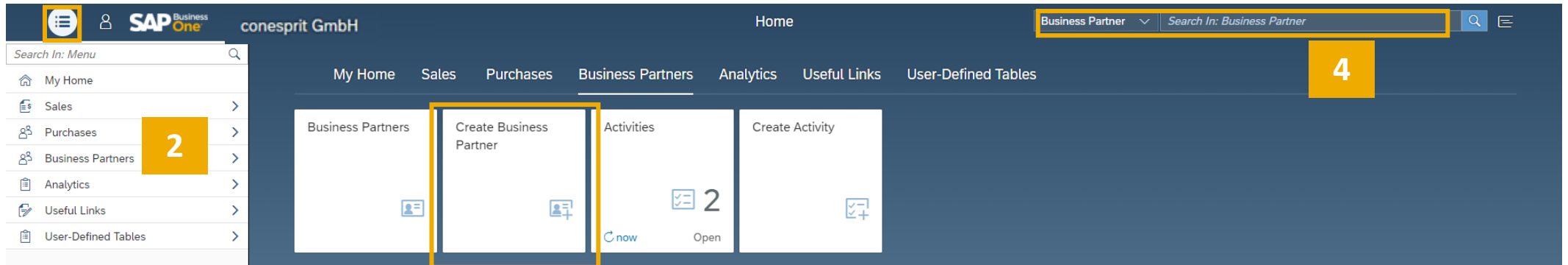
SBO1001-EN

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Open the "Create business partner" dialog

1. The "Create business partner" dialog can be called using the tile on the home page or
2. the main menu or
3. using the search function in the main menu or
4. can be called via the Enterprise Search or
5. can be called up via the NEW button in the article master



Create new business partner – General

The business partner's account can be managed in **local or system currency**.

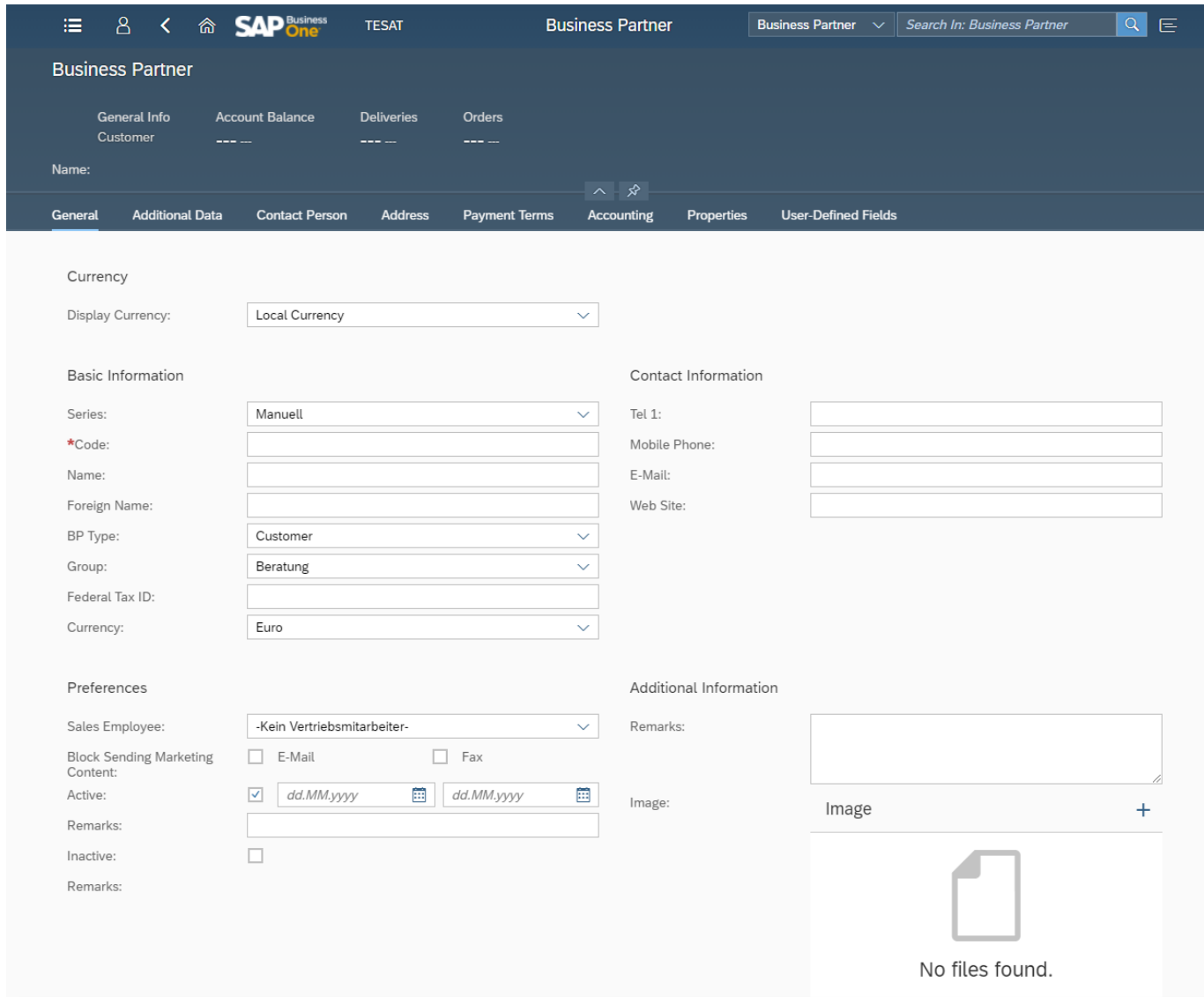
Depending on the database setting, the business partner number can be selected **manually or automatically**.

The customer, lead and vendor are stored in the **business partner type** field. The BP master data for customers is slightly different as for vendors. Leads automatically become a customers when a delivery or invoice has been created for them.

Discounts and price lists can be associated to business partner **groups**. They are also available in reporting.

For tax reasons, the **Federal Tax ID** must be entered for all non-domestic customers.

A **sales representative** can be assigned to a business partner.



The screenshot shows the SAP Business Partner General tab. The top navigation bar includes the SAP logo, user profile, and search bar. The main content area is divided into several sections:

- Currency:** Display Currency is set to Local Currency.
- Basic Information:** Series is Manuell, *Code is empty, Name is empty, Foreign Name is empty, BP Type is Customer, Group is Beratung, Federal Tax ID is empty, and Currency is Euro.
- Contact Information:** Tel 1, Mobile Phone, E-Mail, and Web Site are all empty.
- Preferences:** Sales Employee is -Kein Vertriebsmitarbeiter-, Block Sending Marketing Content has checkboxes for E-Mail and Fax, Active is checked with date pickers, and Inactive is unchecked.
- Additional Information:** Remarks and Image fields are present. The Image field shows a placeholder for a file that has not been uploaded.

The **contact details** of the headquarters can be entered in the General tab. Contact details for employees are maintained in the Contact Person tab.

Images for a business partner can be uploaded.

Business partners can only be deleted if no receipt has yet been created for them. After that, they can only be set **inactive**.

Create new business partner – Additional Data

The **shipping type** can be maintained in the article master as well as in the business partner master. In practice it is mostly maintained in the BP master data.

If the **project module** is activated, a BP project can be assigned to the BP master data.

The following can be specified under **business partner type**: company, private, government or employee.

If the multi-language support is activated, the **language** can be defined.

If sales **territories** are used, a territory can be assigned to BP master data.

Business Partner

- General
- Additional Data**
- Contact Person
- Address
- Payment Terms
- Account

Shipping Type:

Password:

Factoring Indicator:

BP Project:

Business Partner Type:

Industry:

Alias Name:

ID No. 2:

Unified Federal Tax ID:

Remarks:

BP Channel Code:

Technician:

Territory:

Language:

GLN:

Personal Data Protection

Natural Person: No

Status: None

Create new business partner – Contact Person

Business Partner

General Info Account Balance Deliveries Orders
Customer --- --- --- ---

Name:

General Additional Data Contact Person Address Payment Terms Accounting Properties User-Defined Fields

Contact Person

Contact ID	Default	First Name	Last Name	Position	Address	Mobile Phone
<input type="checkbox"/>	<input checked="" type="radio"/>	Pan	Peter	SAP Business One Consultant	Street 2004, Phnom Penh, K...	

You can define the **Contact ID** yourself, for example "Last name, first name". The contact person cannot be entered without specifying the contact ID.

The contact person who is defined as the **default** is displayed in all documents.

If further fields are required for creating a contact person, they can be added using the **cog** (1). The order of the columns can be changed using the arrows (2).

Select Columns

Search Show Selected

<input type="checkbox"/>	Select All (8/29)
<input checked="" type="checkbox"/>	Contact ID
<input checked="" type="checkbox"/>	Default
<input checked="" type="checkbox"/>	First Name
<input checked="" type="checkbox"/>	Last Name
<input checked="" type="checkbox"/>	Position
<input checked="" type="checkbox"/>	Address
<input checked="" type="checkbox"/>	Mobile Phone
<input checked="" type="checkbox"/>	Email
<input type="checkbox"/>	Active
<input type="checkbox"/>	Block Sending Marketing Content via E-Mail
<input type="checkbox"/>	Block Sending Marketing Content via Fax
<input type="checkbox"/>	City of Birth
<input type="checkbox"/>	Country of Birth
<input type="checkbox"/>	Date of Birth
<input type="checkbox"/>	E-Mail Group
<input type="checkbox"/>	eDoc Recipient

Create new business partner – Address

There are two different address types: bill-to and ship-to.

You can define the **address ID** yourself. The address cannot be entered without specifying the address ID. When choosing an **address ID**, it is advisable to assign speaking IDs to several different addresses (e.g. London and Edinburgh or main and sub-camps).

The standard addresses are as default in all documents, but can be changed if necessary.

Bill-to Address

<input type="checkbox"/> Address ID	Default	Street / PO Box	City	Zip Code	State	Country
<input type="checkbox"/> Backnang	<input checked="" type="radio"/>	Hans-Gaugler-Weg 14	Backnang	71522	Baden-Württ...	Germany

Ship-to Address

<input type="checkbox"/> Address ID	Default	Street / PO Box	City	Zip Code	State	Country
<input type="checkbox"/>	<input checked="" type="radio"/>	Hans-Gaugler-Weg 14	Backnang	71522	Baden-Württ...	Germany

If further fields are required for creating an address, they can be added using the **cog** (1). The order of the columns can be changed using the arrows (2).

If the bill-to and ship-to addresses are the same, two addresses must still be created. However, this does not have to be done manually, but can be done using the copy function: **"Copy To Ship-to / Bill-to address"**. Call function as follows: the address to be copied must be ticked in the first column. If the bill-to address changes and this is changed in the BP master, the ship-to address must be adjusted manually. It is not updated automatically.

The specification of the **country** affects the accounts that are addressed when an invoice is created (domestic claims, EU claims or third-party claims).

Select Columns

<input type="checkbox"/> Select All (7/13)	<input checked="" type="checkbox"/> Address ID	<input checked="" type="checkbox"/> Default	<input checked="" type="checkbox"/> Street / PO Box	<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> Zip Code	<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> Country
--	--	---	---	--	--	---	---

Create new business partner – Accounting

Business activities of several business partners can be **consolidated** into one business partner.
 Example: Several branches of a retail chain are supplied. Payment is made by the mother.

Deliveries (e.g. all deliveries to the branches are invoiced to the mother) and payments (e.g. all invoices sent to the branches are paid by the mother) can be consolidated.

In SAP Business One, the corresponding posting records are created when the documents are created. The accounts shown here are defined in Browser Access under:

Administration > Setup > Financials
 > G / L Accounts Determination
 (using Browser Access)

Please reconcile the selected account determination selected in SAP Business One with your tax accountant before you make your first posting.

General		Tax	
Consolidating BP:	<input type="text"/>	Tax Status:	Liable
Consolidation Type:	Payments Consolidation	Tax Group:	<input type="text"/>
		Deferred Tax:	No

Account Type Name	Account Code	Account Name
Down Payment Receivables	1710	Erhaltene Anzahlungen auf Bestellungen
Open Debts		
Accounts Receivable	1410	Forderungen aus L.u.L. Inland
Down Payment Clearing Account	1593	Verrechnungskonto erhaltene Anzahlungen (über Debitor)
Down Payment Interim Account	1792	Sonstige Verrechnungskonten (Interimsk.)

The **tax status** field is set to liable per default. If the customer is located in a third country, it is tax-exempt. Customers in other EU countries have the EU tax status. Please reconcile with your tax accountant which status should be selected.

Please make sure that you apply a Federal Tax ID (tab General) for customers from the EU and third countries.

If the tax status is "liable", the indicator A2 is automatically selected in a document, provided that no further settings are made in the business partner master data or the article master data.

How the current tax cut is dealt with must be clarified on a situational basis.

Create new business partner – Properties and User-Defined Fields

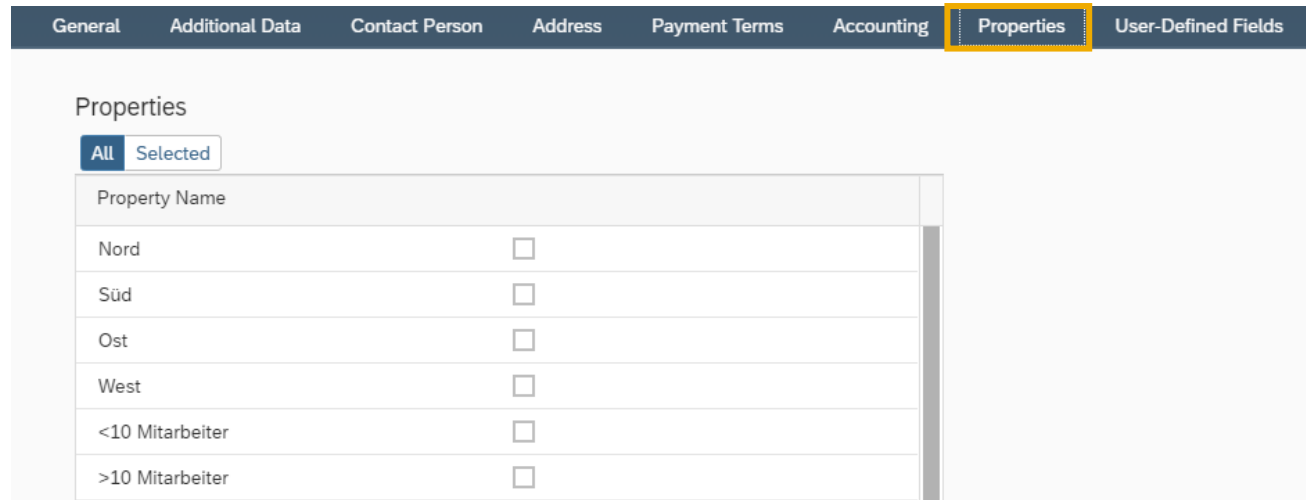
You can classify your business partners using **properties** that you define according to your company requirements. You assign the relevant properties while editing the master record of a business partner. There are 64 properties available.

With the help of the properties you can:

- Define reports and evaluations
- Sort data
- Select master data records during processing

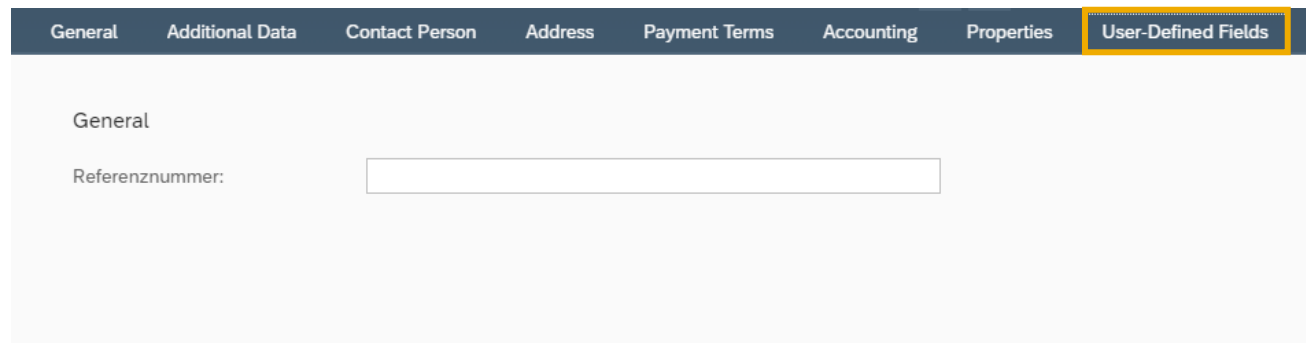
In SAP Business One **user-defined fields** can be added to the existing fields.

The conesprit standard already contains some user-defined fields. In the BP master data it is the reference number field. The field can be used to enter your own supplier number that the customer maintains, or the customer number that the supplier maintains. The field is printed in sales and purchasing documents.



The screenshot shows the 'Properties' tab in the SAP Business One interface. The navigation bar at the top includes 'General', 'Additional Data', 'Contact Person', 'Address', 'Payment Terms', 'Accounting', 'Properties', and 'User-Defined Fields'. The 'Properties' tab is active. Below the navigation bar, there is a section titled 'Properties' with two buttons: 'All' and 'Selected'. A table lists several properties with checkboxes:

Property Name	
Nord	<input type="checkbox"/>
Süd	<input type="checkbox"/>
Ost	<input type="checkbox"/>
West	<input type="checkbox"/>
<10 Mitarbeiter	<input type="checkbox"/>
>10 Mitarbeiter	<input type="checkbox"/>

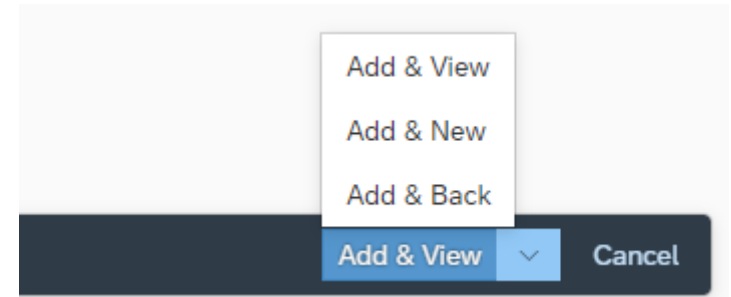


The screenshot shows the 'User-Defined Fields' tab in the SAP Business One interface. The navigation bar at the top includes 'General', 'Additional Data', 'Contact Person', 'Address', 'Payment Terms', 'Accounting', 'Properties', and 'User-Defined Fields'. The 'User-Defined Fields' tab is active. Below the navigation bar, there is a section titled 'General' with a label 'Referenznummer:' and an empty text input field.

Create new business partner – Complete and add data record

If the data record for the business partner is completely you can:

1. Add and view the new record view validation purposes
2. Add the record and open a new empty business partner data sheet
3. Add the record and return to the previous dialog



Call existing business partner

1. The business partner function can be accessed via the tile on the home page or
2. the main menu or
3. using the search function in the main menu or
4. can be called up via the Enterprise Search.

The screenshot displays the SAP Business One user interface with four numbered callouts (1, 2, 3, 4) indicating different ways to access the Business Partners function:

- 1:** A yellow box highlights the 'Business Partners' tile on the home page dashboard.
- 2:** A yellow box highlights the 'Business Partners' option in the main menu on the left side of the screen.
- 3:** A yellow box highlights the search results for 'Business Partners' in the main menu search bar.
- 4:** A yellow box highlights the search results for 'Business Partners' in the Enterprise Search bar at the top right of the page.

View, search and filter business partner lists

The business partner list is opened using the Business partner function. The BP master data you are looking for can be found quickly using the search function (1) and the filter function (2). The corresponding BP master data can be opened using the arrow at the end of the line (3) or a double click on the line. You can use the arrows in the BP master data to move between the data records (4).

The screenshot displays the SAP Business One 'Manage Business Partners' interface. At the top, there are navigation icons and the title 'Manage Business Partners'. Below this, a search bar (1) and filter controls (2) are highlighted. The search bar contains the text 'Search' and a magnifying glass icon. The filter controls include 'BP Code', 'BP Category' (set to 'Customer'), and 'Group'. A 'Go' button is also present.

The main area shows a table of business partners with columns for BP Code, BP Name, BP Category, Group, Account Balance, Currency, Mobile Phone, Email, Web Site, and Default Contact Person. The table is titled 'Business Partners (0 / 15)'. A yellow box (3) highlights the right side of the first row, showing a right-pointing arrow icon.

The detailed view of Business Partner C20000 is shown on the right. It includes a title bar with navigation arrows (4) and buttons for 'Edit', 'New', and 'Remove'. The view is divided into sections: 'General Info' (Customer, Account Balance: 108.620,53 EUR, Deliveries: 29.708,95 EUR, Orders: 165.929,81 EUR), 'Name: PC Welt GmbH & Co.KG', and a tabbed interface with 'General' selected. The 'General' tab shows 'Currency' (Display Currency: Local Currency), 'Basic Information' (Series: Manuell, *Code: C20000, Name: PC Welt GmbH & Co.KG, BP Type: Customer, Group: Konstruktion), and 'Contact Information' (Tel 1:, Mobile Phone:, E-Mail:, Web Site:).

BP Code	BP Name	BP Category	Group	Account Balance	Currency	Mobile Phone	Email	Web Site	Default Contact Person
1	conesprit GmbH	Customer	Beratung	2.488.983,33	EUR				Douverne
C20000	PC Welt GmbH & ...	Customer	Konstruktion	108.620,53	EUR		info@pcweltgmbh...	www.pcweltgmbh...	Christian Gander
C23900	Mikrochips GmbH	Customer	High Tech						
C25000	Büro Online AG	Customer	Einzelhandel						
C26000	Büro Ausstattung ...	Customer	Warenhaus						
C30000	Computerhandel ...	Customer	Warenhaus						
C40000	Büroausstatter Ma...	Customer	Warenhaus						
C42000	CIT Beratungshaus	Customer	Wiederverkäufer						
C50000	INTINT, Inc	Customer	Wiederverkäufer						
C60000	SG Elektronik	Customer	Produktion						
C70000	Broup Inc.	Customer	Einzelhandel						
C99998	Web Einmalkunde	Customer	Kunden						

Analyze business partner lists

The business partner list can be analyzed according to many saved fields (1). Line, column, bar, stacked column, pie and ring diagrams as well as a heat maps are available for the analysis (2). If the created analysis is used regularly, it can be inserted as a tile into the start page (3).

The screenshot displays the SAP Business Partner analysis interface. At the top, the header shows 'SAP Business One conesprit GmbH' and 'Manage Business Partners'. Below the header, there are search and filter fields for 'BP Code', 'BP Category' (set to 'Customer'), and 'Group'. A 'Customers' dropdown is visible on the left. The main content area is divided into two parts: a table on the right and a pie chart on the left. The table lists business partners with columns for 'BP Category', 'Group', 'Account Balance', 'Currency', 'Mobile Phone', 'Email', and 'W'. The pie chart shows the distribution of account balances across different business partner categories. A legend on the right side of the pie chart lists categories such as 'CIT Beratungshaus', 'Buro Inc.', 'INTINT, Inc', 'Einmalkunde', 'Buroausstatter Mayer', 'Uwe Mann', 'Web Einmalkunde', 'Buro Online AG', 'Buro Ausstattung Namysio GmbH', 'SG Elektronik', 'Computerhandel Müller', 'Mikrochips GmbH', 'Tobias Umang', and 'conesprit GmbH'. A 'Save as Tile' dialog box is open on the left, showing a preview of the analysis and fields for 'Title', 'Subtitle', 'Description', and 'Group' (set to 'My Home'). Three yellow callout boxes with numbers 1, 2, and 3 are overlaid on the interface. Callout 1 points to the table, callout 2 points to the pie chart, and callout 3 points to the 'Save as Tile' dialog.

View BP master data and related activities

In addition to the information that is created in the BP master data, the fields account balance (open invoices), the deliveries (open deliveries) and the sales orders (open sales orders) are displayed in the BP master data.

Furthermore, activities can be viewed and created via the BP master data.

The screenshot shows the SAP Business Partner master data for 'C20000' (PC Welt GmbH & Co.KG). The 'Account Balance' is 108.620,53 EUR, 'Deliveries' is 29.708,95 EUR, and 'Orders' is 165.929,81 EUR. The 'View Related Activities[4]' button is highlighted, and an arrow points to the 'My Open Activities' section. The activities table shows 4 activities, all assigned to Robert Leitner.

Business Partner C20000

Account Balance: 108.620,53 EUR
Deliveries: 29.708,95 EUR
Orders: 165.929,81 EUR

Name: PC Welt GmbH & Co.KG

My Open Activities *

Search: [Search] Start Date: [] Type: [] Status: [] Assign To: [] BP Code: [C20000]

Adapt Filters [Go]

Activity Number	Subject	Start Date	Start Time	Assign To	Type	BP Code	Contact Person	Assigned By
34	Anfrage Verkauf	01/10/2016	15:01	Robert Leitner	Campaign	C20000	Christian Gander	Robert Leitner
22	Frühjahr/Somme...	02/12/2013	19:43	Robert Leitner	Campaign	C20000	Christian Gander	Robert Leitner
19	Druckerproblem ...	06/11/2012	09:07	Kolman Winfried	Task	C20000	Christian Gander	Robert Leitner
5	Kampagne Som...	06/06/2012	15:01	Robert Leitner	Campaign	C20000	Christian Gander	Robert Leitner

Duplicate and remove BP master data

It is possible to duplicate BP master data to create a new business partner (1).

A BP master data record can only be removed (2) if it has not yet been used in a document. If it has been used in a document it can be defined as inactive in the General tab.

The screenshot displays the SAP Business Partner master data page for C20000. The interface includes a top navigation bar with the SAP Business One logo and the company name TESAT. The main header shows the Business Partner ID C20000 and the name PC Welt GmbH & Co.KG. Key financial data is presented in a table:

General Info	Account Balance	Deliveries	Orders
Customer	108.620,53 EUR	29.708,95 EUR	165.929,81 EUR

Below the table, the name 'Name: PC Welt GmbH & Co.KG' is displayed. The bottom navigation bar contains tabs for General, Additional Data, Contact Person, Address, Payment Terms, Accounting, Properties, and User-Defined Fields. The 'Remove' and 'Duplicate' buttons are highlighted with yellow boxes, with the 'Remove' button labeled '2' and the 'Duplicate' button labeled '1'.



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