In this topic, we will look at how to easily create a new company database and configure common settings for an SAP Business One company, in one simple step using a guided wizard.
Objectives

At the end of this course, you will be able to:

- Create a new SAP Business One company and configure common settings by following an easy to use wizard

At the end of this topic, you will be able to create a new SAP Business One company and configure the common settings by following an easy to use wizard.
Let us look at a business example. This is your first implementation project and you want to make sure that you make the required configuration settings in the correct order. Due to data dependencies, there is a recommended order for initializing a new company.

**Solution:** The Express Configuration Wizard provides a structured, systematic way to configure common settings for a company.

Let us look at a business example. This is your first implementation project and you want to make sure that you make the required configuration settings in the correct order. Due to data dependencies, there is a recommended order for initializing a new company. This should be done before master data is imported. In addition, some initialization settings cannot be altered after you have posted transactions.

**Solution:** You can easily create a new company and configure common settings, using a step-by-step approach provided by the Express Wizard.
The Implementation Center provides a central location for SAP’s configuration and implementation tools.

The Express Configuration Wizard is one of the tools provided in the Implementation Center. The tools are located under the Implementation Tasks menu.

To run any of the tools, the general authorization Administration > System Initialization > Implementation Center > Implementation Tasks is required.
To prepare SAP Business One for use at a company, you must configure various settings, such as accounting, inventory, business partners, users, sales, and purchasing. Due to data dependencies, there is a suggested order for completing the system initialization and setup for a new company.

The individual configuration screens are located under the Administration > System Initialization and Administration > Setup menus.

For less experienced partners, it is often easier to use the Express Configuration Wizard, since the wizard groups the required screens in an easy to use wizard.
To create a new company and configure it in one step, choose the option *New Using Wizard* from the Choose Company screen. Note that you need to enter the site user password whenever you create a new company.
You can also use the wizard to configure an existing company. Open the *Implementation Tasks* screen in the Implementation Center. Choose *Configure Company Settings* from the Implementation Tasks screen.
When you create a new company using the Express Configuration Wizard, the wizard first takes you to the standard company creation screen where you enter the name for the company and database.

If a license is installed, the new company must be for the same localization. If this is a new SAP Business One installation, you can select the Trial Version checkbox. After the 31 day window expires, you can install the license key and apply it to the trial company.

You can choose to copy the user-defined fields, tables and objects from your existing company to the new company. This can be useful when there is a need to create an additional company for the customer’s business.

When you select the localization settings, this activates local tables and functionalities for the new company. You cannot change the localization after the company is created.
SAP Business One is supplied with chart of account templates for the selected localization. If you choose the “template” option, a default chart of accounts will be created automatically based on the localization; and you can edit these accounts as desired. Alternatively you can choose the option “user-defined”. Only the top-level drawers are provided in a user-defined chart of accounts, allowing you to manually add accounts to the drawers. **Note:** You cannot change the chart of accounts option after you have posted transactions in the new company.

You can select the base language, used for the UI display. The display language can be changed at any time, and can be set for each user.

Lastly, you define the posting periods. At a minimum you should define the *initial posting periods* for the first fiscal year. You can define posting periods for subsequent fiscal years after the company is created. **Note:** If you intend to import or post transactions for the previous fiscal year, you must define the posting periods for the previous year before you define the periods for the current year. Once you have defined the periods for the current year you cannot add posting periods for an earlier year.

When you create a new company, the user “manager” is created by default. You supply a password for this user, and you use these credentials to login to the company for the first time. You also need to electronically sign the End-User License Agreement (EULA).
After the new company is created, the wizard guides you through the configuration process steps for configuring the company setup:

- Company Details
- Accounting
- Banking
- Business Partners
- Inventory (Stock)
- Sales and Purchasing
- Users.

Instead of having to select the individual menu items from the Administration menu, the wizard automatically groups related configuration screens together in a step.

The wizard also ensures that you follow the correct sequence for configuring a company, and advises you of any settings that cannot be changed after transactions have been posted for the company.

**Note:** The Express Wizard covers the most common settings needed for a new company. However, you may still need to access the Administration menus to complete the settings for a customer.
In step one, the wizard guides you to configure the company details. The information here is roughly equivalent to information in the menu Administration > System Initialization > Company Details – General tab.

- Company address
- Contact information
In the accounting step, the wizard guides you through the setup for general accounting and perpetual inventory.

There are several screens for accounting setup.

The basic initialization for accounting includes the local currency, system currency, default currency and exchange rate currency. The equivalent configuration menu is Administration > System Initialization > Company Details – Basic Initialization tab.
In the next accounting setup screen you have the option to select a different chart of accounts template. You cannot change the template after postings have been made.

You can enable the advanced G/L account determination feature in this step. You can also enable the use of segmented accounts if available in the localization.

The equivalent configuration menu is Administration > System Initialization > Company Details – Basic Initialization tab.
In the accounting setup step, you can additionally:

- Add G/L accounts
- Select accounts for G/L account determination
- Define additional posting periods
- Set up tax groups and other tax-related information
- Enable fixed assets

In the accounting setup step, you can additionally:

- Add accounts to the chart of accounts. The equivalent configuration menu is **Financials > Chart of Accounts**.
- Select accounts for the G/L account determination. If you selected the chart of accounts as “user-defined”, you need to select the default accounts. The equivalent menu is **Administration > Setup > Financials > G/L Account Determination**. If you enabled advanced G/L account determination, you can set advanced G/L account determination rules from here. You should always review these default accounts with the client accountant before any transactions are posted.
- Define additional posting periods, in addition to the initial posting period defined earlier. This is equivalent to the menu **Administration > System Initialization > Posting Periods**.
- Set up tax-related information. This is equivalent to the menu **Administration > Setup > Financials > Tax**.
- Enable the use of fixed assets and other functionality, depending on localization.

If you enabled fixed assets, you will have the option to define depreciation types and areas and asset classes.
In the final accounting setup screen, you can enable and set up information for perpetual inventory such as the default valuation method. The equivalent configuration screen is Administration > System Initialization > Company Details – Basic Initialization tab.

Here you can also define warehouses and indicate the default warehouse. The Set G/L Accounts By selection is just the default accounting level for new items: warehouse, item group, or item level, and can be overwritten in the item master data. The G/L account determination for inventory postings will be taken from the level specified in the item master data.

On this screen you can select the option to manage inventory stock levels by warehouse.
The banking step in the wizard allows you to enter the details for the house banks and business partner banks. The equivalent configuration menu is Administration > Setup > Banking.

The Banks table holds the country codes and bank codes for the banks that the company deals with.

The House Banks table holds bank and branch information for the bank codes defined in the Banks table.

You can select a default bank account for payments.
The business partners step allows you to define default payment terms and payment methods, dunning terms, and groups for business partners. The equivalent configuration menus are Administration > General Settings – BP tab and Administration > Setup > Business Partners.
In the inventory step, you can define:

- Units of measure and units of measure groups.
- Item groups and inventory cycles. The equivalent configuration screens are found under the menu **Administration > Setup > Inventory**.
- New price lists and item prices in a price list (assuming items exist in the new company). This is equivalent to the menu **Inventory > Price Lists**.
- Bin locations in warehouses.
In the sales and purchasing step, you can configure the common settings for sales and purchasing documents:

- General and per document type settings. This is equivalent to the configuration menus Administration > System Initialization > Document Settings
- Global checkboxes for Permit More than One Document Type per Series and Manage Freight in Documents
- How decimal places are displayed in documents. This is equivalent to the menu Administration > System Initialization > General Settings - Display tab.
- Document numbering series for each document type. The equivalent configuration menu is Administration > System Initialization > Document Numbering. **Note:** Document numbering is covered in detail in a companion topic

You can set the way gross profit is calculated in documents. You can also set up landed costs allocations for purchasing, and stages to define the company’s sales process. The equivalent menus are Administration > Setup > Purchasing > Landed Costs, and Administration > Setup > Sales Opportunities.

You can select fields from documents as reference fields for journal entries. The equivalent menu is Administration > Setup > General > Reference Field Links.
In the users step, you can define user accounts and designate employees as sales employees or buyers. This is equivalent to the administration menus `Administration > Setup > General > Users` and `Administration > Setup > General > Sales Employees/Buyers`.

You can assign user licenses to user accounts - equivalent to the administration menu `Administration > License > License Administration`.

You can grant general authorizations to users - equivalent to the administration menu `Administration > System Initialization > Authorizations`.

You can create master data for the company’s employees - equivalent to the menu `Human Resources > Employee Master Data`. Employee master data is required in order to set up data ownership authorizations.

**Note:** User accounts, licenses and general authorizations are covered in detail in a companion topic.
On completion of the wizard, a baseline configuration report is created. You can view and print this report.

When you make any subsequent configuration changes using the Express Wizard, a new configuration report will be created.

You can access and compare these reports at any time from the Implementation Center menu Administration System > System Initialization > Implementation Center > Configuration Management.

Note that when you make configuration changes outside of the wizard, a configuration report is not created automatically; however, you can save the current configuration as a report from the General tab of the Configuration Management screen.
Demo
The Express Wizard marks with a red exclamation mark (!) any settings and checkboxes that cannot be changed after a transaction has been posted for the company.

You should carefully plan these settings with the customer since you cannot change most of them after you have posted transactions in the company.

These settings are grayed out in the wizard and cannot be changed after transactions are posted:

- Chart of Accounts template
- Local and System Currencies

These checkboxes are grayed out and cannot be changed:

- Display Credit Balance with Negative Sign
- Use Segmentation Accounts (selected localizations)
- Use Perpetual Inventory
- Manage Item Cost per Warehouse
- Use Purchase Accounts Posting System
- Permit More than One Document Type per Series
- Manage Freight in Documents
To complete the configuration for a customer, you can set General Settings. These settings cover a wide range of defaults and initialization parameters for different areas. Choose Administration > System Initialization > General Settings and select the required tab. Note that some localizations may have additional tabs in the General Settings.

- **BP** – You can activate credit checking and approval procedures from this tab.
- **Budget** – You can activate budget management. Once this option is selected, the budget-related functions appear in the Financials module.
- **Services** – Actions specified under this tab are carried out each time the user logs on. These settings are specific to the current user.
- **Display** – You can define the display language and the ‘skin’ for the user, and how dates, numbers, and currencies are displayed. Some settings apply per company, for example, time and date formats, decimal places and character separator.
- **Font & Background** – Set the text, font size and background for the current user from this tab.
General Settings (Cont.)

Administration > System Initialization > General Settings

Tabs cover default and initialization parameters for different areas:

- **Path** – Set the default folder paths for storing images and attachments. You can also set the paths to the server folders for Microsoft Word and Excel templates which are referenced when the user exports a document to Word or Excel. These settings apply to all users.
- **Inventory** – Define defaults for serial and batch numbering, warehouses, and MRP-related information. These settings are updated immediately, per company, for all users.
- **Cash Flow** – Define the global settings for assigning cash flow line items to cash flow relevant transactions.
- **Cockpit** – Enable the cockpit and the display of dashboards at the company level. Note that the cockpit must also be enabled for each user. The dashboard requires the installation of the SAP Business One Integration Component.
- **Cost Accounting** - Set configurations relevant to cost accounting.
- **Pricing** - Define settings related to zero-priced items and inactive price lists.
The Document Settings window contains two tabs: **General** and **Per Document**.

In addition to the settings made in the Express Configuration Wizard, you can also apply settings to a specific type of document. For example:

- For sales orders you can enable automatic checks on the available quantities of items and offer alternate products if necessary. If you enable the “Allow Changes to Existing Orders" checkbox, you cannot change this setting once documents have been posted.
- For purchase orders, you can split a purchase order that relates to more than one warehouse.
This demo will show you the General and Document Settings.
These are the key points from this topic:

- You can create and configure a new company in one step using the Express Configuration Wizard. This can reduce the time needed to configure a company, and makes it possible for a partner to adopt a uniform approach to configuration.
- You can use the wizard to configure common settings instead of navigating through individual configuration screens.
- The wizard guides you through the correct order for configuration and alerts you to irreversible settings.
- You can also run the wizard from the Implementation Center to configure the settings for an existing company.
- After you run the wizard for the first time, the system saves a baseline configuration report. Each time you use the wizard, a new report is created and you can compare the changes.
You have completed the topic for the Express Configuration Wizard.

Thank you for your time!
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