

# SAP Business One



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SAP Business One 10.0  
Web Client - Item Master data  
October 2024

SBO1002-EN

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# Open „Create Item” dialog

1. The Create item dialog can be accessed via the tile on the start page or
2. the main menu or
3. via the search function in the main menu or
4. via the Enterprise Search or
5. can be called via the button NEW button in the item master data

The screenshot illustrates the SAP Business One interface with five numbered callouts (1-5) highlighting different methods to access the 'Create Item' dialog:

- 1:** A yellow box highlights the 'Create Item' tile in the 'Sales' section of the start page.
- 2:** A yellow box highlights the 'Sales' menu item in the main menu.
- 3:** A yellow box highlights the search bar in the main menu, which contains the text 'Create Item'.
- 4:** A yellow box highlights the search results dropdown menu, showing 'Create Item' as the top result.
- 5:** A yellow box highlights the 'New' button in the 'Item Master Data' view for item A00001.

The 'Item Master Data' view for item A00001 shows the following data:

In Stock	Committed	Ordered	Available
10.619,00	3.852,00	2.279,00	9.046,00

Description: J.B. Multifunktionsdrucker 1420

Navigation tabs: General, Logistics, Purchasing, Sales, Inventory, Pricing, Properties, User-Defined Fields

# Create item – General information

Depending on the database settings, the item number can be selected **manually** or **automatically**

The assignment to **item groups** is used in reports and valuations. The valuation, planning and procurement methods as well as the assignment to G/L accounts and discounts can be assigned to item groups.

Groups can be created for items with regard to the **units of measure**. Those groups can be applied to items using the same quantities in the purchase and sale process. For example: purchase in pallets, sale in cartons.

**Images** can be uploaded to the item master data.

**Remarks** can be applied, they are not printed in the documents. For printing purposes there is a user defined field in the conesprit template. Sales text and purchase text each in German and English (refer following slides).

The screenshot shows the 'Item Master Data' configuration screen for an item named 'Manuell'. The interface is divided into several sections:

- General** (selected):
  - Basic Information:** Series: Manuell; \*Item No.: (empty); Description: (empty); Foreign Name: (empty); Item Group: Artikel; UoM Group: Manuell.
  - Item Type:** Item Type: Items; Inventory Item: Yes; Sales Item: Yes; Purchase Item: Yes.
  - Preferences:** Manufacturer: OEC; Shipping Type: DHL; Active: checked; Remarks: (empty); Inactive: unchecked; Remarks: (empty).
- Additional Information:** Image: (empty); Remarks: (empty).

Item types:  
**Items** - Use the default item type to define items.  
**Labor** - Use this option in the Service module to calculate the time required to execute a task.  
**Travel** - Use this option in the Service module to calculate the time a service technician travels.

Information about **inventory, sales** and **purchase items** can be found on the following slide.

For many companies it's more applicable to maintain the **shipping type** in the business partner master.

Items can be **active** indefinitely (default setting) or be active for a certain period of time. Items that are removed from the assortment of goods can be set to inactive. An item can only be deleted as long as it has not been used in any document.

# Create item – Settings for inventory, sales and purchase items

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By selecting the **inventory item** option, you can use the corresponding item in the stock management. For example, inventory transactions such as stock transfers can only be performed for inventory items. If you define an item as an inventory item only, you cannot sell or buy it.

You sell a **sales item** to a customer. For example, if you have defined an item as a sales item, you can create a sales order for a customer. This category also includes services, since these are neither purchased nor kept in stock.

**Purchase items** are purchased from a vendor. If you have defined an item as a purchased item, you can create a purchase order, for example.

By default, an item is a combination of all three categories. However, these values change depending on the selected item type (refer to slide 4).

**Stock items can be changed to non-stock items and vice versa, provided that:**

- No warehouse transactions (good receipt PO, delivery and stock transfer) have been posted for the item.
- No purchasing and sales documents exist for the item, such as quotations, sales orders, purchase orders, purchase or sales down payment requests, incoming and outgoing invoices and credit memos (parked documents are also relevant)

When an **item is used in a BOM**, the setting for stock, sales and purchase items cannot be changed, even if the item has not yet been used in a document. If the setting is to be changed, the item must be taken from the BOM and then changed. It can then be added to the parts list again.

It is useful to consider the settings for stock, sales and purchase items when creating an item, because it is difficult or impossible to change these settings later.

# Create item – Items overview

This overview can help to maintain article settings in SAP Business One:

	Item that is bought and sold from the warehouse	Produced Bill of Materials	Component of a Bill of Materials	Service	Drop-ship item
Inventory item	x	x	x		x*
Sales item	x	x		x	x
Purchase item	x		x		x
Sales price list	x	x		x	x
Purchase price list	x		x	x	x
Item type	Item	Item	Item	Item or work (if it is an hourly rate) or travel (if it is travel expenses)	Item
Valuation	Moving average, Fifo or standard cost	Moving average, Fifo or standard cost	Moving average, Fifo or standard cost	standard cost	Moving average, Fifo or standard cost
Inventory Data	Warehouse	Warehouse	Warehouse		Drop-ship

\* It is recommended to create physical items from drop-ship business as stock items. If the items are purchased one day to your own warehouse or produced yourself, the item master record can be used for this purpose. If the check mark for stock items is not set in the item master data, a new item would have to be created.

# Create item – Logistics

If the Serial number or batch option is activated, serial numbers and batches can be managed on each transaction or only on release.

**On Every Transaction:** with this method of serial number management, serial numbers are created and selected whenever stock is received or issued, transferred or produced.

**On Release Only:** With this method of serial number management, serial numbers are created and selected when stock is released, i.e. when stock is released internally or externally. Prior to this, the item is in stock virtually anonymously

A barcode can be inserted using the plus sign.

Item Master Data A00006

General Logistics Purchasing Sales Inventory Pricing Properties User-Defined Fields

Serial and Batch Numbers

Manage Item by: Serial Numbers

Management Method: On Every Transaction

Issue Primarily By: Serial and Batch Numbers

Bar Codes

<input type="checkbox"/>	Bar Code	Default	Free Text
<input type="checkbox"/>			No data

+ [trash] [gear]

# Create item – Purchasing

**Manufacture Catalog numbers** can be created on the Purchasing tab if the item is only purchased from a preferred supplier.

If the item is procured by several vendors, then these numbers should be maintained using the function business partner catalog number. However, this cannot be maintained with the Web Client.

The corresponding preferred vendor is entered further down in the dialog and assigned to the supplier master data using the the sign.

If you have set the UoM group to manual, you need to enter the **purchasing unit of measure** here manually. Additionally, length, width, height, volume and weight can be maintained.

By default, the **tax group** V2 (19%) is applied. If the reduced tax rate of 7% is used for the item (code V1), this must be selected manually. If the system has been set up before 1<sup>st</sup> of January 2021, it is necessary to consider how to handle the tax codes until that point in time.

Item Master Data A00006

General Logistics **Purchasing** Sales Inventory Pricing Properties User-Defined Fields

Mfr Catalog No.:

Purchasing UoM Name:

Items per Purchase Unit:

Length:

Width:

Height:

Volume:

Weight:

Accounting

Customs Group:  0,0000 %

Tax Group:  19,0000 %

Preferred Vendors

<input type="checkbox"/>	BP Code	BP Name	Default	Price List	Item Price	Last Price
<input type="checkbox"/>	> V20000	Michael Krause GmbH	<input checked="" type="radio"/>	EK Discount	73,50 EUR	



# Create item – Sales

If you have set the UoM group to manual, you need to enter the **sales unit of measure** manually here. Additionally, length, width, height, volume and weight can be maintained.

By default, the **tax group** A2 (19%) is defined. If the reduced tax rate of 7% is used for the item (code A1), this must be adjusted manually. If the system has been set up before 1<sup>st</sup> of January 2021, it is necessary to consider how to handle the tax codes until that point in time.

## Artikelstammdaten A0009

General   Logistics   Purchasing   **Sales**   Inventory   Pricing   Properties   User-Defined Fields

Sales UoM Name:	<input type="text"/>	Accounting	
Items per Sales Unit:	<input type="text" value="1,0000"/>	Tax Group:	<input type="text" value="A2"/> 19,0000 %
Length:	<input type="text" value="0,000"/> <input type="text" value="0,000"/>		
Width:	<input type="text" value="0,000"/> <input type="text" value="0,000"/>		
Height:	<input type="text" value="0,000"/> <input type="text" value="0,000"/>		
Volume:	<input type="text" value="0,000"/> <input type="text" value="cc"/>		
Weight:	<input type="text" value="0,000"/> <input type="text" value="0,000"/>		

# Create item – Inventory

If the **G/L account** definition has been configured in Administration (using Browser Access) for the selected item group, then this field does not need to be changed. The G/L accounts can be selected based on: Warehouse, article groups or articles.

If you have set the UoM group to manual, **the stock unit of measure** must be entered here manually. Additionally, the weight can be maintained.

The following **valuation methods** are available if perpetual inventory management is activated: standard, moving average and FiFo.

The **standard valuation method** for all items can be defined in Administration (using the Browser Access). If the valuation method is different for article groups, it can also be maintained based on article group level. If the valuation standard price is chosen, the standard price must be defined by a new valuation in the Browser Access. The valuation method can only be changed when the inventory is zero.

A **default warehouse** must be assigned to each stock item.

Item Master Data A00003

General Logistics Purchasing Sales **Inventory** Pricing Properties User-Defined Fields

Set G/L Accounts By: Warehouse Weight: Valuation Method: Moving Average

UoM Name: Piece

Warehouses

<input type="checkbox"/>	Warehouse Code	Warehouse Name	Default	Locked	In Stock	Committed	Ordered
<input type="checkbox"/>	01	Allgemeines Lager	<input checked="" type="radio"/>	<input type="checkbox"/>	1.893,000	41,000	36,000
<input type="checkbox"/>	02	Außenlager	<input type="radio"/>	<input type="checkbox"/>	150,000	0,000	0,000
<input type="checkbox"/>	03	Streckengeschäft	<input type="radio"/>	<input type="checkbox"/>	0,000	0,000	0,000
<input type="checkbox"/>	04	Konsignationslager	<input type="radio"/>	<input type="checkbox"/>	0,000	0,000	0,000
<input type="checkbox"/>	05	Lagerplätze	<input type="radio"/>	<input type="checkbox"/>	0,000	0,000	0,000

# Create item – Pricing

If a price for different price lists (e.g. **sales** and **purchasing price list**) should be saved the corresponding information must be inserted into the price list table.

**Discount groups** can be applied.

Item Master Data

General Logistics Purchasing Sales Inventory Pricing Properties User-Defined Fields

Price List: Basis Preisliste  
Pricing Unit: Manuell  
Do Not Apply Discount Groups: No

Price

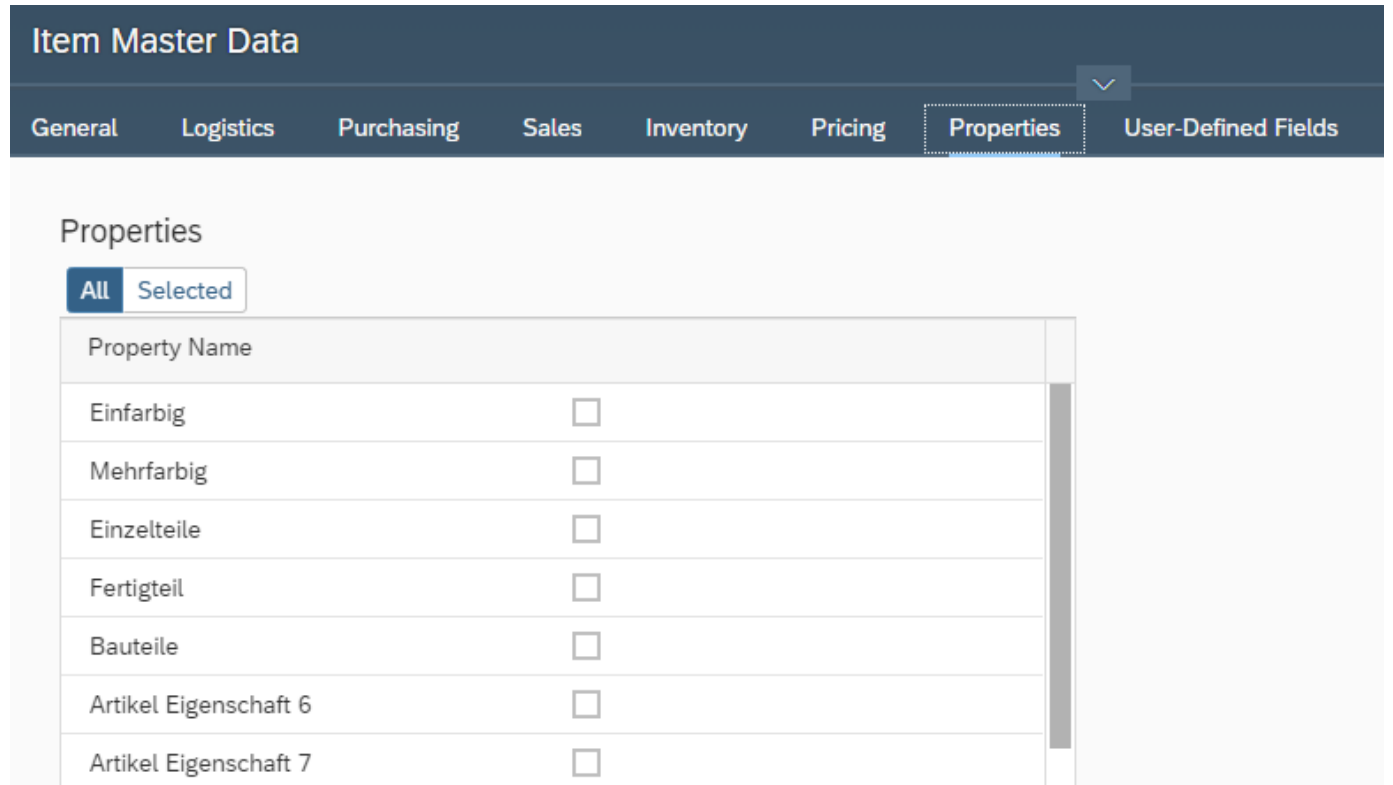
<input type="checkbox"/>	UoM Code	UoM Name	Base Price (Primary Curr...	Reduce By % (Primary ...	Price (Primary Currency)	Auto
<input type="checkbox"/>	Manuell	Manuell				<input type="checkbox"/>

# Create item – Properties

Items can be classified by **properties**. There are 64 properties available.

Using properties you can:

- Filter for reports and valuations
- Select master data records during processing



The screenshot shows the SAP Item Master Data interface with the 'Properties' tab selected. The 'Properties' section is active, displaying a list of properties with checkboxes for selection. The 'All' button is selected, and the 'Selected' button is also visible. The list includes 'Einfarbig', 'Mehrfarbig', 'Einzelteile', 'Fertigteil', 'Bauteile', 'Artikel Eigenschaft 6', and 'Artikel Eigenschaft 7'.

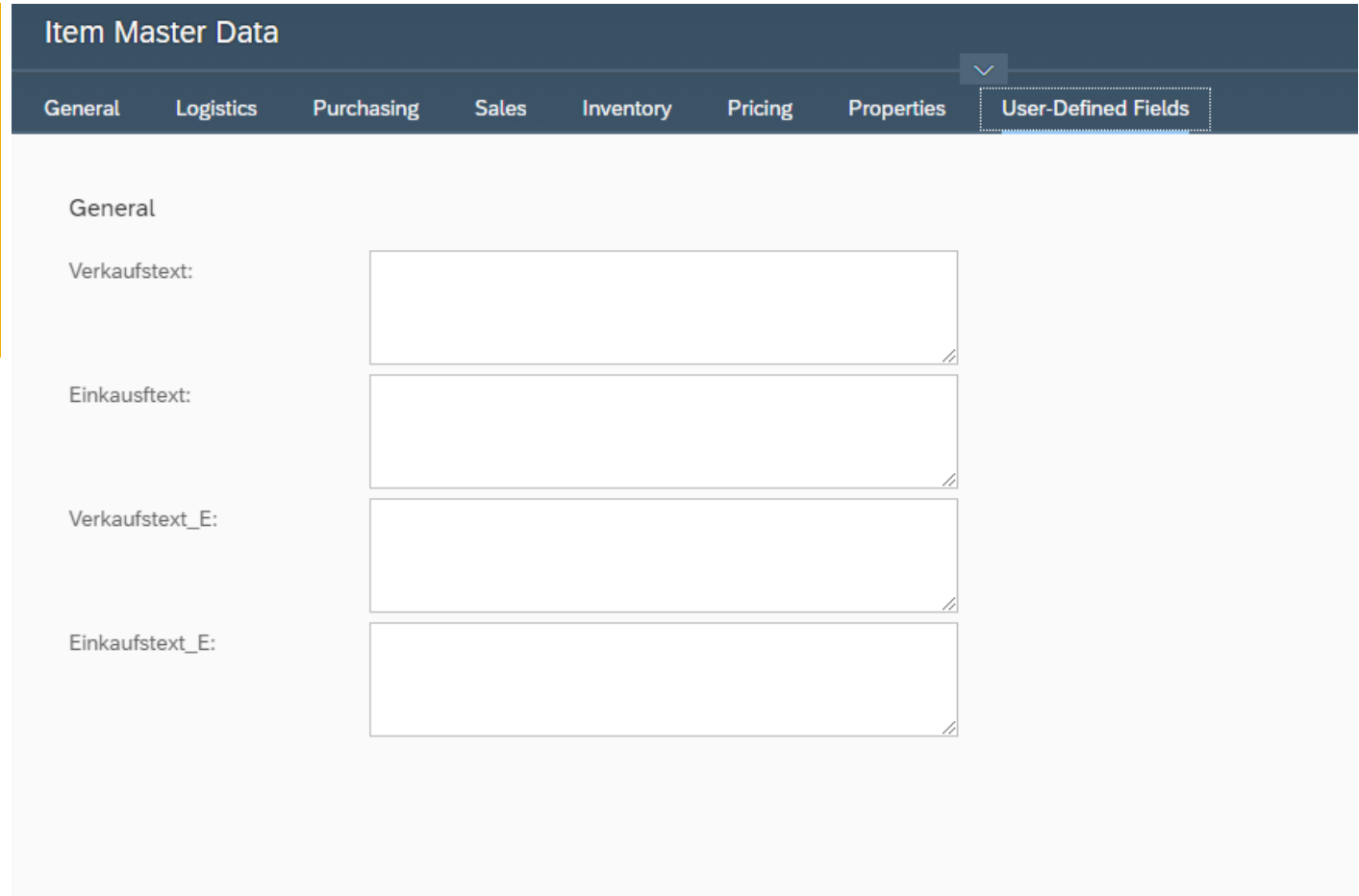
Property Name	
Einfarbig	<input type="checkbox"/>
Mehrfarbig	<input type="checkbox"/>
Einzelteile	<input type="checkbox"/>
Fertigteil	<input type="checkbox"/>
Bauteile	<input type="checkbox"/>
Artikel Eigenschaft 6	<input type="checkbox"/>
Artikel Eigenschaft 7	<input type="checkbox"/>

# Create item – User-defined fields

**User-defined fields** can be added to the fields that are available by SAP standard.

The conesprit standard already contains some user-defined fields.

In the item master data these are the fields: Sales text, purchase text in German and English. These fields are printed in the sales and purchasing documents.



The screenshot shows the SAP Item Master Data configuration screen. The top navigation bar includes tabs for General, Logistics, Purchasing, Sales, Inventory, Pricing, Properties, and User-Defined Fields. The 'User-Defined Fields' tab is selected and highlighted with a dashed border. Below the navigation bar, the 'General' section is visible, containing four text input fields:

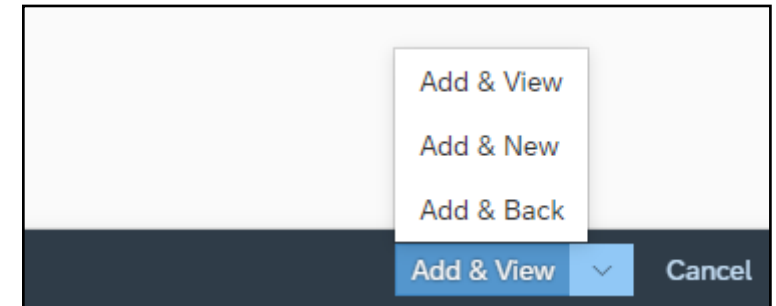
- Verkaufstext:
- Einkaufstext:
- Verkaufstext\_E:
- Einkaufstext\_E:

Each field is represented by a rectangular text box with a small diagonal slash icon in the bottom right corner, indicating it is a text field.

# Create item – Add record

If the item master data record is complete, it can be

1. added and then immediately displayed for review
2. added and then afterwards new empty master data sheet is opened
3. added and then the previous dialog is opened



# Call item master data

1. The item dialog can be opened with the tile on the start page or
2. the main menu or
3. via the search function in the main menu or
4. can be accessed with the Enterprise Search.

The screenshot displays the SAP Business One user interface for user 'TESAT' on the 'Home' page. The interface is divided into a left-hand navigation pane and a main content area with various tiles. Four yellow boxes with numbers 1 through 4 highlight different methods to access the 'Items' dialog:

- 1:** A yellow box highlights the 'Items' tile in the main content area, which shows a document icon and a refresh button.
- 2:** A yellow box highlights the 'Sales' menu item in the left-hand navigation pane.
- 3:** A yellow box highlights the search bar in the left-hand navigation pane, which contains the text 'Items'.
- 4:** A yellow box highlights the search bar at the top right of the page, which also contains the text 'Items' and shows a dropdown list of search results including 'App Items', '257', 'PC Welt', and 'invoice'.

Additional details in the screenshot include: the top navigation bar with 'Home', 'All', and a search bar; the main content area with tiles for 'Sales Quotations' (2 items), 'Sales Orders' (18 items), 'Create Sales Order', 'Sales Drafts', 'Docs in Approval Process' (0 items), 'Deliveries' (7 items), 'Create A/R Invoice', 'Returns' (0 items), 'A/R Credit Memos' (0 items), and 'Create Item'; and a bottom-right inset showing a zoomed-in view of the 'Items' dialog with a yellow box labeled '3' highlighting the search bar.

# View, search and filter item master data list

The item list is opened via the item tile. Using the search (1) and the filter function (2) the item can be found quickly. By using the arrow at the end of the line (3) or a double click on the line the corresponding item master data can be opened. With the arrows in the item master data you can move between the records (4).

The screenshot displays the SAP Manage Items interface. At the top, there is a search bar (1) and a filter function (2). Below this is a table of items with columns for Item No., Item Description, Item Type, Item Group, and UoM Group. The first row is highlighted, and a right arrow (3) is visible at the end of the row. Below the table, a detailed view of the item master data for A00001 is shown, including fields for In Stock, Committed, Ordered, and Available quantities, and a description of the item. Navigation arrows (4) are visible at the top of this detailed view.

Picture	Item No.	Item Description	Item Type	Item Group	UoM Group
<input type="checkbox"/>	100000	Schulung	Labor	Artikel	Manuell
<input type="checkbox"/>	100001	Starterset	Items	Artikel	Manuell
<input type="checkbox"/>	A00001	J.B. Multifunktionsdrucker 1420	Items	J.B. Drucker	Manuell
<input type="checkbox"/>	A00002	J.B. Multifunktionsdrucker 1111	Items	J.B. Drucker	Manuell
<input type="checkbox"/>	A00003	J.B. Multifunktionsdrucker 1186	Items	J.B. Drucker	Manuell
<input type="checkbox"/>	A00004	Rainbow Farbdrucker 5.0	Items	Rainbow-Drucker	Manuell
<input type="checkbox"/>	A00005	Rainbow Farbdrucker	Items	Rainbow-Drucker	Manuell
<input type="checkbox"/>	A00006	Rainbow 1200 Laserdrucker	Items	Rainbow-Drucker	Manuell

Item Master Data A00001	
In Stock	10.619,00
Committed	3.850,00
Ordered	2.279,00
Available	9.046,00
Description: J.B. Multifunktionsdrucker 1420	
General   Logistics   Purchasing   Sales   Inventory   Pricing   Properties   User-Defined Fields	
Basic Information	
Series:	Manuell
*Item No.:	A00001
Description:	J.B. Multifunktionsdrucker 1420
Foreign Name:	DRuckername in E
Item Group:	J.B. Drucker
UoM Group:	Manuell



# Analyze item master data list

The article list can be analyzed using many fields (1). Line, column, bar, stacked column, pie and ring charts as well as a heat maps are available (2). If the created analysis is regularly used, it can be placed as a tile on the start page (3).

The screenshot shows the SAP Business One 'Manage Items' interface. At the top, there are search filters for 'Item No.', 'Item Description', 'Item Type', and 'Item Group'. Below this, a table of items is visible, with a pie chart overlaid on it. The pie chart is divided into several segments, each representing a different item category. A legend on the right side of the chart lists these categories with corresponding colored squares. A 'Save as Tile' dialog box is open on the left side of the screen, showing a preview of the chart and fields for 'Title', 'Subtitle', and 'Description'. Three yellow callout boxes with numbers 1, 2, and 3 are overlaid on the interface. Callout 1 points to the 'Item Cost' field in the table header. Callout 2 points to the chart type selection menu. Callout 3 points to the 'Save as Tile' button in the dialog box.

Item No.	Item Description
0000	
0001	
0002	
0003	
0004	
0005	
0006	
711	

- Rainbow Drucker 9.5 Tintenpatrone
- Speicherkarte
- Druckerpapier A4 weiß
- Stundensatz
- Tragbare Festplatte 1TB
- Peanuts
- DL Blu-Ray Rohlinge 10er Pack
- Gehäuse für externe Festplatte
- Rainbow 1200 Laserdrucker
- PC Set Express
- Verkaufset Vorlage2
- Gigabit Netzwerkkarte
- LeMon 4029 Drucker AC Adapter
- PC Set Professional
- Starterset
- Quadcore Prozessor 3.4 GHz
- Tragbare Festplatte 4TB
- LeMon 4029 Drucker Systemboard
- Tagessatz Service
- PC Set 2
- MRP\_Artikel2
- WLAN-Karte
- BIO-Fruchtkugeln
- 1TB Disk für externe Festplatte
- USB Speicherstick 256GB
- LeMon 4029 Drucker
- LeMon 4029 500 Blatt Zuführung
- Motherboard BTX
- KG Datentransferkabel

# View item master

In addition to the information created in the item master, the item master shows the stock level (In Stock), the quantity of items committed by a sales order (Committed), the items already ordered (Ordered) and the quantity available for disposal (Available) (1).

Mathematically, the available quantity is calculated as  $\text{In Stock} - \text{Committed} + \text{Ordered}$ .

The available quantity is displayed in the article master header across all warehouses. For each warehouse, this information is displayed on the Warehouse Management tab (2).

The item costs based on the selected valuation method are also shown there (3).

Item Master Data A00001

In Stock	Committed	Ordered	Available
10.619,00	3.852,00	2.279,00	9.046,00

Description: J.B. Multifunktionsdrucker 1420

Warehouse Code	Warehouse Name	Default	Locked	In Stock	Committed	Ordered	Available	Item Cost
<input type="checkbox"/> 01	Allgemeines Lager	<input type="radio"/>	<input type="checkbox"/>	10.469,000	3.852,000	2.279,000	8.896,000	105,65 EUR
<input type="checkbox"/> 02	Außenlager	<input type="radio"/>	<input type="checkbox"/>	150,000	0,000	0,000	150,000	364,03 EUR
<input type="checkbox"/> 03	Streckengeschäft	<input type="radio"/>	<input type="checkbox"/>	0,000	0,000	0,000	0,000	0,00 EUR
<input type="checkbox"/> 04	Konsignationslager	<input type="radio"/>	<input type="checkbox"/>	0,000	0,000	0,000	0,000	0,00 EUR
<input type="checkbox"/> 05	Lagerplätze	<input type="radio"/>	<input type="checkbox"/>	0,000	0,000	0,000	0,000	0,00 EUR

# Duplicate and remove item master data

To create a new item, it can be useful to duplicate the item master data of a similar item (1).

An item can only be removed (2) if it has not yet been used in a document. If it is used in a document the item can no longer be deleted, it can only be defined as inactive in the General tab.

Item Master Data A00001

In Stock	Committed	Ordered	Available
10.619,00	3.852,00	2.279,00	9.046,00

Description: J.B. Multifunktionsdrucker 1420

Remove 2 Duplicate 1

General Logistics Purchasing Sales Inventory Pricing Properties User-Defined Fields



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