



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

SAP Business One 10.0  
Web Client – Basics  
October 2024

SBO1000-EN

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# Log on to the web client

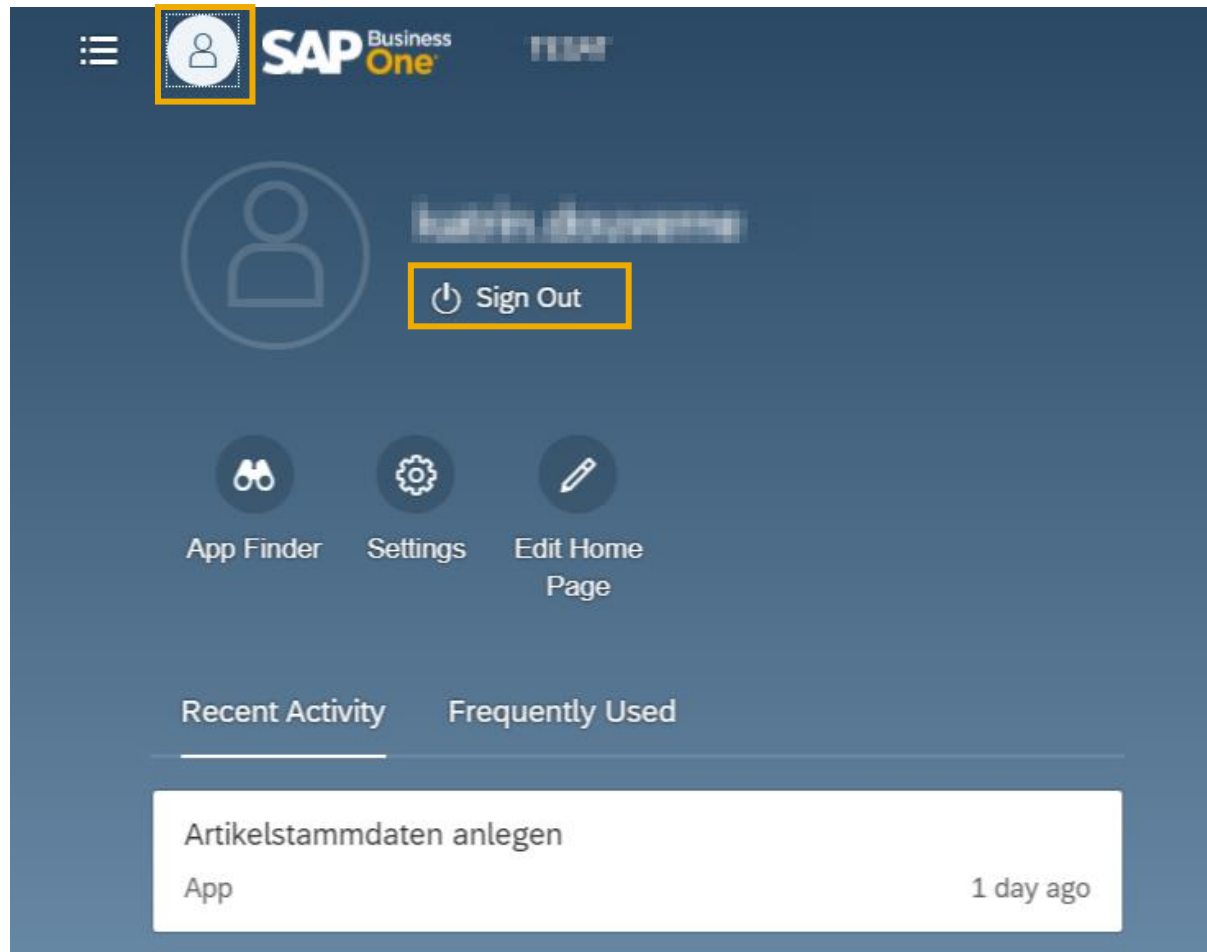
1. Open the SAP Business One Cloud with your browser (preferably Mozilla Firefox and Google Chrome) and enter the URL:  
<https://www.business-one.cloud/en/>
2. You can now log in.

The screenshot illustrates the steps to log on to the SAP Business One Cloud web client. It shows a browser window with the URL <https://www.business-one.cloud/en/> entered in the address bar. The website header features a 'Login' button. The main content area displays a 'Welcome to SAP BUSINESS ONE CLOUD' message for small companies and startups, with a 'Login' button and a 'Try it now' button. Below this, there are tiles for 'Web Client' and 'Browser Access'. A yellow arrow points from the 'Login' button in the main content area to the 'Web Client' tile.

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

Home page      Me area      Company name      Enterprise Search      Notifications

The screenshot shows the SAP Business One Home page for user TESAT. The top navigation bar includes 'My Home', 'Sales', 'Purchases', 'Business Partners', 'Analytics', 'Useful Links', and 'User-Defined Tables'. The main content area is divided into several sections:

- Sales Quotations:** 2 open items.
- Sales Orders:** 18 open items.
- Purchase Orders:** 10 open items.
- Create Sales Order:** 0 open items.
- Sales Analysis by Rows Overview:** Sales YTD by Customer Group. Data: Einzelhandel (8.25K), Konstruktion (245.31K), ... (3.3M).
- Business Partners:** 0 open items.
- Deliveries:** 6 open items.
- A/R Invoices:** 38 open items.
- Sales Drafts:** 0 open items.
- Docs in Approval Process:** 0 open items.
- Create Delivery:** 6 open items.
- A/R Invoices (Detailed):** 38 open items.
- Create A/R Invoice:** 0 open items.
- Returns:** 0 open items.
- A/R Credit Memos:** 0 open items.
- Items:** 0 open items.
- Create Item:** 0 open items.

Annotations include:

- Yellow callouts pointing to the 'Sales' menu item and various tiles.
- A red box highlights the top navigation menu.
- A red box highlights the 'A/R Invoices' tile with the number 38.
- A red box highlights a group of tiles (Create A/R Invoice, Returns, A/R Credit Memos, Items, Create Item).
- A red box highlights a group of tiles (Docs in Approval Process, Deliveries, Create Delivery, A/R Invoices).
- A yellow callout points to the number 38 in the A/R Invoices tile, stating: 'The number in the tile shows my open A/R invoices'.
- A red box contains the text: 'These functions are not explained in this training module. Check corresponding training material for details.'

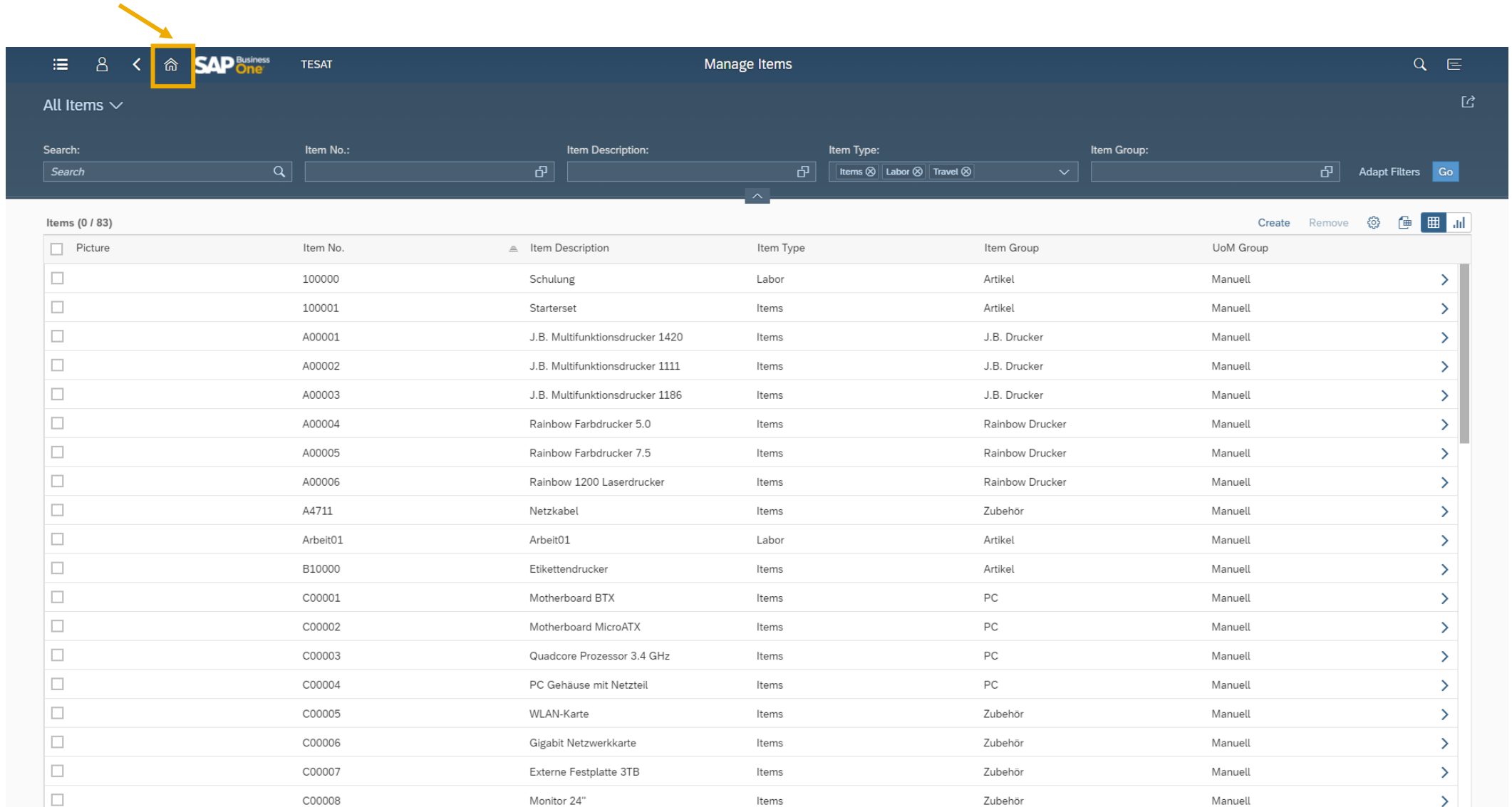
Functions are shown as tiles

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 interface for the 'Manage Items' page. The top navigation bar includes a menu icon, a user profile icon, a back arrow, and a house icon (highlighted with a yellow box and a yellow arrow). The SAP Business One logo and the company name 'TESAT' are also visible. The page title is 'Manage Items'. Below the navigation bar, there is a search bar and several filter fields: 'Item No.', 'Item Description', 'Item Type' (with a dropdown menu showing 'Items', 'Labor', and 'Travel'), and 'Item Group'. A 'Go' button is located at the end of the filter row. The main content area displays a table of items with columns for 'Picture', 'Item No.', 'Item Description', 'Item Type', 'Item Group', and 'UoM Group'. The table contains 83 items, with the first 8 items visible in the screenshot. The table is sorted by 'Item No.' in ascending order.

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.

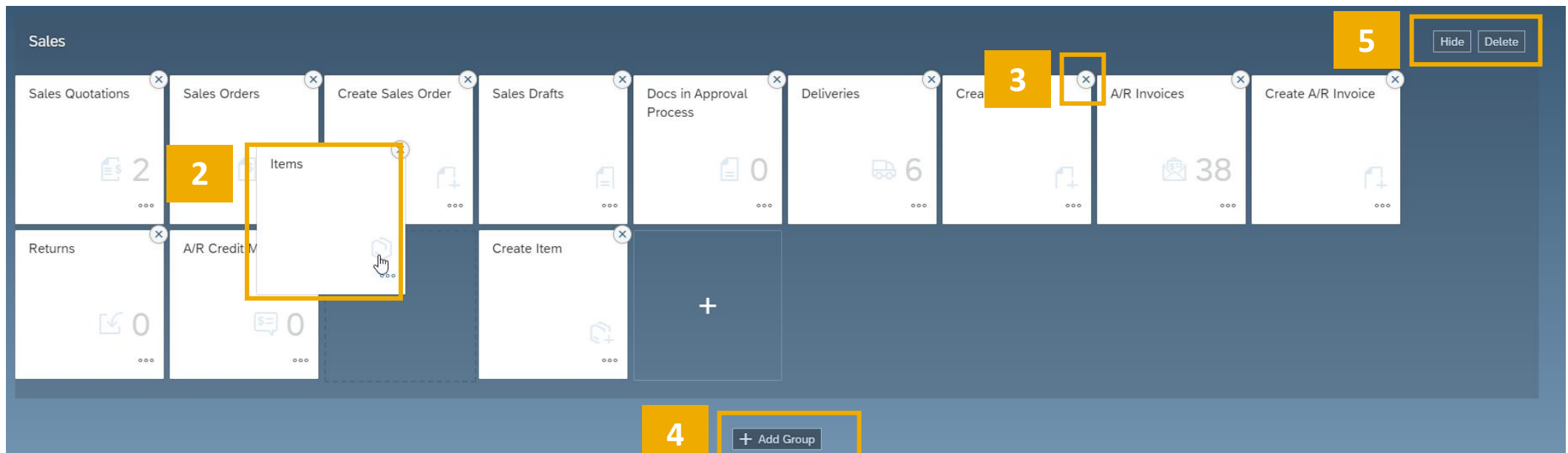
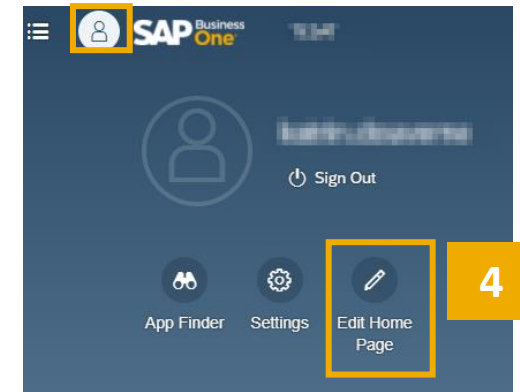
The screenshot displays the SAP Business One home page for user 'katrin.douverne'. The top navigation bar includes a menu icon, a user icon (highlighted with a yellow box and labeled '1'), a home icon, the SAP Business One logo, and the company name 'TESAT'. Below the navigation bar, the user's name and a 'Sign Out' button are visible. The main area features three navigation buttons: 'App Finder' (highlighted with a yellow box and labeled '1'), 'Settings', and 'About'. Below these are sections for 'Recent Activity' and 'Frequently Used' apps, including 'Manage Items -- All Items' and 'Artikelstammdaten anlegen'. On the right, a grid of app tiles is shown under the 'Sales' category. The tiles include 'Sales Quotations', 'Create Sales Quotation', 'Docs in Approval Process', 'Deliveries', 'Returns', and 'Memos'. A context menu is open over the 'Create Sales Quotation' tile (highlighted with a yellow box and labeled '2'), showing the 'Add to Groups' option. The menu lists 'New Group' and several groups: 'My Home', 'Sales' (checked), 'Purchases', 'Business Partners', and 'Analytics'. A yellow box labeled '3' highlights the pin icon on the 'Create Sales Quotation' tile.

# 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.

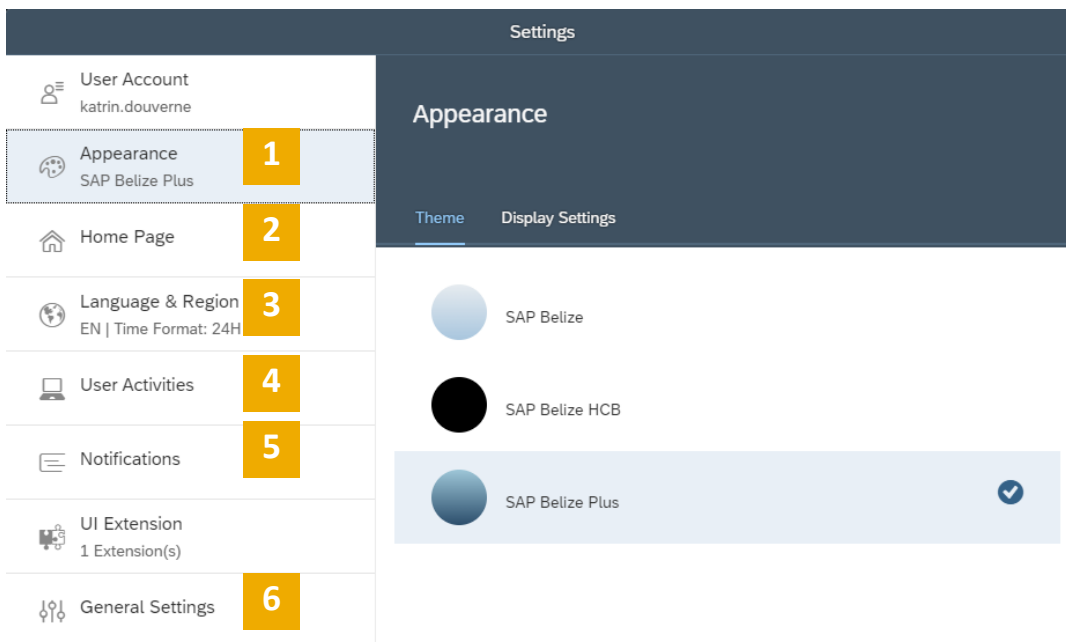




# Maintain settings

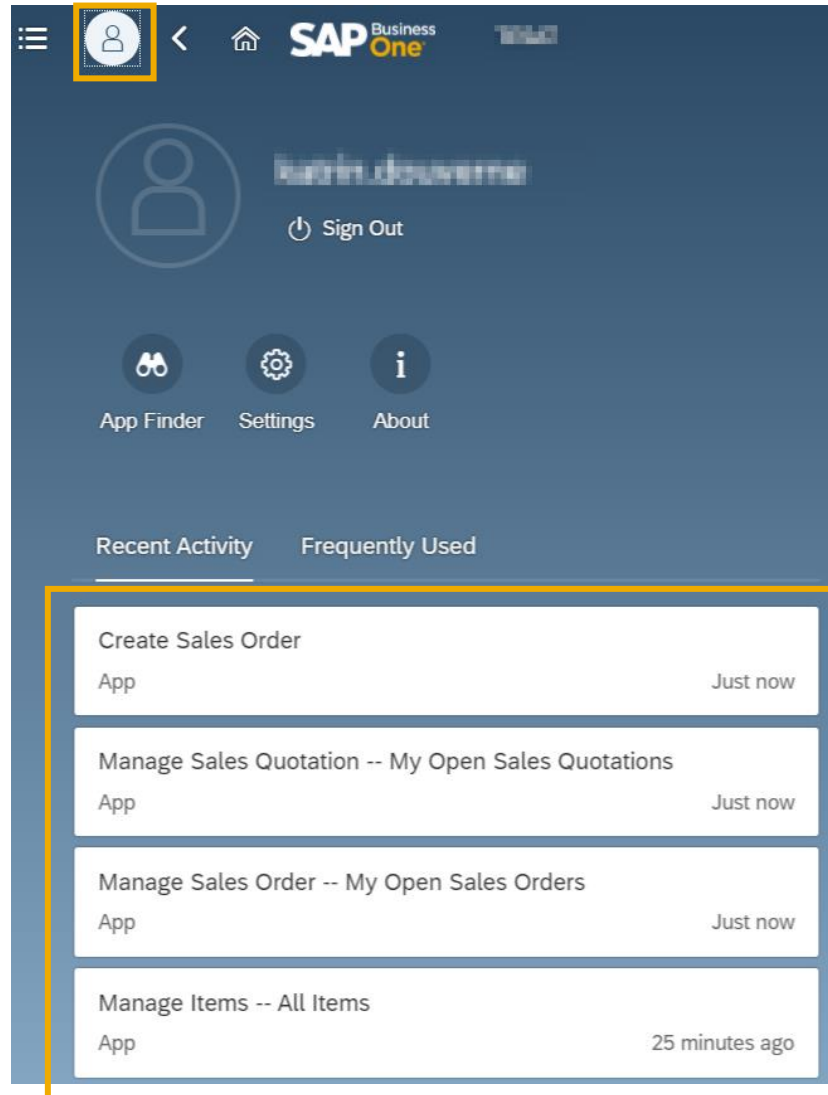
The settings are called using the User icon. The users can maintain the following functions for themselves:

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.

The screenshot illustrates the SAP Business One interface with four numbered callouts demonstrating different ways to access call functions:

- 1:** A tile labeled "Items" on the home page dashboard.
- 2:** The main menu icon (hamburger menu) in the top left corner.
- 3:** A search bar in the main menu with the text "item" entered, showing search results for "Items" and "Create Item".
- 4:** The enterprise search bar at the top right with the text "Item" entered, showing search results for "App Create Item" and "App Items".

# 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 name 'TESAT', and a search bar. The search bar contains the text 'invoice' and is highlighted with a yellow box. Below the search bar, the results are displayed in a list format. The first result is '5 Activity' with details: Activity Code: 5, Activity: P(Campaign), Tel.: 030/56590-1, Remarks: Kampagne Sommerspezial, Start Date: 06.06.2012, Start Time: 1501, End Date: 06.06.2012, End Time: 1516, Priority: 1(Normal), Inactive: N(No), BP Name: PC Welt GmbH & Co.KG. The second result is '19 Activity' with details: Activity Code: 19, Activity: T(Task), Tel.: 030/56590-1, Remarks: Druckerproblem - IBM Infopri... The third result is '22 Activity' with details: Activity Code: 22, Activity: P(Campaign), Tel.: -, Remarks: Frühjahr/Sommer 2013. A yellow callout box on the right side of the screenshot contains the text: 'If the search term is regularly used, it can be placed as a tile on the start page.' Another yellow callout box at the bottom right of the screenshot contains the text: '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.

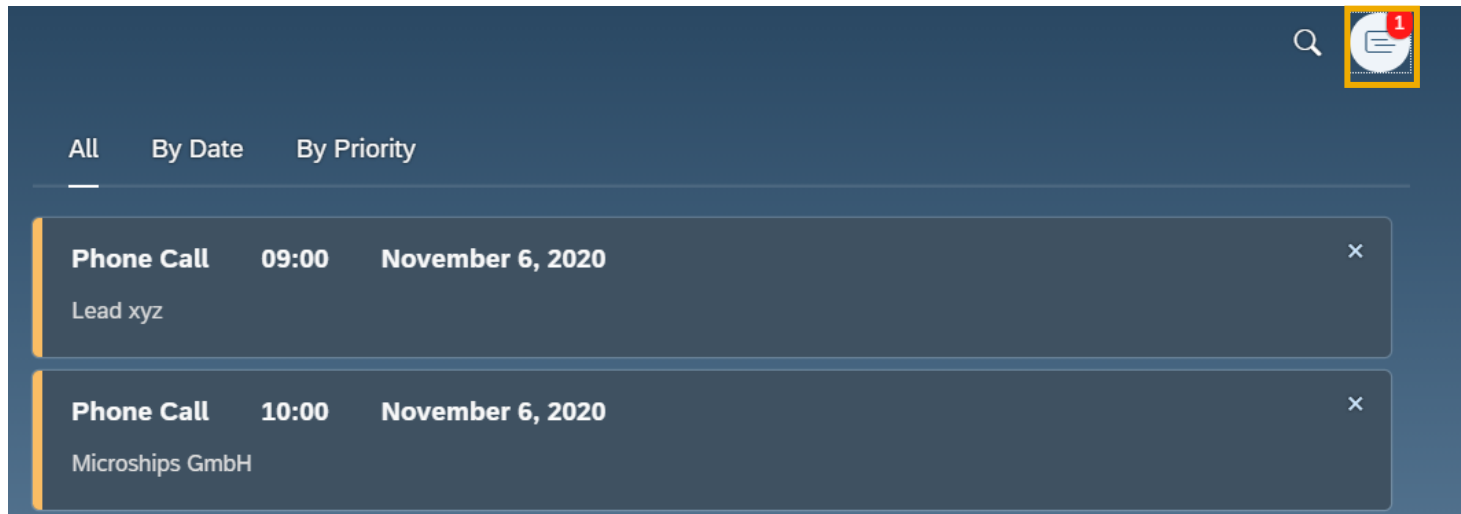
The screenshot shows the SAP Business One Enterprise Search interface. The search bar contains the number '257'. A filter dropdown menu is open, showing options: 'All' (9), 'Sales A/R Invoice' (4), 'Sales Delivery' (2), 'Sales Order' (2), and 'Sales Quotation' (1). The 'Sales A/R Invoice' option is selected. The search results are displayed in a list view, showing details for document number 257, including Doc#, Doc Number, BP Code, Status, Posting Date, Due Date, Remarks, and Total. A yellow callout box highlights the search results and the filter dropdown, with text explaining that the data available in SAP Business One is searched for a term, and the associated master sheets and processes are displayed. The callout also notes that by clicking on the filter, the filter can be set on a more detailed level, such as limiting results to a specific contact person, BP name, posting date, due date, status, document date, sales representative, etc.

**2b**

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.



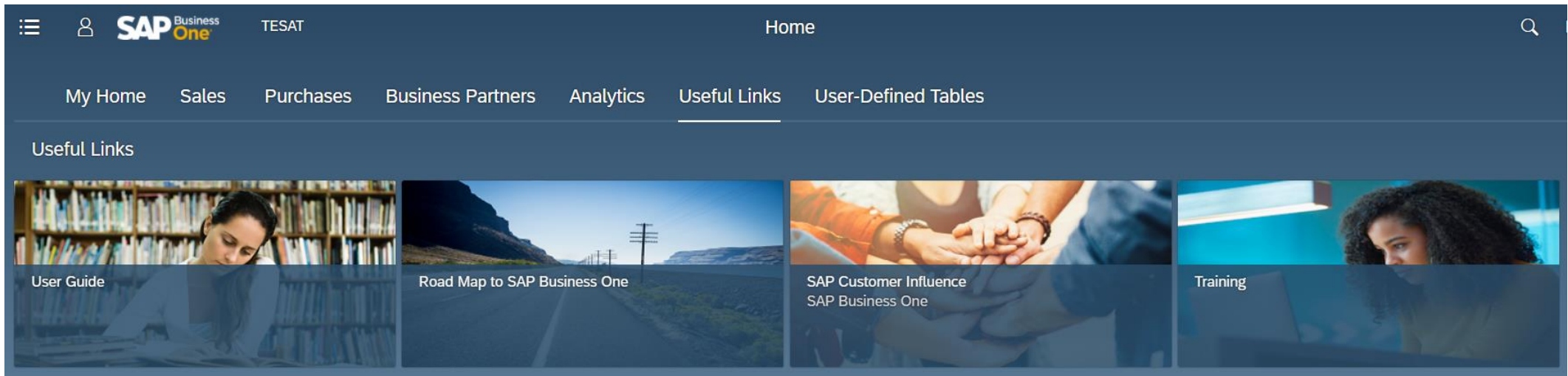
The screenshot shows a notification interface with a dark blue background. At the top right, there is a search icon and a notification icon with a red '1' badge. Below the search and notification icons are three tabs: 'All', 'By Date', and 'By Priority'. The 'All' tab is selected. The notification list contains two entries:

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

# Useful links

The following external functions are visible as a tile:

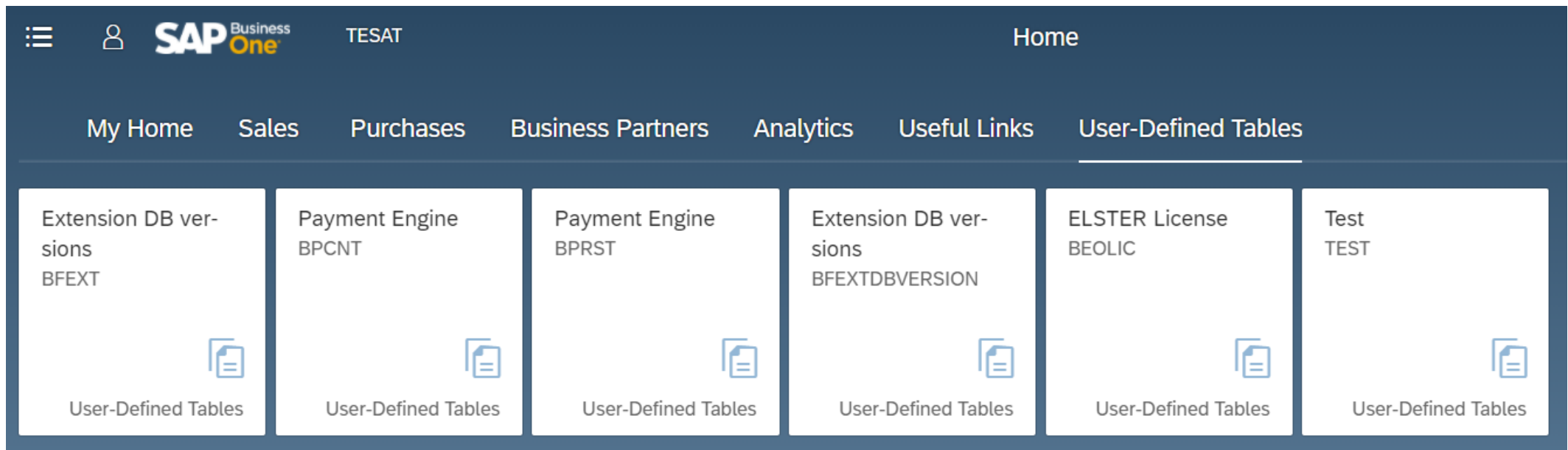
- User guide
- Roadmap for SAP Business One:  
After registering with your S-User, you can look up which functions are planned for the web client in the future
- SAP Customer Influence:  
After logging in with your S-User, you can submit suggestions for improvement for SAP Business One and vote for suggestions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



The screenshot displays the SAP Business One web client interface. At the top, the SAP Business One logo is visible on the left, and the user name 'TESAT' and the word 'Home' are on the right. Below the header, a navigation bar contains links for 'My Home', 'Sales', 'Purchases', 'Business Partners', 'Analytics', 'Useful Links', and 'User-Defined Tables'. The 'Useful Links' section is highlighted and contains four tiles: 'User Guide' (with a background image of a woman reading), 'Road Map to SAP Business One' (with a background image of a road in a landscape), 'SAP Customer Influence SAP Business One' (with a background image of hands clasped together), and 'Training' (with a background image of a woman looking at a laptop).

# User-defined tables

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



The screenshot shows the SAP Business One interface. At the top, there is a navigation bar with the SAP Business One logo, the user name 'TESAT', and the 'Home' button. Below this is a secondary navigation bar with tabs for 'My Home', 'Sales', 'Purchases', 'Business Partners', 'Analytics', 'Useful Links', and 'User-Defined Tables'. The 'User-Defined Tables' tab is active. The main content area displays a list of six user-defined tables, each in a white card with a blue border. Each card contains the table name, a document icon, and the text 'User-Defined Tables' at the bottom.

Table Name	Category
Extension DB versions BFEXT	User-Defined Tables
Payment Engine BPCNT	User-Defined Tables
Payment Engine BPRST	User-Defined Tables
Extension DB versions BFEXTDBVERSION	User-Defined Tables
ELSTER License BEOLIC	User-Defined Tables
Test TEST	User-Defined Tables



# SAP Business One



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