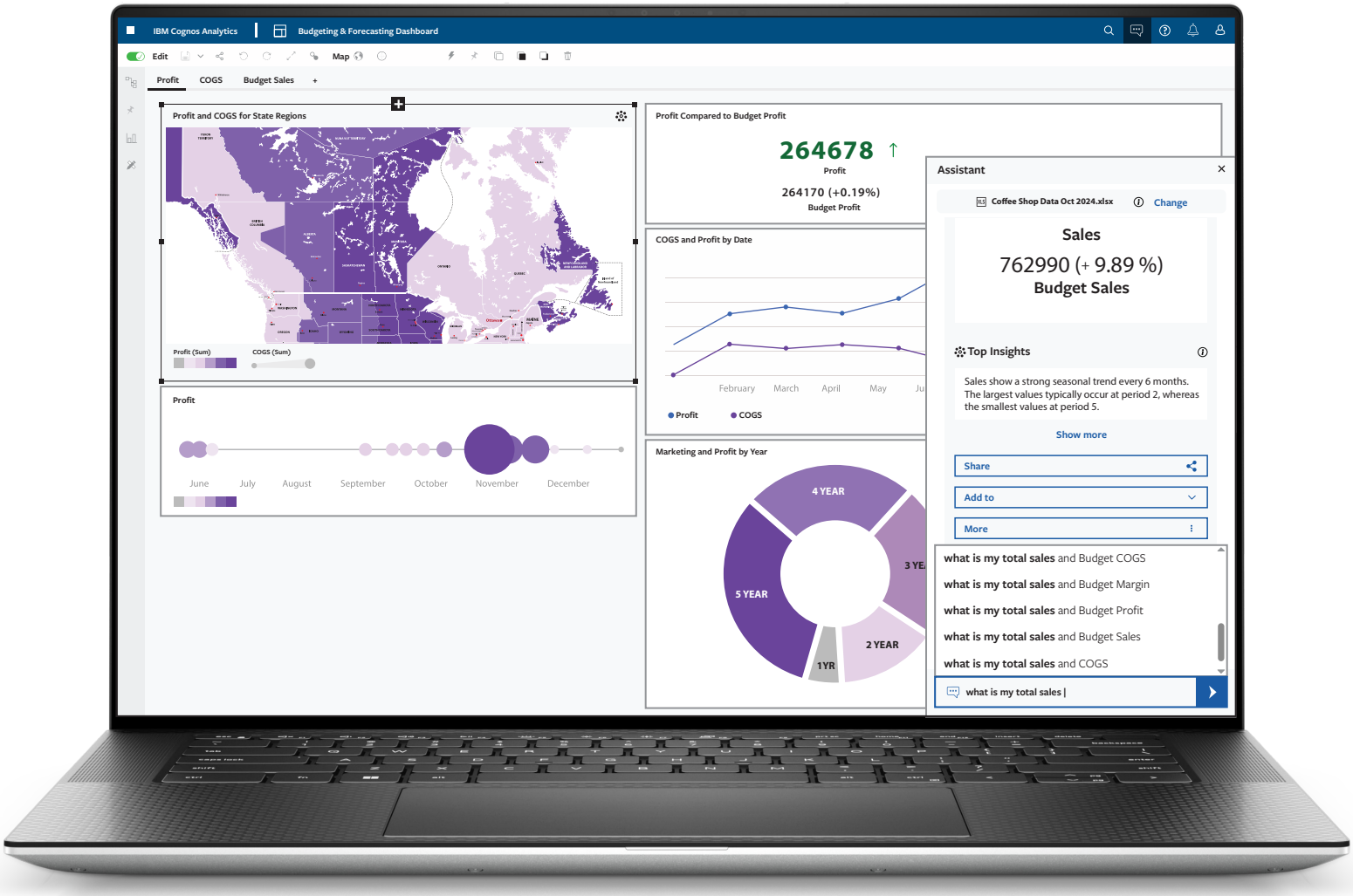
QuickStart

SOLUTION FOR SAP BUSINESS ONE

Clarity from Chaos: Organize and Analyze Your SAP B1 Data



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SAP Business One

IBM Business Partner

IBM Cognos Analytics

IBM Planning Analytics

QuickStart
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At its core, NewIntelligence's ***QuickStart Solution for SAP Business One*** is more than just a collection of dashboards—it's a powerful narrative engine for your business. Each module captures a different chapter in your company's story, from the moment a quote is created to when revenue hits the books or inventory hits the shelves.

By organizing insights into three tiers—***Operations, Financial Reporting, and Budgeting & Forecasting***—QuickStart lets decision-makers see how departments interconnect, how strategies perform, and where opportunities lie. It translates your SAP B1 data into a living, breathing report card of how your business is really doing—and where it can go next.

WHY IT JUST WORKS

Rapid Deployment
QuickStart integrates seamlessly with your existing SAP B1 environment, achieving full functionality within weeks.

Comprehensive Data Coverage
Offers approximately 30 modules spanning various business functions, and adding more as our clients needs grow.

User-Friendly Customization
Allows business users to create and modify reports and dashboards effortlessly, reducing reliance on IT support.

Enterprise-Grade Security
Powered by IBM Cognos Analytics and IBM Planning Analytics, all data processing is performed securely within your organization's environment. No data leaves your network, ensuring compliance and peace of mind.

Enhanced with AI-Driven Insights
Powered by IBM Cognos Analytics and IBM Planning Analytics, QuickStart leverages advanced artificial intelligence to automatically uncover hidden trends, anomalies, and actionable recommendations within your SAP B1 data, empowering your team to make smarter, data-driven decisions effortlessly.

Timely Data Updates
QuickStart reflects your SAP B1 data with flexible refresh options—daily, multiple times per day, or on-demand—ensuring you always work with the latest insights.

Built to Grow With You
QuickStart's modular design supports additional customization as your business evolves. New modules can be added or adjusted without disrupting your existing setup.

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Each business has a story—of performance, of growth, of challenges overcome—and your data is the author. That's where QuickStart's modular structure comes in. With nearly 30 purpose-built modules organized into three intuitive tiers.

QuickStart doesn't just present numbers; it tells the story behind them.

Whether you're tracking day-to-day operations, managing your finances, or planning for the future, each module delivers meaningful insight into how your company is really doing—and where it's headed.

MODULE LIST BY KEY FUNCTION SUPPORT

OPERATIONS
Modules Available:

- Available to Sell
- Campaigns
- Container Management
- Customer Insights
- Customer Price History (CPH)
- Customer Relationship Management (CRM)
- Delivery
- Demand Forecasting for Inventory Management (DFIM)
- Drafts
- Fulfillment Reporting
- Inventory
- Invoicing
- Landed Cost Analysis
- Opportunities
- Orders
- Purchasing
- Quotations
- Return Requests
- Serial Activity
- Service
- Short Ship
- Warehouse Picking

FINANCIAL REPORTING
Modules Available:

- Accounts Payable
- Accounts Payable Detail
- Accounts Receivable
- GL Financial Board of Directors
- GL Financial Reporting
- GL Financial Templates

BUDGETING & FORECASTING
Modules Available:

- Sales Budgeting and Forecasting

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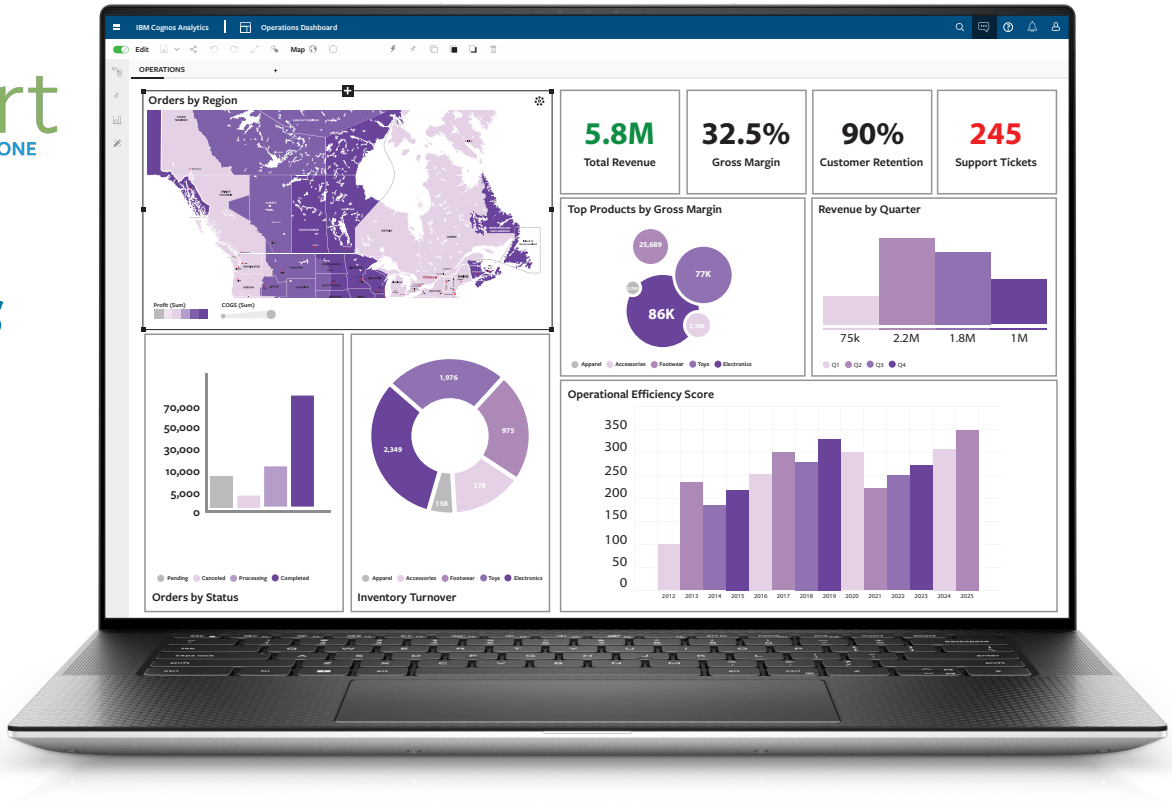
TIER 1.
OPERATIONS

- Quotations
- Orders
- Invoicing
- Inventory



MODULE BREAKDOWN & BENEFIT

QUOTATIONS

This Quotations module for operations allows you to analyze all quotes in SAP Business One. It will allow you to report on quotes entered into the system from the perspective of item, client, and sales representative for a variety of metrics including quantity, sales and cost to name a few.

Enhances forecasting accuracy and identifies successful sales strategies.

ORDERS

The Orders module for operations allows you to analyze all orders in SAP Business One. It will allow you to report on orders entered into the system from the perspective of item, client, and sales representative for a variety of metrics including quantity, sales and cost to name a few.

Improves order processing efficiency and customer satisfaction through timely deliveries.

INVOICING

The Invoicing module for operations allows you to analyze all invoices in SAP Business One. It will allow you to report on sales invoices and sales credits entered into the system. The system will consolidate both sales and credits for a net position but also allow you to differentiate between sales and credits with a transaction type. You will be able to analyze from the perspective of item, client, and sales representative for a variety of metrics including quantity, sales and cost to name a few.

Facilitates better cash flow management and reduces outstanding receivables.

INVENTORY

The Inventory module for operations will allow you to look at various metrics related to inventory. These include On Hand, On Order and Committed. You also have the ability to analyze the information at the item level as well as summarize the information at whatever level of granularity you would like. You also have the ability to look at this information by Warehouse.

Optimizes inventory turnover, minimizes holding costs, and prevents stockouts.

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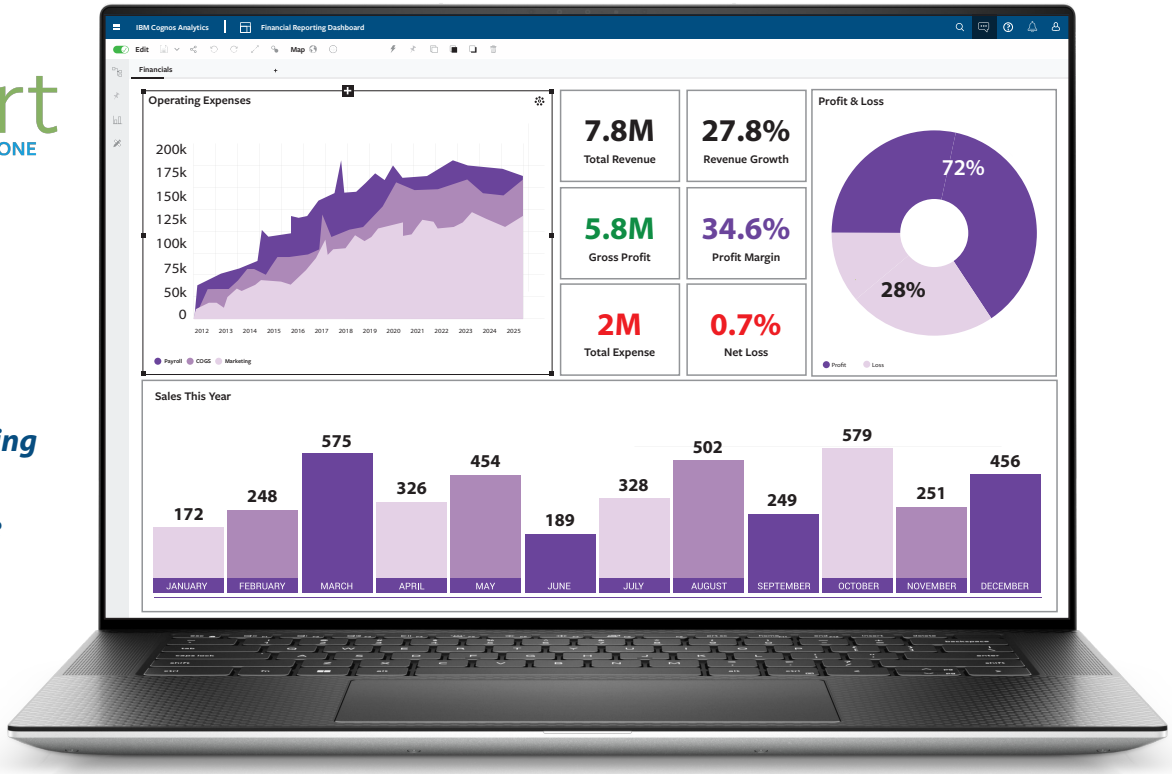
TIER 2.
FINANCIAL REPORTING

- GL Financial Reporting
- Accounts Payable
- Accounts Receivable



MODULE BREAKDOWN & BENEFIT

GENERAL LEDGER (G/L) FINANCIAL REPORTING

The GL Financial Reporting module provides access to interactive General Ledger (GL) reporting for your income statements, balance sheets and journal entries. Now you can Explore GL Income Statement and Balance Sheet Information in Excel or via browser with NewIntelligence's QuickStart Solution for SAP Business One. You can explore GL Periods, Chart of Accounts, Versions (Actual versus Budget) and GL measures.

Provides a clear view of financial health and supports strategic planning.

ACCOUNTS PAYABLE (A/P)

The Accounts Payable module for financial reporting allows you to analyze all AP Invoices at the header level in SAP Business One. It will allow you to report on AP Invoices entered into the system from the perspective of supplier for a variety of metrics including invoice amount, paid amount and discounts applied to name a few.

Improves cash flow management and vendor relations.

ACCOUNTS RECEIVABLE (A/R)

The Accounts Receivable module for financial reporting allows you to analyze all AR Invoices at the header level in SAP Business One. It will allow you to report on AR Invoices entered into the system from the perspective of customer and salesperson for a variety of metrics including invoice amount, paid amount and discounts applied to name a few.

Enhances collection efforts and reduces days sales outstanding (DSO).

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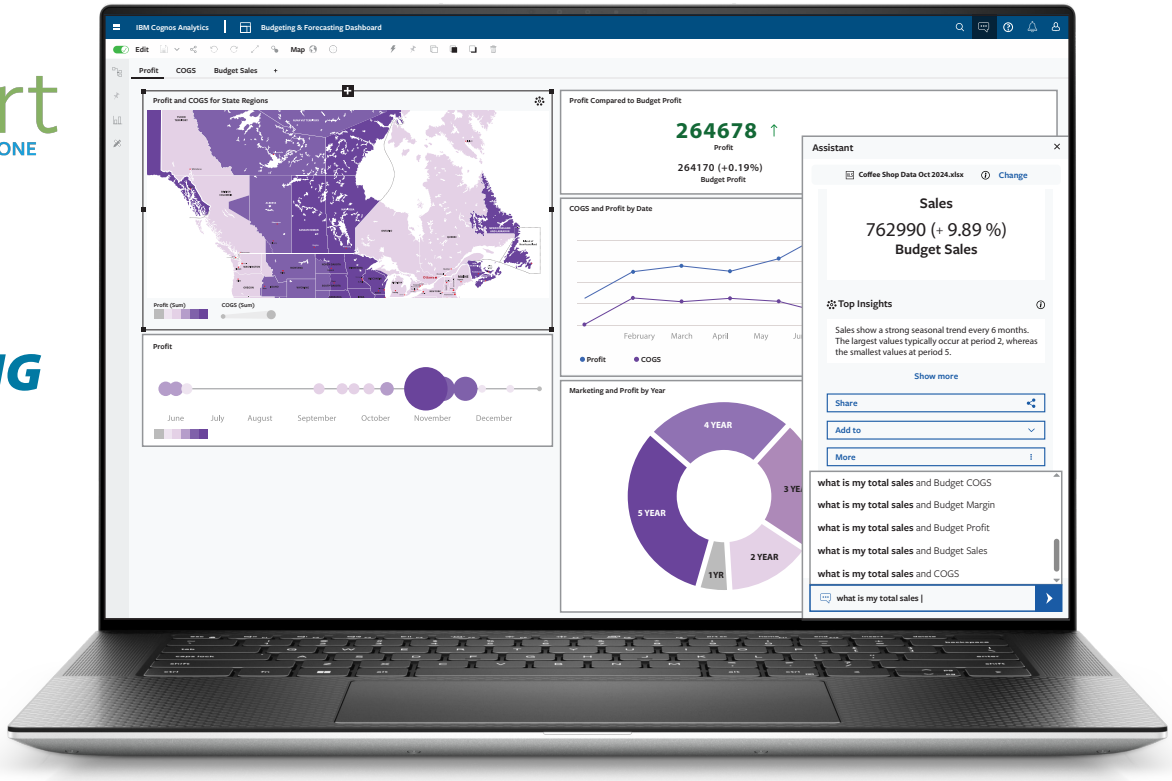
TIER 3.
BUDGETING & FORECASTING

✔ *Sales Budgeting and Forecasting*



MODULE BREAKDOWN & BENEFIT

SALES BUDGETING AND FORECASTING

The Sales Budgeting module for Budgeting & Forecasting allows you to plan at different levels of granularity and simplify your budgeting and forecasting processes. You can also compare the current year's budget versus actual sales of previous year by item group, customer channel and salesperson. The Sales module also allows you to create a simulation in the form of a sandbox for increasing the budget, as well as how to use last year's actuals as a baseline increasing them by 10%.

Aligns sales targets with business objectives and market trends.

OPERATIONS
ADDITIONAL MODULES

MODULE BREAKDOWN & BENEFIT

AVAILABLE TO SELL (ATS)

The Available to Sell module for operations provides the ability to look at inventory from the combined perspective of what items are on hand, what is being shipped to customers, and what is still incoming, viewable by warehouse and by item.

Helps sales reps promise accurate delivery dates and avoid overbooking.

CAMPAIGNS

The Campaigns module for operations is a tailored tool that streamlines sales campaign management, offering comprehensive tracking and reporting features. Beyond traditional flyer campaigns, it provides insights into metrics like business partner involvement and sales quantity, revolutionizing sales strategy with enhanced tracking and analytical capabilities.

Measures ROI and refines future campaigns for better targeting.

CONTAINER MANAGEMENT

The Container Management module for Operations allows you to streamline your warehouse operations and improve efficiency, empowering you to have greater visibility into your purchasing operations. The seamless integration with Produmex provides access to container information, tracking incoming shipments, and seeing when the orders would arrive. By combining these powerful data sources, we bring you a comprehensive view of your purchasing process.

Streamlines import logistics and supports accurate inventory planning.

CUSTOMER INSIGHT

The Customer Insights module for operations revolutionizes reporting and dashboarding by categorizing customers, offering a comprehensive overview inside SAP B1, and providing robust visualization tools. Seamlessly integrating with CRM systems, it empowers businesses to monitor customer behavior patterns, identify issues, and make strategic decisions, representing a significant leap forward in operational efficiency.

Enables segmentation and tailored marketing or service strategies.

CUSTOMER PRICE HISTORY

The Customer Price History module for operations allows the user to see historical price changes over time by Customer/Item or Customer Group identifying when a price change occurred and what date it happened. It also shows the current list price for the item to which that customer belongs. This provides insight into which customers may be due for a price adjustment in an easy manner.

Supports pricing negotiations and consistency across accounts.

CUSTOMER RELATIONSHIP MANAGEMENT (CRM)

The CRM module for operations is for those that are using CRM inside of SAP Business One. It allows clients to see all activities, including meetings and tasks, and time associated with each, providing visibility into the activity that is being done inside of SAP B1. This information can then be viewed by Salesperson, by Customer or by Period and together with Quotations, Orders and Sales allows users to see which activities within the CRM are generating results.

Improves win rates and customer lifetime value.

DELIVERY

The Delivery module for operations allows our clients to see their company's total cost breakdown, including freight, in order to analyze their true expected gross margin prior to shipping out their orders and invoicing them, thus providing reporting of which deliveries fell short of their set gross profit margin benchmark.

Improves delivery reliability and customer communication.

DEMAND FORECASTING FOR INVENTORY MANAGEMENT

The Demand Forecasting for Inventory Management module for Operations allows clients to predict customer demand for inventory items over a defined period of time by linking "what you have" to "what you should have" based on analysis of historical demand/sales data across items and warehouses.

Optimizes stock planning and avoids costly over- or under-stocking.

DRAFTS

The Drafts module for Operations provides visibility on drafts within SAP Business One, offering a unique perspective on the ordering process. SAP Business One refers to these documents as drafts themselves. This terminology highlights their distinct nature from regular orders. The Drafts module enables you to work with partially completed information, giving you the flexibility to make changes and complete the order later.

Reduces processing errors and allows better workflow tracking.

FULFILLMENT REPORTING

The Fulfillment Reporting module for Operations includes capabilities to uncover insights on Fulfillment against Orders vs Invoices. The module also helps to measure the Short Quantity, Lost Revenue, and Fulfillment %. You can see this information by Customer, Item, Salesperson, Warehouse, etc. Truly allowing you to see your SLA and identifying what areas need improvement.

Enhances customer satisfaction and operational visibility.

LANDED COST ANALYSIS

The Landed Cost Analysis module for Operations allows clients to see their landed costs but with a view of including the entirety of any given shipment. Fixed costs associated with a shipment are prorated across all items contained within it based on shipped quantities, first costs and even weights, providing a comprehensive view of where the true costs lie.

Supports accurate pricing and profitability analysis.

OPPORTUNITIES

The Opportunities module provides visibility into all sales opportunities entered by your sales team in SAP Business One. It captures key information such as opportunity status (Open, Won, Lost), expected close dates, customer details, and potential revenue and profit values. It also tracks progress through sales stages and links to actual SAP transactions for comparison.

Empowers SAP B1 users to track and analyze their sales pipeline in real time, improving forecasting accuracy and sales performance visibility.

PURCHASING

The Purchasing module for Operations allows our clients to see what the company is purchasing by Vendor, by Item down to the individual Purchase Order with a view of Quantities, Cost and a variety of other metrics to analyze various PO's. It also provides the ability to see when items are due to come in so that you have full blown analysis on where your spending is occurring.

Ensures timely restocking and cost-effective buying.

RETURN REQUESTS

The Return Requests module for Operations streamlines returns by integrating with sales orders, providing detailed information, and initiating processes before credit issuance inside SAP B1. Its versatility, customization support, and seamless integration enhance reporting capabilities, offering operational efficiency and valuable insights into return reasons and codes.

Identifies quality or satisfaction issues and streamlines return handling.

SERIAL ACTIVITY

The Serial Activity module in QuickStart for SAP Business One provides end-to-end visibility into the life cycle of serialized inventory items. It enables businesses to track each item by its unique serial number—from purchase and inventory movement to sales, delivery, and service. Designed for industries where traceability is critical, the module delivers real-time insights through dynamic dashboards built in IBM Cognos. Users can drill into historical activity, service events, and warranty status for any serialized product. This not only supports compliance and quality control but also improves inventory accuracy, streamlines service management, and enhances accountability across departments.

Gives businesses complete traceability of serialized items, improving inventory accuracy, service tracking, and compliance with minimal effort.

SERVICE

The Service module for operations allow companies that handle RMAs with repair and service calls, better reporting and visibility on various aspects of the service department, detailing items such as RMA numbers, who they are assigned to, subject, serial number, and more. Filtering by priority and status (open, closed, pending) provides organizations with the visibility required to make informed and important decisions.

Improves post-sale support and customer retention.

SHORT SHIP

The Short Ship module for Operations allows clients to compare ordered quantities with what was actually shipped. Users can review the back-order quantity, and analyze the short-ship quantities by customer, salesperson, item, viewed by item family or item group, at any level of detail.

Supports fulfillment accuracy and inventory reconciliation.

WAREHOUSE PICKING

The Warehouse Picking module offers an analysis on what orders are being picked and by whom allowing managers to take a closer look at their key personnel, and monitor or measure their performance. This module looks at a variety of metrics related to what has been picked in the warehouse. Taking into account the Sales Order Qty, Delivered Sales Qty and the Picked Qty to name a few. This module will provide the ability to look at the information by item, customer as well as warehouse.

Reduces warehouse errors and accelerates order fulfillment.

FINANCIAL REPORTING
ADDITIONAL MODULES

MODULE BREAKDOWN & BENEFIT

ACCOUNTS PAYABLE DETAIL

The AP Detail module provides line-level visibility into every purchase order recorded in SAP Business One. It enables users to analyze each PO line by supplier, item, warehouse, delivery date, unit price, duty fee, exchange rate, and more. This module integrates with related data such as supplier country, item descriptions, and warehouse details, allowing for comprehensive, cross-functional reporting.

Gives SAP Business One users granular insight into purchasing activity, improving accuracy in landed cost analysis, vendor auditing, and PO reconciliation — all while enhancing visibility into procurement processes.

GL FINANCIAL BOD (BOARD OF DIRECTORS)

The GL Financial BOD (Board of Directors) module within QuickStart for SAP Business One is designed to simplify and elevate executive-level financial reporting. It provides a high-level, presentation-ready view of key financial statements—like income statements and balance sheets—tailored specifically for board meetings and strategic reviews. Built using IBM Cognos Analytics, this module enables finance leaders to quickly generate clean, visual, and digestible reports that highlight performance trends, KPIs, and variances without manual spreadsheet work. It streamlines board communication by turning complex general ledger data into clear, actionable insights—so leadership teams can make faster, more informed decisions.

Fast executive overview to drive daily financial decisions.

GL FINANCIAL TEMPLATES

GL Financial Templates allows users to leverage information from SAP Business One and generate financial metrics such as income statements, balance sheets, KPIs, segment codes, and display orders. Our QuickStart module seamlessly integrates with GL Financial Reporting, adding a new folder called Financial Templates to your Chart of Accounts. The structure of this folder closely resembles the existing Chart of Accounts in our model but is built from the GL templates you have defined in SAP B1.

Saves time and ensures consistency across financial reporting.

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IMPLEMENTATION & SUPPORT

QuickStart Solution is delivered in collaboration with certified SAP B1 partners, ensuring seamless ERP integration and ongoing support. The implementation process typically spans 2-3 weeks, minimizing disruption and accelerating time-to-value.

PLATFORM COMPATIBILITY

QuickStart is compatible with current versions of SAP Business One (HANA and SQL). IBM licensing requirements are bundled as part of the solution.

TRAINING AND ENABLEMENT

Our delivery includes training sessions to ensure your team is fully equipped to explore, analyze, and act on your business data from day one.

With QuickStart Solution for SAP Business One, you don't have to guess.

From Operations to Finance to Forecasting, our solution reveals the insights hidden in your data—so you can make better decisions, faster.

Contact us today to book your personalized demo and see for yourself.

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