

Configuring Excel for SAP Business One

SAP Business One integrates very well with the Microsoft Office suite. However, for SAP Business One to properly export data and launch Microsoft Excel, several options must be selected. The following selections help to automate the export from SAP Business One to Microsoft Excel.

Step 1 – Open Microsoft Excel and edit the Excel Options.

New	Recent Documents
<u>H</u> em	1 Sales By Distributor Dollars and Cases.xls
<u>Open</u>	2 Canada Weekly Case Sales.xlsx
<u>S</u> ave	3 2009 Case Sales per sku (all distributors).xlsx →
Save <u>A</u> s	y ⊲
Open from Office Live	▶:
Save to Office Live	×
Print	×
Pr <u>e</u> pare	k
Sen <u>d</u>	×
P <u>u</u> blish	ks
<u>C</u> lose	

Step 2 – Select and Enter the Trust Center Settings







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cel Options	
Popular Formulas	Help keep your documents safe and your computer secure and healthy.
Proofing	Protecting your privacy
Save	Microsoft cares about your privacy. For more information about how Microsoft Office Excel helps to protect your privacy, please see the privacy statements.
Advanced	Show the Microsoft Office Excel privacy statement
Customize	Microsoft Office Online privacy statement Customer Experience Improvement Program
Add-Ins	Customer Experience Improvement Program
rust Center	Security & more
esources	Learn more about protecting your privacy and security from Microsoft Office Online.
	Microsoft Windows Security Center
	Microsoft Trustworthy Computing
	Microsoft Office Excel Trust Center
	The Trust Center contains security and privacy settings. These settings help keep your computer secure. We recommend that you do not change these settings.
	OK Cance

Step 3 – Select the following Trust Center Settings

Trust Center		? 💌
Trusted Publishers	Macro Settings	
Trusted Locations	For macros in documents not in a trusted location:	
Add-ins	Disable all macros without notification	
ActiveX Settings	 Disable all macros with notification Disable all macros except digitally signed macros 	
Macro Settings	Enable all macros (not recommended; potentially dangerous code can run)	
Message Bar	Developer Macro Settings	
External Content	☑ Trust access to the <u>VBA</u> project object model	
Privacy Options		







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Trusted Publishers	ActiveX Settings for all Office Applications
Trusted Locations	For ActiveX controls in documents not in a trusted location:
Add-ins	Disable all controls without notification
ActiveX Settings	Prompt me before enabling Unsafe for Initialization (UFI) controls with additional restrictions and Safe for Initialization (SEI) controls with minimal restrictions
Macro Settings	Prompt me before enabling all controls with minimal restrictions
Message Bar	Enable all controls without restrictions and without prompting (not recommended; potentially dangerous controls can run)
External Content	
Privacy Options	Safe mode (helps limit the control's access to your computer) Optional

Now select "OK" to save your changes.

SAP Business One should now properly work with Microsoft Excel

- Exporting queries to Excel
- Exporting forms to Excel
- Exporting reports to Excel

* Note, this process must also be followed when enabling XL Reporter.

** If Microsoft Excel still does not properly work with SAP Business One, check the Administration > System Initialization > General Settings > Path tab for the definition of a proper path to the Excel directory.



