Starting right now: Your SAP Business One Cloud test system will be ready in 3 minutes>

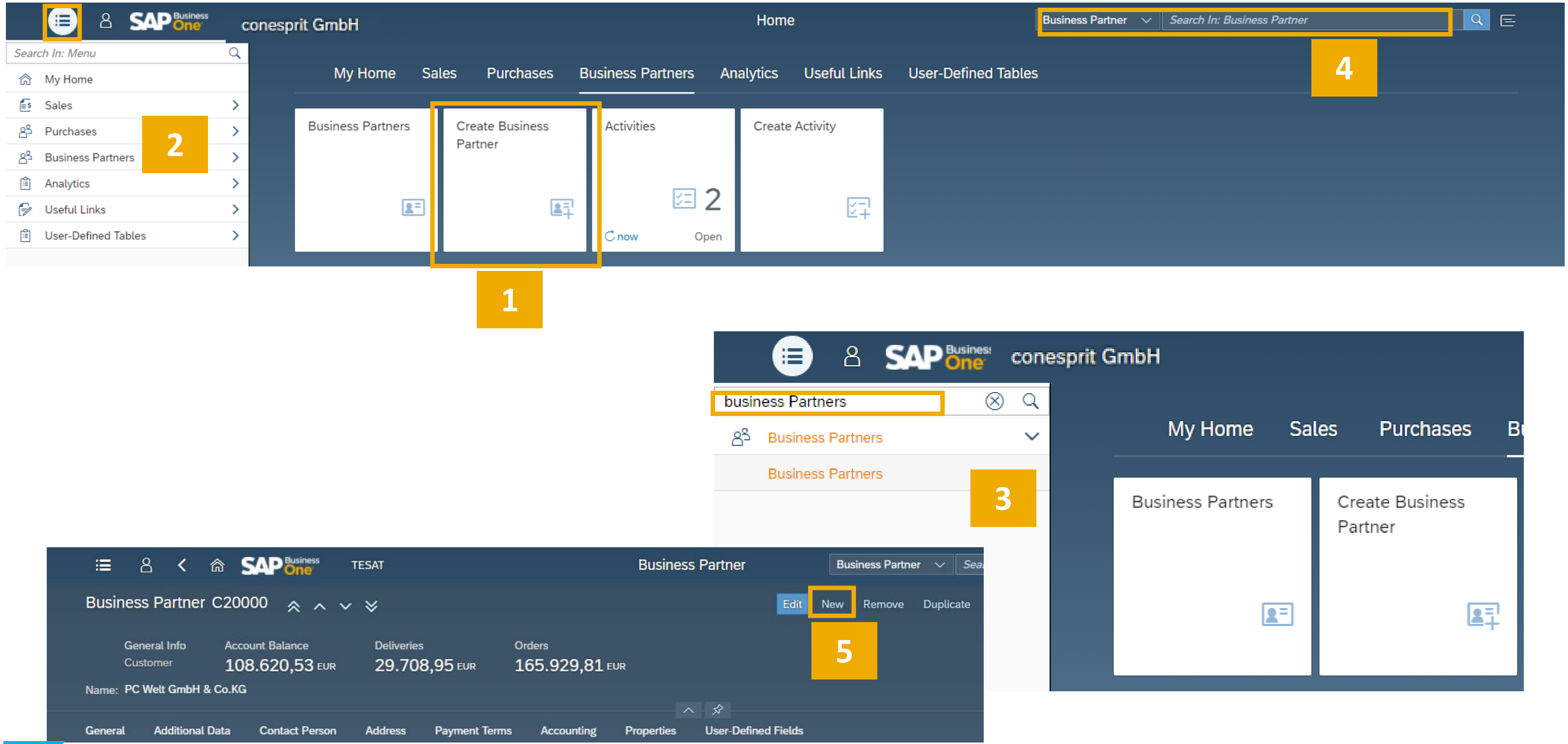
SAP Business One 10.0
Web Client - Business Partner master data
October 2024

SBO1001-EN

Table of contents

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**.

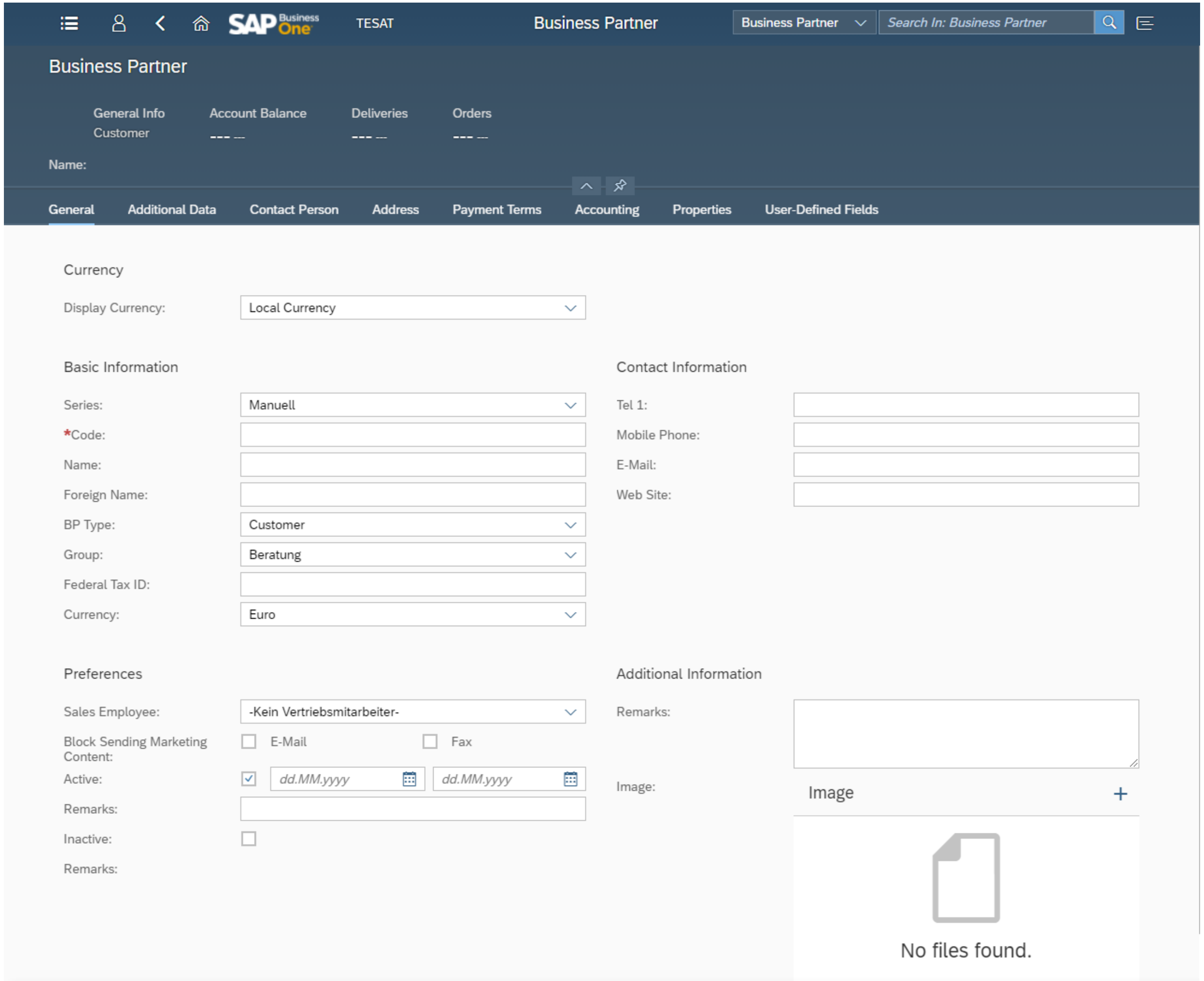
Depending on the database setting, the business partner number can be selected **manually** or **automatically**.

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 **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

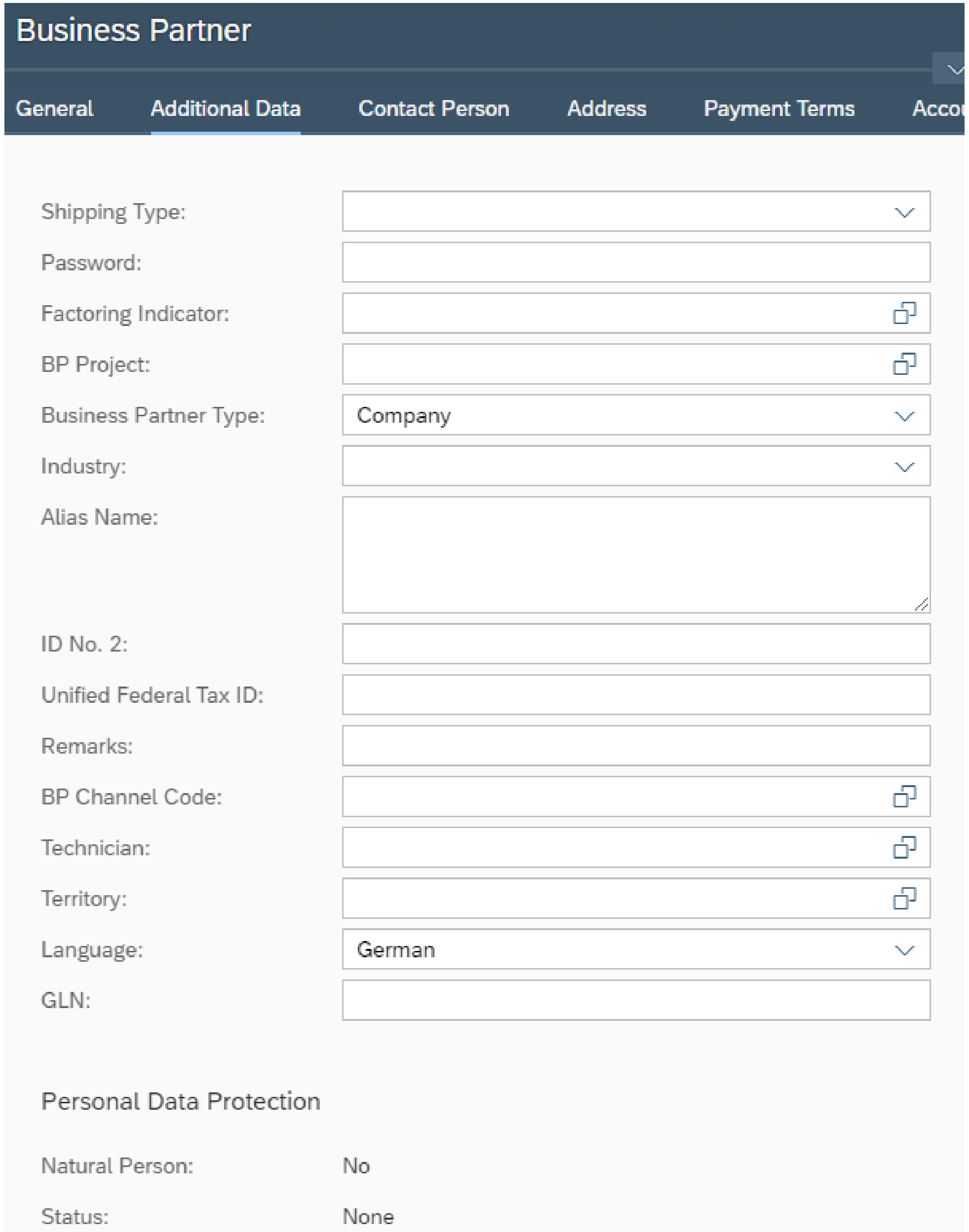
The **shipping type** can be maintained in the article master as well as in the business partner master. In practice it is mostly maintained in the BP master data.

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.

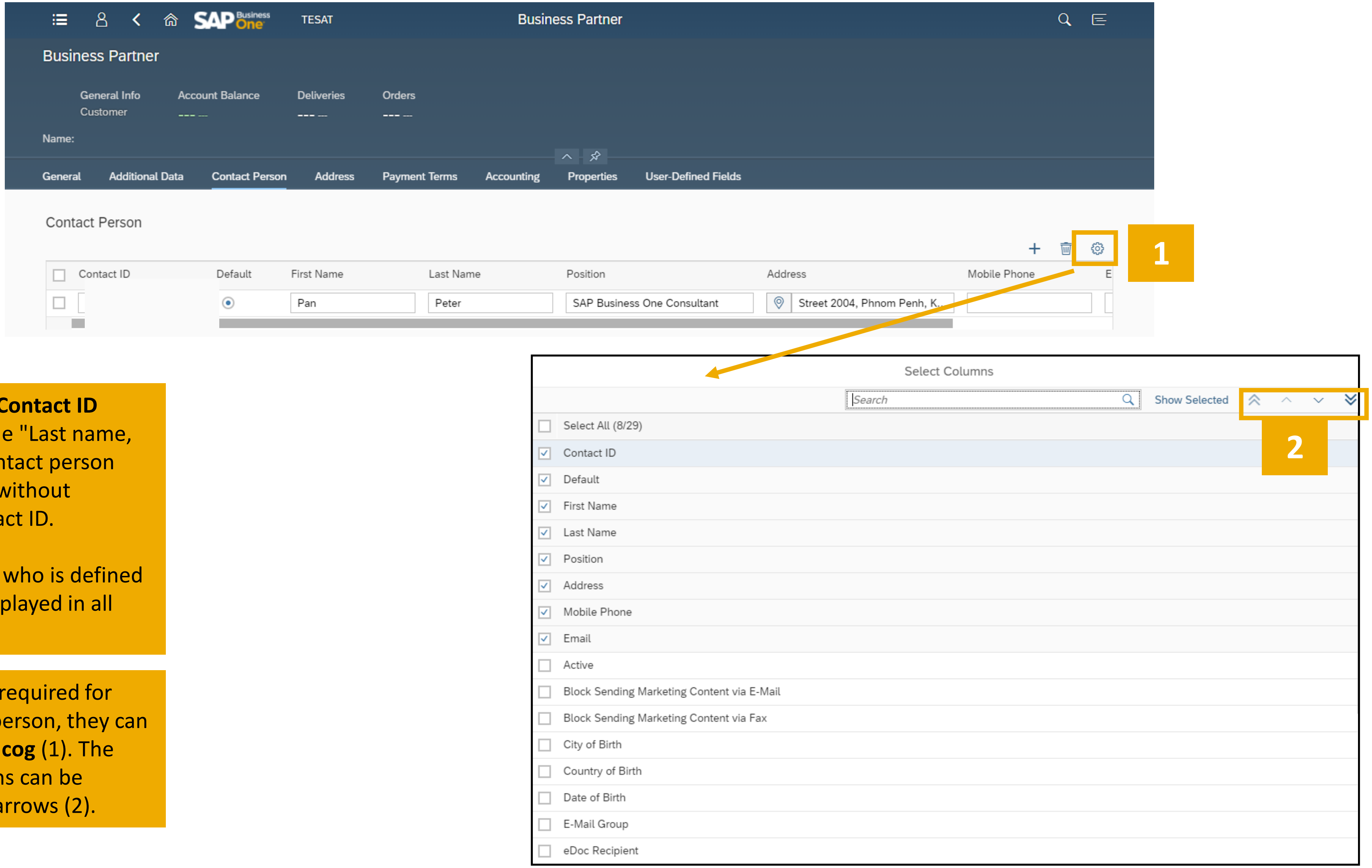
If the multi-language support is activated, the **language** can be defined.

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



con-esprit

Create new business partner – Contact Person



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.

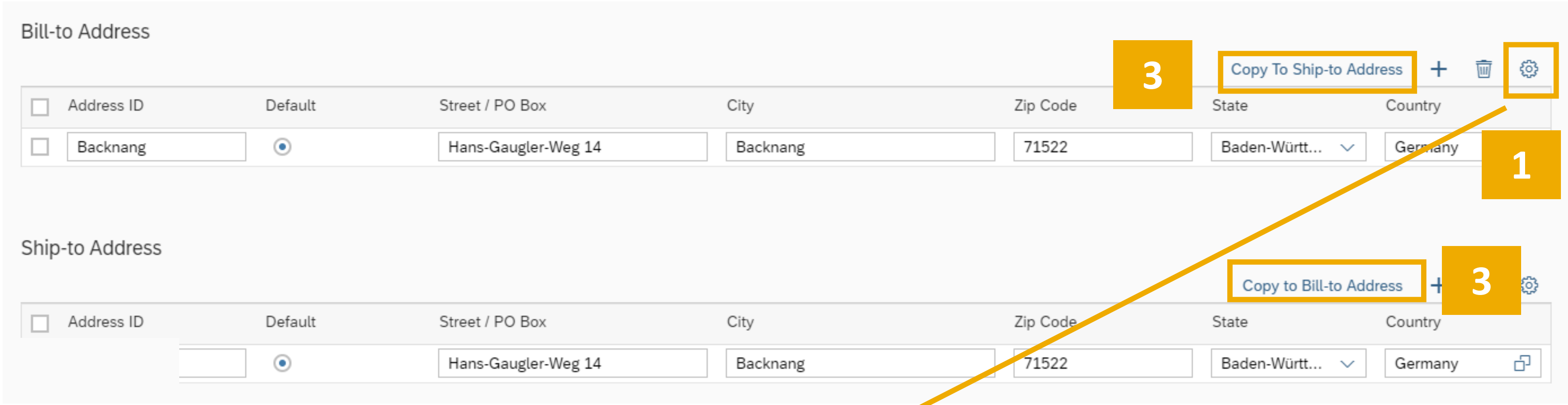
If further fields are required for creating a contact person, they can be added using the **cog** (1). The order of the columns can be changed using the arrows (2).

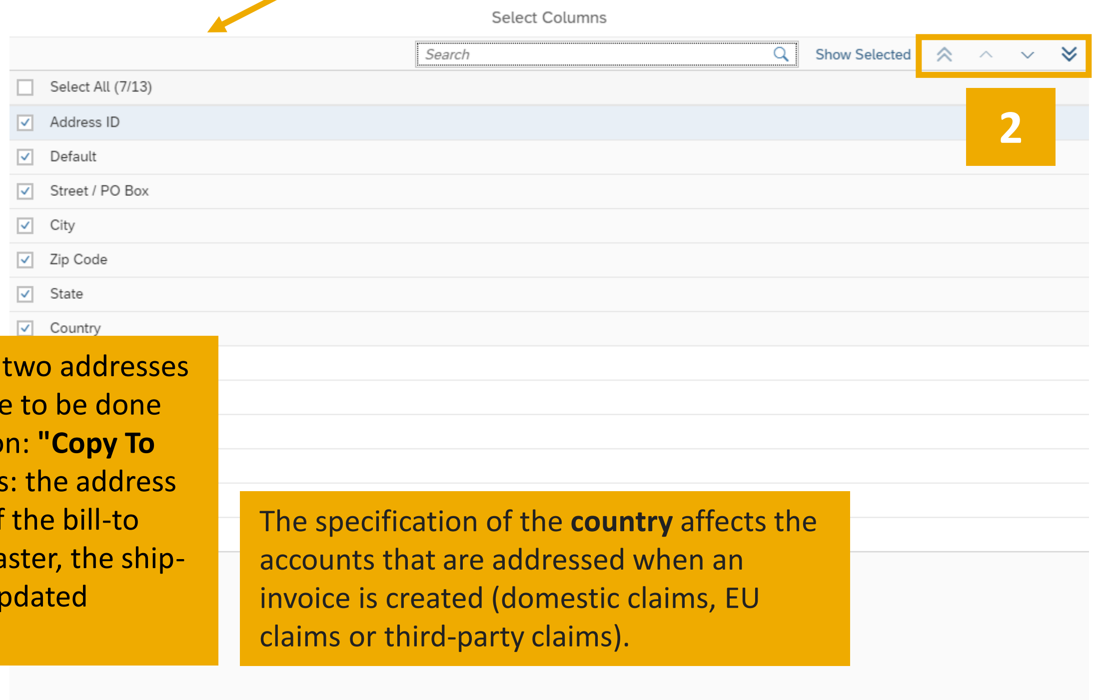
Create new business partner – Address

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.





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.

General

Consolidating BP:
Consolidation Type: Payments Consolidation

Tax

Tax Status: Liable
Tax Group:
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.)

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.

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.

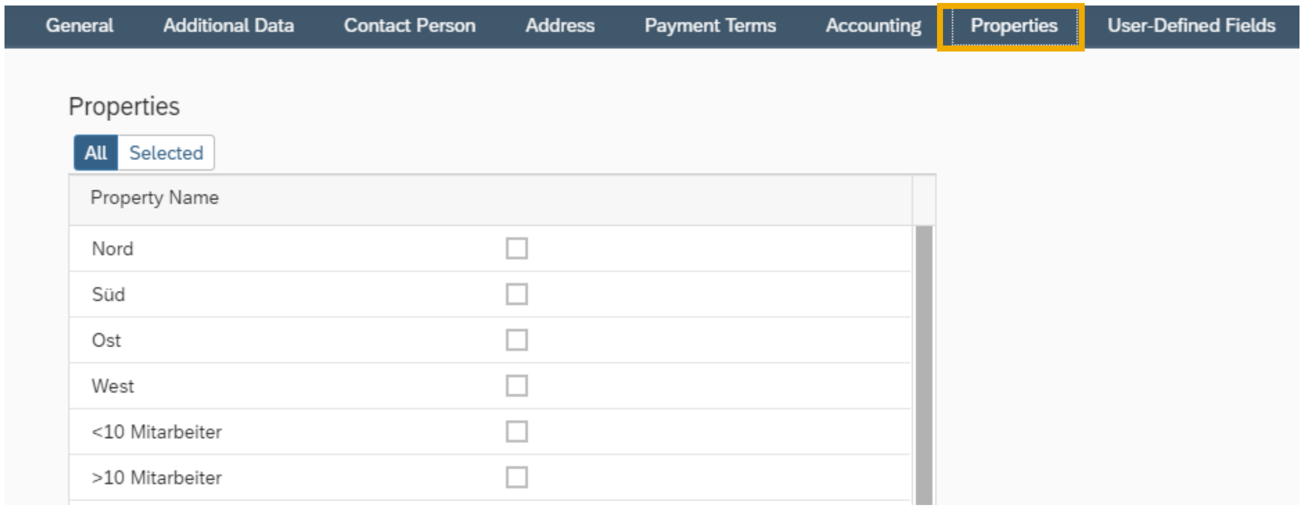
If the tax status is “liable", the indicator A2 is automatically selected in a document, provided that no further settings are made in the business partner master data or the article master data.

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

Create new business partner – Properties and User-Defined Fields

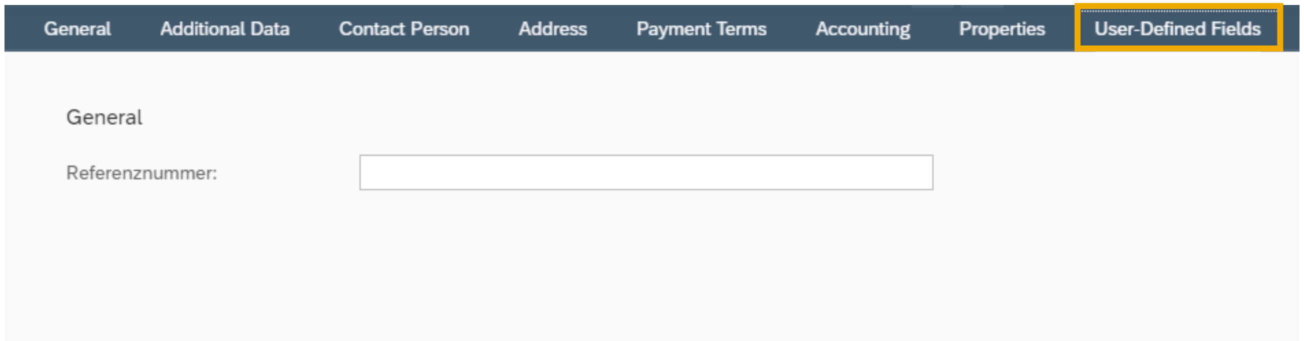
You can classify your business partners using **properties** that you define according to your company requirements. You assign the relevant properties while editing the master record of a business partner. There are 64 properties available.

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.

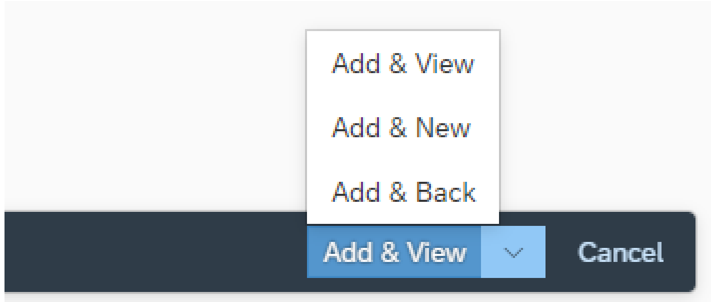
The conesprit standard already contains some user-defined fields. In the BP master data it is the reference number field. The field can be used to enter your own supplier number that the customer maintains, or the customer number that the supplier maintains. The field is printed in sales and purchasing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



Create new business partner – Complete and add data record

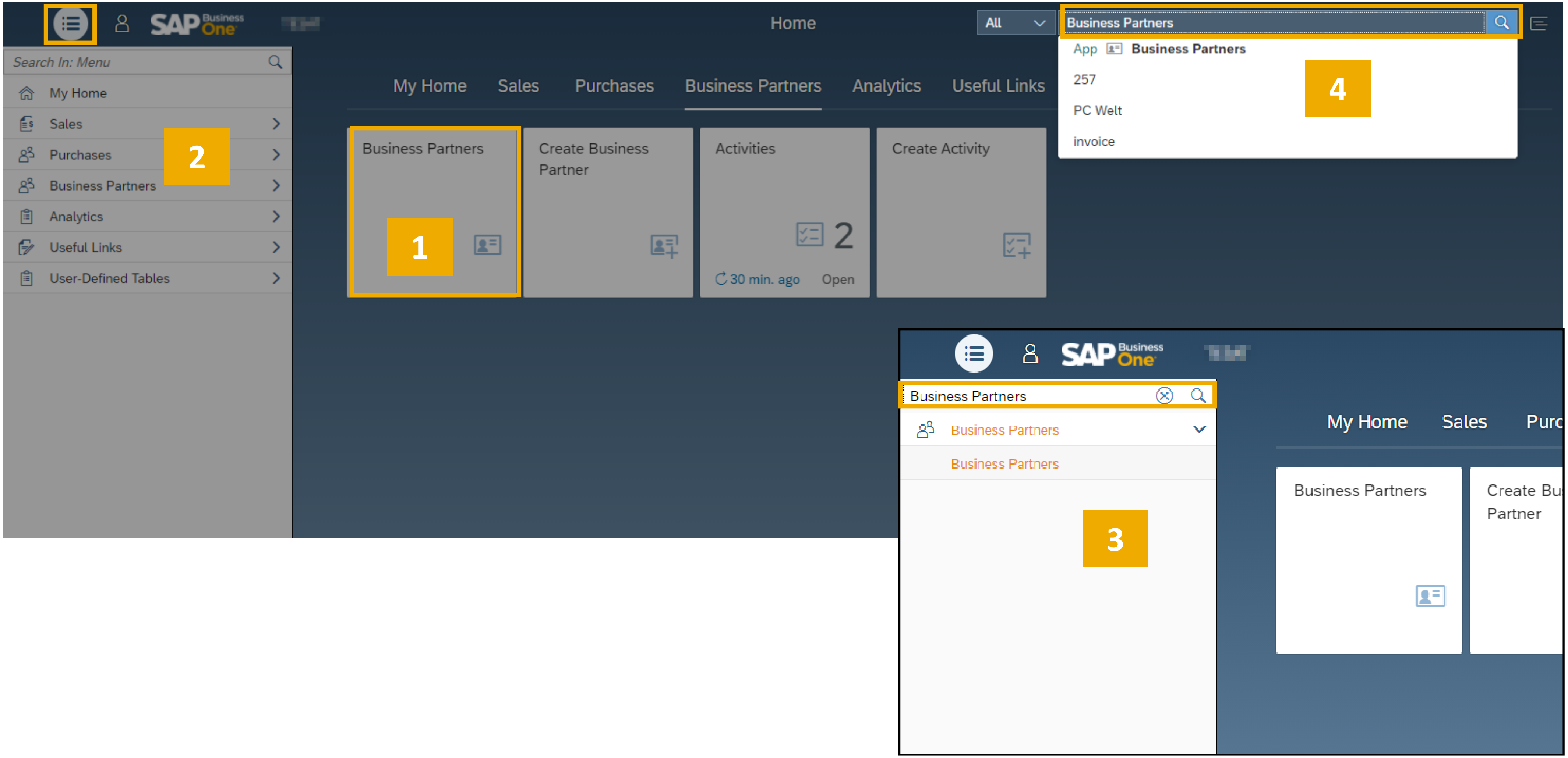
If the data record for the business partner is completely you can:

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



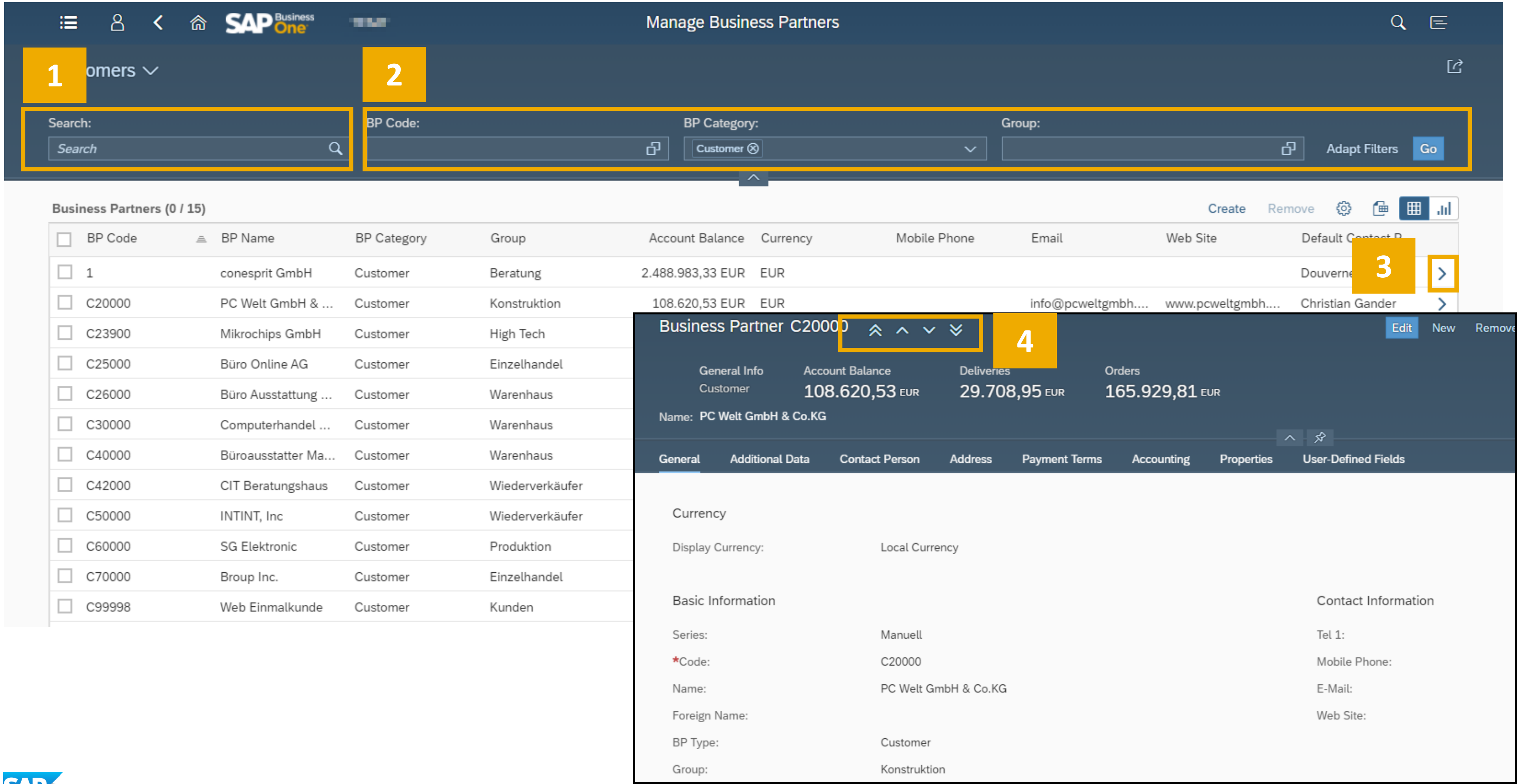
Call existing business partner

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.



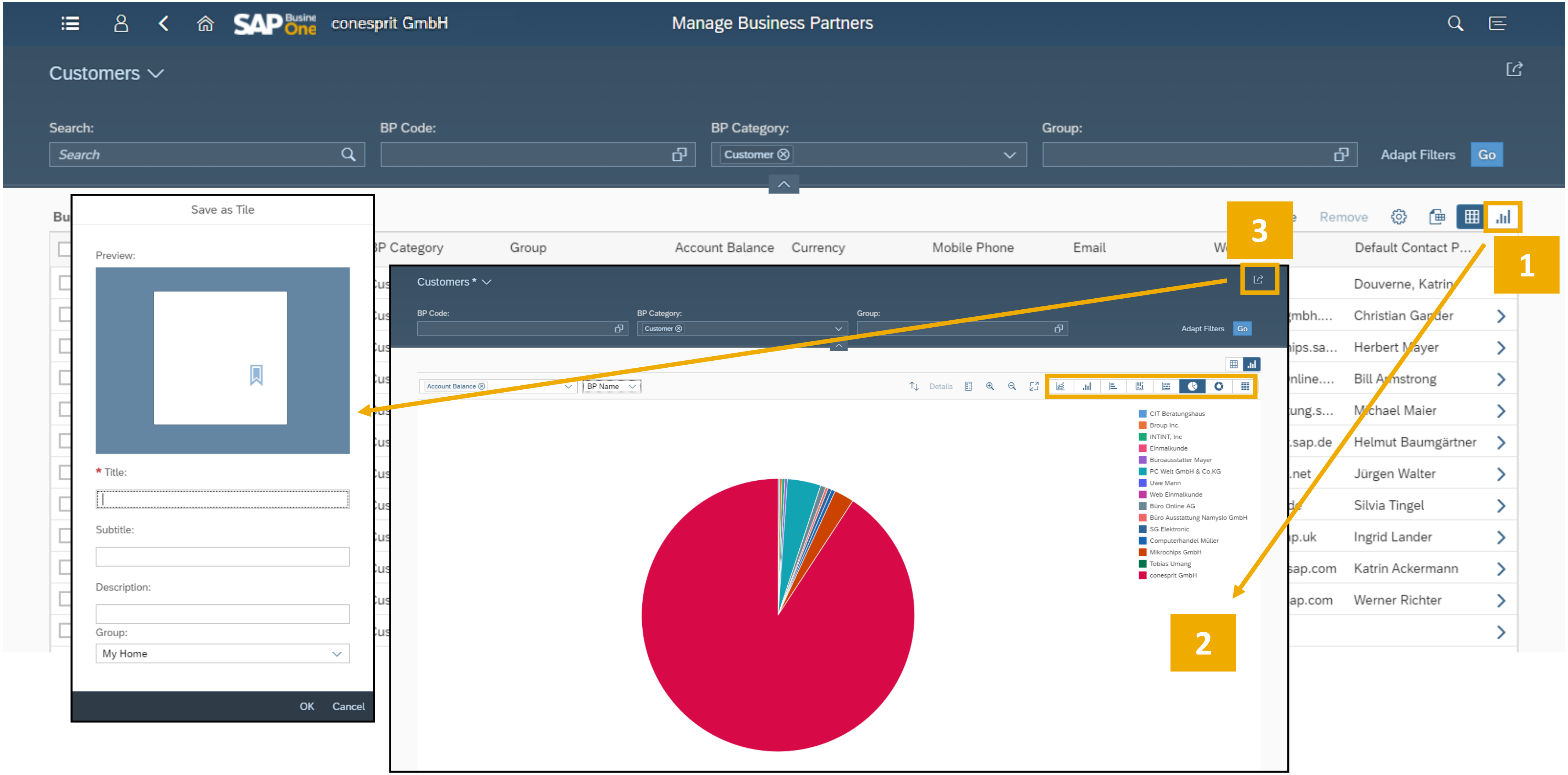
View, search and filter business partner lists

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).



Analyze business partner lists

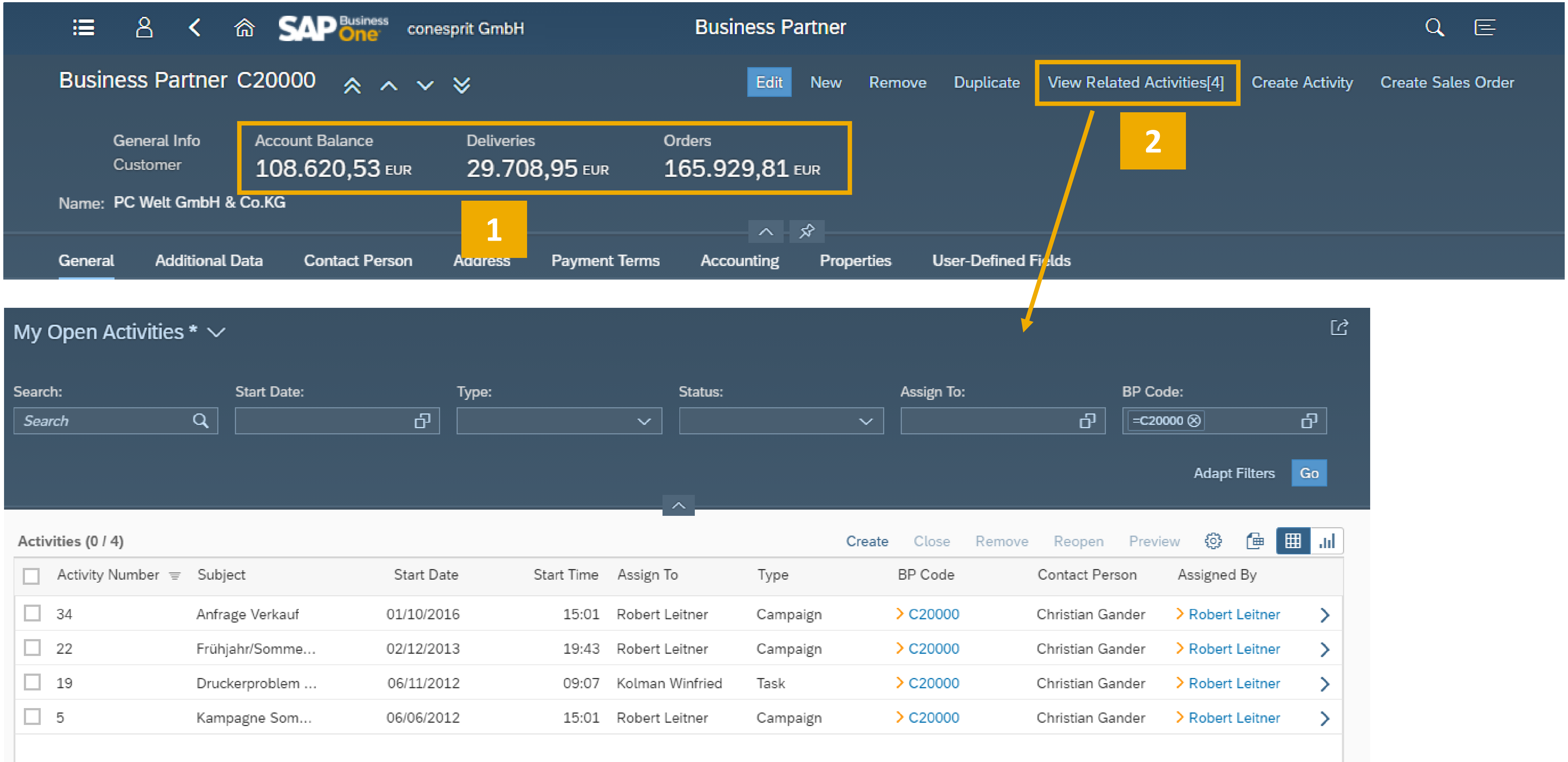
The business partner list can be analyzed according to many saved fields (1). Line, column, bar, stacked column, pie and ring diagrams as well as a heat maps are available for the analysis (2). If the created analysis is used regularly, it can be inserted as a tile into the start page (3).



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.

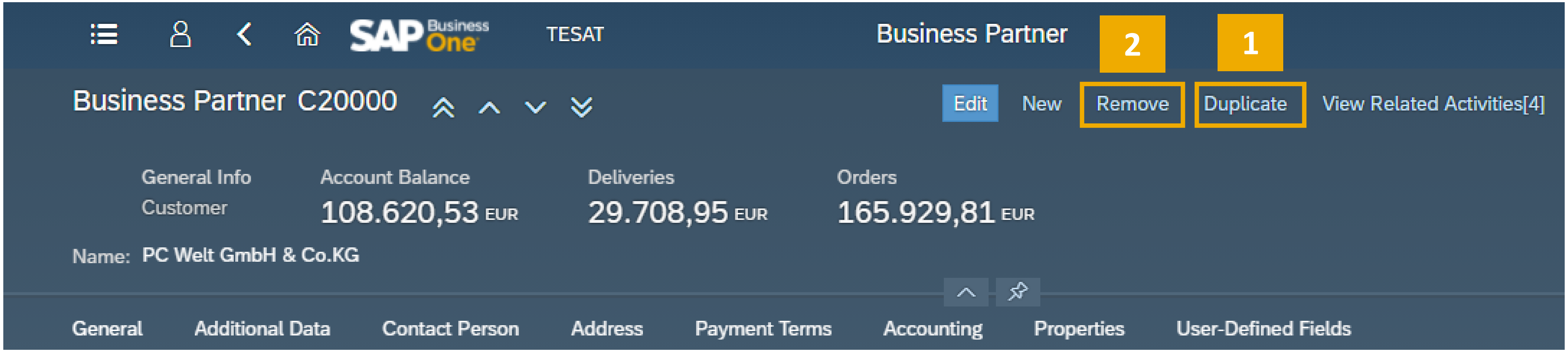
Furthermore, activities can be viewed and created via the BP master data.



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 defined as inactive in the General tab.



Disclaimer of liability

The information in this publication was compiled from data that were assumed to be correct; however, we do not assume any liability or guarantee for the correctness and completeness of the information.

Although we have prepared this publication with care, it cannot be ruled out that it is incomplete or contains errors. The publisher, its managing directors, executives or employees are therefore not liable for the correctness and completeness of the information. Any inaccuracies or incompleteness of the information do not constitute liability, neither for direct nor for indirect damage.

conesprit GmbH
Eduard-Breuninger-Straße 6/1
71522 Backnang
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