



OutSmart

Connected
Field Service
Apps

Manual

Integration SAP Business One V10+



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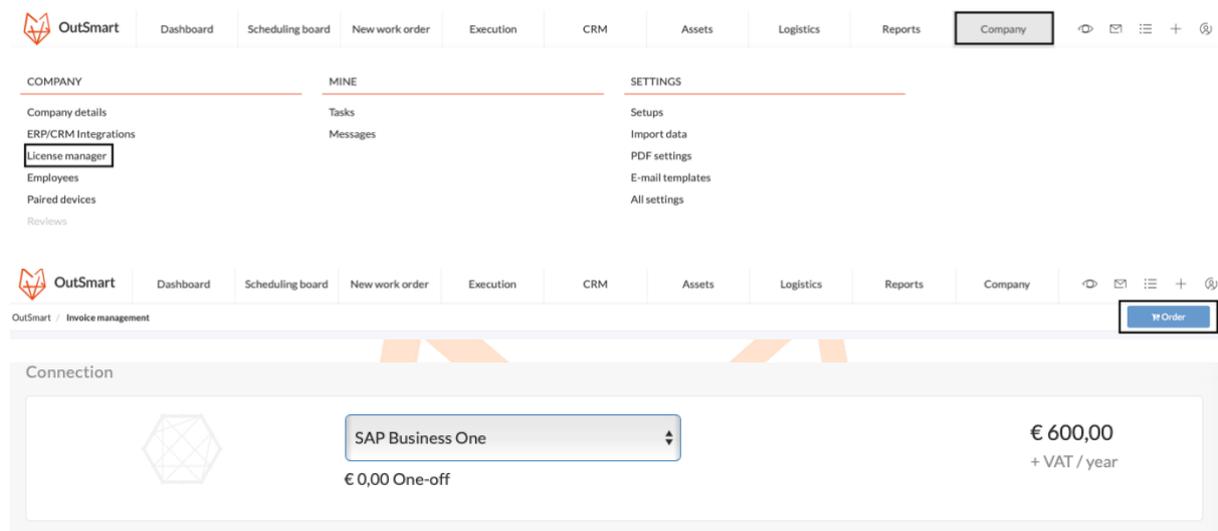
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Order an integration

The first step to use the integration is to order one.

1. By navigating to Company -> License manager you will have the possibility to purchase new integrations.
2. Press the order button in the upper right corner.
3. Select **SAP Business One** from the dropdown menu.



The screenshot shows the OutSmart web application interface. The top navigation bar includes 'OutSmart' and various menu items: Dashboard, Scheduling board, New work order, Execution, CRM, Assets, Logistics, Reports, and Company. The 'Company' menu is expanded, showing sub-menus like 'License manager' (highlighted), Employees, Paired devices, and Reviews. Below this, the 'License manager' section is visible, featuring a dropdown menu with 'SAP Business One' selected. To the right of the dropdown, the cost is displayed as '€ 600,00 + VAT / year' and '€ 0,00 One-off'. An 'Order' button is located in the top right corner of the interface.

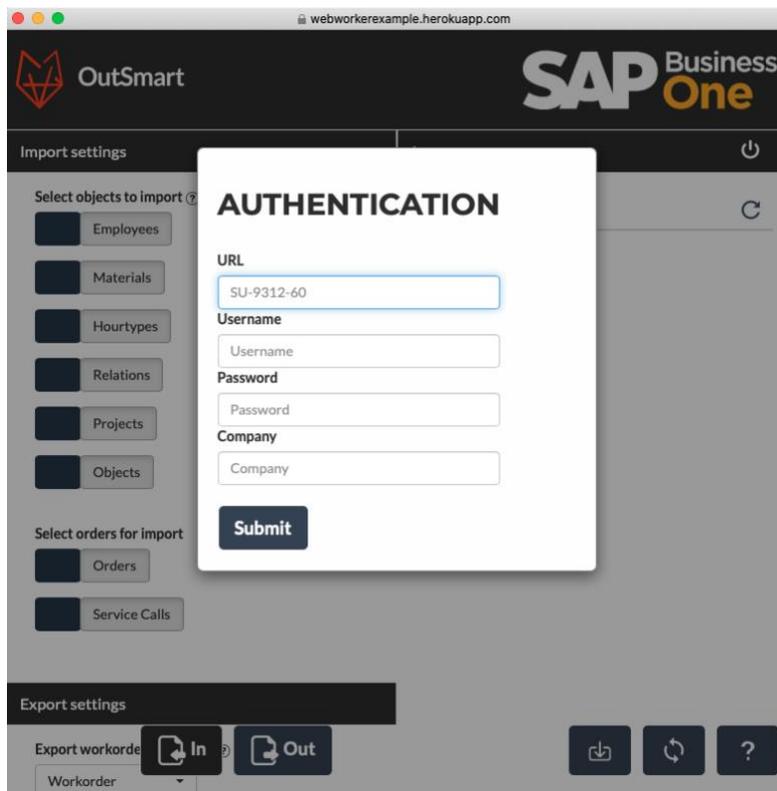
The costs of this integration currently are €50,- per month (€600,-). When you have a demo account you can order this integration without any costs.

Integration setup

When you have ordered the integration, some settings should be set before the integration can be used.

1. Navigate to Company -> ERP/CRM Integrations.
2. On the right side click on the Open settings button.

The integration page now opens and you will be shown a window that looks like this:



The screenshot shows a web browser window with the URL 'webworkerexample.herokuapp.com'. The page header includes the OutSmart logo and 'SAP Business One'. The main content area is titled 'Import settings' and contains several sections: 'Select objects to import' with buttons for Employees, Materials, Hourtypes, Relations, Projects, and Objects; 'Select orders for import' with buttons for Orders and Service Calls; and 'Export settings' with buttons for 'In' and 'Out'. An 'AUTHENTICATION' modal is overlaid on the page, containing the following fields: 'URL' (with the value 'SU-9312-60'), 'Username', 'Password', and 'Company'. A 'Submit' button is located at the bottom of the modal. A large orange arrow points from the modal towards the right side of the page.

URL

When using the public cloud of SAP the url will look like this:

<https://SU-9312.85.emea.businessone.cloud.sap/b1s/v1/>

Username

The username which you use to login to SAP B1

Password

The password which you use to login to SAP B1

Company

The company which you use to login to SAP B1

Import settings

The import settings determine which data will be fetched from SAP B1. Select the checkboxes of the data you want to import. Every 15 minutes an automated synchronization will take place in the background using these settings. To the right of the import checkboxes you will find the synchronize icon.  When you press this button the corresponding import function will start.

Select objects to import

- Employees
- Materials
- Hourtypes
- Relations
- Projects
- Objects



Select orders for import

- Orders

Orderfield

- Service Calls

Service call status

Service call received status





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Orders

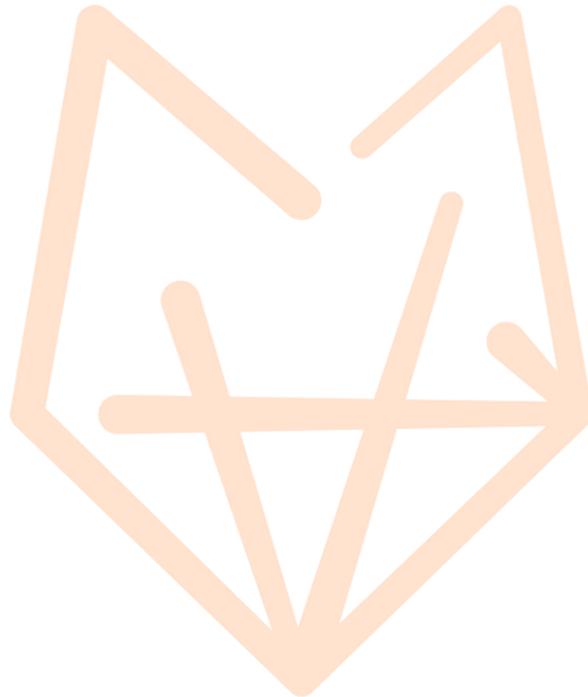
With this function the salesorders from **SAP B1** will be imported as workorder to OutSmart. When the checkbox is selected, another input field (Orderfield) will appear where you can set a keyword. This keyword is used to check whether an order should be imported or not. Just enter the keyword at the Customer. Ref. No. field on an order in SAP B1. If you leave this field blank the default value "OUTSMART" is the keyword.

Service calls

With this function the service calls from **SAP B1** will be imported as workorder to OutSmart. Set the service call status which will be used to check whether a service call should be imported or not. Set the service call received status to update an imported service call status in SAP b1.



By clicking this button the orders and/or service call will be imported manually.





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Export settings

Export workorder or invoice:

Workorders with status complete will be exported to **SAP B1**.

Export as:

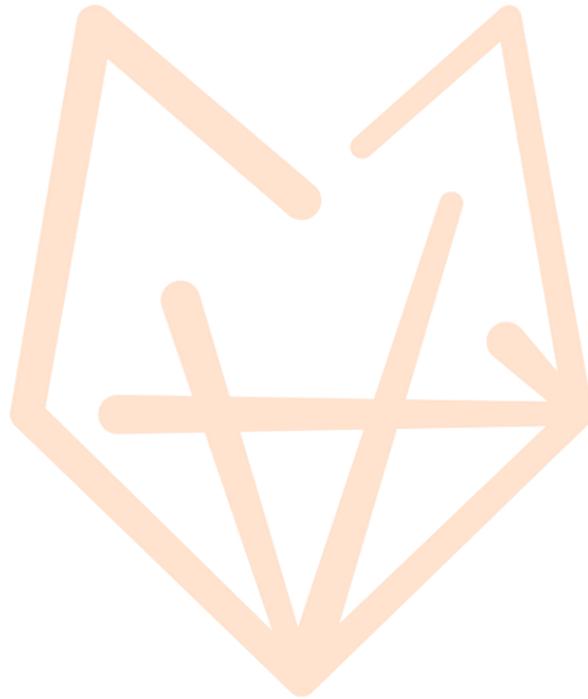
Workorders will be exported as invoice to **SAP B1**.

Export options

Use this option to create new materials which are found on a workorder in OutSmart, in **SAP B1**. Without this function enabled a workorder cannot be handled when a material on this workorder doesn't exist in SAP B1.

Invoice description

This function makes it possible to set which data should be sent to the description field in SAP B1.





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Questions

When you have any questions about the workflow of the integrations or any questions in general regarding the integration.

You can contact our support.

- Telefoon: 020 22 98 144
- E-mail: support@out-smart.com

