



Biz.ONE Conference

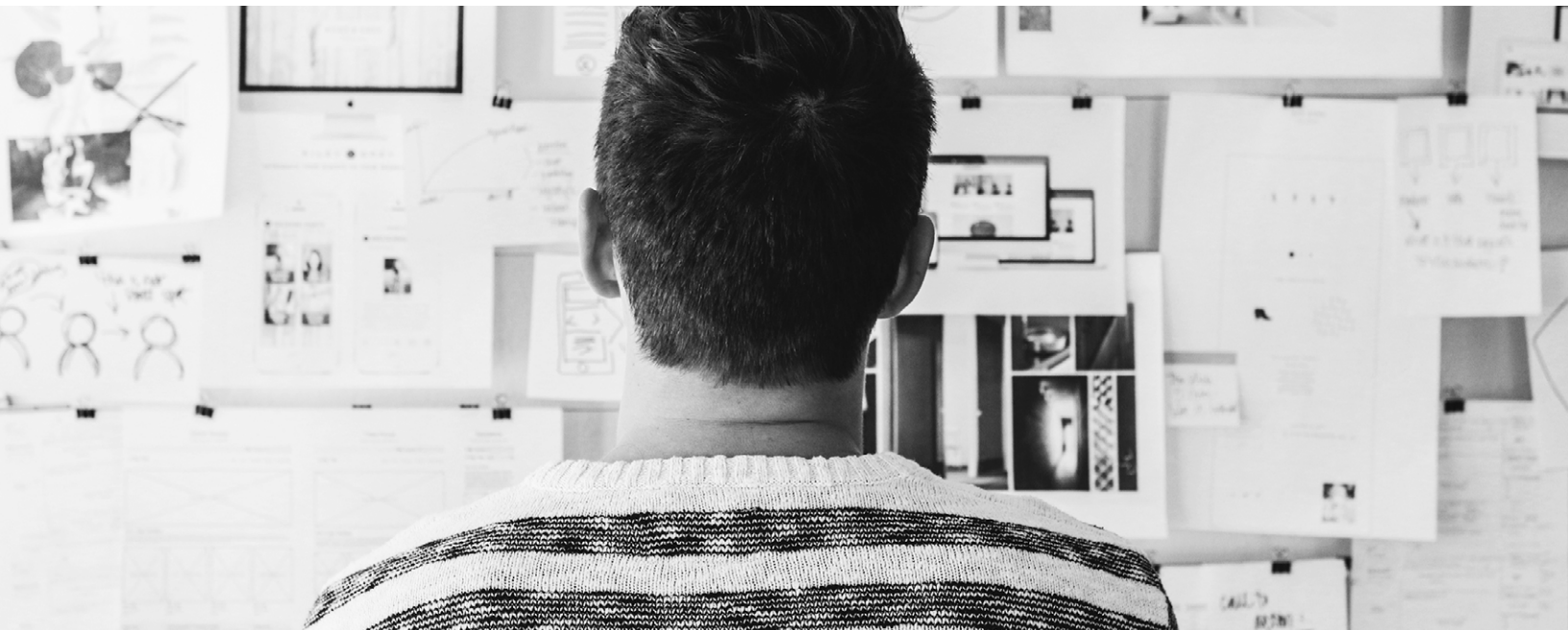
Where the SAP Business One Ecosystem Ignites

October 22-24
2018

Omni Resort at ChampionsGate
Orlando, FL

Hot Topics
Research Report

eventful
CONFERENCES



Where the **SAP Business One** Ecosystem Ignites

In year two of our research, the Biz.ONE team at Eventful Conferences spent over 5 months conducting extensive customer-rich interviews and focus groups on the experience of SAP Business One users. We've compiled that research and refined it into the following report. In doing so, we've uncovered areas where users are looking for more training and education. SAP Business One users are looking to maximize their investment by accomplishing more as the needs of their businesses evolve. Many of these areas are primed for additional training and are interconnected with various modules within Business One.

Driven by this research and as the largest user conference for SAP Business One in the world, Biz.ONE is the **best place to learn** how to maximize the investment you've made into technology for your business. It is the premier event where people unlock their biggest issues. Where questions get asked and answered. Where your Business One peers come together to fuel new ideas – where the ecosystem ignites.

We are excited to share our finalized blueprint for the upcoming Biz.ONE Conference taking place in Orlando, FL on October 22-24. Last year, we raised the bar with the rebranded and reimagined Biz.ONE. This year, we'll pick up right where we left off and help the community of Business One users to realize even greater return on their technology investments.

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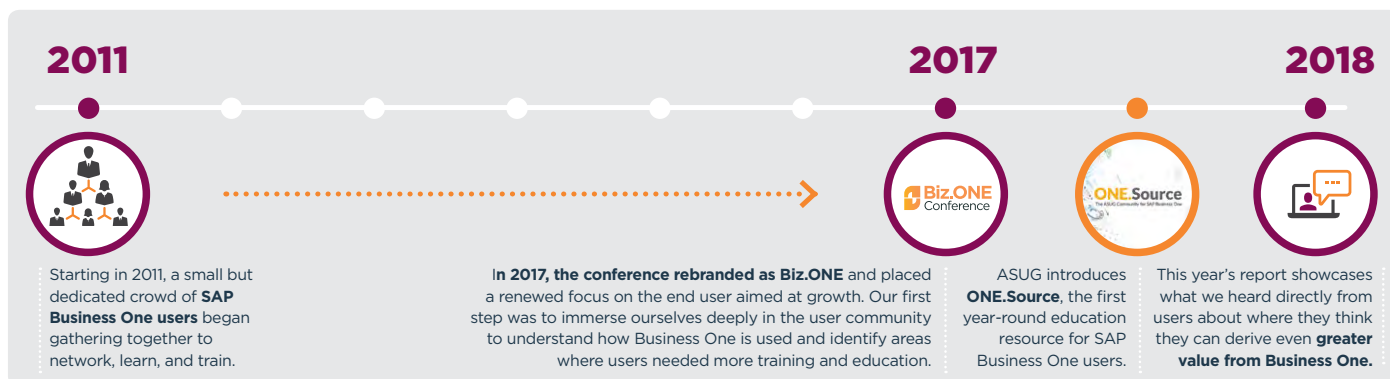
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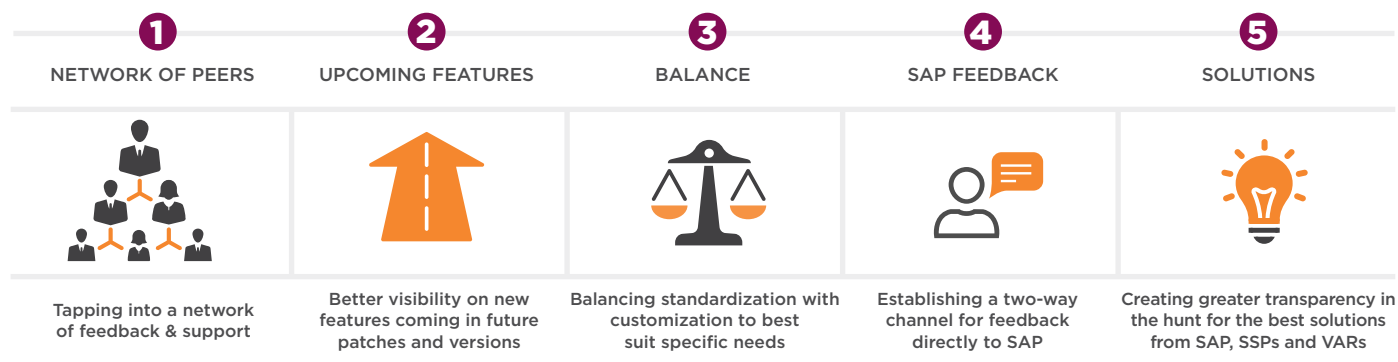
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By the Numbers

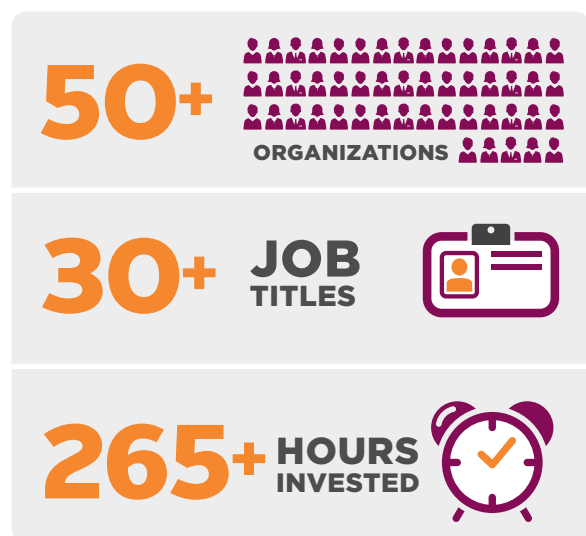
A History Of Biz.ONE



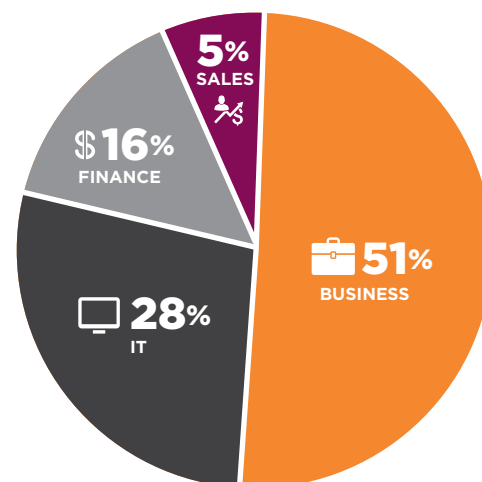
Key High-Level Themes



Our Research Aggregated From



Job Titles



Users are looking for
**more SAP Business One
resources.**



100%

of respondents stated they were
looking for **additional training.**



Most Popular Reoccurring Issues

1



TOOLS

2



TRAINING

3



INVENTORY

4



CLOUD

5



SUPPORT

6



SECURITY

7



FUNCTIONALITY

8



REPORTS

9



SALES

10



ORDERS

11



MANAGEMENT



Focus Groups
conducted in
3 locations



HUNTINGTON BEACH,
CA



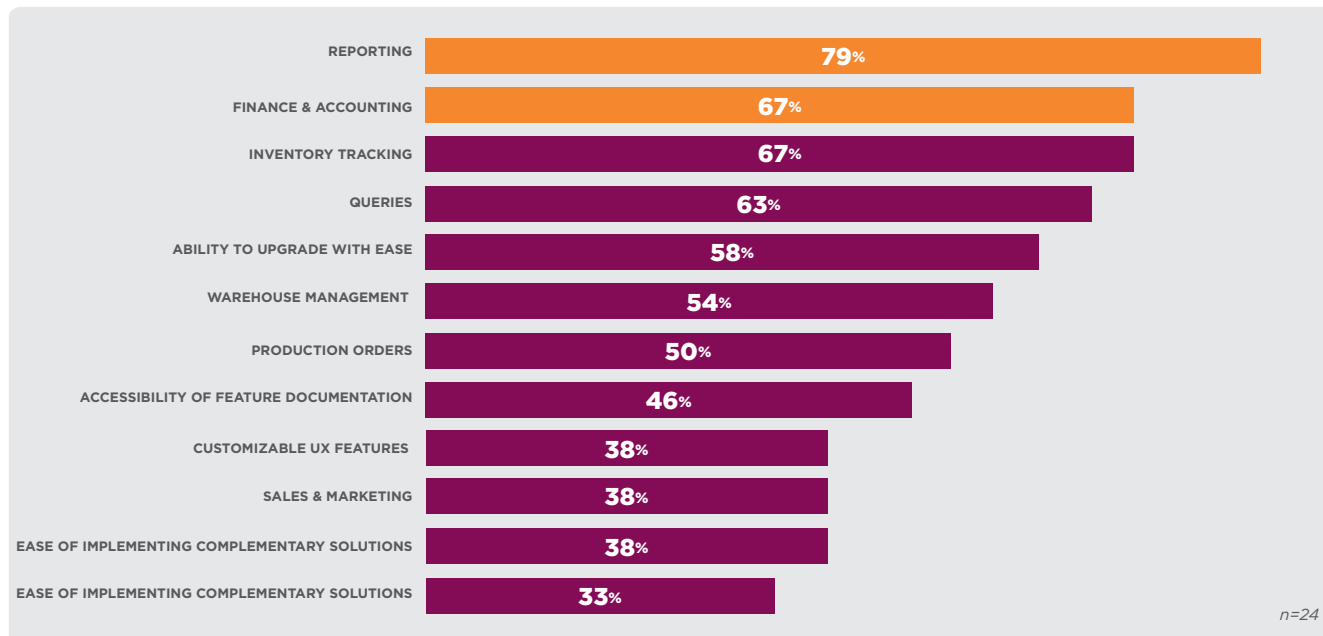
DALLAS, TX



ORLANDO, FL

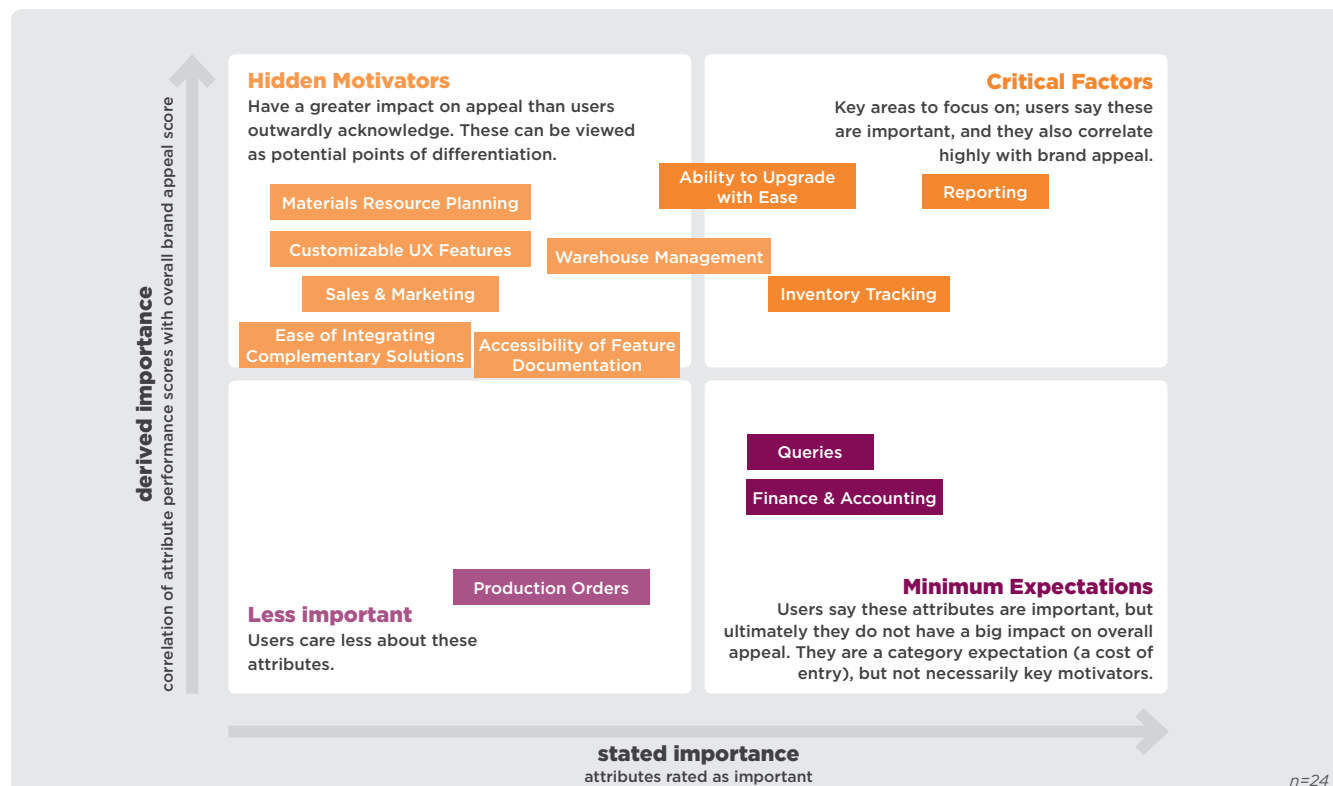


Attribute Importance for SAP Business One



When considering SME software or service providers, how important are each of the following software functionalities/options?

Stated vs. Derived Importance



Thinking specifically about SAP Business One, how satisfied are you with the performance of each of the following?

Inventory Management



Inventory management is a vast umbrella term that covers multiple highly complex aspects of an organization. Every organization - even those without a physical product - can benefit from best practices for effective inventory/product management. For those with large quantities of product, warehouse management and material requirements planning are each complex enough by themselves to need discrete solutions and focus. At a higher level, some broad questions can help organizations develop strategies to optimize this complex aspect of their organization.

- How can I have better visibility of where product is physically located during shipping or storage
- How can I incorporate better mobility into my inventory processes
 - Count sheets that can be managed via iPad/tablet
- Several necessary functions require add-ons to accommodate
 - Ability to drill down into committed and ordered inventory
 - Inventory load and allocation depending on order date
 - Reporting for FIFO
- The manufacturing functions of Business One have improved, but I want to have a clear idea of what's coming next so I can plan
- Are there simple workarounds to meet the needs of transfers & in-transit inventory
 - How can I solve this challenge and others rather than rely on workarounds

a. Material Requirements Planning (MRP)

At a deeper level within inventory management, Business One users want to learn more about best practices and add-ons to help them with their manufacturing and operations processes. In addition to add-ons, users want to see enhanced functionality around core MRP functions and better training on how to use these systems out of the box.

- Include alternate parts as part of the system as sometimes the same part has two part numbers because of different suppliers. This could include a "Not" option (check box) as well.
- Forecasting is difficult and lacks full integration to other areas of the business such as finance
- Getting forecasts to work with planning recommendations is a challenge
 - How is a forecast going to drive our planning later
 - Once you know what to produce, then raw materials, then purchase orders, lead times, optimizing the amount of inventory at the right time
- Costing - the link between manufacturing and finance. Getting the costing right within SAP for produced goods.

b. Warehouse Management System (WMS)

For those organizations where inventory and workload demands exceed the capabilities of Business One's base functions, the decision of which Warehouse Management System (WMS) to use is critical. With multiple solutions in the market, users want to work closely with their VAR to help determine the system that best meets their needs while also feeling empowered to do their own research into all the available options.

- Cost of a WMS can equal or exceed the cost for Business One – how do I make sure I'm getting the right one
- How can I best integrate 3PL data into my WMS or EDI systems
- Integrated scanning is critical to accurate inventory counts
 - Doesn't matter if it's out of the box or through an add-on
- Drop shipping and warehousing present many challenges, especially with multiple warehouses or branches
- Pick & Pack manager doesn't always see the whole picture

C. Production

Production represents a critical area for training, with a demonstrated need for tips and tricks on how to meet the needs of normal day-to-day operation. Users acknowledge that this is an area of Business One that is difficult to configure optimally for their business and want to see examples of how other users effectively manage the out of the box capabilities of Business One. Users are very eager to learn about the offerings available from add-ons that could meet their needs and want a way to easily see multiple options for their production needs.

- How can I work with my partners to help me create the right customizations or tools like queries that I need to make the right production orders
- Managing production is a highly manual process and takes up valuable resources of employees for repetitive and time consuming work
- There should be a dashboard for planning around BOMs
 - Current functionality is difficult and cumbersome to have strategic visibility around BOMs
 - Current functionality can't handle complex orders
 - Needs to be able to collapse and provide better high level visibility across orders
- Outsourcing can be very difficult to track for single products and across complex orders

Reporting



The reporting tools and functionality within Business One hold incredible potential for insight and analytics regarding business performance. Much of that potential, though, requires specialized training and education in order to access that data correctly and effectively. Many users spend hours scouring the internet for forum posts or training videos that can teach them how to run the report they want. Even then, a video might only teach part of the skill, meaning more time spent searching for the rest of the answer. Users want access to experts and other users who have the skills to teach them how to better use the tools at their disposal.

- How can I combine old familiar tools (Excel) with Business One
- How can I run commission reports that match my exact commission structure without needing lengthy revisions or adjustments
- Multiple line-items cause exponential bottlenecks and sometimes serve as the primary reports a business wants to run
- What kind of training and education can I get from ASUG, from SAP, from my VAR
- How do I train and educate other users who aren't technically skilled
- What are the major changes that will result from HANA or new versions

Security



As an emerging topic this year, users wanted to focus specifically on security within Business One. Security manifests in nearly every module and function of Business One – from setting up user access in sales reports to the much broader topics of cyber security. As threats to business grow in a highly connected and digital world, users want to know how Business One helps protect their data and their IP. Security also means creating safeguards and authorizations internally to preserve data integrity.

- Is it possible to create authorizations and security clearances at the field level
 - With add-ons, this still requires highly detailed and ongoing maintenance
 - Can I hide a field or make it inactive for certain users
- Functions like Drag and Relate are an all or nothing toggle, want more granular control
- How can Business One help insure full GDPR compliance
- What industry specific security options exist (i.e. HIPAA compliance)
- How do different technology stack setups protect against external threats like ransomware
- How can data be made accessible to the right people without exposing risk via outside contractors

Finance



As the true core of an ERP system, users expect a great deal out of the Finance and Accounting tools within Business One – and they’re not disappointed. Indeed, many organizations know that there’s additional functionality living within Business One’s finance tools that they’re not fully utilizing. To that end, users want more training and education on how to realize the full value of their system – from specialized training for super users to “B1 Basics” for the more typical daily users.

- My organization uses complex workarounds for many of our regular tasks (i.e., moving deposits between orders).
Are we missing some key functionality to accomplish this work within Business One’s existing tools
 - Can add-ons help me solve these problems and can I develop my own
- I need a champion of training and education, from SAP or a VAR, to get all my employees to the right level of knowledge and skill
 - This training needs to be ongoing to account for turnover and growth
 - How do you on-board new people
- Including whole document attachments on journal entries
- Financial reports out of the box aren’t very usable for the complex requirements of my business
 - HANA has all sorts of bells and whistles for financial reports, but it feels like there are very few changes to the SQL version
- I want to do more with eCommerce and eBanking but need to know the solutions available
- I know add-ons help with tax and tax law, how can I choose the best solution

Usability & Administration



SAP has included tools and creates documentation available to everyone to help achieve the right level of customization, but not every organization has the skill or resources to take advantage of those tools. Regardless of the skill level within an organization, they all want to be sure that their business needs are met through the functionality and usability of Business One, whether out of the box or with customization and add-ons in conjunction with their VAR and SSPs.

- The ability to move fields to the main view is possible in 9.2 but still difficult and finicky
- Work orders in 9.1 are not exposed to production order
- The DTW (data transfer workbench) is a valuable tool, but it feels that documentation is hidden in the SDK toolkit
 - Better documentation of tools like the SDK toolkit that are available for free to all users
 - Is it just easier to use an add-on to achieve these results
- I want to learn about the Master Data Cleanup tool and feel comfortable using it
- Reports out of the box often meet my minimum needs, but I want to get more out of them
 - This includes Cashflow Reports, Financial Reports and Cost Center Reporting

Support



Business One users across the country are eager to develop networks of support among their peers. Time and again during interviews and especially at focus groups, users expressed a strong desire to meet other Business One customers to ask questions and problem solve together. The inherent support structure of the Business One ecosystem is unique compared to most other ERP offerings for businesses of any size. Without direct access to SAP, users develop a strong relationship with their VAR. Users are eager to maximize the benefit of this relationship and develop stronger ties to their add-on providers. Most importantly, they want to have a direct method of communicating with SAP that operates both ways – hearing from SAP and giving feedback on Business One directly to SAP.

- How can I maximize my relationship with my VAR to ensure that I receive the best support
- I want to be able to view and compare many different solutions and add-ons with appropriate guidance from my VAR
- There must be a channel for communication directly to SAP
 - I want to hear directly from them and they need an avenue for receiving feedback directly from end users in a face-to-face environment
- I know that I can benefit from interacting with my peers and establishing networks and connections of others using Business One
 - I want ways to maintain connections and establish regular interactions with my peers

Cloud



The conversation around cloud based servers is, for many organizations, a nascent one. For those who didn't start with cloud servers, the decision of if or when to switch may not even be taking place. If it is, there are still many questions concerning the business case, the security of data, the change in service model, the costs and cost savings, public vs. private cloud, and many others. Truly, this is an area of interest for many Business One users, but still very much in the education stage of conversation.

- Where can I find an easy to understand explanation of the business benefits of cloud servers
- How can I separate the 'process' of cloud from the 'technology' of cloud
- Is a co-located server the same thing as public cloud and how does SAP classify it
- What sort of tools are available to facilitate workflow on a cloud server
- Is there a significant impact of latency on critical decisions and events (safety, health related, etc.)
- Who technically owns the data that I store on cloud servers
- How can I plan and accommodate upgrade schedules through a cloud model

Sales & CRM



Bulk changes to sales orders. Territory management. Forecasting tools. Improved search. Sales processes are some of the bedrock functions for many organizations and so customers want Business One to offer the best tools and support to sales teams. There is a need to enhance the customization of sales functions and to have greater visibility of transactions across the business. Salespeople need quick and easy access to information through multiple avenues like mobile and need the tools to efficiently and effectively search for the right contacts and business partners. In addition to dedicated sales tools, users want more consolidated and intuitive CRM functionality. Users want to use Business One for these functions rather than investing in a discrete CRM solution.

- The approval process & workflow should be able to be edited and repeated
- How can I generate various forecasts per sales person/customer easily and effectively
- Want to search by contacts in out of the box
 - What kind of training is available to help me link various addresses and contacts together under one account
- What tools exist to automate workflow in Business One out of the box
 - What add-ons can help improve or increase automation
- Where can I find training on best practices for data management within my CRM
- Having to enter each line item one at a time causes significant slowdowns
- I want the ability to quote/commit and hold units to help mitigate the needs to constantly manage customers
- I know that RMAs & Returns are coming in 9.3, but what can I do before I upgrade or if I don't upgrade
- Tighter integration with Outlook and get more functionality on fewer screens

SAP Roadmap, Features, & Versions



While knowing the roadmap for future aspects of Business One doesn't affect the day-to-day operations of most users, there is significant value in understanding where and when new features will be added for the long-term strategy of a business. Users want to hear from SAP about the plan for changes to Business One, how new technology will alter the landscape, and what kind of support they can expect over the next months and years regarding their investment in Business One.

- Where can I find documentation on new features and bug fixes
 - How can I let SAP know about bugs
 - How can I suggest new features for future versions
- The movement to HANA, upgrade path and how to get there
 - Is HANA right for my business, what is the business case
- Understanding what features will be impacted by upgrades and how that changes current functionality
 - Changes and documentation about changes
- How far back does SAP support actively vs. how much does my VAR support
- The ability to upgrade in a test environment is difficult for small customers without IT staff
 - What's my best testing scenario for my size, and what are the models

Conclusion

The topics outlined in this report represent the top concerns that Business One customers raised about how to make their businesses better. Business One users have highly complex businesses and achieve significant positive ROI from their investment into Business One. As a comprehensive system, there's no shortage of opportunities for additional and ongoing training to help realize even greater results. From reporting to inventory to integration, these topical areas are critical for small and medium businesses to execute efficiently and effectively to maximize their success and Business One enables them to do so.

The concerns and questions raised here will form the blueprint for Biz.ONE 2018 where thought leaders and experts will share their insight to help you get the most out of your Business One systems. Join us in Orlando, Florida for Biz.ONE on October 22-24, 2018.

Check out the **Biz.ONE** website for more information as we announce speakers, keynotes, trainings and more over the coming weeks and months. Contact Eventful Conferences at 914-509-5354 for more info.

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