SAP Business One 10.0
Basics – Business Partner
(customer/vendor master data)

EN-SBO1001

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SAP Business One Microsoft Partner

December 2025

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Customer master data

Binoculars — Find
+
— Next data set
Arrows — First to last data set

fields highlighted in yellow: search fields
fields with a white background: input fields

Business partner master data always open in find mode (documents always open in add mode)

Searching for customers
You can either enter the exact name in the name field and press Enter (example: "conesprit GmbH" + Enter), or you can enter a * in connection with part of the name (example: "* con" + Enter). In the latter case, a list with suitable customer names opens and you can select the customer you want.

WARNING
As long as a business partner has not yet initiated a transaction, this master data can still be deleted. However, the BP code is not assigned a second time if consecutive numbering is used.

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Create customer

Business Partners > Business Partner Master Data

Price lists and discounts are assigned to the group. Please confirm with "Yes".

Business Partner Master Data

Do you want to replace the price list, effective discount group, and effective price according to the selected business partner group?
Field: Group

[Yes] [No]

WARNING
Do not save (add) until the data record has been completely entered. The data record is closed by the saving process and a new one is opened immediately. If you don't pay attention to this, instead of a complete data set you will have several partial data sets that cannot be deleted but overwritten. If you add the data record too early, you call up the correct data record again and complete it.

The ENTER key activates the saving process. Instead of ENTER, the Tab key should be used for navigation in SAP Business One.

Customer master data - Head and general

Discounts and price lists can be associated to the **customer group**. They are also available in reporting.

The **currency** defines the currency in which sales documents are created.

From a tax point of view, the **Federal Tax Id** is relevant for customers in EU foreign country or third countries.

The **shipping type** is shown in the receipts. It can be maintained in the article master and in the GP master. In practice it is mostly maintained in the GP master data.

Business Partner Master Data

Code	Manuell	1	Customer ▼
Name	conesprit GmbH	
Foreign Name		
Group	High Tech ▼	
Currency	Euro ▼	
Federal Tax ID		

Account Balance — 2.488.983,33
Deliveries — 157,08
Orders — 333.763,40
Opportunities —

Local Currency ▼

General | Contact Persons | Addresses | Payment Terms | Payment Run | Accounting | Properties | Remarks | Attachments | eDocs

Tel 1
Tel 2
Mobile Phone
Fax
E-Mail
Web Site
Shipping Type — DHL ▼
Password
Factoring Indicator
BP Project
Industry
Business Partner Type — Company ▼

Contact Person — Max Mueller
ID No. 2
Unified Federal Tax ID

Remarks

Sales Employee — Bernhard Heinrich ▼

BP Channel Code
Technician
Territory
Language — German ▼

Personal Data Protection
☐ Natural Person   Status   None
Alias Name

GLN

☐ Block Sending Marketing Content   ...

◉ Active
○ Inactive   From   To   Remarks
○ Advanced

[Update]   [Cancel]

Account Balance, deliveries and sales orders, as well as outstanding opportunities are shown in the customer master data.

The **contact person** is specified, which is stored as the default in the contact person tab.

An internal **sales employee** can be permanently connected to the BP.

The specification of the **language** influences the document language if the database supports the multi-language function.

Leads who are not yet customers are created like customers.
Exception: In the **Business Partner Type** field, there's a lead instead of a customer. The Business Partner Type field changes when the lead becomes a customer. Offers and customer orders can be created under the lead type. As soon as deliveries and outgoing invoices are created, you receive a request to convert the lead into a customer.

Customer master data – Contact persons

Business Partners > Business Partner Master Data

Contact persons are created.

You can define the **ID** yourself.

The contact person that is defined as **default** is shown in the General tab and is preselected in all documents.

Customer master data - Addresses

Business Partners > Business Partner Master Data

A distinction is made between Bill to and Ship to addresses.

When choosing an **ID**, it is advisable to assign speaking IDs to several different addresses (e.g. Berlin and Hanover or main and sub-camps).

If the bill to and ship to addresses are the same, the bill to address can be copied into the ship to address using the >> arrows. However, if the bill to address changes in the future, the ship to address will not be adjusted 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).

Customer master data – Payment terms

Standard **payment terms** are defined under Administration> System initialization> General settings > BP tab.
Of course, another condition can be stored in the BP master data.

Price lists and **discounts** are defined via the customer group. They are pre-assigned, but can be adjusted.

Definition of the customer group under:
Administration> Setup > Business Partners > Customer Groups

Credit limits and **commitment limits** can be set if necessary.

Under Administration> System initialization> General settings> GP tab, you can set whether a warning should be issued if the limit is exceeded.

Customer master data – Payment run

This register is not part of the basic training. It is dealt with in the payment transactions training course.

Customer master data – Accounting – General

In SAP Business One, the corresponding posting records are created when documents are created.

The accounts shown here are defined under:
Administration> Setup > Financials > G / L Accounts Determination

Please reconcile the selected account determination with your tax accountant before you make your first booking.

Customer master data – Accounting – Tax

The **tax status** field is set to mandatory in the standard system. If the customer is located in a third country, it is "tax-exempt". Customers in other EU countries have the "EU" tax status. Please discuss with your tax accountant which indicator must be selected.
Please make sure that you create a UID 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 item master data.

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

The **DATEV account** field is only relevant for the German localization. This account is used when exporting data from SAP Business One to DATEV. This is part of another training course.

Customer master data – Properties

Business Partners > Business Partner Master Data

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 those properties you can:
- Define reports and assessments
- Sort data
- Select master data records during processing

Customer master data – Remarks

Business Partners > Business Partner Master Data

Comments and a photo can be saved in this register.

Customer master data – Attachments

Attachments, such as contracts or the like, can be stored for the business partner.

The master data record is only saved at the end of the entry.

Business partner master data – Vendor / Register General

Business Partners > Business Partner Master Data

The dialog for vendors differs only marginally from the customer master data. Only the main differences are explained here:

If invoices from a supplier are not made in EUR, the **currency** is specified here. Purchasing documents are created in the specified foreign currency.

The specification of the **language** influences the document language if the database supports multi-language function.

Corresponding settings aren't part of the basic training.

Vendor master data – Payment terms

Standard **payment terms** are defined under Administration> System initialization> General settings > BP tab.
Of course, another condition can be stored in the BP master data.

Price lists and **discounts** are defined via the vendor group. They are pre-assigned, but can be adjusted.

Definition of the customer group under:
Administration> Setup > Business Partners > Vendor Groups

The vendor's **bank details** must be entered if the automated payment run is to be used.

Vendor master data – Accounting – Tax

The **tax status** field is set to "Liable" in the standard system. If the supplier is located in another EU country (acquisition) or a third country (exempt), the tax status and **tax code** must be entered here accordingly. Please discuss with your tax accountant which indicator must be selected.
Please make sure that the supplier prints your UID in his invoices.

If the tax status is " Liable", the indicator V2 is automatically selected in a purchasing document, provided that no further settings are made in the business partner master data or the item master data.

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

Business Partner Master Data   _ □ ✖

Code	Manuell	V30000	Vendor ▼
Name		Block*	
Foreign Name			
Group		Vertriebsunternehmen ▼	
Currency		GBP ▼	
Federal Tax ID			

BP Currency ▼

Account Balance ➡ -484,19
Goods Receipt POs ➡ -6.048,00
Purchase Orders ➡ -235,20

General	Contact Persons	Addresses	Payment Terms	Payment Run	Accounting	Properties	Remarks	Attachments	eDocs

General	Tax

Tax Status   Liable ▼
Tax Group   V0   VSt 0%

☐ Deferred Tax

DATEV Account   [   ] 🔍
First Data Entry   Yes ▼

OK   Cancel   You Can Also

conesprit | SAP Business One

Set default payment preference

Define payment terms for customers and vendors

The existing conditions can be displayed using the **magnifying glass symbol** or the **arrows**. New conditions are added using the "**+**" symbol.

The **payment terms code** is displayed on the receipts, so the text should be understandable for customers. Conditions for customers start in the code with a C, conditions for vendors, i.e. the conditions that you are subject to, start with an V for vendors.

When defining the discount, the following must be noted:
The special character "%" must not be used in the discount definition code. The word percent must be written out, otherwise the discount definition cannot be saved. In the name of the discount definition, however, the special character "%" may be used.

If the defined payment term is a term for customers, a sales price list must be associated to the term. If the term is for vendors, a purchase price list must be associated to the term.

If the box for freight is not ticked, the freight is not included in the discount calculation. If the check mark is set, the freight is also discounted by a discount.

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Define customer and vendor groups

Customer Groups - Setup

#	Group Name	Price List	Effective Discount Groups	Effective Price
1	Kunden	VK Einzelhandel	Lowest Discount	Default Priority
2	Warenhaus	VK Wiederverkäufer	Lowest Discount	Default Priority
3	Wiederverkäufer	VK Wiederverkäufer	Lowest Discount	Default Priority
4	Einzelhandel	VK Einzelhandel	Lowest Discount	Default Priority
5	Regierung	VK Regulär	Lowest Discount	Default Priority
6	High Tech	VK Regulär	Lowest Discount	Default Priority
7	Konstruktion	VK Regulär	Lowest Discount	Default Priority
8	Produktion	VK Regulär	Lowest Discount	Default Priority
9	Inaktiv	VK Einzelhandel	Lowest Discount	Default Priority
10	Beratung	VK Regulär	Lowest Discount	Default Priority
11			Lowest Discount	Default Priority

OK   Cancel

Enter a meaningful name for the group.
A suitable price list can be assigned to the respective group in the Price List column. The selected price list is assigned to the customer or supplier by default when the corresponding customer or supplier group is selected in the business partner master data.
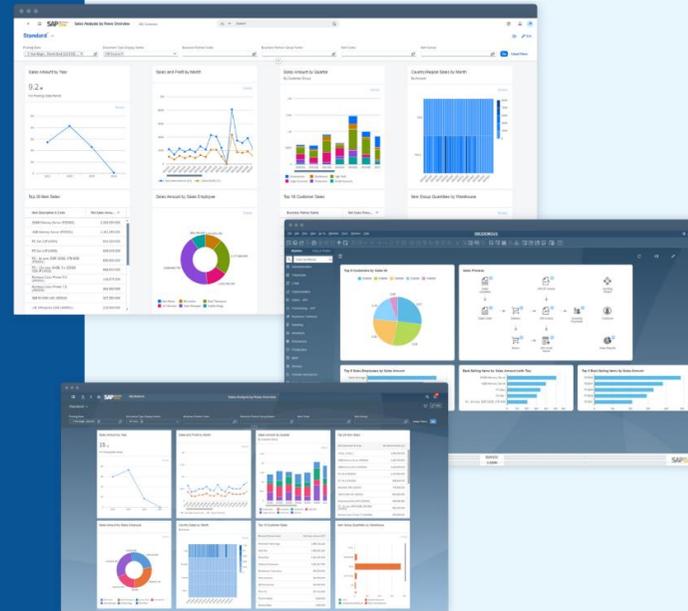
Discounts and price lists can be associated to the group. The group is also regularly available for selection in reporting.

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conesprit GmbH
Eduard-Breuninger-Straße 6/1
71522 Backnang, Germany
conesprit.de
business-one-consulting.com

Contact person
Katrin Douverne
Email: katrin.douverne@conesprit.de
Tel.: +49 7191 18 70 190
Fax: +49 7191 18 70 191