



Starting right now: Your SAP Business One Cloud test system will be ready in 3 minutes>

SAP Business One 10.0  
Basics First Steps  
October 2024

SBO1000-EN

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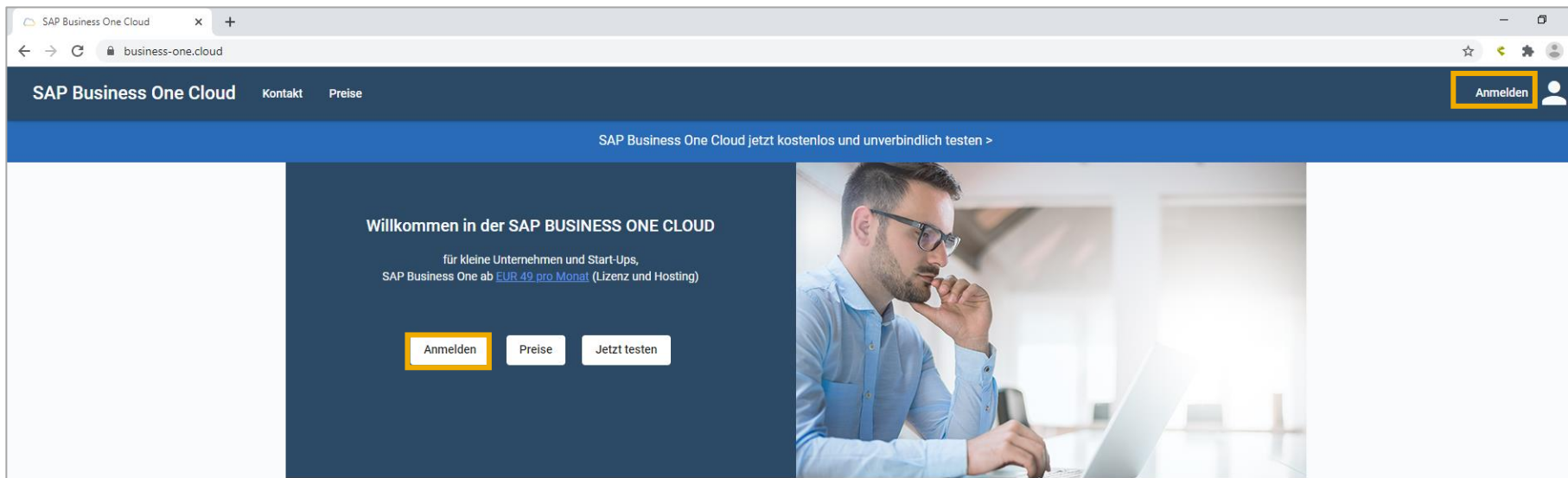
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# Set user data and password initially

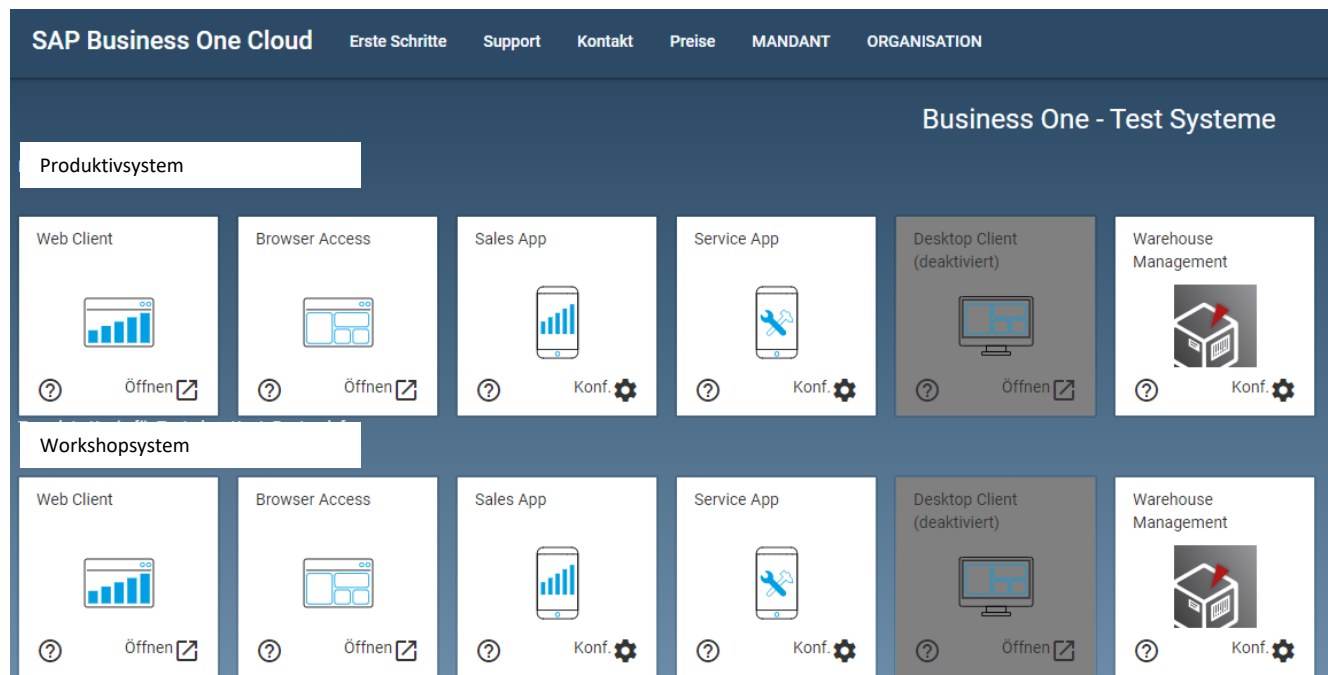
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1. You receive an email with an invitation to the SAP Business One Cloud Portal
2. Please click on the link in this email
3. On the page that opens you can generate a username and password. Please refrain from using a Google or LinkedIn account for registration, this function is only suitable for demo systems and not for productive nor workshop systems. If you have Microsoft accounts in your company, it is recommended that you use them. Alternatively, you can use the "Create Business One Account" or "Register" function to create user data and a password. We recommend creating an internal company guideline for SAP Business One access.

# Login to SAP Business One



1. Ideally, enter the following URL in Firefox or Chrome browser: <https://www.business-one.cloud/>
2. Log in, enter your user ID and password
3. Select database and access by clicking on the corresponding tile. In this basic training we use Browser Access.



# Basic structure and navigation

The screenshot shows the SAP Business One web interface in a Microsoft Edge browser. The browser address bar shows the URL: <https://c0cm6kiisn4257usua86y.ba.eu.business-one.cloud/dispatcher/>. The interface includes a menu bar (1), a toolbar (2), a left-hand navigation menu (3) listing various modules, and an enterprise search bar (4) with the text "Look up menus" and a "Search" button. The main content area is currently blank with a blue background and a loading spinner. The status bar at the bottom shows the date "26.10.2020" and time "08:32", along with the SAP Business One logo.

- 1. Menu bar**
- 2. Toolbar**
- 3. Modules** for structuring dialogues  
May look different depending on your authorizations
- 4. Enterprise Search**  
Search for menu items or documents

# Enterprise Search

The Enterprise Search is the intelligent search function of SAP Business One. It can be searched for:

1. Menus (search example: "Invoice"): As a result, all suitable functions are displayed.
2. Master data / documents (search examples: customer name, document number or invoice amount): As a result, the business partner master, article master and all documents associated with the search term are displayed. On the left side of the results window, the result is structured in groups such as master data, sales transactions, service, opportunity and bank processing.

The screenshot shows the SAP Enterprise Search interface. At the top, there is a search bar containing 'PC Welt' and buttons for 'Suchen' and 'Nach Vorlage suchen'. Below the search bar, the results are displayed in a table format. On the left side, there is a navigation pane with a tree view showing various categories: 'Alle', 'Stammdaten (3)', 'Verkaufstransaktion (362)', 'Service (10)', 'Opportunity (9)', and 'Bankenabwicklung (27)'. The main area displays search results for 'PC Welt', showing details for several activities and documents. The results are grouped by activity type, such as 'Aktivität - 5', 'Aktivität - 19', 'Aktivität - 22', 'Aktivität - 34', and 'Ausgangsgutschrift - 10'. Each result entry includes fields like 'Aktivität', 'Startdatum', 'Endzeit', 'Geschlossen', 'Zugeordnet von', 'GP-Name', 'Tel.', 'Startzeit', 'Priorität', 'Typ', 'Zugeordneter Benutzer', 'Anspruchspartner', 'Bemerkungen', 'Enddatum', 'Inaktiv', 'Thema', and 'Zugeordneter Mitarbeiter'.

With keys Ctrl + F2 and Ctrl + F3 the search can be switched between menu search and master data / document search.

# The cockpit is your personal home page (1/2)

There are 4 cockpit templates in SAP Business One Standard: Finance, Sales, Purchase und Inventory.

The screenshot displays the SAP Business One cockpit interface. On the left is a navigation menu with categories like Administration, Financials, CRM, Opportunities, Sales - A/R, Purchasing - A/P, Business Partners, Banking, Inventory, Resources, Production, MRP, Service, Human Resources, Project Management, and Reports. The main area contains several KPI cards and a process flowchart. A yellow box highlights the cockpit content, with callouts for 'Refresh cockpit' (a circular arrow icon) and 'Edit cockpit' (a pencil icon). The KPI cards show: 'Anzahl offener Angebote' (9), 'Gesamtbetrag Forderungen' (0 EUR), 'Anzahl offener Kundenaufträge' (56), 'Überfällige Verbindlichkeiten' (2.51 M EUR), 'Anzahl offener Lieferungen' (31), and 'Summe Verbindlichkeiten' (5.02 M EUR). The 'Sales Process' flowchart shows steps: Sales Quotation, A/R DP Invoice, Dunning Wizard, Sales Order, Delivery, A/R Invoice, Incoming Payments, Customer, Return, and A/R Credit Memo, with Sales Reports also shown. The bottom status bar shows the date 26.10.2020, time 08:49, and the SAP Business One logo.

KPI Card	Value	Unit	Date	Change
Anzahl offener Angebote	9			▲
Gesamtbetrag Forderungen	0	EUR		
Anzahl offener Kundenaufträge	56			▲
Überfällige Verbindlichkeiten	2.51 M	EUR	26.10.2020	▲ 0%
Anzahl offener Lieferungen	31			▲
Summe Verbindlichkeiten	5.02 M	EUR	26.10.2020	▲ 0%

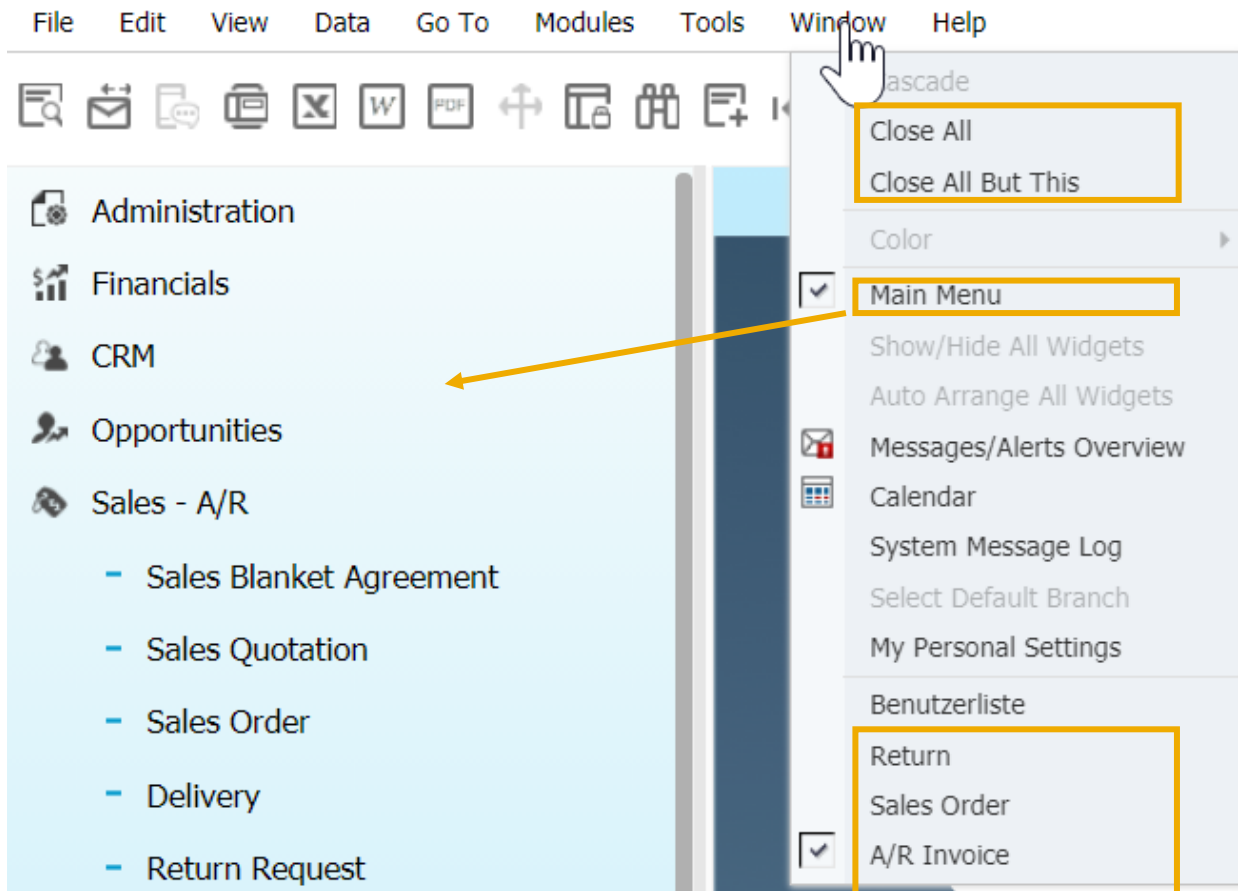
# The cockpit is your personal home page (2/2)

In the widget gallery, various dashboards, key performance indicators and workbenches are available that can be integrated into your cockpit.





# Menu bar: Window



**Close All / Close All But This**  
All or all but the active window can be closed with one click.

The **main menu** can be shown or hidden.

All **open windows** are displayed here. By clicking one item, you can move the corresponding window to the foreground.

# Toolbar

**Document preview**

**Create PDF**

**Lock application**

**Open base document**  
You can use this function to switch from the invoice to the delivery or the sales order

**Form settings**  
Columns in documents and tables can be added or hidden

**Send the document by email to the email address of the contact person**

**Binoculars** Search  
**+** New data set  
**Arrows** First to last data record, scroll through the documents

**Personal Settings / Users Setup**

# Personal Settings / Users Setup

Toolbar > Symbol Personal Settings / Users Setup

User types, user code and name informative

Contact information and affiliation to branch, department, group are specified in the General tab

In the Services tab, you can define which services / tables are shown each time you log on to SAP Business One

Language of the user interface

# Find vs. Add Mode

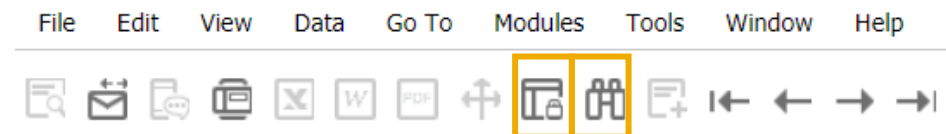
Documents always start in add mode. Other dialogues may start in find mode.

The screenshot shows the 'Item Master Data' dialog in 'Find' mode. The 'Item No.' field is empty. The 'Description' field is empty. The 'Item Type' is set to 'Artikel'. The 'UoM Group' is set to 'Manuell'. The 'Price List' is set to 'Basis Preisliste'. The 'Unit Price' is set to 'Primary Curre...'. The 'Find' button is highlighted in blue.

The screenshot shows the 'Item Master Data' dialog in 'Add' mode. The 'Item No.' field is set to 'Manuell'. The 'Description' field is empty. The 'Item Type' is set to 'Artikel'. The 'UoM Group' is set to 'Manuell'. The 'Price List' is set to 'Basis Preisliste'. The 'Unit Price' is set to 'Primary Curre...'. The 'Add' button is highlighted in blue.

**Search in SAP Business One**  
You can either enter the exact name of an item in the description field and press Enter (Example: "JB Multifunction Printer 1420" + Enter), or you can enter an asterisk (\*) in combination with part of the item description (Example: "\* JB" + Enter or \* printer + Enter). In the latter case, a list of suitable articles opens and you can select the article in question.

You can switch between Find and Add in the **menu bar**. Depending on the selected mode, the name of the button changes in the dialog..



# Adding standard columns in forms

Columns in documents, lists and reporting tables can usually be expanded. This is done via the form settings (1). The form settings dialog looks different depending on the source. All fields are displayed directly in the dialog that is opened when you want to add documents (2). Newly added fields (this is done by placing a tick in the visible column) are displayed immediately. The dialog that is opened shows all fields displayed; additional fields can be defined by searching in the field name field (3). Newly added fields do not appear until the list is closed and reopened.

The image shows two SAP dialog boxes side-by-side. The left one is 'Form Settings - Sales Order' and the right one is 'Liste - Einstellungen'. Annotations in yellow boxes and callouts explain various actions and states.

**Form Settings - Sales Order**

- 1**: A yellow box highlights the 'Form Settings' icon in the top toolbar.
- 2**: A yellow box highlights the 'Table Format' tab in the 'Form Settings' dialog.
- 3**: A yellow box highlights the 'Add field' button in the 'Form Settings' dialog.

**Liste - Einstellungen**

#	Feldname	Angezeigter Name	Grupp	Sichtb	Beschr
1	Artikelnr.	Artikelnr.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	Artikelbeschreibung	Artikelbeschreibung	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3	Auf Lager	Auf Lager	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
4	Lieferantenkatalognr.		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	Bevorzugter Lieferant	Lieferant	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
6	Eigenschaft 15		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	Material	Material	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	Materialart		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
9	Materialgruppe		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
10	Chargenr. verwalten...	Charge	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
11	Serie	Serie	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
12	Seriennr.verwaltung	Serie	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
13			<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Annotations:**

- Select table format**: Callout pointing to the 'Table Format' tab.
- Add field**: Callout pointing to the 'Add field' button.
- Check the visible column**: Callout pointing to the 'Sichtb' column header.
- Remove fields**: Callout pointing to the 'Sichtb' column header.
- Field visible but not changeable**: Callout pointing to the 'Sichtb' column header.
- Feld hinzufügen**: Callout pointing to the search field in the 'Liste - Einstellungen' dialog.
- Felder entfernen**: Callout pointing to the right mouse button area in the 'Liste - Einstellungen' dialog.
- Liste nach Feld gruppieren**: Callout pointing to the 'Grupp' column header.

# Transferring form settings from one user to another

Administration > Setup > General > Users

The form settings can be transferred from one user to another or several others. This is especially useful if a super user sets the form settings for all colleagues before go-live. If the form settings are transferred, the settings of the other users are completely overwritten. Transferring the format must therefore be carried out with care.

Users - Setup

Superuser     Mobile User     Support User

User Code: [text field]  
User Name: [text field]  
Defaults: [text field]

General    Services    Display

At the Beginning of Each Session

Perform Data Check  
 Open Exchange Rates Table  
 Display Recurring Postings on Execution  
 Display Recurring Transactions on Execution  
 Send Alert for Activities Scheduled for Today  
 Display Inbox When New Message Arrives  
 Open Window for Credit Voucher Ref. Update  
 Open Postdated Checks Window  
 Display Worklist When New Task Arrives

Update Messages (Min.): [5]  
Screen Locking Time (Min.): [30]  
Open Postdated Credit Vouchers Window: [dropdown]

Alternative Keyboard Usage

Use Numeric Keypad Enter Key as Tab Key  
 Use Numeric Keypad Period Key as Separator on Display Tab  
 Enable Document Operations by Mouse Only (Such as Add, Update, OK)

SAP Business One Office 365 Integration

OK    Cancel    **Copy Form Settings**    Restore Defaults    Send Mobile Setting

Copy Form Settings

Find: [text field]

Users    Groups

#	User Code	User Name	Department	Branch	
1	[text]	[text]	Verwaltung	Haupt	<input checked="" type="checkbox"/>
2	[text]	[text]	Verwaltung	Haupt	<input type="checkbox"/>
3	[text]	[text]	Verwaltung	Haupt	<input checked="" type="checkbox"/>
4	[text]	[text]	Verwaltung	Haupt	<input checked="" type="checkbox"/>
5	[text]	[text]	Verwaltung	Haupt	<input type="checkbox"/>
6	[text]	[text]	Verwaltung	Haupt	<input checked="" type="checkbox"/>
7	[text]	[text]	Verwaltung	Haupt	<input checked="" type="checkbox"/>
8	[text]	[text]	Verwaltung	Haupt	<input type="checkbox"/>

User Preferences    **2**  
 Message Preferences  
 Tooltip Preview Preferences

**Copy**    Cancel

**4**

1. „Copy Form Settings“
2. Check User Preferences
3. Select users that receive the settings
4. Copy

# Display user-defined fields (UDFs) and automatisms

Master data masks and receipts have a large number of standard fields in SAP Business One. If these fields are not sufficient, user-defined fields can be created. It is also possible to fill existing or new fields with automatisms.

User-defined fields can be displayed in the existing masks or called up in additional masks; these are displayed via View > User-Defined Fields.

The screenshot shows the SAP Business One Sales Order mask. The 'UDF' (User-Defined Fields) panel is open on the right side, displaying a list of user-defined fields. The 'General' tab is selected, showing fields like 'Kommissionieren' and 'Rechnungszweck'. The 'Zeitraum' (Period) field is also visible. The main mask displays the following data:

#	Type	Item No.	Item Description	Quantity	UoM Name	Unit Price	Discount %
1							0,0000

Summary fields at the bottom right:

Total Before Discount	
Discount	%
Freight	
<input type="checkbox"/> Rounding	0,00 EUR
Tax	
Total	0,00 EUR

# Filter lists

Lists can be filtered according to a variety of criteria.



Open Items List
Filter
\_ □ ×

Currency Local Currency ▾
Open Documents A/R Invoices ▾

Doc. Series	Doc. No.	Installment No.	Customer Code	Customer Name	Days Overdue	Customer Ref. No	Due Date	Amount
Primär	950	1 of 1	C70000	Broup Inc.	1506		11.09.2016	2.660,00
Primär	951	1 of 1	C70000	Broup Inc.	1482			
Primär	936	1 of 1	C26000	Büro Ausstattung Namyslo G..	1503			
Primär	935	1 of 1	C26000	Büro Ausstattung Namyslo G..	1492			
Primär	932	1 of 1	C25000	Büro Online AG	1524			
Primär	933	1 of 1	C25000	Büro Online AG	1510			
Primär	934	1 of 1	C25000	Büro Online AG	1486			
Primär	953	1 of 1	C25000	Büro Online AG	262			
Primär	970	1 of 1	C25000	Büro Online AG	239			
Primär	940	1 of 1	C40000	Büroausstatter Mayer	1521			
Primär	941	1 of 1	C40000	Büroausstatter Mayer	1513			
Primär	942	1 of 1	C40000	Büroausstatter Mayer	1480			
Primär	943	1 of 1	C42000	CIT Beratungshaus	1503			

OK

Filter Table
\_ □ ×

#	Field	Rule	Value	To Value
1	Doc. No.			
2	Installment No.			
3	Customer Code			
4	Customer Name			
5	Days Overdue			
6	Customer Ref. No.			
7	Due Date			
8	Amount			
9	Net			
10	Tax			
11	Original Amount			
12	Posting Date			
13	Document Date			
14	Document Type			
15	Blanket Agreement			
16	Doc. Series			

OK
Cancel
Clear

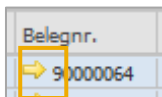


# Shortcuts

Action	Shortcut	Action	Shortcut
Print current document	Strp + P	Close all windows except for the main menu	Shift + Close the window using X.
Display transaction journal	Strg + J	Open new windows	Enter
Close SAP Business One	Strg + Q	Close current window	Esc
Undo	Strg + Z	In table: add a row	Strg + I
Redo	Strg + Shift + Z	In table: duplicate a row	Strg + M
Cut	Strg + X	In table: delete a row	Strg + K
Copy	Strg + C	Sort table by column in ascending order	Double click on column heading
Paste	Strg + V	Sort table by column in descending order	ALT + Double click on column heading
Search function for customers or articles starting with certain letters	Entering letters * Tab	In table: Display detailed information for a series	Strg + L
Multiple choice	Strg or Shift + Selection of entries	In table: Jump to the first row	Strg + H
Show user-defined fields	Strg + Shift + U	In table: Jump to the last row	Strg + E
Show next document	Strg + ->	In table: Copy from cell above	Strg + [arrow up]
Show previous document	Strg + <-	In table: Calculate gross profit	Strg + G
Switch to add mode	Strg + A	In table: Select payment method	Strg + Y
Switch to find mode	Strg + F	In table: Calculate volume and weight	Strg + W
Modify field name	Strg + Double click on field names	In table: Open base document	Strg + N
Show alternative item	Strg + Tab in the Item number field	In table: open target document	Strg + T
Enter current date	Any key (except numbers) + Tab	In table: Select a serial number for an item	Strg + Tab (in the quantity field of the item)
Enter any date in the current month	Tag + Tab	In table: Show last prices	Strg + Tab (in the price field of the item)
Enter any date in the current year	Tag + Month + Tab	In table: Copy the amount when entering the payment	After clicking on the wallet icon to specify incoming payment (Ctrl + B to copy the amount)

# Hinweise

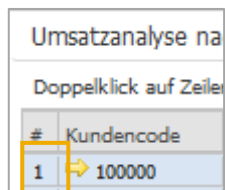
- Über goldene Pfeile können Sie in Berichten eine Ebene tiefer gehen.



- Über schwarze Pfeile und den Button „Expandieren“ kann ein Bericht expandiert, also in einer weiteren Detailtiefe aufgerufen werden.



- Oftmals bekommt man einen Bericht in einem tieferen Detailgrad, wenn man am Anfang einer Zeile auf die Positionsnummer einen Doppelklick macht.





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