



SAP Business One 10.0
Web Client
Business Partner master data

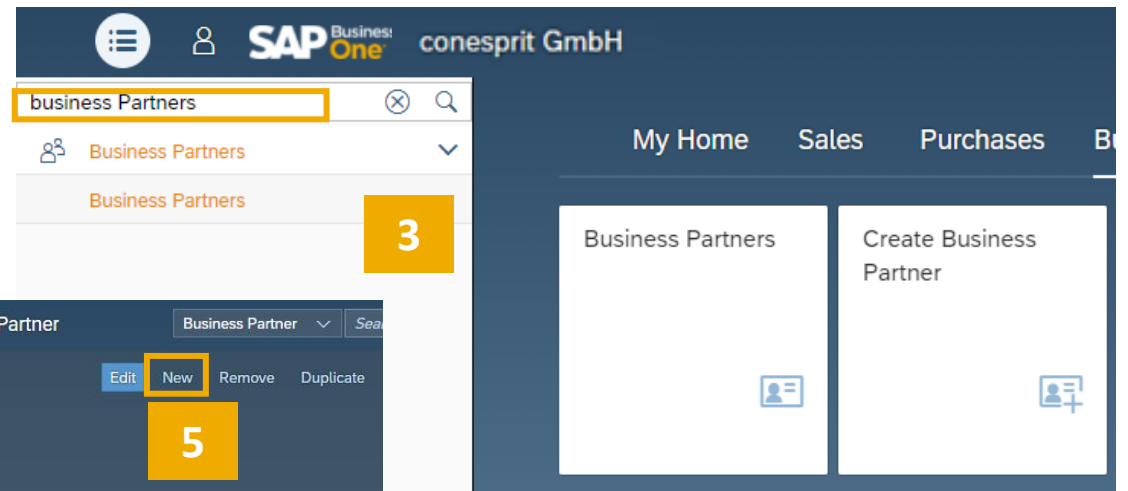
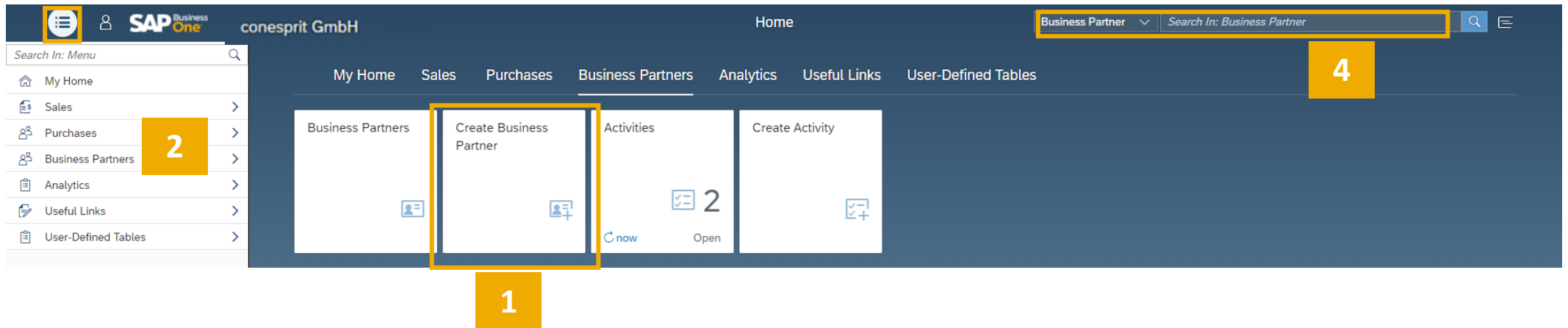
SBO1001-EN

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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**.

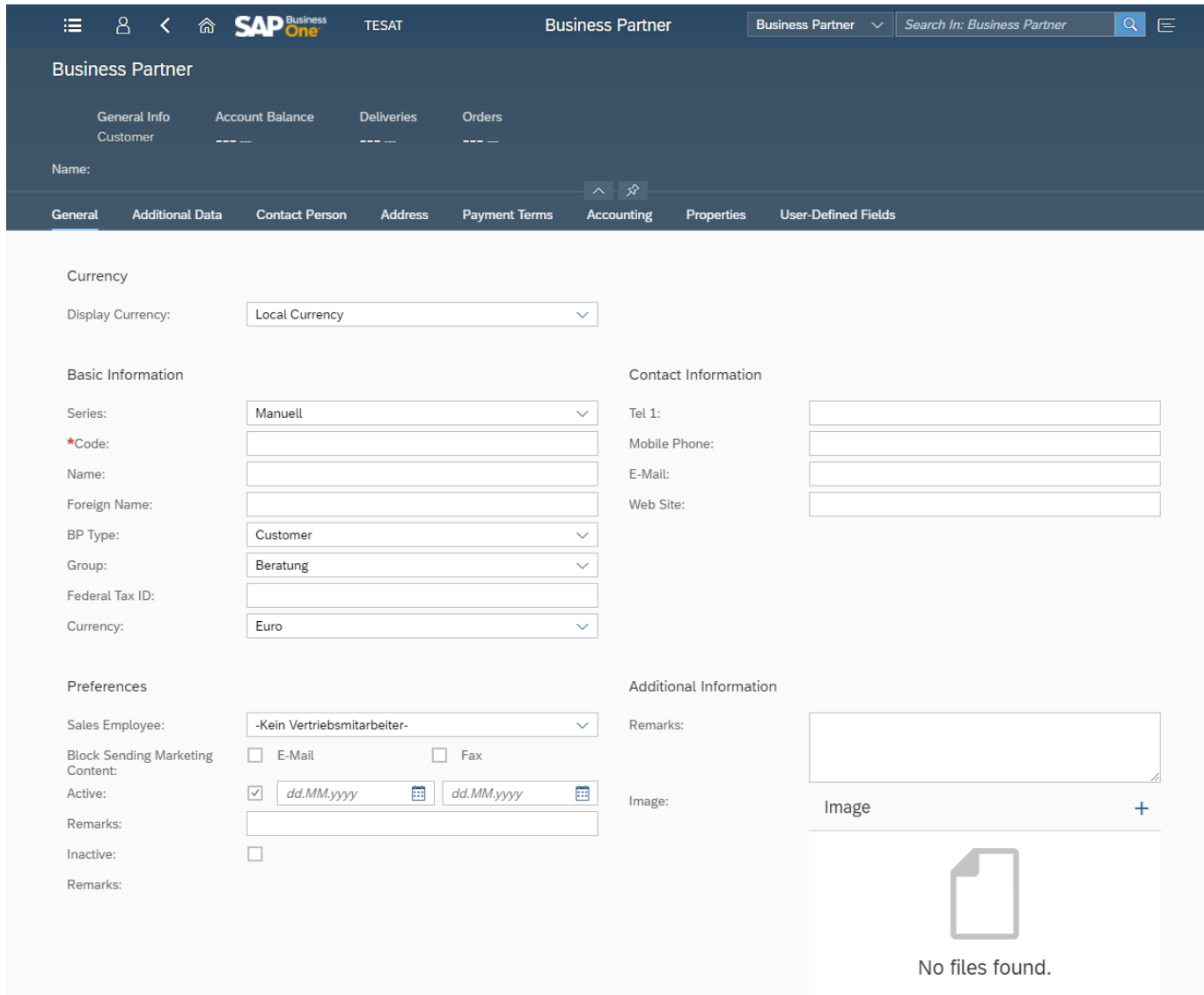
Depending on the database setting, the business partner number can be selected **manually or automatically**.

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, Basic Information, Contact Information, Preferences, and Additional Information. The Currency section shows 'Display Currency' set to 'Local Currency'. The Basic Information section includes fields for Series (Manuell), *Code, Name, Foreign Name, BP Type (Customer), Group (Beratung), Federal Tax ID, and Currency (Euro). The Contact Information section has fields for Tel 1, Mobile Phone, E-Mail, and Web Site. The Preferences section includes Sales Employee (-Kein Vertriebsmitarbeiter-), Block Sending Marketing Content (E-Mail and Fax checkboxes), Active status (checked), and Remarks. The Additional Information section has a Remarks field and an Image upload area with a 'No files found' message.

Business Partner

General Info Account Balance Deliveries Orders

Customer --- -- -- --

Name:

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

Currency

Display Currency: Local Currency

Basic Information

Series: Manuell

*Code:

Name:

Foreign Name:

BP Type: Customer

Group: Beratung

Federal Tax ID:

Currency: Euro

Contact Information

Tel 1:

Mobile Phone:

E-Mail:

Web Site:

Preferences

Sales Employee: -Kein Vertriebsmitarbeiter-

Block Sending Marketing Content: ☐ E-Mail ☐ Fax

Active: ☒ dd.MM.yyyy dd.MM.yyyy

Remarks:

Inactive: ☐

Remarks:

Additional Information

Remarks:

Image: Image +

No files found.

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

GeneralAdditional DataContact PersonAddressPayment TermsAccount

Shipping Type:

Password:

Factoring Indicator:

BP Project:

Business Partner Type:

Company

Industry:

Alias Name:

ID No. 2:

Unified Federal Tax ID:

Remarks:

BP Channel Code:

Technician:

Territory:

Language:

German

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

+ - ⚙️ 1

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 ⌵ 2

<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

Note: In the original image, a red arrow points from the 'Copy to Ship-to Address' button in the Bill-to section to the 'Copy to Bill-to Address' button in the Ship-to section.

Select Columns

☐ Select All (7/13)

☒ Address ID

☒ Default


☒ Street / PO Box





☒ City

☒ Zip Code

☒ State

☒ Country



Show Selected    

2

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).

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

Accounts		
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 tab bar at the top includes 'General', 'Additional Data', 'Contact Person', 'Address', 'Payment Terms', 'Accounting', 'Properties' (highlighted), and 'User-Defined Fields'. Below the tab bar, the 'Properties' section has two buttons: 'All' and 'Selected'. A table lists various properties with checkboxes for selection:

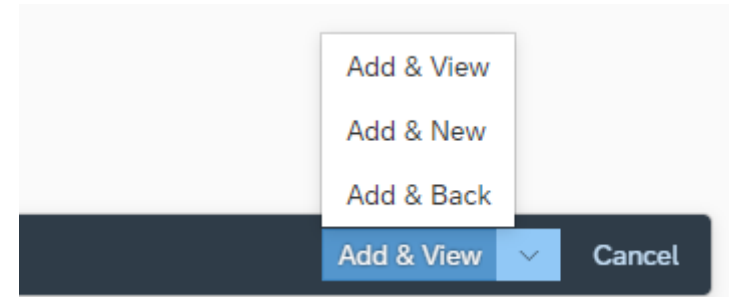
Property Name	
Nord	<input type="checkbox"/>
Süd	<input type="checkbox"/>
Ost	<input type="checkbox"/>
West	<input type="checkbox"/>
<10 Mitarbeiter	<input type="checkbox"/>
>10 Mitarbeiter	<input type="checkbox"/>

The screenshot shows the 'User-Defined Fields' tab in the SAP Business One interface. The tab bar at the top includes 'General', 'Additional Data', 'Contact Person', 'Address', 'Payment Terms', 'Accounting', 'Properties', and 'User-Defined Fields' (highlighted). Below the tab bar, the 'General' section contains a label 'Referenznummer:' followed by an empty text input field.

Create new business partner – Complete and add data record

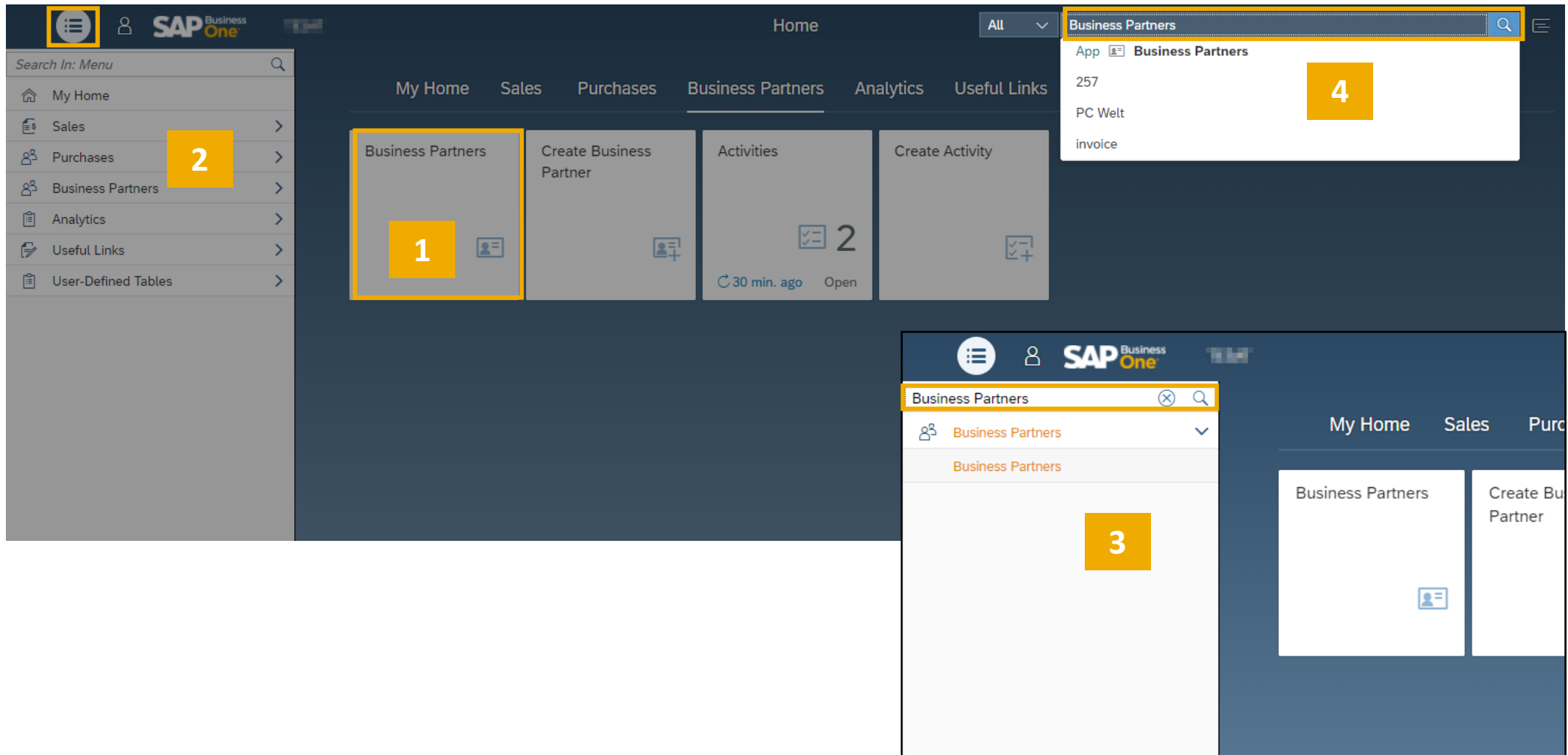
If the data record for the business partner is completely you can:

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.



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, there are search and filter fields. The search field (1) contains the text 'Search'. The filter fields (2) include 'BP Code', 'BP Category' (set to 'Customer'), and 'Group'. Below these fields is a table of business partners. The table has columns for BP Code, BP Name, BP Category, Group, Account Balance, Currency, Mobile Phone, Email, Web Site, and Default Contact Person. The table lists 15 business partners, including 'conesprit GmbH', 'PC Welt GmbH & Co. KG', 'Mikrochips GmbH', 'Büro Online AG', 'Büro Ausstattung ...', 'Computerhandel ...', 'Büroausstatter Ma...', 'CIT Beratungshaus', 'INTINT, Inc', 'SG Elektronik', 'Broup Inc.', and 'Web Einmalkunde'. The 'PC Welt GmbH & Co. KG' entry is highlighted. To the right of the table, there is a detailed view of the selected business partner. This view shows the 'Business Partner C20000' and includes tabs for 'General', 'Additional Data', 'Contact Person', 'Address', 'Payment Terms', 'Accounting', 'Properties', and 'User-Defined Fields'. The 'General' tab is active, showing 'General Info' with fields for 'Account Balance' (108.620,53 EUR), 'Deliveries' (29.708,95 EUR), and 'Orders' (165.929,81 EUR). It also shows 'Basic Information' with fields for 'Series' (Manuell), '*Code' (C20000), 'Name' (PC Welt GmbH & Co.KG), 'Foreign Name', 'BP Type' (Customer), and 'Group' (Konstruktion). The 'Contact Information' section shows 'Tel 1:', 'Mobile Phone:', 'E-Mail:', and 'Web Site:'. Navigation arrows (3) are visible at the end of the table row and in the detailed view. Arrows (4) are also visible in the detailed view, indicating navigation between data records.

Business Partners (0 / 15)

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	EUR				Douven...
C20000	PC Welt GmbH & ...	Customer	Konstruktion	108.620,53 EUR	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						

Business Partner C20000

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

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

Currency

Display Currency: Local Currency

Basic Information

Series: Manuell

*Code: C20000

Name: PC Welt GmbH & Co.KG

Foreign Name:

BP Type: Customer

Group: Konstruktion

Contact Information

Tel 1:

Mobile Phone:

E-Mail:

Web Site:

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 One 'Manage Business Partners' interface. The top navigation bar includes the SAP logo, 'conespritz GmbH', and the title 'Manage Business Partners'. Below this, a search bar and filters for 'BP Code', 'BP Category' (set to 'Customer'), and 'Group' are visible. A 'Customers' dropdown menu is also present.

On the right side, a table lists business partners with columns for 'BP Category', 'Group', 'Account Balance', 'Currency', 'Mobile Phone', 'Email', and 'W'. The table includes entries such as 'Douverne, Katrin', 'Christian Gander', 'Herbert Mayer', 'Bill Armstrong', 'Michael Maier', 'Helmut Baumgärtner', 'Jürgen Walter', 'Silvia Tingel', 'Ingrid Lander', 'Katrin Ackermann', and 'Werner Richter'.

At the bottom, a large pie chart represents the distribution of account balances. A legend on the right lists various business partners and their corresponding colors: CIT Beratungshaus, Group Inc., INTINT, Inc., Einmalkunde, Büroausstatter Mayer, PC Welt GmbH & Co.KG, Uwe Mann, Web Einmalkunde, Büro Online AG, Büro Ausstattung Namysio GmbH, SG Elektronik, Computerhandel Müller, Mikrochips GmbH, Tobias Umgang, and conespritz GmbH.

A 'Save as Tile' dialog box is open on the left, showing a preview of a tile 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 image:

- 1: Points to the table of business partners.
- 2: Points to the pie chart and legend.
- 3: Points to the 'Save as Tile' dialog box.

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 displays the SAP Business Partner interface for Business Partner C20000. The top navigation bar includes the SAP Business One logo, the company name 'conespritz GmbH', and the title 'Business Partner'. The main header shows 'Business Partner C20000' with navigation icons and buttons for 'Edit', 'New', 'Remove', 'Duplicate', 'View Related Activities[4]', 'Create Activity', and 'Create Sales Order'. The 'View Related Activities[4]' button is highlighted with a yellow box and labeled with a yellow '2'. Below the header, the 'General Info Customer' section is visible, containing a table with three columns: 'Account Balance', 'Deliveries', and 'Orders'. The values are '108.620,53 EUR', '29.708,95 EUR', and '165.929,81 EUR' respectively. This table is highlighted with a yellow box and labeled with a yellow '1'. Below the table, the name 'Name: PC Welt GmbH & Co.KG' is displayed. The bottom navigation bar includes tabs for 'General', 'Additional Data', 'Contact Person', 'Address', 'Payment Terms', 'Accounting', 'Properties', and 'User-Defined Fields'. The 'Address' tab is selected and highlighted with a yellow box. Below the navigation bar, the 'My Open Activities *' section is visible, featuring a search bar and filters for 'Start Date', 'Type', 'Status', 'Assign To', and 'BP Code'. The 'BP Code' filter is set to 'C20000'. Below the filters, a table titled 'Activities (0 / 4)' displays a list of activities. The table has columns for 'Activity Number', 'Subject', 'Start Date', 'Start Time', 'Assign To', 'Type', 'BP Code', 'Contact Person', and 'Assigned By'. The activities listed are:

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 shows the SAP Business Partner C20000 master data screen. The top navigation bar includes the SAP Business One logo, the company name TESAT, and the title Business Partner. Below the title, there are two yellow boxes with numbers: '2' above the 'Remove' button and '1' above the 'Duplicate' button. The 'Remove' and 'Duplicate' buttons are highlighted with yellow borders. The screen displays the following information:

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

Name: PC Welt GmbH & Co.KG

At the bottom, there is a tab bar with the following tabs: General, Additional Data, Contact Person, Address, Payment Terms, Accounting, Properties, and User-Defined Fields.

SAP Business One



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