

Automations for SAP Business One

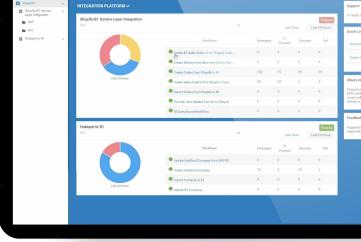
Automate the repetitive, daily tasks that slow your business down.

Manual processes bog down critical resources and prevent you from spending time on strategic initiatives that move the business forward.

Automations for SAP Business One

transforms manual tasks into automated workflows that simplify business operations, prevent costly mistakes, and save precious time.

Each automation delivers specific business outcomes to ensure a strong return on your investment.





Improves cash flow



Saves time on administrative tasks



Increases process efficiency



Eliminates costly mistakes and oversight

Flawless operations. No surprises. Automations for SAP Business One is powered by Saltbox. That means it extends SAP Business One's functionality without compromising system performance or generating intrusive client-side pop-ups.



Automations for



Inventory and Production

Avoid production delays. Reduce administrative work.

Create subassembly work orders automatically.

newly created production orders with subassembly components and automatically creates a new work order component for each one.

This automation scans SAP Business One for

This automation scans SAP Business One for

Keep production cycles moving. Reduce administrative

Change the status of work orders automatically.

them to 'released' so the orders can progress through the production cycle. This automation uses historical sales data and product

production orders with the status 'planned' and changes

Prevent stock shortages and costly surpluses. Eliminate manual min max calculations.

Calculate min max inventory levels automatically.

lead time to calculate min max inventory levels for each item master at regular intervals. Min max levels can be calculated at the item or warehouse levels.

Finance

invoices for service contracts automatically. Close the books faster. Improve cash flow.

Defer revenue and raise recurring

entry to the deferred revenue account. At the end of each month, the automation scans all deferred revenue entries, calculates how much of that liability should be realized as revenue, and creates a new journal entry in the revenue account equal to the proportion of services delivered. A debit is also made to the deferred revenue account.

This automation raises invoices for service contracts per the billing contract schedule and posts a journal

open delivery notes automatically. Always issue timely invoices. Improve cash flow.

Create supplier self-invoices for

Create A/R invoices for

account reviews.

manually.

linked back to the delivery note and sales order. This automation scans SAP Business One for goods issue

and goods issue for production to determine how much

This automation scans SAP Business One for open delivery

notes and creates an A/R invoice for each one. Invoices are

consignment inventory automatically. Eliminate manual inventory counts and invoice creation.

Create liability accruals automatically for

inventory was used since the last A/P invoice was issued to the supplier. SAP Business One then raises a new A/P invoice to the supplier so they can be paid for the items consumed. Multiple goods issues are automatically consolidated onto a single invoice. This automation scans SAP Business One for open service

orders (GRPOs). Save time. Eliminate manual journal entries.

non-inventory and service goods receipt purchase

accrual for the open value of the GRPO. This automation scans SAP Business One for overdue invoices and adds a 'payment overdue' comment to the

customer's account. The account status is then changed to

type and non-inventory goods receipt purchase orders

(GRPOs) and creates a reversing journal entry that posts an

Put customers on hold automatically when payment is overdue. Avoid selling to high-risk customers. Eliminate manual

> 'inactive,' preventing the customer from placing new orders until their outstanding bill is paid.

Sales

Create back-to-back orders automatically. Prevent fulfillment delays and missed orders.

Eliminate manual creation of pick notes.

Create pick notes for open orders automatically. Prevent orders from falling through the cracks.

> creates a pick note so the order can be filled. This automation scans SAP Business One to determine

if there's enough inventory to fulfill new sales orders. If inventory is insufficient: (1) for items flagged as 'buy,'

a purchase order will be raised to the item's preferred

This automation searches SAP Business One for open

inventory levels. If inventory is sufficient, the automation

orders that haven't been sent to pick and checks

Stop creating purchase and production orders

vendor, or (2) for items flagged as 'make,' a production order will be created. This automation scans SAP Business One for new customer quotes and creates a reminder activity for the

Create opportunities from

Create follow-up reminders

Close more deals.

for sales quotes automatically.

This automation scans SAP Business One for new sales quotes, creates a new opportunity for that quote and links the two documents. If an existing quote changes,

the linked opportunity is updated. If an order is attached

to a quote that has been closed, the opportunity status changes to 'won'. If a quote was closed but an order was

account owner to follow up.

sales quotes automatically. Use SAP Business One's pre-built opportunity reports. Improve pipeline visibility, accuracy, and sales forecasting.

> not placed, then the opportunity status changes to 'lost'. **Service**

Avoid booking service calls on lapsed service contracts.

Create A/R invoices for open delivery notes automatically when a service call closes. Invoice every service call upon completion. Avoid billing and payment delays.

Terminate service contracts automatically

Eliminate manual cleanup of service contract data.

when they reach their end date.

delivery notes related to closed service calls and generates an A/R invoice for the open deliveries. Open delivery notes are then closed, and invoices are linked to

This automation searches SAP Business One for open

This automation searches SAP Business One for active

service contracts with lapsed end dates and changes

their status from 'active' to 'expired.'

their service calls and delivery notes.

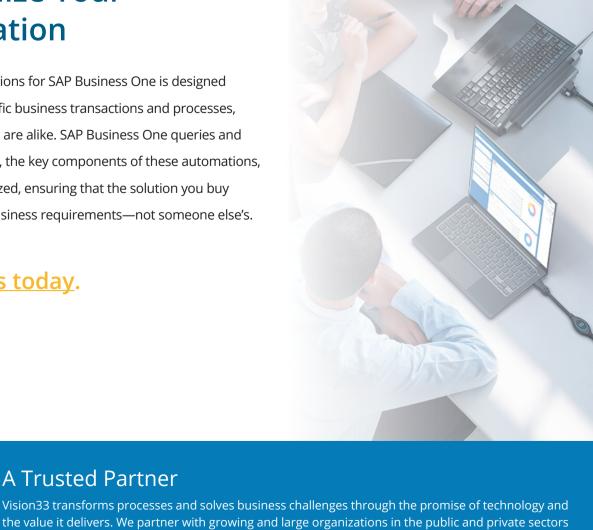
New automations are released every month. Visit our website for the complete list.

Customize Your

Automation

Although Automations for SAP Business One is designed to automate specific business transactions and processes, no two companies are alike. SAP Business One queries and Saltbox workflows, the key components of these automations, are easily customized, ensuring that the solution you buy addresses your business requirements—not someone else's.

Contact us today.





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