



SAP Business One 10.0  
Basics First Steps  
October 2020

SBO1000-EN

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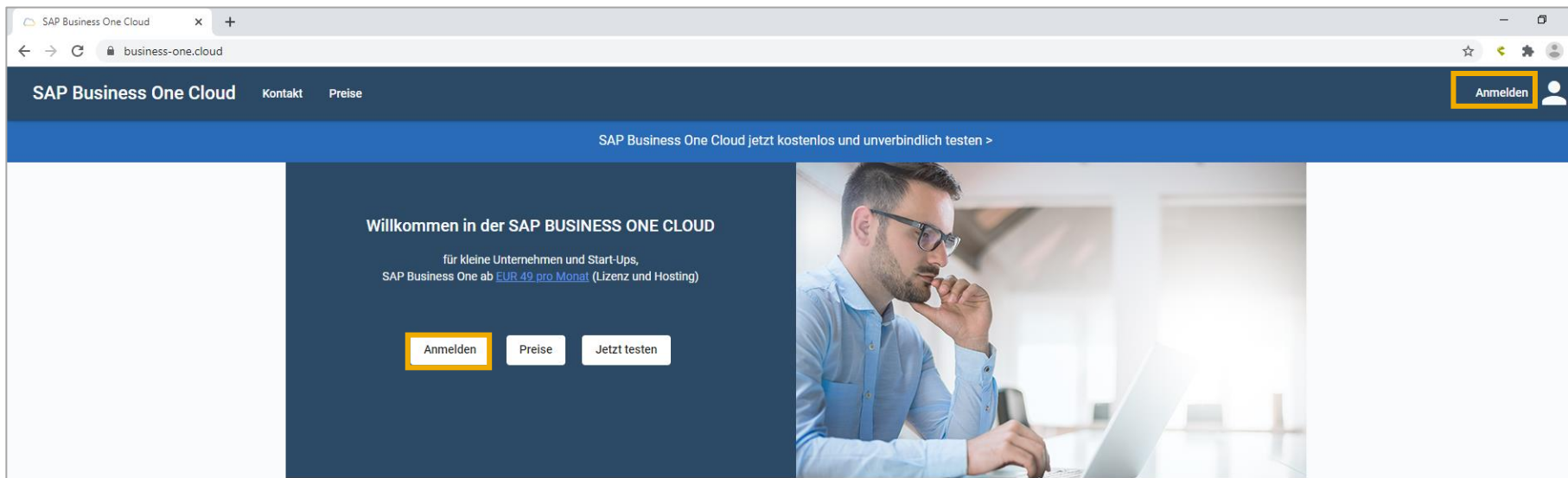
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# Set user data and password initially

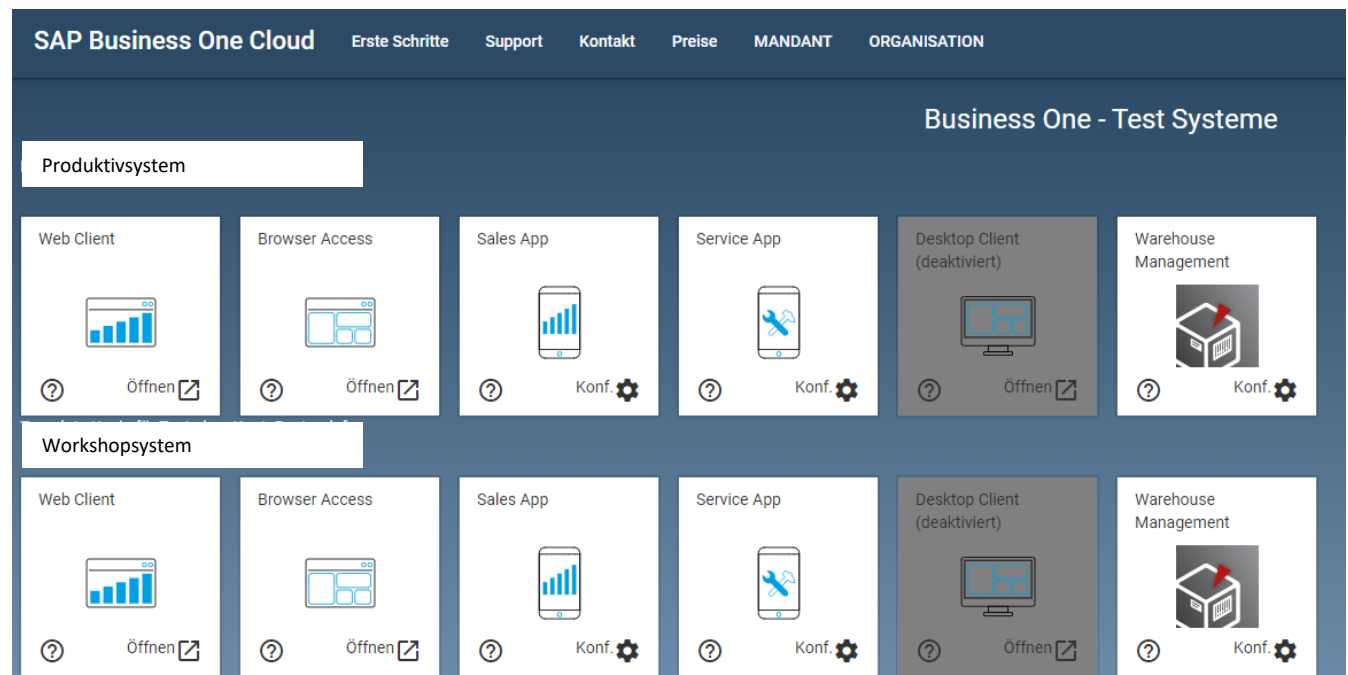
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1. You receive an email with an invitation to the SAP Business One Cloud Portal
2. Please click on the link in this email
3. On the page that opens you can generate a username and password. Please refrain from using a Google or LinkedIn account for 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 address bar shows the URL: <https://c0cm6kiisn4257usua86y.ba.eu.business-one.cloud/dispatcher/>. The interface includes a menu bar, a toolbar, a left-hand navigation pane, and a main content area. A search bar is located in the top right corner.

Numbered callouts highlight the following components:

- 1. Menu bar**: Located at the top of the browser window, containing standard menu items like File, Edit, View, Data, Go To, Modules, Tools, Window, and Help.
- 2. Toolbar**: A horizontal bar below the menu bar containing various icons for document management, navigation, and application functions.
- 3. Modules for structuring dialogues**: A vertical list on the left side of the interface, including Administration, Financials, CRM, Opportunities, Sales - A/R, Purchasing - A/P, Business Partners, Banking, Inventory, Resources, Production, MRP, Service, Human Resources, Project Management, and Reports.
- 4. Enterprise Search**: A search bar in the top right corner with the placeholder text "Look up menus" and a "Search" button.

The main content area is currently blank, displaying a large blue circle and a mouse cursor.

At the bottom of the interface, a status bar shows the date and time: 26.10.2020 08:32. The SAP Business One logo is visible in the bottom right corner.

# 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 displays the SAP Enterprise Search interface. At the top, a search bar contains the text "PC Welt". Below the search bar, the results are organized into a left-hand navigation pane and a main content area. The left pane lists various categories: "Alle", "Stammdaten (3)", "Verkaufstransaktion (362)", "Service (10)", "Opportunity (9)", and "Bankenabwicklung (27)". The main content area shows search results for "PC Welt", including activities and outgoing invoices. Each result entry includes details such as activity type, start/end dates, time, priority, and associated users. The interface also shows a "Suchergebnis" header, a "Layout" button, and a "Suchvorlage auswählen" dropdown.

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. The left sidebar lists various modules: 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 dashboard area is titled 'pc welt' and features several key figures and a sales process flowchart.

**Key Figures:**

- 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%)

**Sales Process Flowchart:**

```
graph TD
    SQ[Sales Quotation] --> SO[Sales Order]
    SO --> D[Delivery]
    D --> R[Return]
    R --> CM[A/R Credit Memo]
    CM --> ARI[A/R Invoice]
    ARI --> ARI2[A/R DP Invoice]
    ARI2 --> IP[Incoming Payments]
    IP --> C[Customer]
    C --> SW[Dunning Wizard]
    C --> SR[Sales Reports]
```

Annotations:

- Refresh cockpit:** A yellow callout box pointing to the refresh icon (circular arrow) in the top right corner.
- Edit cockpit:** A yellow callout box pointing to the edit icon (pencil) in the top right corner.

The bottom status bar shows the date and time: 26.10.2020 08:49. The SAP Business One logo is visible in the bottom right corner.

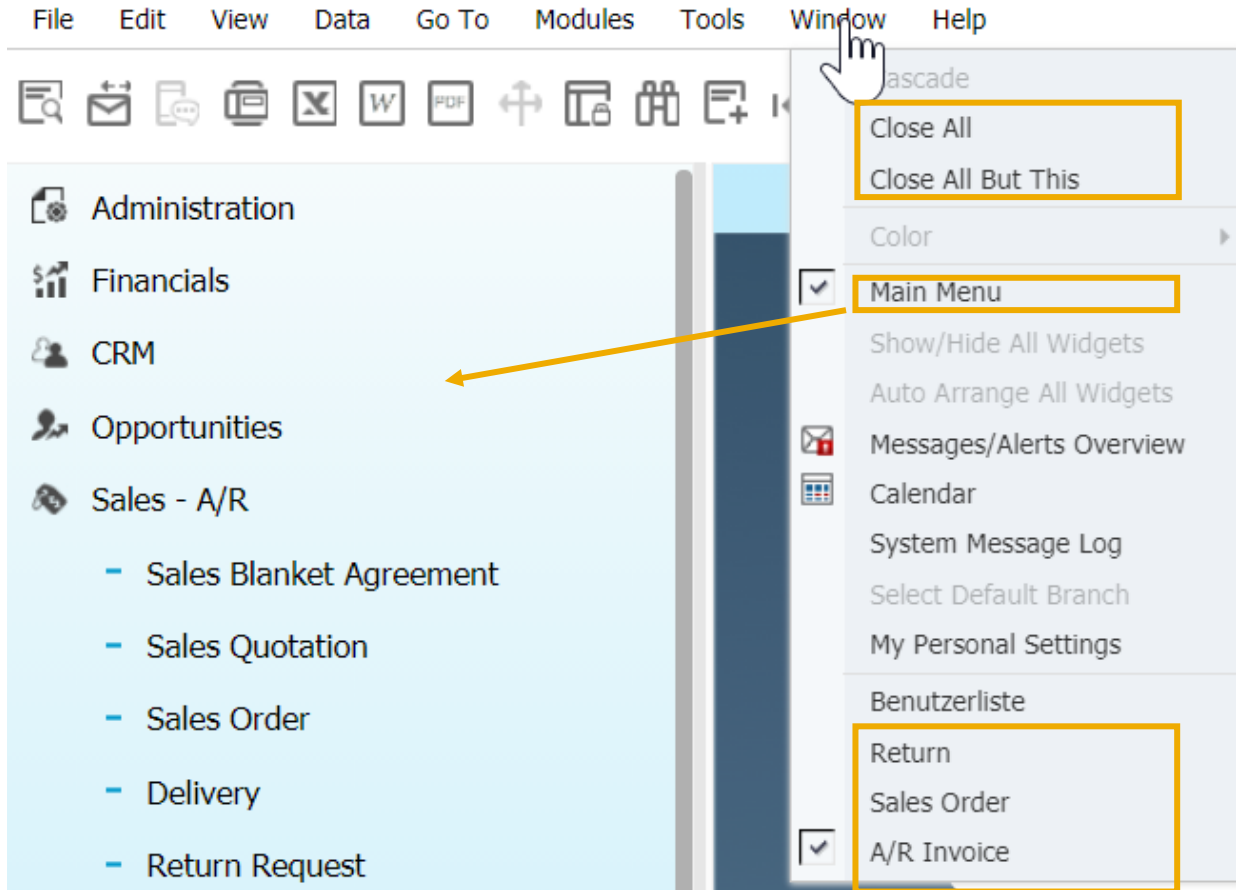
# The cockpit is your personal home page (2/2)

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





## Menu bar: Window



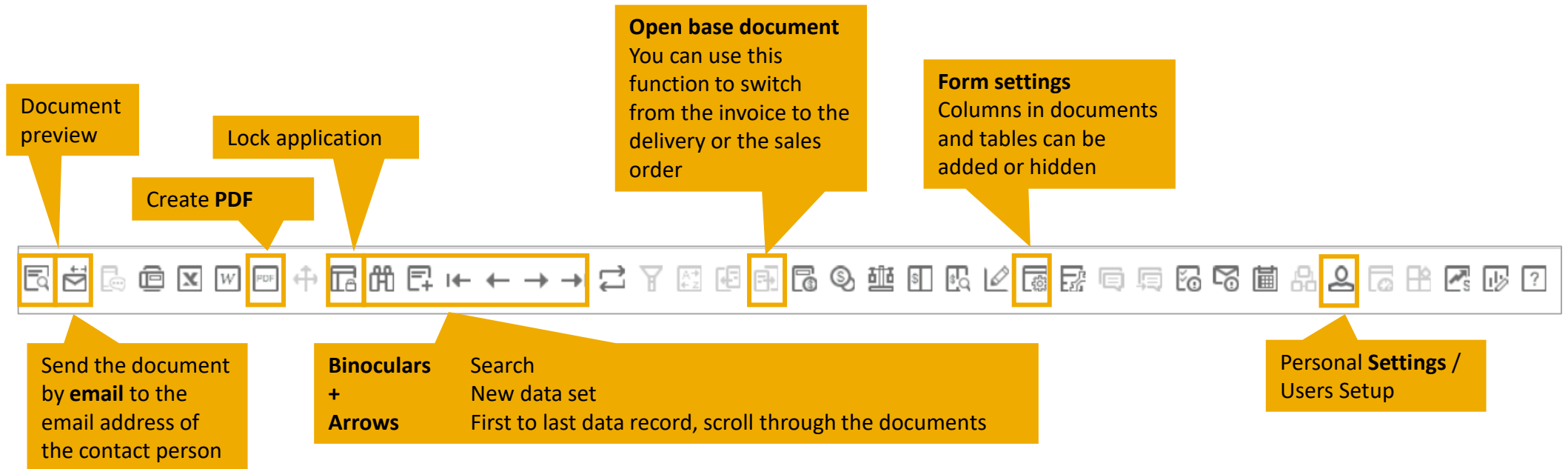
Close All /  
Close All But This

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



# 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

Users - Setup

☐ Superuser ☐ Mobile User ☐ Support User

User Code  
User Name  
Defaults

General Services Display

Bind with Microsoft Windows Account  
Employee  
E-Mail  
Mobile Phone  
Mobile Device ID  
Fax

Branch  
Department  
Groups

Password  
☒ Password Never Expires  
☐ Change Password at Next Logon  
☐ Locked

Personal Data Protection  
☐ Natural Person  
Status None

OK Cancel Copy Form Settings

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

Users - Setup

☐ Superuser ☐ Mobile User ☐ Support User

User Code  
User Name  
Defaults

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

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

Restore Defaults

OK Cancel Copy Form Settings Send Mobile Setting

Users - Setup

☐ Superuser ☐ Mobile User ☐ Support User

User Code  
User Name  
Defaults

General Services Display

Skin Style  
Color  
Language English (United States)  
Font  
Font Size  
Preview  
AaBbYyZz - abcd

Background Preview

Image Display  
Ext. Image Processing

Restore Defaults

OK Cancel Copy Form Settings Send Mobile Setting

Language of the user interface

# Find vs. Add Mode

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

Item Master Data

Item No.  ☒ Inventory Item  
Description  ☒ Sales Item  
Foreign Name  ☒ Purchase Item  
Item Type  Items  
Item Group  Artikel  
UoM Group  Basis Preisliste  
Price List  Bar Code  Unit Price  Primary Curre...  
General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Attachments

☐ Do Not Apply Discount Groups  
Manufacturer  OEC  
Additional Identifier   
Shipping Type  DHL  
Serial and Batch Numbers   
Manage Item by  None

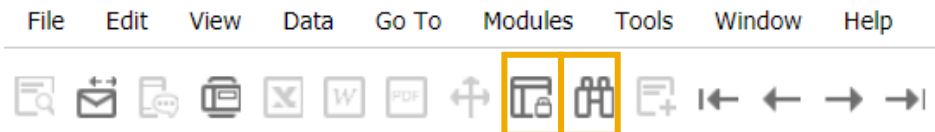
☐ Active  
☐ Inactive  
☐ Advanced

Linked to Resource   
Standard Item Identification   
Commodity Classification

**Find** Cancel

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..



Item Master Data

Item No.  Manuell ☒ Inventory Item  
Description  ☒ Sales Item  
Foreign Name  ☒ Purchase Item  
Item Type  Items  
Item Group  Artikel  
UoM Group  Manuell  
Price List  Basis Preisliste  
Bar Code  Unit Price  Primary Curre...  
General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Attachments

☐ Do Not Apply Discount Groups  
Manufacturer  OEC  
Additional Identifier   
Shipping Type  DHL  
Serial and Batch Numbers   
Manage Item by  None

☒ Active  
☐ Inactive  
☐ Advanced

From  To  Remarks

**Add** Cancel

## 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.

# 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.

**Form Settings - Sales Order**

Select UI Template:  Apply

Table Format | **Row Format** | Document

**General** | Table

**Select table format**

Sales Employee: -Kein Vertriebsmitarbeiter-  
 Commission %: 0,0000  
 Discount %: 0,0000  
 G/L Account:   
 Distr. Rule:   
 COGS Account:   
 COGS Distr. Rule:   
 Project:   
 Warehouse: 01 | Allgemeines Lager  
 Delivery Date:

**Add field**  
Check the visible column

**Remove fields**  
Delete the check mark in the Visible column

**Field visible but not changeable**  
Set a checkmark for visible but not active

**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	Chargennr. 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="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Feld hinzufügen**  
Suche in Feldname

**Felder entfernen**  
Zeile löschen über rechts Mausclick

**Liste nach Feld gruppieren**  
Haken setzen für gruppieren

# 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  
☐ Message Preferences  
☐ Tooltip Preview Preferences

**Copy** Cancel

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 contains standard sales order fields such as Customer, Name, Contact Person, Customer Ref. No., Local Currency, No., Primär, 1015, Status, Open, Posting Date, 26.10.2020, Delivery Date, 26.10.2020, and Document Date, 26.10.2020. The 'Contents' tab is active, showing a table with columns: #, Type, Item No., Item Description, Quantity, UoM Name, Unit Price, and Discount %. The table contains one row with # 1, Type Item, Item No., Item Description, Quantity, UoM Name, Unit Price, and Discount % 0,0000. The 'Sales Employee' field is set to '-Kein Vertriebsmitarbeiter-'. The 'Total Before Discount' is 0,00 EUR, and the 'Total' is 0,00 EUR. The 'Remarks' field is empty. The 'Add & New' button is visible at the bottom left.

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

Total Before Discount	
Discount	%
Freight	0,00 EUR
Rounding	0,00 EUR
Tax	0,00 EUR
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	2.650,00
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



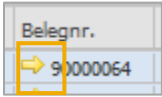
# Shortcuts

Action	Shortcut
Print current document	Strp + P
Display transaction journal	Strg + J
Close SAP Business One	Strg + Q
Undo	Strg + Z
Redo	Strg + Shift + Z
Cut	Strg + X
Copy	Strg + C
Paste	Strg + V
Search function for customers or articles starting with certain letters	Entering letters * Tab
Multiple choice	Strg or Shift + Selection of entries
Show user-defined fields	Strg + Shift + U
Show next document	Strg + ->
Show previous document	Strg + <-
Switch to add mode	Strg + A
Switch to find mode	Strg + F
Modify field name	Strg + Double click on field names
Show alternative item	Strg + Tab in the Item number field
Enter current date	Any key (except numbers) + Tab
Enter any date in the current month	Tag + Tab
Enter any date in the current year	Tag + Month + Tab

Action	Shortcut
Close all windows except for the main menu	Shift + Close the window using X.
Open new windows	Enter
Close current window	Esc
In table: add a row	Strg + I
In table: duplicate a row	Strg + M
In table: delete a row	Strg + K
Sort table by column in ascending order	Double click on column heading
Sort table by column in descending order	ALT + Double click on column heading
In table: Display detailed information for a series	Strg + L
In table: Jump to the first row	Strg + H
In table: Jump to the last row	Strg + E
In table: Copy from cell above	Strg + [arrow up]
In table: Calculate gross profit	Strg + G
In table: Select payment method	Strg + Y
In table: Calculate volume and weight	Strg + W
In table: Open base document	Strg + N
In table: open target document	Strg + T
In table: Select a serial number for an item	Strg + Tab (in the quantity field of the item)
In table: Show last prices	Strg + Tab (in the price field of the item)
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

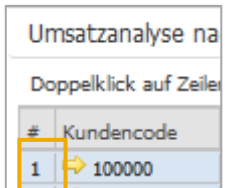
- Über goldene Pfeile können Sie in Berichten eine Ebene tiefer gehen.



- 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.



# SAP Business One



## Disclaimer of liability

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