

How To Guide

SAP Business One 9.1

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PUBLIC

How to Package and Deploy SAP Business One Extensions for Lightweight Deployment

All Countries

Typographic Conventions

Type Style	Description
<i>Example</i>	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
Example	Emphasized words or expressions.
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
Example	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
Example	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example>	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
EXAMPLE	Keys on the keyboard, for example, F2 or ENTER.

Document History

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1.0	2014-05-09	First version.

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1 Introduction

This document describes how to manage the lifecycle of your extensions for lightweight deployment.

Extensions that are enabled for lightweight deployment do not have dedicated installers. Instead, the required files are located within a ZIP archive, and installation is performed by the application.

In SAP Business One 9.1, the lifecycle management of the extensions for lightweight deployment is managed end to end by SAP Business One. You do not need to use InstallShield (or equivalent) third party tools.

With this feature, you have the following key benefits:

- Automated life cycle management of extensions without user interaction
- Zero operational down time required for extension deployment
- No administrator privileges required for end users to install the extension

1.1 Overview

The following are the basic steps to managing the lifecycle of your extensions for lightweight deployment:

1. Use the Extension Package tool to package the lightweight binaries into a zip file and generate an add-on registration data (.ard) file containing data about extensions enabled for lightweight deployment in Extensible Markup Language (XML) format.

For more information, see *Packaging Your Extension for Lightweight Deployment*.

Caution

The Extension Package tool is not designed to replace the original Ard Generator tool. This tool is designed for extensions using lightweight deployment only. For extensions that do not use lightweight deployment, use the original tool.

2. Use the SAP Business One Extension Manager to upload the package into SAP Business One and assign companies that run this extension.

For more information, see *Deploying Your Extension for Lightweight Deployment*.

2 Packaging Your Extension for Lightweight Deployment

The Extension Package tool enables you to package your extensions for lightweight deployment.

The Extension Package tool is a component in SAP Business One Software Development Kit. To install the Extension Package tool, you should install SAP Business One Software Development Kit, and select [Tools](#) → [ExtensionPackage](#).

Using the Extension Package tool, you are able to do the following:

- Package your extension for lightweight deployment
- Create an add-on registration data (ARD) file
- Import and edit an existing ARD file

2.1 Packaging Extension Data Files

To package the extension files to a zip file and create a new file containing add-on registration data, do the following:

1. In `...\\SAP\\SAP Business One SDK\\Tools\\ExtensionPackage`, run the `ExtensionPackage.exe` file.
2. In the [Extension Registration Data Generator](#) window, expand [Basic Information](#). Specify the extension name, version, and basic properties of the extension, and the name and contact information of the SAP partner that creates the extension.

For more information, see [Specifying Basic Information](#).

3. Expand [Extension File](#), specify the path of the executable file of your 32-bit or 64-bit add-on, and select the files that should be packaged in the zip file.

To package your app for the version for SAP HANA, specify the app zip file, the name and the package of your app.

Note

The naming convention for your package is `*.*`. For example, if the package hierarchy is `sap.sbo.atp` in SAP HANA, the package name is this, and the corresponding URL will be <https://host:port/sap/sbo/atp>.

4. Expand [Deployment Steps](#), and select the COM dlls to register for your 32-bit or 64-bit add-on.
5. Expand [SBO Compatibility](#), you can specify the versions of SAP Business One with which the add-on is compatible.

For more information, see [Specifying Compatibility Information](#).

6. Expand [Parameters](#); you can optionally specify shared parameters and parameters for the extension.

For more information, see [Specifying Parameters Information](#).

7. Choose the [Package](#) button.
8. In the [Save As](#) window, specify the location where you want to save the file and choose the [Save](#) button.

Note

If you just want to create a new file containing add-on registration data, choose the [Export](#) button, and save the ARD file.

2.2 Editing Existing Add-On Registration Data Files

To edit an existing file containing add-on registration data, do the following:

1. In `...\\SAP\\SAP Business One SDK\\Tools\\ExtensionPackage`, run the `ExtensionPackage.exe` file.
2. In the *Extension Registration Data Generator* window, choose the [Import](#) button.
3. In the *Open* window, locate the file that you want to edit and choose the [Open](#) button.
4. In the *Extension Registration Data Generator* window, expand [Basic Information](#). Specify the extension name, version, and basic properties of the extension, and the name and contact information of the SAP partner that creates the extension.

For more information, see *Specifying Basic Information*.

5. Expand [SBO Compatibility](#); you can specify the versions of SAP Business One with which the add-on is compatible.

For more information, see *Specifying Compatibility Information*.

6. Expand [Parameters](#); you can optionally specify shared parameters and parameters for the extension.

For more information, see *Specifying Parameters Information*.

7. Choose the [Export](#) button.
8. In the *Save As* window, specify the location where you want to save the file and choose the [Save](#) button.

2.3 Specifying Basic Information

The ARD files that you generate using the Extension Package tool contain basic information, which includes the name, version, and basic properties of the extension, and the name and contact information of the SAP partner that creates the extension.

To specify basic information, do the following:

1. In `...\\SAP\\SAP Business One SDK\\Tools\\ExtensionPackage`, run the `ExtensionPackage.exe` file.
2. In the *Extension Registration Data Generator* window, expand [Basic Information](#), and specify the following fields:
 - o [Extension Name](#) – Enter the name of the extension. This field is mandatory.
 - o [Extension Version](#) – Enter the version of the extension for which you want to package and generate the ARD file. This field is mandatory.
 - o [Extension Provider](#) – Enter the name of the SAP partner that creates and owns the extension, for example, the name of your company.
 - o [Extension Namespace](#) – Enter a name for the folder in which SAP Business One places the extension after a user registers the extension in the application.

- o [Supported Database](#) – Specify the database in which the extension works. This field is mandatory.
 - o [Contact Data](#). – Enter contact information for the SAP partner that creates and owns the extension. For example, enter the URL of your company's Website.
3. After specifying the basic information, do either of the following:
- o If you are editing an existing ARD file, choose the [Export](#) button to complete the editing process.
 - o If you are packaging your extension or creating a new ARD file, before exporting the file, you can optionally specify the compatibility information and the parameters information.
- For more information, see [Specifying Compatibility Information](#) and [Specifying Parameters Information](#).

2.4 Specifying Compatibility Information

The files that you generate using the Extension Package tool can contain data about the versions of SAP Business One with which the extension is compatible. This data is optional.

To specify compatibility information, do the following:

1. In ...\[SAP\Business One SDK\Tools\ExtensionPackage](#), run the [ExtensionPackage.exe](#) file.
2. In the [Extension Registration Data Generator](#) window, select the [SBO Compatibility](#) tab.
3. In the [Compatible with SAP Business One](#) area, specify the following:
 - o [Version From](#) – Enter the earliest version of SAP Business One with which the extension is compatible.
 - o [To](#) – Enter the latest version of SAP Business One with which the extension is compatible.



Enter compatible versions of SAP Business One with the format `<xxx.yyy.xx>`, for example, **910.000.00.**



You must select a later version of SAP Business One from the [To](#) dropdown list than the value you select from the [From](#) dropdown list; otherwise, the application encounters an error during export.

4. After specifying the compatibility information, do either of the following:
 - o If you are editing an existing ARD file, choose the [Export](#) button to complete the editing process.
 - o If you are packaging your extension by creating a new ARD file, before you can export the file, you must specify the basic information and you can optionally specify the parameters information.
- For more information, see [Specifying Basic Information](#) and [Specifying Parameters Information](#).

2.5 Specifying Parameters Information

The files that you generate using the Extension Package tool can contain parameters information, which includes shared parameters and parameters properties for the extension. This data is optional.

- **Shared Parameters** - The parameters or configuration required to run the extension. The parameters are shared in all extension instances running on different companies.

- Parameters - The parameters or configurations required to run the extension.

To specify parameters information, do the following:

1. In ...\- 2. In the *Extension Registration Data Generator* window, expand the *Parameters* tab.
- 3. From the navigation menu, select *Shared Parameters*.

In the *Properties* area of the *Shared Parameters* window, click the add icon, and then specify the following:

- o *Name* – Enter the name of a property, which appears on the application user-interface.
- o *Value* – Enter a value for the property, which you can use to customize the extension deployment process.
- o *Description* – Optionally, enter a description for the property.

To add valid values for the property, click the add icon, and then specify the following in the *Valid Values* area:

- o *Display Value* – Enter a name for the valid value, which appears on the application user-interface.
- o *Value* – Enter a value for the valid value, which you can use during the deployment process.

4. To specify additional shared parameters, in the *Properties* area, click the add icon and specify the information from the previous step.
5. From the navigation menu, select *Parameters*.

In the *Properties* area of the *Parameters* window, click the add icon, and then specify the following:

- o *Name* – Enter the name of a property, which appears on the application user-interface.
- o *Value* – Enter a value for the property, which you can use to customize the extension assignment process.
- o *Description* – Enter an optional description for the property.

To add valid values for the property, click the add icon, and then specify the following in the *Valid Values* area:

- o *Display Value* – Enter a name for the valid value, which appears on the application user-interface.
- o *Value* – Enter a value for the valid value, which you can use during the assignment process.

6. To specify additional parameters, in the *Properties* area, click the add icon and specify the information from the previous step.
7. After specifying the parameters information, do either of the following:
 - o If you are editing an existing ARD file, choose the *Export* button to complete the editing process.
 - o If you are packaging your extension by creating a new ARD file, before you can export the file, you must specify the basic information and you can optionally specify the compatibility information.

For more information, see *Specifying Basic Information* and *Specifying Compatibility Information*.

Note

You can use the following UI API code to get and set the shared parameters and parameters.

```
string value =
Application.SBO_Application.Company.GetExtensionProperty(Program.connectionString,
SAPbouiCOM.BoExtensionLCMStageType.lcm_deployment, "SP1");
Application.SBO_Application.MessageBox(value);
Application.SBO_Application.Company.SetExtensionProperty(Program.connectionString,
SAPbouiCOM.BoExtensionLCMStageType.lcm_deployment, "SP1", "Test1");

string value =
Application.SBO_Application.Company.GetExtensionProperty(Program.connectionString,
SAPbouiCOM.BoExtensionLCMStageType.lcm_assignment, "P1");
```

```
Application.SBO_Application.MessageBox(value);
Application.SBO_Application.Company.SetExtensionProperty(Program.connectionString,
SAPbouiCOM.BoExtensionLCMStageType.lcm_assignment, "P1", "TestP1");
```

2.6 Packaging Your Extension in SAP Business One Studio for Microsoft Visual Studio

The SAP Business One Extension Package features are integrated in SAP Business One Studio for Microsoft Visual Studio. If you develop your extension using SAP Business One Studio for Microsoft Visual Studio, you can package your project directly from the menu bar.

To package your project, do the following:

1. Build your project first to get the executable file of your extension.
2. From the menu bar of the Microsoft Visual Studio main window, choose *SAP Business One Studio* → *Extension Package*.
3. In the *Extension Registration Data Generator* window, specify the required information.
For more information, see *Packaging Extension Data Files*.
4. Choose the *Package* button and save the file.

Note

If you are not yet ready to package your extension, you can choose the *Save* button. The information you entered in the *Extension Registration Data Generator* window will be saved in your project. The next time you open the *Extension Registration Data Generator* window, the saved information will be displayed.

For more information about the SAP Business One Studio, see *Working with SAP Business One Studio Suite*.

3 Deploying Your Extension for Lightweight Deployment

The SAP Business One Extension Manager enables you to deploy your extensions for lightweight deployment. The SAP Business One Extension Manager is a component in Server Tools for SAP Business One. To install SAP Business One Extension Manager, you should install SAP Business One Server, and select [Server Tools](#) → [Landscape Management](#) → [Extension Manager](#).

To deploy an extension, perform the following steps:

1. Import the extension to SAP Business One Extension Manager.
2. Assign the extension to companies in SAP Business One Extension Manager.
3. Run the extension in SAP Business One.

3.1 Accessing SAP Business One Extension Manager



Caution

Access to SAP Business One Extension Manager is under SAP Business One user authorization. Only a site user can open it. For more information about site users, see SAP Business One online help.

To access SAP Business One Extension Manager, do the following:

1. In the SAP Business One client, from the [Main Menu](#), choose [Administration](#) → [Add-Ons](#) → [Add-On Administration](#).

The [Add-On Administration](#) window appears.

2. In the [Add-On Administration](#) window, click the [Manage Extensions for Lightweight Deployment](#) hyperlink. A Web browser opens and displays the logon page of System Landscape Directory (SLD).
3. To log on, enter the site user name and password and choose the [Log On](#) button.

The [SAP Business One Extension Manager](#) window appears.



Note

Alternatively, you can access SAP Business One Extension Manager directly from a Web browser on the machine on which the System Landscape Directory (SLD) service is running using the following URL: <https://<hostname>:<port>/ExtensionManager>.

3.2 Importing an Extension

To import your extension to SAP Business One, perform the following steps:

1. In the [SAP Business One Extension Manager](#) window, on the [Extensions](#) tab, choose the [Import](#) button.

- The *Extension Import Wizard* window appears.
- Choose the *Browse* button to locate the zip file of your extension (created in section 2.1), and choose *Upload*. The basic information of the extension appears.
 - Choose *Next* to optionally specify the value of the shared parameters. The shared parameters are the parameters or configuration required to run the extension. The parameters are shared in all extension instances running on different companies. The *Shared Parameters* table displays all shared parameters that are defined in the Extension Package tool when you package your extension. For more information, see *Specifying Parameters Information*.
 - Choose *Next*. On the *Finish* tab, we recommend that you continue to assign this extension to a company. After you click the *Finish import and run the company assignment wizard* hyperlink, the *Company Assignment Wizard* window appears. For more information, see *Assigning an Extension to a Company*.

3.3 Removing an Extension

To remove the imported extensions, perform the following steps:

- In the *SAP Business One Extension Manager* window, choose the *Extensions* tab.
- From the table, select the extension you want to remove.
- Choose the *Remove* button.



Caution

If an extension is assigned to companies, after the removal, the assigned extension will no longer be available.

3.4 SAP Business One Extension Manager - Extensions Tab

The *Extensions* tab displays a list of available extensions with basic information of the extensions. You can import new extensions or remove existing extensions.

SAP Business One Extension Manager, Extensions Tab Fields

Field	Activity/Description
<i>Server</i>	Select the SAP Business One server that is registered in System Landscape Directory (SLD).
<i>Import</i>	Choose the <i>Import</i> button to open the <i>Extension Import Wizard</i> window and import your extension to SAP Business One.
<i>Remove</i>	Removes an imported extension. If an extension is assigned to companies, after the removal, the assigned extension will no longer be available.

Field	Activity/Description
Name	Displays the name of the extension.
Version	Displays the version of the extension.
Provider	Displays the name of the SAP partner that creates and owns the extension.
Parameters	Choose the Edit link to edit the shared parameters that you have specified for the extension.
Force Install	Forces the SAP Business One application to install the extension each time the user on this client logs on to the assigned company. If the extension is already installed, the application does not reinstall it.
Status	Displays the status of the extension.
More Info	Choose the Details link to view the extension details. The extension details contain the compatibility information with SAP Business One, and the extension component information if the extension is an app for the version for SAP HANA.

3.5 Assigning an Extension to a Company

Use one of the following two ways to assign an extension to a company:

- o Run the company assignment wizard
- o Run the extension assignment wizard

Running the Company Assignment Wizard

1. In the last step of the [Extension Import Wizard](#) window, choose the [Finish import and run the company assignment wizard](#) hyperlink.
The [Company Assignment Wizard](#) window appears.
2. From the [Specify Company](#) tab, select a company to which you want to assign this extension, and choose [Next](#).
3. Optionally, from the [Specify Parameters](#) tab, specify the value of the parameters and choose [Next](#).
The parameters are the parameters or configuration required to run the extension. The parameters are specific for the extension in this company.
The [Parameters](#) table displays all parameters that are defined in the Extension Package tool when you package your extension.
For more information, see [Specifying Parameters Information](#).
4. From the [Specify Setup Mode](#) tab, select the default startup mode of this extension, specify the user preferences, and choose [Next](#).
 - o [Default Startup Mode](#): The default startup mode determines how the extension is launched for all users that are connected to the company.
 - o [Automatic](#) - SAP Business One starts the extension automatically. Users can stop automatically started add-ons with no impact on SAP Business One. A warning message informs users when the extension stops.

- *Manual* - SAP Business One does not start the extension automatically. Users can start the extension at any time. A message informs users when a manually started extension is stopped.
 - *Mandatory* - SAP Business One starts the extension automatically. The extension is necessary for the successful operation of the SAP Business One application. The application launches the extension at start-up and shuts it down if the extension is terminated for any reason. Users cannot start or stop mandatory extensions.
 - *Disabled* - The extension is disabled.
 - *User Preferences*: All users are displayed in the *User Preferences* table, letting you set preferences for users in the company.
 - *Default* - User preferences for the extension come from the company preferences.
 - *Automatic* - SAP Business One starts the extension automatically. Users can stop automatically started extensions with no impact on SAP Business One.
 - *Manual* - SAP Business One does not start the extension automatically. Users can start the extension at any time.
 - *Disabled* - The extension is disabled for the selected user.
5. On the *Finish* tab, if you want to assign another extension, click the *Run the company assignment wizard again* hyperlink, and you can repeat the steps to assign the extension to another company.
 6. Choose *Finish* to close the *Company Assignment Wizard* window.
 7. To check the assigned extensions in a company, in the *SAP Business One Extension Manager* window, choose the *Company Assignment* tab. From *Company List*, select the company and check whether the extension is available.

Running the Extension Assignment Wizard

1. In the *SAP Business One Extension Manager* window, choose the *Company Assignment* tab.
2. From *Company List*, select the company to which you want to assign extensions.
3. In the *Extensions* area, choose *Assign*.
The *Extension Assignment Wizard* window appears.
4. On the *Specify Extension* tab, select an extension that you want to assign to this company, and choose *Next*.
5. Optionally, on the *Specify Parameters* tab, specify the value of the parameters, and choose *Next*.
The parameters are the parameters or configuration required to run the extension. The parameters are specific for the extension in this company.
The *Parameters* table displays all parameters that are defined in the *Extension Registration Data Generator* tool when you package your extension.
For more information, see *Specifying Parameters Information*.
6. From the *Specify Setup Mode* tab, select the default startup mode of this extension and specify the user preferences, and choose *Next*.
 - *Default Startup Mode*: The default startup mode determines how the extension is launched for all users that are connected to the company.
 - *Automatic* - SAP Business One starts the extension automatically. Users can stop automatically started add-ons with no impact on SAP Business One. A warning message informs users when the extension stops.
 - *Manual* - SAP Business One does not start the extension automatically. Users can start the extension at any time. A message informs users when a manually started extension is stopped.

- o *Mandatory* - SAP Business One starts the extension automatically. The extension is necessary for the successful operation of the SAP Business One application. The application launches the extension at start-up and shuts it down if the extension is terminated for any reason. Users cannot start or stop mandatory extensions.
 - o *Disabled* - The extension is disabled.
 - o *User Preferences*: All users are displayed in the *User Preferences* table, letting you set preferences for users in the company.
 - o *Default* - User preferences for the extension come from the company preferences.
 - o *Automatic* - SAP Business One starts the extension automatically. Users can stop automatically started extensions with no impact on SAP Business One.
 - o *Manual* - SAP Business One does not start the extension automatically. Users can start the extension at any time.
 - o *Disabled* - The extension is disabled for the selected user.
7. On the *Finish* tab, if you want to assign another extension, click the *Run the extension assignment wizard again* hyperlink, and repeat the steps to assign other extensions to this company.
 8. Choose *Finish* to close the *Extension Assignment Wizard* window.

3.6 Unassigning an Extension from a Company

To unassign an extension from a company, perform the following steps:

1. In the *SAP Business One Extension Manager* window, choose the *Company Assignment* tab.
2. From *Company List*, select the company for which you want to modify the extensions assignments.
3. In the *Extensions* area, select the extension.
4. Choose *Unassign*.

Note

After you unassign an extension from a company, the extension is still available in the server side, and therefore, you can still assign the extension to other companies.

Note

You can also disable an extension by deselecting the *Enabled* checkbox in the *Extensions* area. If an extension is disabled, when you open the SAP Business One client, the extension is not loaded.

3.7 SAP Business One Extension Manager - Company Assignment Tab

The *Company Assignment* tab displays a list of available companies. Choosing a company from the list lets you see the basic information of the company and the extensions assigned to it. You can assign new extensions to or unassign existing extensions from the company.

SAP Business One Extension Manager, Company Assignment Tab Fields

Field	Activity/Description
<i>Server</i>	Select the SAP Business One server that is registered in System Landscape Directory (SLD).
<i>Company List</i>	List all companies that are connected to the server. Choose a company from the list to assign or unassign extensions.
<i>Database Name</i>	Displays the name of the company database.
<i>Company Name</i>	Displays the name of the company.
<i>Version</i>	Displays the version of SAP Business One.
<i>Extensions</i>	Displays the basic information of the extensions: <ul style="list-style-type: none">• <i>Assign</i>: Choose the <i>Assign</i> button to open the <i>Extension Assignment Wizard</i> window and assign your extension to the company.• <i>Unassign</i>: Choose the <i>Unassign</i> button to unassign an extension from a company.• <i>Name</i>: Displays the name of the extension.• <i>Version</i>: Displays the version of the extension.• <i>Provider</i>: Displays the name of the SAP partner that creates and owns the extension.• <i>Enabled</i>: By default, this checkbox is selected. You can disable an extension by deselecting the <i>Enabled</i> checkbox. If an extension is disabled, it is not loaded when you open the SAP Business One client.• <i>Settings</i>: Choose the <i>Edit</i> link to edit the shared parameters and the startup mode that you have specified for the extension.• <i>Status</i>: Displays the status of the extension.

3.8 Running the Extension in SAP Business One

After you assign the extension to a company, the SAP Business One client automatically loads the extension program the next time you log on to the company.

The extension is started based on the company preferences and user preferences you set in SAP Business One Extension Manager.

SAP Business One starts the extension automatically if you set the preference to *Automatic*.

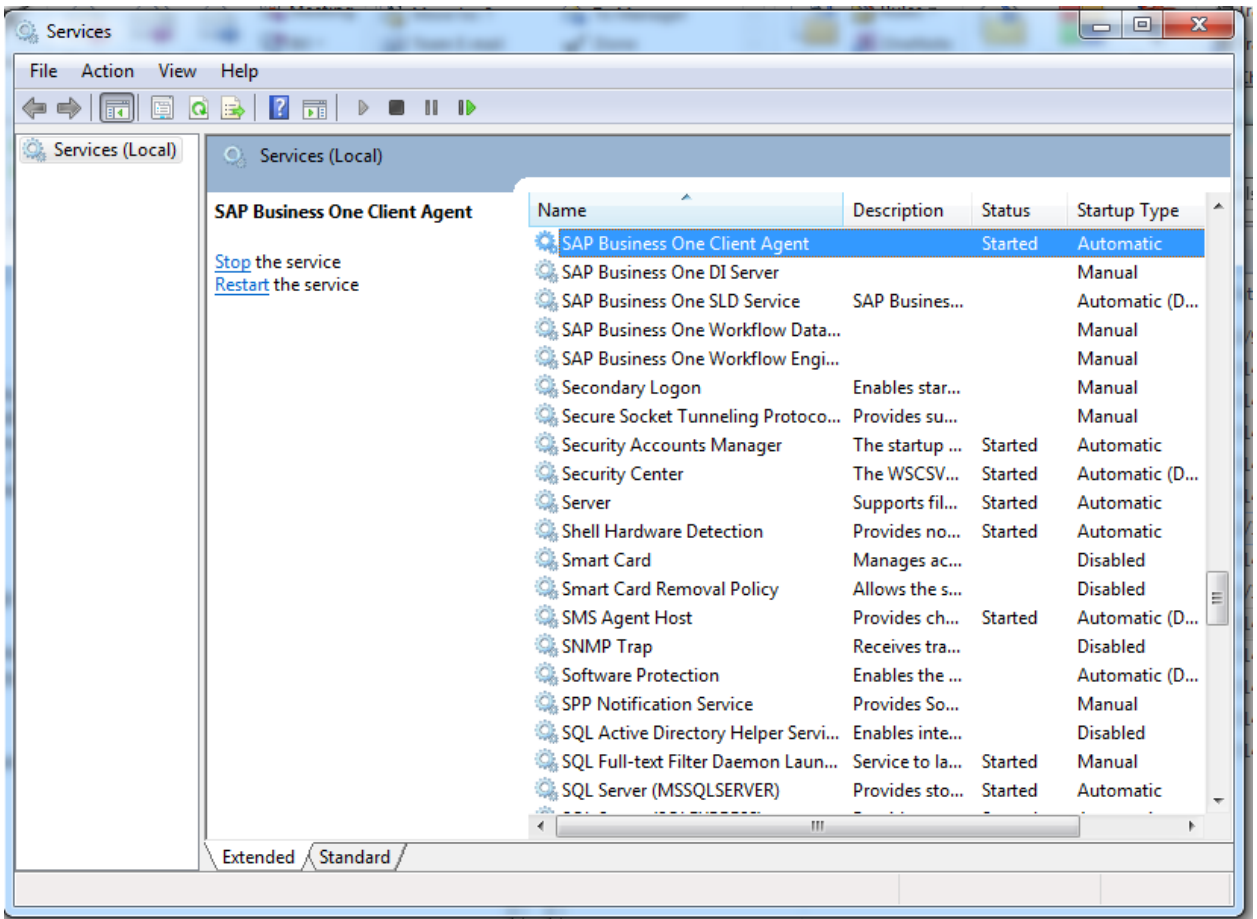
To manually start the extension, perform the following steps:

1. From the SAP Business One *Main Menu*, choose *Administration* → *Add-Ons* → *Add-On Manager*.
2. On the *Installed Add-Ons* tab, select the relevant extension and choose the *Start* button.
SAP Business One starts the add-on and sets the status to *Connected*.
3. To close the *Add-On Manager* window, choose the *OK* button.

 **Caution**

If you have stopped the *SAP Business One Client Agent* service, you must restart it before the application installs the extension.

If the service is stopped and you are not running the SAP Business One client as administrator, the extension will fail to load.



4 Upgrading Your Extension for Lightweight Deployment

To upgrade your extension for lightweight deployment, perform the following steps:

1. Package the higher version extension files in the Extension Package tool.

For more information, see *Packaging Extension Data Files*.

Note

When you package a higher version extension, make sure that you specify the same *Extension Name* and the same *Extension Provider*, and a higher *Extension Version*.

2. Import the higher version extension zip file into SAP Business One Extension Manager.

For more information, see *Importing an Extension*.

3. Assign the extension to a company in SAP Business One Extension Manager.

This step is optional. If you have already assigned the lower version to a company, you do not need to perform this step.

For more information, see *Assigning an Extension to a Company*.

Once the extension is assigned to a company, SAP Business One automatically loads the higher version extension program the next time you log on to the company. The lower version extension is automatically uninstalled.

4. Run the extension in SAP Business One client.

For more information, see *Running the Extension in SAP Business One*.



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