



SAP Business One 10.0
Web Client
Basics

SBO1000-EN

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Log on to the web client

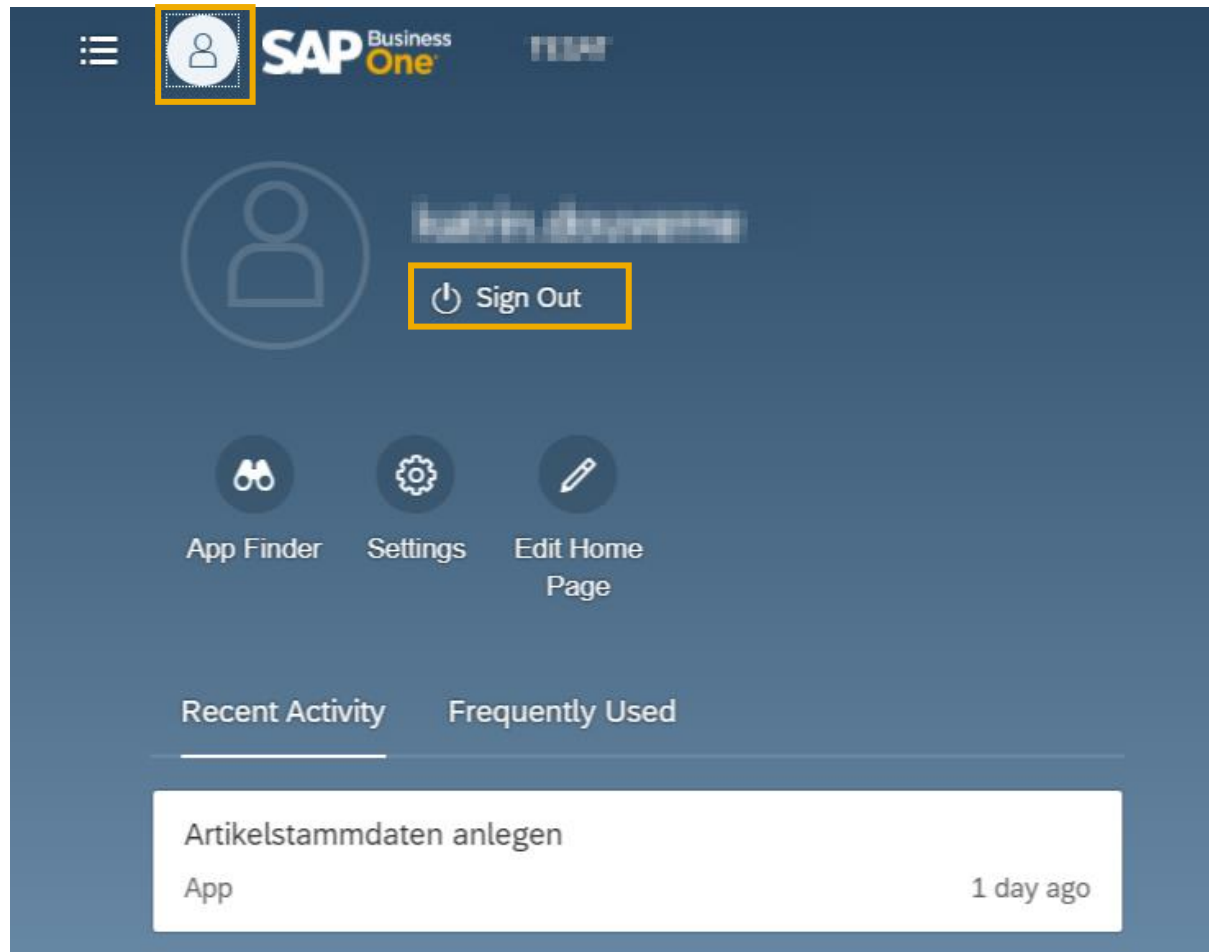
1. Open the SAP Business One Cloud with your browser (preferably Mozilla Firefox and Google Chrome) and enter the URL:
<https://www.business-one.cloud/en/>
2. You can now log in.

The screenshot shows the SAP Business One Cloud login page in a web browser. The address bar shows the URL <https://www.business-one.cloud/en/>, which is highlighted with a yellow box and labeled with a yellow square containing the number 1. The page header includes 'SAP Business One Cloud' and 'Contact'. A blue banner below the header says 'Try SAP Business One Cloud now for free and without obligation >'. The main content area has a dark blue background with the text 'Welcome to SAP BUSINESS ONE CLOUD for small companies and startups'. Below this text are two buttons: 'Login' and 'Try it now'. The 'Login' button is highlighted with a yellow box and labeled with a yellow square containing the number 2. A yellow arrow points from the 'Login' button to a 'Login' button in the top right corner of the page, which is also highlighted with a yellow box and labeled with a yellow square containing the number 2. Below the main content area, there is a section titled 'SAP Business One Cloud supports the' with two icons: 'Web Client' and 'Browser Access'. A yellow arrow points from the 'Web Client' icon to a 'Web Client' tile in a grid of application tiles, which is highlighted with a yellow box and labeled with a yellow square containing the number 3. The grid of application tiles includes 'Web Client', 'Browser Access', 'Sales App', and 'Service App'. Each tile has an icon, a question mark, and an 'Open' or 'Conf.' button.

3. The portal is opened.
There you can select the Web Client tile.

Log off from the web client

The web client is logged off via the User icon.



Home page

The screenshot displays the SAP Business One Home page for user TESAT. The top navigation bar includes a hamburger menu, a user profile icon, the SAP Business One logo, the user name 'TESAT', and the word 'Home'. On the right side of the top bar are search and list icons. Below the top bar is a secondary menu with tabs: 'My Home' (selected), 'Sales', 'Purchases', 'Business Partners', 'Analytics', 'Useful Links', and 'User-Defined Tables'. The main content area is divided into several sections. The top section contains tiles for 'Sales Quotations' (2), 'Sales Orders' (18), 'Purchase Orders' (10), 'Create Sales Order', 'Sales Analysis by Rows Overview' (0), and 'Business Partners'. The 'Sales Analysis by Rows Overview' tile shows a table with data: Einzelhandel (8.25K), Konstruktion (245.31K), and ... (3.3M). Below this is a 'Road Map to SAP Business One' banner. The middle section features a 'SAP Customer Influence' banner, 'Deliveries' (6), 'A/R Invoices' (38), and 'Sales Drafts'. The bottom section is titled 'Sales' and contains a grid of tiles: 'Sales Quotations' (2), 'Create Sales Quotation', 'Sales Orders' (18), 'Create Sales Order', 'Sales Drafts', 'Docs in Approval Process' (0), 'Deliveries' (6), 'Create Delivery', 'A/R Invoices' (38), 'Create A/R Invoice', 'Returns' (0), 'A/R Credit Memos' (0), 'Items', and 'Create Item'. Annotations with yellow callouts point to various elements: 'Home page' points to the top bar; 'Me area' points to the user profile icon; 'Company name' points to 'TESAT'; 'Enterprise Search' points to the search icon; 'Notifications' points to the list icon; 'Functions are shown as tiles' points to the bottom section; 'Functions are assembled in groups (Sales, Purchasing, Business Partners, Analytics, Useful Links and Custom Tables)' points to the secondary menu; 'In the top menu the corresponding function groups are shown and can be used for navigation' points to the top bar; 'The number in the tile shows my open A/R invoices' points to the 'A/R Invoices' tile with the number 38; and a red-bordered box contains the text 'These functions are not explained in this training module. Check corresponding training material for details.'

Home page

Me area

Company name

Enterprise Search

Notifications

Home

My Home Sales Purchases Business Partners Analytics Useful Links User-Defined Tables

Sales Quotations 2 Open

Sales Orders 18 Open

Purchase Orders 10 Open

Create Sales Order

Sales Analysis by Rows Overview
Sales YTD by Customer Group

Business Partners

Road Map to SAP Business One

SAP Customer Influence
SAP Business One

Deliveries 6 Open

A/R Invoices 38 Open

Sales Drafts

User Guide

Sales

Sales Quotations 2 Open

Create Sales Quotation

Sales Orders 18 Open

Create Sales Order

Sales Drafts

Docs in Approval Process 0

Deliveries 6 Open

Create Delivery

A/R Invoices 38 Open

Create A/R Invoice

Returns 0 Open

A/R Credit Memos 0 Open

Items

Create Item

The number in the tile shows my open A/R invoices

These functions are not explained in this training module. Check corresponding training material for details.

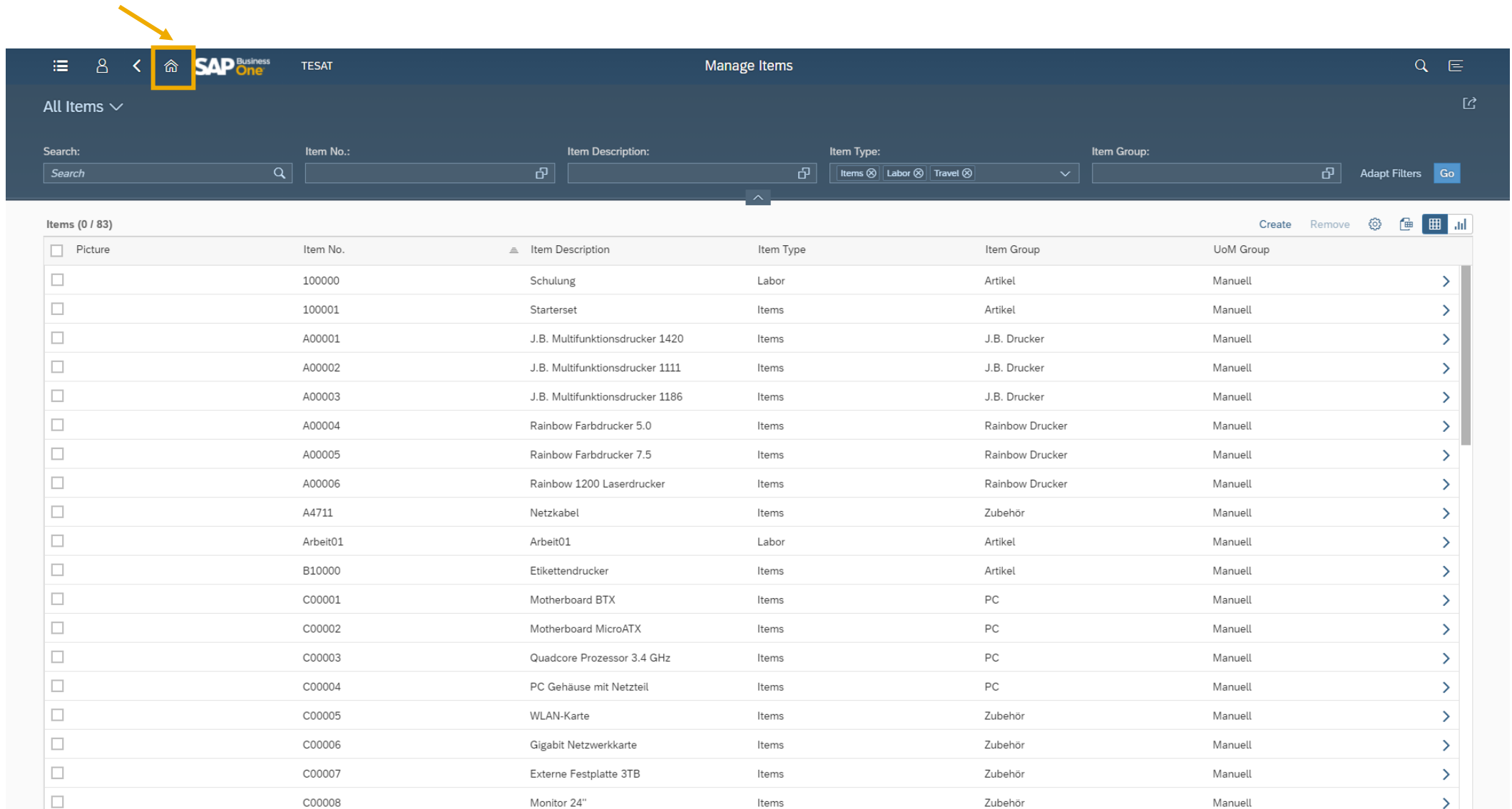
Functions are shown as tiles

Functions are assembled in groups (Sales, Purchasing, Business Partners, Analytics, Useful Links and Custom Tables)

In the top menu the corresponding function groups are shown and can be used for navigation

Go to the home page

If you are not on the home page, the home page can be called up via the house icon.

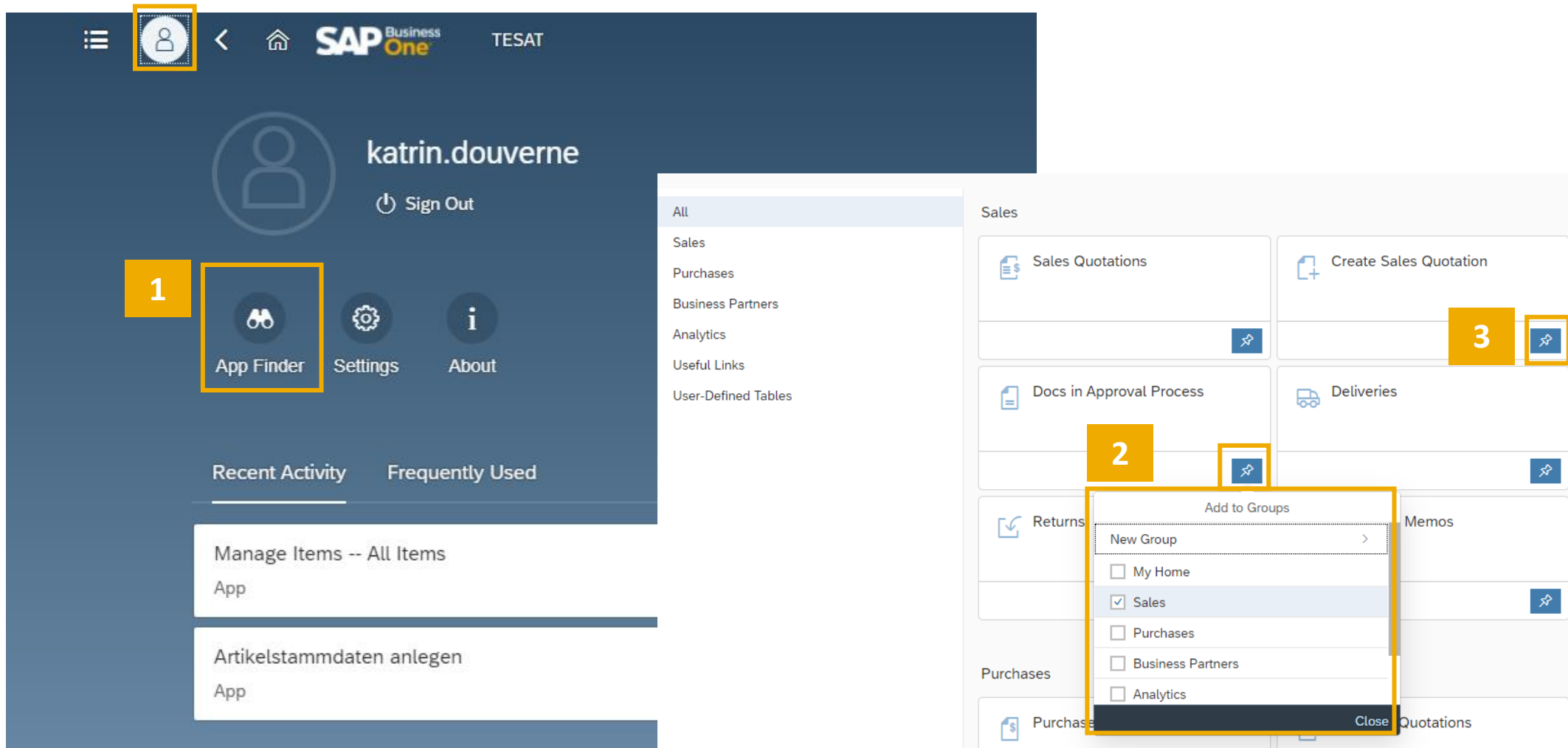


The screenshot shows the SAP Business One 'Manage Items' interface. The top navigation bar includes a house icon highlighted by a yellow arrow. Below the navigation bar, there are search and filter fields for 'Search', 'Item No.', 'Item Description', 'Item Type', and 'Item Group'. The main area displays a table of items with the following columns: Picture, Item No., Item Description, Item Type, Item Group, and UoM Group. The table lists 18 items, including various printers, cables, and computer components.

Picture	Item No.	Item Description	Item Type	Item Group	UoM Group
<input type="checkbox"/>	100000	Schulung	Labor	Artikel	Manuell
<input type="checkbox"/>	100001	Starterset	Items	Artikel	Manuell
<input type="checkbox"/>	A00001	J.B. Multifunktionsdrucker 1420	Items	J.B. Drucker	Manuell
<input type="checkbox"/>	A00002	J.B. Multifunktionsdrucker 1111	Items	J.B. Drucker	Manuell
<input type="checkbox"/>	A00003	J.B. Multifunktionsdrucker 1186	Items	J.B. Drucker	Manuell
<input type="checkbox"/>	A00004	Rainbow Farbdrucker 5.0	Items	Rainbow Drucker	Manuell
<input type="checkbox"/>	A00005	Rainbow Farbdrucker 7.5	Items	Rainbow Drucker	Manuell
<input type="checkbox"/>	A00006	Rainbow 1200 Laserdrucker	Items	Rainbow Drucker	Manuell
<input type="checkbox"/>	A4711	Netzkabel	Items	Zubehör	Manuell
<input type="checkbox"/>	Arbeit01	Arbeit01	Labor	Artikel	Manuell
<input type="checkbox"/>	B10000	Etikettendrucker	Items	Artikel	Manuell
<input type="checkbox"/>	C00001	Motherboard BTX	Items	PC	Manuell
<input type="checkbox"/>	C00002	Motherboard MicroATX	Items	PC	Manuell
<input type="checkbox"/>	C00003	Quadcore Prozessor 3.4 GHz	Items	PC	Manuell
<input type="checkbox"/>	C00004	PC Gehäuse mit Netzteil	Items	PC	Manuell
<input type="checkbox"/>	C00005	WLAN-Karte	Items	Zubehör	Manuell
<input type="checkbox"/>	C00006	Gigabit Netzwerkkarte	Items	Zubehör	Manuell
<input type="checkbox"/>	C00007	Externe Festplatte 3TB	Items	Zubehör	Manuell
<input type="checkbox"/>	C00008	Monitor 24"	Items	Zubehör	Manuell

Edit home page: Add tiles, assign and remove groups

1. All available functions (apps) are available through the app finder (use the user icon to navigate to the app finder)
2. Functions with a white pin are not pinned to your home page and can be added to the home page by clicking on the pin. When you click on the pin, the function can also be assigned to one or more groups.
3. Functions with a dark blue pin are already included on your home page and can be removed from the start screen by clicking on the pin.

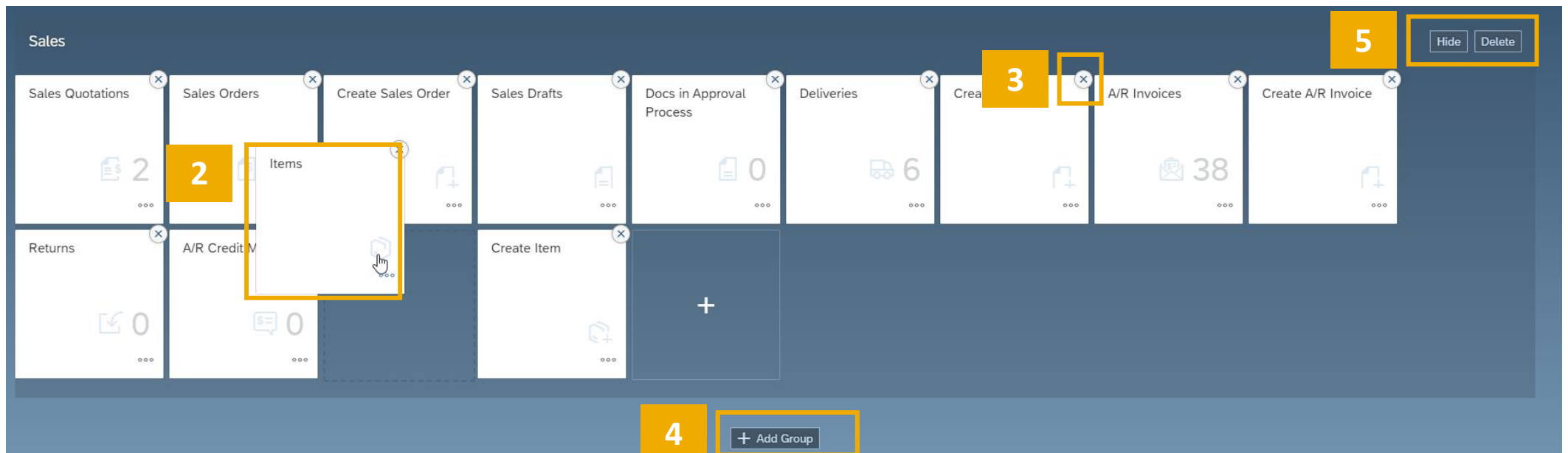
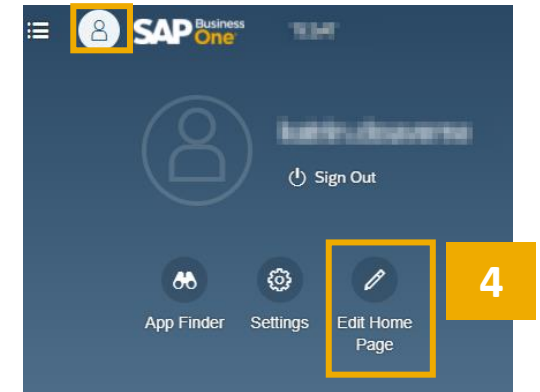


Edit home page: Structure existing tiles

1. The “Edit home page” function is accessed from the Me area.

The following options are offered:

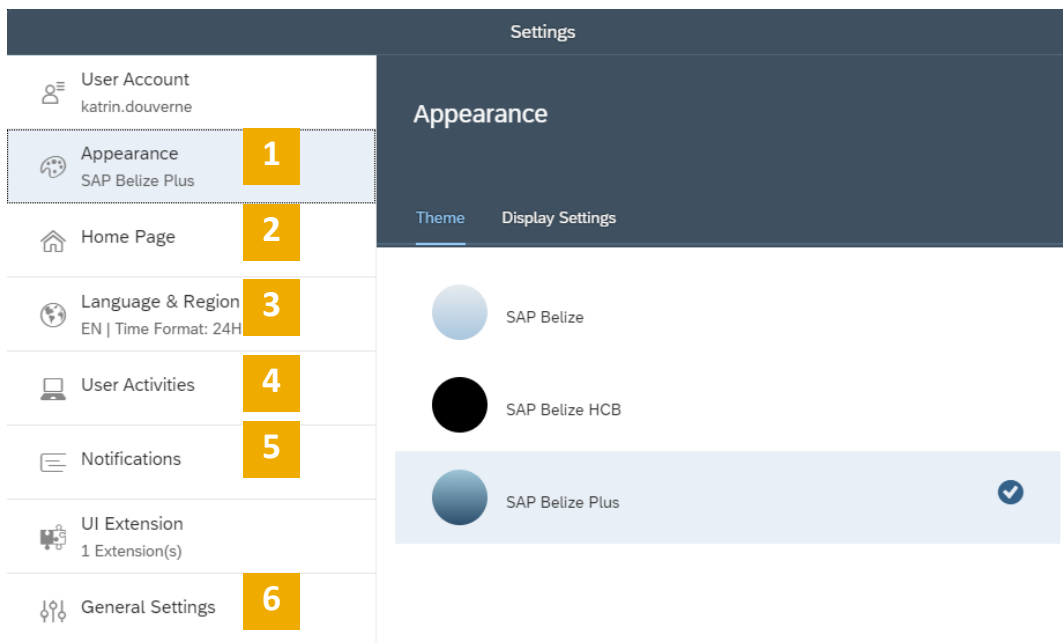
2. Tiles can be moved within a group or from group to group using drag and drop.
3. Tiles can be deleted from the start page.
4. New groups can be created.
5. Existing groups can be hidden or deleted.



Maintain settings

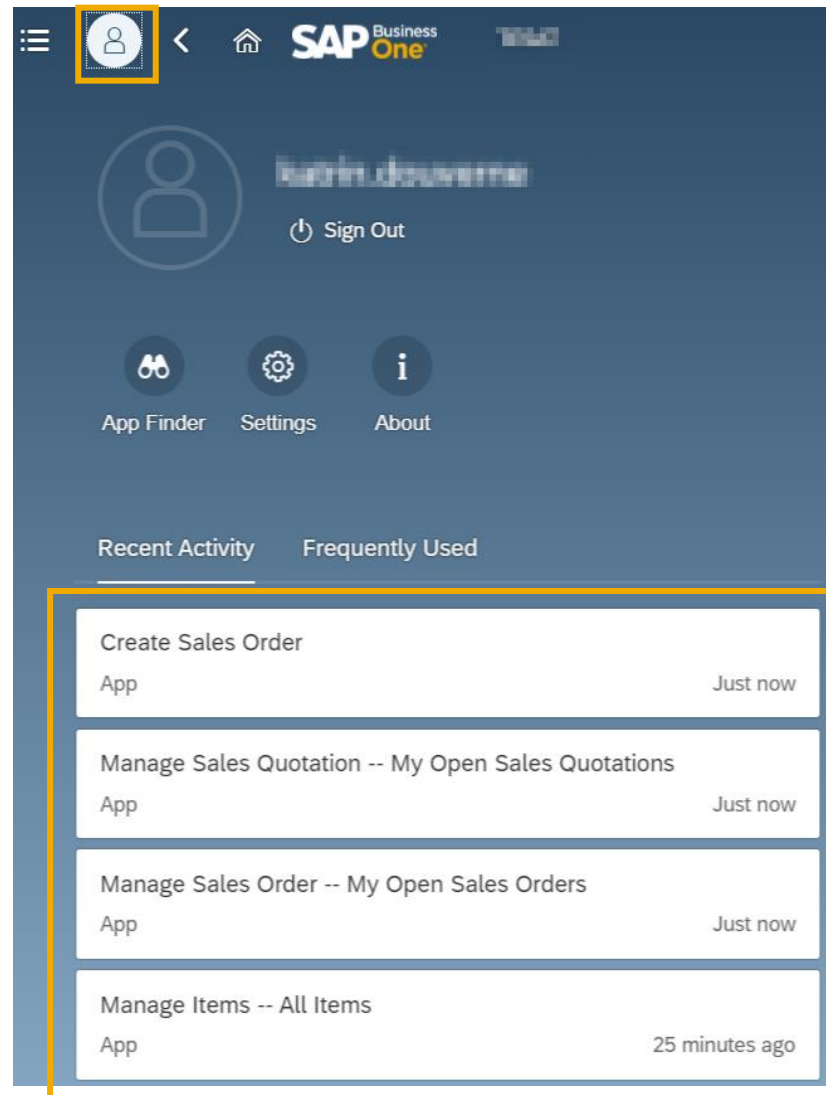
The settings are called using the User icon. The users can maintain the following functions for themselves:

1. **Appearance:** You can choose between 3 different interfaces in the Theme tab. The size and spacing of the controls as well as the choice of animation can be determined in the Display Settings tab.
2. **Home Page:** The home page shows your tiles and links grouped together. You can choose whether you want to display all groups on one page or one group at once. The single group display may be more suitable for groups with many apps.
3. **Language & Region:** The language and the time format are defined here.
4. **User Activities:** In the Me area, the Web Client shows a dynamic list of the 30 most recently used apps and the 30 most frequently used apps. The history can be deleted here.
5. **Notifications:** Activity reminders can be displayed. You can de/activate functionality here. You can define if the corresponding information should be displayed on the home page and how many days the information may go back.
6. **General settings:** It is determined whether a quick view should be displayed. For many functions there are golden arrows that enable the user to e.g. jump from the customer order to the business partner master data. This function is very helpful and informative in practice.



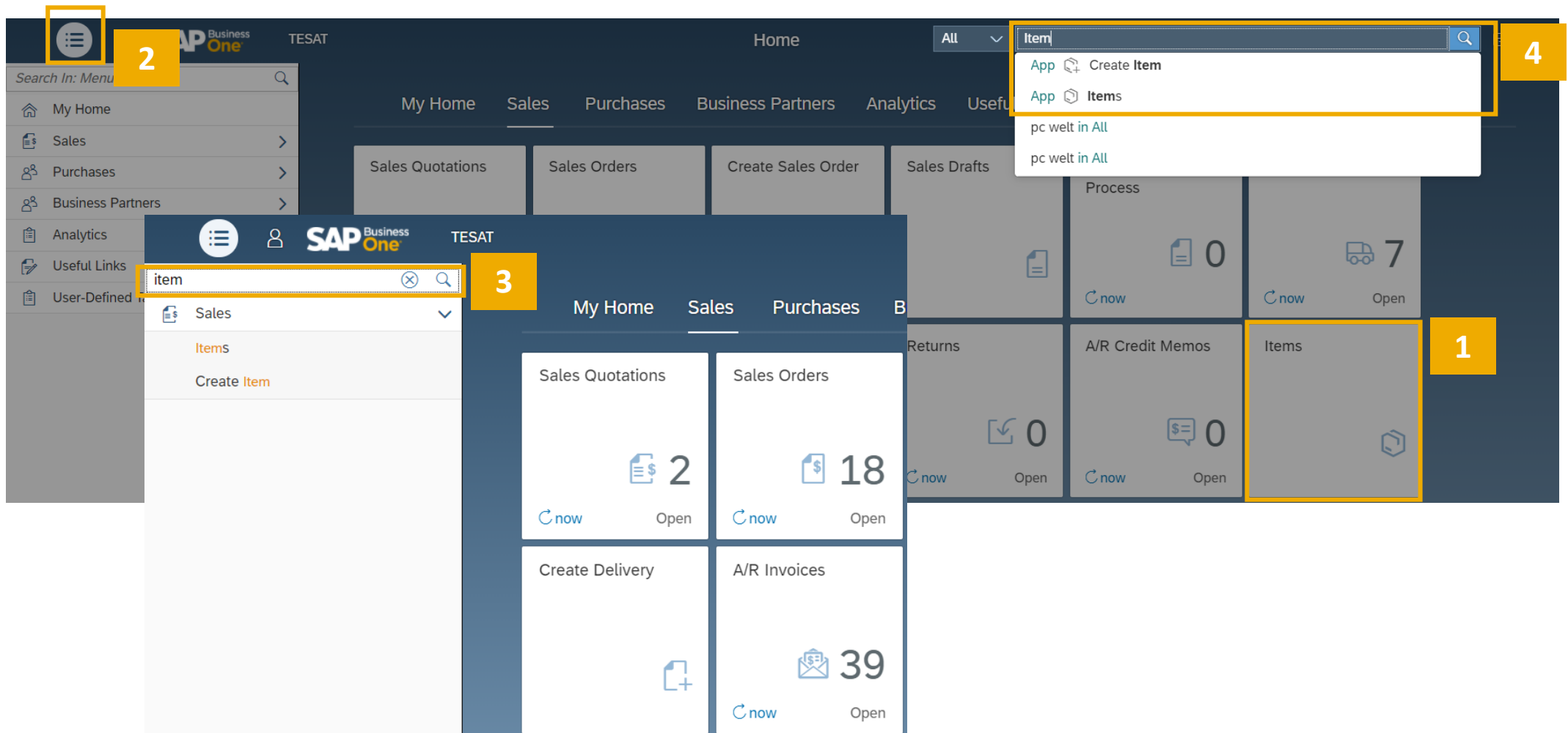
Recently used / frequently used

The history of the most recently used functions as well as the most frequently used functions can be viewed in the Me area.



Call functions

1. Apps can be accessed using the tiles on the home page or
2. the main menu can be used.
3. Hidden function can be found using the search function in the main menu or
4. using the enterprise search.



Enterprise Search (1)

Enterprise Search is the intelligent search function of SAP Business One. You can search for:

1. Functions (search example: "Invoice"): As a result, all suitable functions are displayed.
2. Data (search example: customer name (2a), document number (2b) or invoice amount (2b)): The result is the business partner master or article master and all processes associated with the search term.

The screenshot displays the SAP Business One Enterprise Search interface. The top navigation bar includes the SAP Business One logo, the user 'TESAT', and a search bar. Below the navigation bar, there are two search results panels. The first panel shows results for the search term 'invoice', with a filter icon highlighted. The second panel shows results for the search term 'PC Welt', with a filter icon highlighted. The search results are displayed in a table format, showing various activities and their associated data.

Search 1: invoice

Results (12)

Search 2: PC Welt

Results (379)

Search In

Search In	Count
All	379
Activity	4
A/R Credit Memo	3
Business Partner	1
Sales A/R Invoice	117
Sales Delivery	97
Sales Order	108
Sales Quotation	47
Sales Return	2

Results (379)

Activity	Activity Code	Activity	Tel.	Remarks
5 Activity	5	P(Campaign)	030/56590-1	Kampagne Sommerspezial
19 Activity	19	T(Task)	030/56590-1	Druckerproblem - IBM Infopri...
22 Activity	22	P(Campaign)	-	Frühjahr/Sommer 2013

Annotations:

- If the search term is regularly used, it can be placed as a tile on the start page.
- If the data available in SAP Business One is searched for a term, the associated master sheets and processes are displayed. You can use the filter to get to the result quickly.

Enterprise Search (2)

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

1. Functions (search example: "Article"): All matching functions are displayed as a result.
2. Data (search example: customer name (2a), document number (2b) or invoice amount (2b)): The result is the business partner master or article master and all processes associated with the search term. You can use the filter to get to the result quickly.

The screenshot displays the SAP Business One Enterprise Search interface. The search bar at the top right contains the number '257'. A dropdown menu on the left, titled 'Search In', lists various document types with their respective counts: 'All' (9), 'Sales A/R Invoice' (4), 'Sales Delivery' (2), 'Sales Order' (2), and 'Sales Quotation' (1). The 'Sales A/R Invoice' option is highlighted. The main results area shows a list of documents, with the first result being document 257, a Sales A/R Invoice. The details for this document are displayed on the right, including Doc#, Doc Number, BP Code, Status, Posting Date, Due Date, Remarks, Total, and Track No. A yellow callout box on the right explains that if data is searched for a term, the associated master sheets and processes are displayed, and the filter can be set on a more detailed level. The bottom of the interface shows the 'Filter By' section with options for 'Contact Person' and 'BP Code'.

Search In

Search In	Count
All	9
Sales A/R Invoice	4
Sales Delivery	2
Sales Order	2
Sales Quotation	1

Results (9)

257 Sales A/R Invoice

Doc#: 257 Doc Number: 257 BP Code: C60000

Status: C(Closed) Posting Date: 04.06.2012 Due Date: 04.07.2012

Remarks: Based On Sales Quotations 9... Total: 1,123.50 Track No.: -

295 Sales A/R Invoice

Doc#: 295 Doc Number: 295 BP Code: C60000

Status: C(Closed) Posting Date: 04.06.2012 Due Date: 04.07.2012

Remarks: Based On Sales Quotations 91... Total: 1,123.50 Track No.: -

692 Sales A/R Invoice

Doc#: 692 Doc Number: 692 BP Code: L10001

Status: C(Closed) Posting Date: 04.06.2012 Due Date: 04.07.2012

Remarks: Based On Sales Quotations 91... Total: 1,123.50 Track No.: -

961 Sales A/R Invoice

Doc#: 961 Doc Number: 961 BP Code: C20000

Status: C(Closed) Posting Date: 04.06.2012 Due Date: 04.07.2012

Remarks: Based On Sales Quotations 91... Total: 1,123.50 Track No.: -

Filter By

Contact Person

Contact Person	Count
Alexandre Gueriot	1
Christian Gander	1
Katrin Ackermann	2

BP Code

BP Code	Count
C20000	1
C60000	2

Results (4)

257 Sales A/R Invoice

Doc#: 257 Doc Number: 257 BP Code: C60000

Status: C(Closed) Posting Date: 04.06.2012 Due Date: 04.07.2012

Remarks: Based On Sales Quotations 91... Total: 1,123.50 Track No.: -

295 Sales A/R Invoice

Doc#: 295 Doc Number: 295 BP Code: C60000

Status: C(Closed) Posting Date: 04.06.2012 Due Date: 04.07.2012

Remarks: Based On Sales Quotations 91... Total: 1,123.50 Track No.: -

692 Sales A/R Invoice

Doc#: 692 Doc Number: 692 BP Code: L10001

Status: C(Closed) Posting Date: 04.06.2012 Due Date: 04.07.2012

Remarks: Based On Sales Quotations 91... Total: 1,123.50 Track No.: -

961 Sales A/R Invoice

Doc#: 961 Doc Number: 961 BP Code: C20000

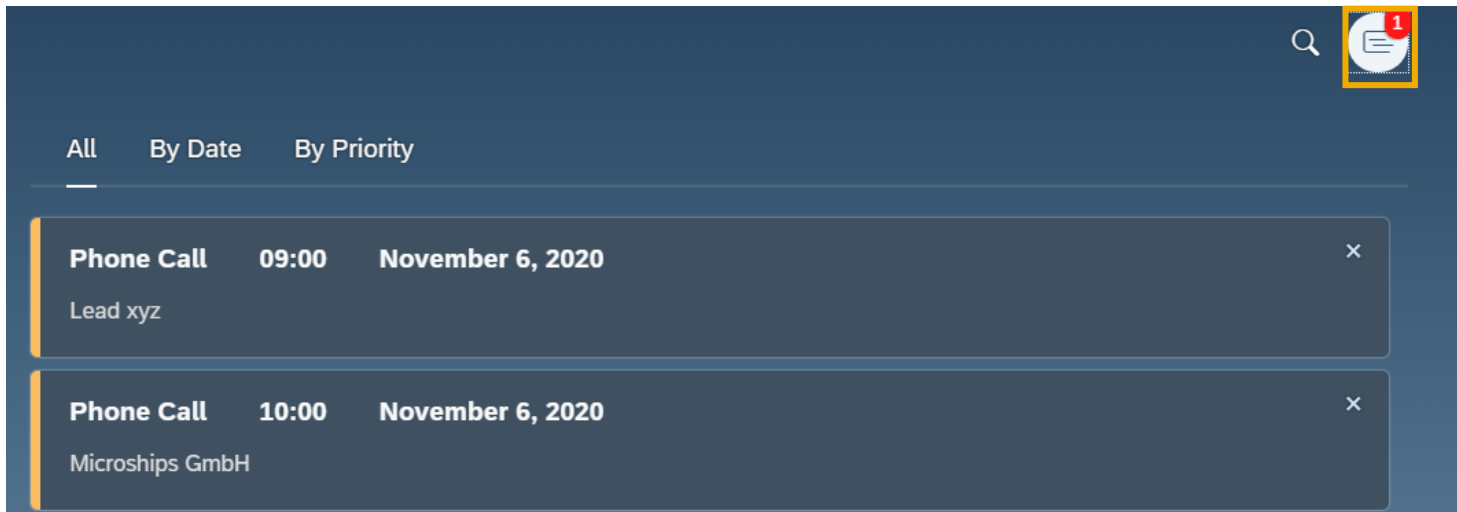
Status: C(Closed) Posting Date: 04.06.2012 Due Date: 04.07.2012

Remarks: Based On Sales Quotations 91... Total: 1,123.50 Track No.: -

If the data available in SAP Business One is searched for a term, the associated master sheets and processes are displayed. You can use the filter to get to the result quickly. In this example a number is searched for, master data sheets are now displayed in which the number is used, document numbers, reference numbers and invoice amounts that match the search number are also displayed. By clicking on the filter, the filter can be set on a more detailed level. In the case of an outgoing invoice, for example, it can be limited to: Contact person, BP name, posting date, due date, status, document date, sales representative.

Notifications

Here you can view a list of activity notifications, including notifications about approval processes for the author of an approval process (currently only supported for customer orders), and delete all irrelevant notifications (X). The “By Date” tab shows the notifications grouped by date. On the “By Priority” tab, activity notifications appear by priority: high (red) first, followed by normal (yellow) and low (green) priority. By clicking on an entry, the corresponding activity is opened.



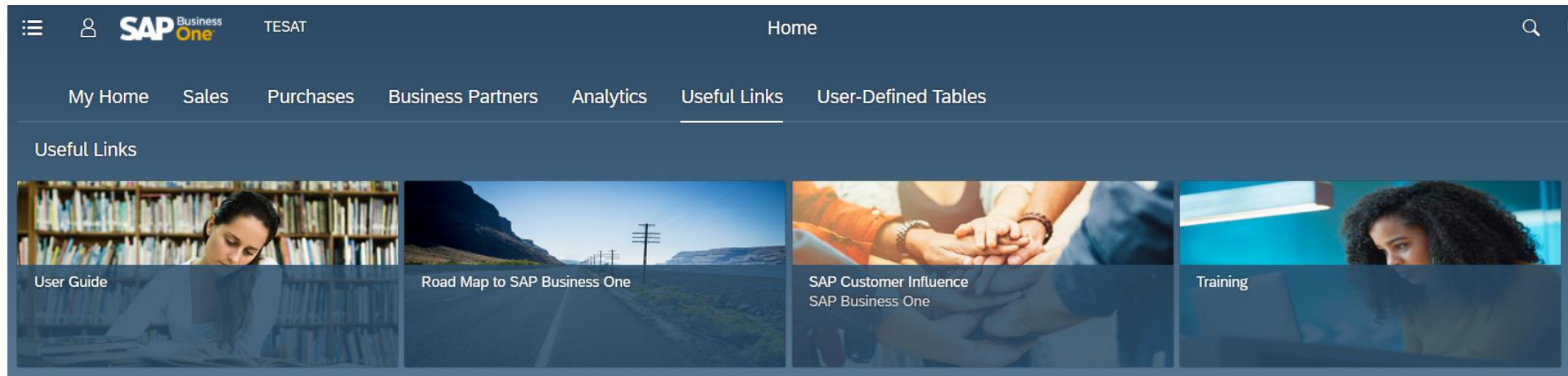
The screenshot displays the SAP Notifications interface. At the top right, there is a search icon and a notification icon with a red '1' badge. Below these are three tabs: 'All', 'By Date', and 'By Priority'. The 'All' tab is selected. The notification list contains two entries, both for 'November 6, 2020'. Each entry has a title, a time, and a description, with a delete icon (X) on the right.

Activity	Time	Date	Action
Phone Call	09:00	November 6, 2020	X
Lead xyz			
Phone Call	10:00	November 6, 2020	X
Microships GmbH			

Useful links

The following external functions are visible as a tile:

- User guide
- Roadmap for SAP Business One:
After registering with your S-User, you can look up which functions are planned for the web client in the future
- SAP Customer Influence:
After logging in with your S-User, you can submit suggestions for improvement for SAP Business One and vote for suggestions that other users have already submitted
- Training
Videos about the Web Client



User-defined tables

List of add-ons that are connected to the current SAP Business One system.

The screenshot displays the SAP Business One user interface. At the top, the header bar includes the SAP Business One logo, the company name 'TESAT', and the 'Home' button. Below the header, a navigation bar contains links for 'My Home', 'Sales', 'Purchases', 'Business Partners', 'Analytics', 'Useful Links', and 'User-Defined Tables'. The 'User-Defined Tables' section is active, showing a list of six add-ons, each with a document icon and a 'User-Defined Tables' link below it:

Add-on Name	Table Name
Extension DB versions	BFEXT
Payment Engine	BPCNT
Payment Engine	BPRST
Extension DB versions	BFEXTDBVERSION
ELSTER License	BEOLIC
Test	TEST

SAP Business One



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