

# Easy Start to SAP Business One 9.1



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# Document History

The following table provides an overview of the most important document changes.

Version	Date	Description
1.0	2014-04-22	Final

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# 1 Introduction

This document helps you get started with the SAP Business One application.

**Checklists** guide you through the following key tasks:

- Preparing to install SAP Business One
- Installing SAP Business One
- Obtaining a license key for SAP Business One
- Updating SAP Business One
- Getting support

These checklists contain multiple references to the following **Web sites**:

Table 2: Web Site References

Portal Name	URL	Access
SAP Business One Customer Portal	<a href="http://service.sap.com/smb/sbocustomer">service.sap.com/smb/sbocustomer</a>	To gain access to the SAP Business One Customer Portal, you need an Internet connection, an S-user identification, and a password. If you do not have an S-user, contact your partner.  Partners can request S-user IDs and passwords for customers and users at <a href="http://sappartneredge.com">sappartneredge.com</a> by choosing <a href="#">► Partnership</a> <a href="#">► Manage</a> <a href="#">► Manage my Partnership</a> <a href="#">►</a> .

Portal Name	URL	Access
SAP Business One area of sappartneredge.com	<a href="http://sappartneredge.com">sappartneredge.com</a> When accessing sappartneredge.com for the first time, SAP Business One partners should make sure to select SAP Business One in their profile to ensure they get the latest information about SAP Business One right on their home page.	To gain access to the SAP Business One area on sappartneredge.com, you must be an SAP partner. You also need an Internet connection, an S-user identification, and a password. SAP automatically creates an S-user ID plus password for a new partner. As a partner, you can have additional S-user identifications and passwords generated for partner employees, as follows: <ol style="list-style-type: none"> <li>1. Go to <a href="http://sappartneredge.com">sappartneredge.com</a>.</li> <li>2. Click <i>Partner Login</i> under sappartneredge.com.</li> <li>3. Click ► <i>Partnership</i> ► <i>Manage</i> ► <i>Manage My Partnership Application</i> ►</li> <li>4. Click the <i>Access</i> button.</li> <li>5. Select the <i>Contacts</i> tab.                The <i>Own Contacts</i> window appears, in which you can create new S-users. For more information, use the navigation bar on the left.</li> </ol>
SAP Business One entry point to SAP Community Network	<a href="http://scn.sap.com/community/business-one">scn.sap.com/community/business-one</a>	Access to SAP Community Network is granted via user ID and password. Anyone may become a member of this community.

The **Web sites** in the table above are free of charge.

For more information about using these **Web sites**, see the section *Learning More About SAP Business One*.

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## 2 Before Installing SAP Business One

1. Familiarize yourself with the contents of the SAP Business One software packages:
  - Full product (DVD or download)
  - Upgrade (download only)
2. Check the hardware and software requirements. Ensure that your system meets the hardware and software requirements by reading the **platform support** information:

### Procedure for Customers

1. Go to [service.sap.com/smb/sbocustomer/documentation](http://service.sap.com/smb/sbocustomer/documentation).
2. On the left, click *Release Family 9.0*.
3. Expand the *System Administration* section.
4. Click *Hardware Requirements Guide for SAP Business One*.

### Procedure for Partners

Go to [sappartneredge.com](http://sappartneredge.com), and search for *Hardware Requirements Guide for SAP Business One*.

# 3 Installing SAP Business One

If you are installing SAP Business One for the first time, follow these steps.

## ➔ Recommendation

We recommend that you work closely with your partner when performing this task.

1. Read the *SAP Business One Administrator's Guide*, including the information that is specific to your database and operating system platforms. If you are a partner, go to [sappartneredge.com](http://sappartneredge.com), and search for the *Platform Support Matrix for SAP Business One*.

You can find the *SAP Business One Administrator's Guide* on the SAP Business One DVD as well as on the documentation pages of SAP Business One Customer Portal at [service.sap.com/smb/sbocustomer/documentation](http://service.sap.com/smb/sbocustomer/documentation) and at [sappartneredge.com](http://sappartneredge.com), by searching for *SAP Business One Administrator's Guide*. This guide is release-specific.

2. Install SAP Crystal Reports, version for the SAP Business One application.

One designer license is provided free of charge with SAP Crystal Reports. For more information, see the *Software Use Rights* document at [www.sap.com/corporate-en/our-company/agreements/index.epx](http://www.sap.com/corporate-en/our-company/agreements/index.epx).

For information about how to install SAP Crystal Reports, see the documentation on the SAP Crystal Reports CD (shipped together with the SAP Business One DVD).

3. Install the database server: **Microsoft SQL Server 2008**, or **Microsoft SQL Server 2008 R2**.
4. Initialize the database server.
5. Install SAP Business One.

For detailed installation instructions, see the *SAP Business One Administrator's Guide*.

To download SAP Business One from the software distribution center in SAP Service Marketplace, proceed as follows:

1. Go to [service.sap.com/sbo-swcenter](http://service.sap.com/sbo-swcenter).
2. To download an entire software package, expand *SAP Business One Products* in the navigation panel, and click *Installations*.

## i Note

If you experience problems during the installation, send an incident to SAP in the following way:

1. Go to the SAP Business One product area at [sappartneredge.com](http://sappartneredge.com) and choose the *Support* tab.
2. In the left navigation panel, click *Partner Support Dashboard*.
3. Use *SAP Incident Wizard* to create the incident, and then assign it to the component **SBO-CRO-SUP**.

6. Configure the services that you have installed as part of your post-installation activities. For more information, see the *SAP Business One Administrator's Guide*.



## 4 Obtaining a License Key

To use SAP Business One in accordance with your contract, you are required to implement a license key assigned by SAP. For new installations, the system can be used for a period of 31 days without a license key. After that period, SAP Business One will not run.

Each license key is valid for a specific release, and localization of SAP Business One.

Partners can find information about SAP Business One license mechanisms, license comparisons, and license ordering in the *License Guide for SAP Business One*. This document is available on the SAP Business One DVD, and at [sappartneredge.com](http://sappartneredge.com) (search for *License Guide for SAP Business One*).

### ➔ Recommendation

Request the license key immediately after installing the system.

### i Note

The license manager must be running before you can access its settings in the *SAP Business One Service Manager* window, or import a license key.

To obtain a license key, follow these steps:

1. Locate your SAP Business One hardware key.

Do one of the following:

- Start SAP Business One and choose **► Help ► About SAP Business One**.

The hardware key is displayed.

- In the *SAP Business One Service Manager* window, select *License Manager* from the dropdown list, and choose the *Settings* button. If necessary, in the *General Settings* window, enter your server name and choose *Connect*.

The hardware key is displayed.

2. Send the hardware key to your SAP Business One partner (unless you wish to request the license key yourself).
3. Request the license key.

This task is normally performed by the partner, but it can be done by the customer.

#### Procedure for Customers

1. Go to [service.sap.com/smb/sbocustomer](http://service.sap.com/smb/sbocustomer).
2. From the *Workbench* navigation panel on the left, select *License Key*.
3. Follow the instructions provided on the Web page.

The license key is available in SAP Business One Customer Portal within one hour, and will also be sent to you by e-mail within three days.

If your hardware key or the number of users has changed, you must request a license key for an existing system.

For more information, see SAP Note [578256](#). For information about deleting or returning SAP Business One licenses, see SAP Note [614911](#).


#### Procedure for Partners

1. Check which activities each license user type may perform in the *License Comparison Chart for SAP Business One*.
2. Go to the SAP Business One product area at [sappartneredge.com](http://sappartneredge.com) and click on "License Key Request".

3. Choose the *Request License Key* button.
4. Follow the instructions provided on the Web page.  
The license key will be available in [sappartneredge.com](http://sappartneredge.com) within one hour, and will also be sent to you by e-mail within three days.
4. Install the license key.

After receiving the license key, import the license file using one of the following methods:

#### Importing the License File with Server Tools

1. Open SAP Business One Service Manager by choosing **Start** > *All Programs* > *SAP Business One* > *Server Tools* > *Service Manager*.
2. In the *SAP Business One Service Manager* window, select *License Manager* in the *Service* field, and choose the *Settings* button.  
The *General Settings* window appears.
3. In the *License Server* field, enter the computer name or IP address of the machine on which the server tools were installed.
4. Choose the  (*Browse*) button and select the license key file (a **.txt** file that you received from SAP).
5. Choose the *Import License File* button.
6. Choose the *OK* button.

#### Importing the License File into the SAP Business One Application

1. In the SAP Business One *Main Menu*, choose **Administration** > *License* > *License Administration*.
2. In the *License Administration* window, choose the *Import License File* button.
3. In the *Select License File* window, select the .txt file you received from SAP and choose the *Open* button.
4. In the dialog box, choose the *OK* button.

## 5 Updating SAP Business One

If you are installing a **patch** for an existing installation, or if you are **upgrading** to a newer release, follow these steps.

### **i** Note

The following information is relevant for partners only.

1. Keep informed about new patches by subscribing to our notification service.

You can receive patch notifications through one of the following:

- Your mailbox – for example, on your Blackberry
- Your feed reader application
- A Microsoft Windows sidebar gadget

To obtain the gadget, go to [service.sap.com/~sapidp/011000358700001514812008E/Patch\\_Updates.zip](http://service.sap.com/~sapidp/011000358700001514812008E/Patch_Updates.zip).

For more information, search for “SAP Business One Delivered Patches” at [sappartneredge.com](http://sappartneredge.com).

2. Download the SAP Business One patch or upgrade package from SAP Service Marketplace, as follows:
  1. Go to the SAP Business One software distribution center in SAP Service Marketplace at [service.sap.com/sbo-swcenter](http://service.sap.com/sbo-swcenter).
  2. To download a patch or an upgrade, click SAP Business One Products in the left navigation panel, and choose *Updates*.
  3. Navigate to and select the relevant download object.
  4. Before starting the download, read the *Info* file for the selected download object.
  5. Before you start an upgrade, read the section *Upgrading SAP Business One* in the *SAP Business One Administrator's Guide* (part of the update package).

### **i** Note

If you experience problems when downloading software, send an incident to SAP as follows:

1. Go to the SAP Business One support center at [sappartneredge.com](http://sappartneredge.com).
2. In the left navigation panel, click *Partner Support Dashboard*.
3. Use *SAP Incident Wizard* to create the incident and assign it to the component **SBO-CRO-SUP**.
6. Perform the upgrade using the SAP Business One upgrade wizard. For more information, see the *SAP Business One Administrator's Guide*.

## 6 Getting Support

1. To have SAP analyze your system remotely for bottlenecks and other issues, use the remote support platform for SAP Business One.

For more information, see the remote support platform documentation on the SAP Business One DVD. If you are a partner, you can also go to the SAP Business One Product area at [sappartneredge.com](http://sappartneredge.com) and choose **► Support ► Remote Support Platform** .

2. If you have a consulting-related or “how-to” question about SAP Business One, use the SAP Community Network forums, and the knowledge and resources available in this collaborative environment, to achieve a resolution. Certain country-specific forums are also available.

Do not use this channel to report bugs or product-related issues.

3. Access the SAP Business One area on the SAP Community Network at [scn.sap.com/community/business-one](http://scn.sap.com/community/business-one). If you encounter a product-related error, search for a solution to known problems as follows:

### Procedure for Customers

1. Go to SAP Business One Customer Portal at [service.sap.com/smb/sbocustomer](http://service.sap.com/smb/sbocustomer).
2. In the left *Workbench* panel, click *Find Solution*.
3. Conduct your search by entering either an SAP Note number or a search term.

### Procedure for Partners

1. Go to the SAP Business One support center at [sappartneredge.com](http://sappartneredge.com).
2. In the right panel under *Supporting SAP Business One*, click *SAP Business One Notes*.
3. Conduct your search by entering either an SAP Note number or a search term.
4. If you still need help, look for guidance in the following areas:
  - Forums
  - Root cause analysis guides
  - Documentation resource center
  - Online help
  - Support self help and library
  - Self help
4. If you cannot find a suitable solution to a product-related problem, create an incident:

### Procedure for Customers

1. Go to SAP Business One Customer Portal at [service.sap.com/smb/sbocustomer](http://service.sap.com/smb/sbocustomer).
2. In the left *Workbench* panel, click *Contact Support* and follow the online instructions. Your incident is routed to the predefined support organization (partner or SAP).

### Procedure for Partners

1. Go to the SAP Business One support center at [sappartneredge.com](http://sappartneredge.com).
2. In the left navigation panel, click *Partner Support Dashboard*.
3. Use *SAP Incident Wizard* to document your issue in detail, and submit it to SAP Business One product support.

# 7 Learning More About SAP Business One

Use the following sources to acquire knowledge about the SAP Business One application.

## **i** Note

This section is aimed primarily at partners.

## 7.1 Last Updates

For more information about last updates, see the following documents:

- *Readme* file  
Note that the *Readme* file is located on the DVD, or in the download package (installation package, upgrade package, or patch file).
- SAP Notes (see below)

## 7.2 Documentation

A wide range of documentation, including context-sensitive online help and printable documents, is available from the installed SAP Business One application.

You can also find the documentation in the documentation folder on your SAP Business One DVD, or download package.

## **i** Note

To read some of the documentation supplied with SAP Business One, you must have Adobe Acrobat Reader 5.0.5 or higher installed on your computer. To obtain Adobe Acrobat Reader from the Internet, free of charge, go to [adobe.com/products/acrobat/readstep.html](http://adobe.com/products/acrobat/readstep.html).

To visit the *Documentation* pages in SAP Business One Customer Portal, go to [service.sap.com/smb/sbocustomer/documentation](http://service.sap.com/smb/sbocustomer/documentation).

## 7.3 Training Courses

Ask your SAP Business One partner about training courses. To visit the *Education* pages in SAP Business One Customer Portal, go to [service.sap.com/smb/sbocustomer/education](http://service.sap.com/smb/sbocustomer/education).

## 7.4 SAP Notes

See the following SAP Notes for SAP Business One 9.1:

- SAP Business One 9.1 Overview Note – [2001307](#)
- Collective SAP Note for 9.1 upgrade issues – [2004987](#)

## 7.5 Communities

**SAP Community Network** is a public online community for all SAP users, partners, consultants, and developers, to share their experience and knowledge, to network, and to co-innovate in a robust and highly collaborative environment.

To navigate directly to areas of SAP Community Network relevant to SAP Business One, use the links in the following table:

Table 3: Communities

Area	URL	Description
Discussion Forums	<a href="http://wiki.scn.sap.com/wiki/display/B1/SAP+Business+One+Forums">wiki.scn.sap.com/wiki/display/B1/SAP+Business+One+Forums</a>	Questions and answers on consulting-related topics, such as “how-to” questions. Some country-specific forums are available.
Blogs	<a href="http://scn.sap.com/community/business-one/blog">scn.sap.com/community/business-one/blog</a>	Blogs are written by experts who want to share their knowledge and ideas, or explain their own personal tips and tricks.
Wiki	<a href="http://wiki.scn.sap.com/wiki/display/B1/SAP+Business+One">wiki.scn.sap.com/wiki/display/B1/SAP+Business+One</a>	An A-Z collection of information articles related to SAP Business One. The articles can be created or edited by anybody. An entry point to other SAP Business One spaces within SAP Community Network is provided through the navigation bar on the right.
Submit Your Ideas	<a href="http://cw.sdn.sap.com/cw/community/ideas/sme/b1">cw.sdn.sap.com/cw/community/ideas/sme/b1</a> or <a href="http://ideas.sap.com/ct/s.bix?c=5E7C8A57-8FB9-4C04-9571-9B61022802BA">ideas.sap.com/ct/s.bix?c=5E7C8A57-8FB9-4C04-9571-9B61022802BA</a>	Take advantage of the opportunity to participate in the development of future SAP Business One releases by sharing your ideas, and voting on those already proposed.
Downloads for Developers	<a href="http://scn.sap.com/community/downloads">scn.sap.com/community/downloads</a>	A repository of SAP Business One-related resources, stored according to category. An entry point to other SAP Business One spaces within SAP Community Network is provided through the navigation bar on the right.

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You can also work with other SAP partners in SAP PartnerEdge Interactive, which is an online community dedicated for SAP partners to share, connect and collaborate. Access SAP PartnerEdge Interactive at [scn.sap.com/community/partneredge-interactive](https://scn.sap.com/community/partneredge-interactive).

# Typographic Conventions

Example	Description
<Example>	Angle brackets indicate that you replace these words or characters with appropriate entries to make entries in the system, for example, "Enter your <User Name>".
▶ Example ▶ Example ▸	Arrows separating the parts of a navigation path, for example, menu options
<b>Example</b>	Emphasized words or expressions
<b>Example</b>	Words or characters that you enter in the system exactly as they appear in the documentation
<a href="http://www.sap.com">www.sap.com</a>	Textual cross-references to an internet address
<a href="#">/example</a>	Quicklinks added to the internet address of a homepage to enable quick access to specific content on the Web
<a href="#">123456</a>	Hyperlink to an SAP Note, for example, SAP Note <a href="#">123456</a>
<i>Example</i>	<ul style="list-style-type: none"> <li>• Words or characters quoted from the screen. These include field labels, screen titles, pushbutton labels, menu names, and menu options.</li> <li>• Cross-references to other documentation or published works</li> </ul>
Example	<ul style="list-style-type: none"> <li>• Output on the screen following a user action, for example, messages</li> <li>• Source code or syntax quoted directly from a program</li> <li>• File and directory names and their paths, names of variables and parameters, and names of installation, upgrade, and database tools</li> </ul>
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, database table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE
EXAMPLE	Keys on the keyboard



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