



SAP Business One 10.0  
Web Client  
Processes

SBO1004-EN

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# Create documents

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There are several ways to create a document:

**1. Create new document**

Open the dialog for the new document to be created and enter contents. Each document can be individually created without any prior document. E.g. an invoice does not require a sales order document. You can start directly creating an invoice.

**2. Function "Copy To"**

Open any reference document and copy its contents to a new document using the "Copy to" function. The contents are copied.

**3. Function "Copy From"**

Open a blank document, enter the customer or vendor code, and use the "Copy from" function to find the preceding document(s) from which you want to copy. This method takes a longer than "Copy to", but contents from several preceding documents can be copied. This procedure supports a fast creation of collective invoices.

**4. Duplicate document for the same business partner**

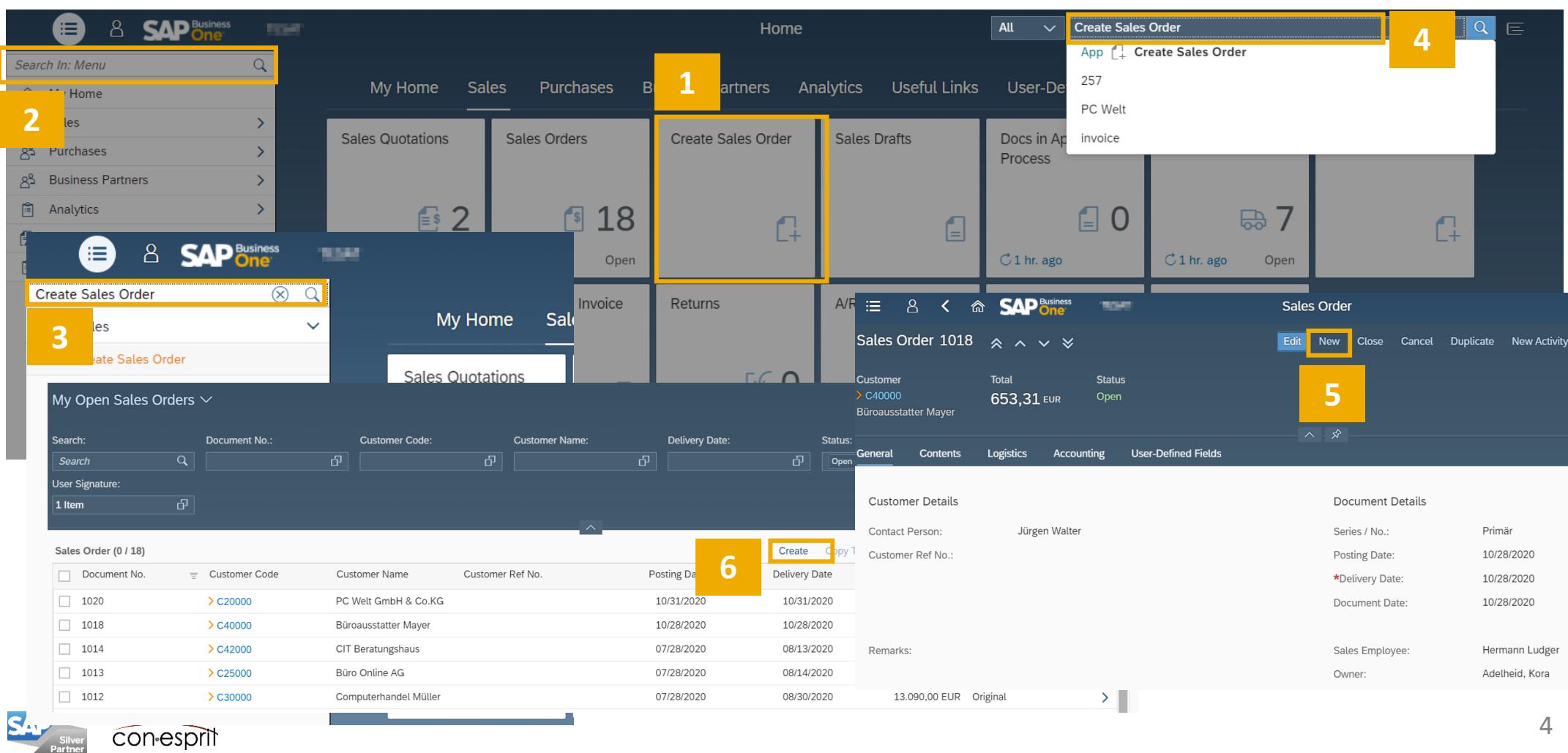
Open the document to be duplicated and use the "Duplicate" function to copy its contents together with the BP into a new document.

**5. Duplicate document for another business partner**

Open the document to be duplicated and copy its contents to a new document without the BP using the "Duplicate" function.

# Open “Create document” dialog

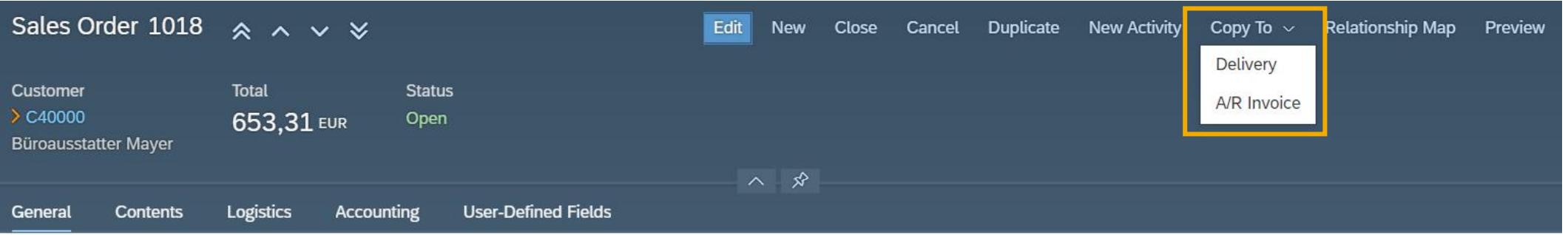
1. The dialog "Create document" (in this example the dialog "Create Sales Order") can be opened with the tile on the start page or
2. the main menu or
3. with the search function in the main menu or
4. can be accessed via the Enterprise Search
5. In an existing document there is the option to open a new document: New
6. From a document list there is the option to create a new document: Create



# Copy To

Call the preceding document and copy its contents to a new subsequent document using the "Copy To" function. The contents are copied 1:1.

E.g. sales order document. Open existing sales orders with the sales orders tile on the start page. Open the document in question and use function "Copy To" to copy the contents into a subsequent document (delivery or A/R invoice).



The screenshot shows the SAP Fiori interface for a Sales Order. At the top, the document header is displayed: "Sales Order 1018". Below it, the customer information is shown: "Customer C40000" and "Total 653,31 EUR". The status is listed as "Status Open". The toolbar includes standard actions like Edit, New, Close, Cancel, Duplicate, New Activity, and a "Copy To" dropdown. The "Copy To" dropdown is highlighted with a yellow box and contains two options: "Delivery" and "A/R Invoice". Below the toolbar, there are tabs for General, Contents, Logistics, Accounting, and User-Defined Fields. The General tab is selected. The main content area is divided into two sections: Customer Details and Document Details. In the Customer Details section, fields include Contact Person (Jürgen Walter), Customer Ref No., and Remarks. In the Document Details section, fields include Series / No. (Primär 1018), Posting Date (10/28/2020), \*Delivery Date (10/28/2020), Document Date (10/28/2020), Sales Employee (Hermann Ludger), and Owner (Adelheid, Kora).

Customer Details		Document Details	
Contact Person:	Jürgen Walter	Series / No.:	Primär 1018
Customer Ref No.:		Posting Date:	10/28/2020
		*Delivery Date:	10/28/2020
		Document Date:	10/28/2020
Remarks:		Sales Employee:	Hermann Ludger
		Owner:	Adelheid, Kora

# Copy From

Open a new document and transfer the contents of one or more preceding documents to a new document using the "Copy From" function.

Example: Sales Order document. A new sales order can be created using the Sales orders tile on the start page. After the new sales order is opened and a customer is selected, the "Copy From" function is made visible. The contents of one or more preceding documents can now be copied.

Sales Order 1023

Customer Total Status  
C20000 0,00 EUR Open

General Contents Logistics Accounting User-Defined Fields

Copy From ▾  
Sales Quotations

**Customer Details**

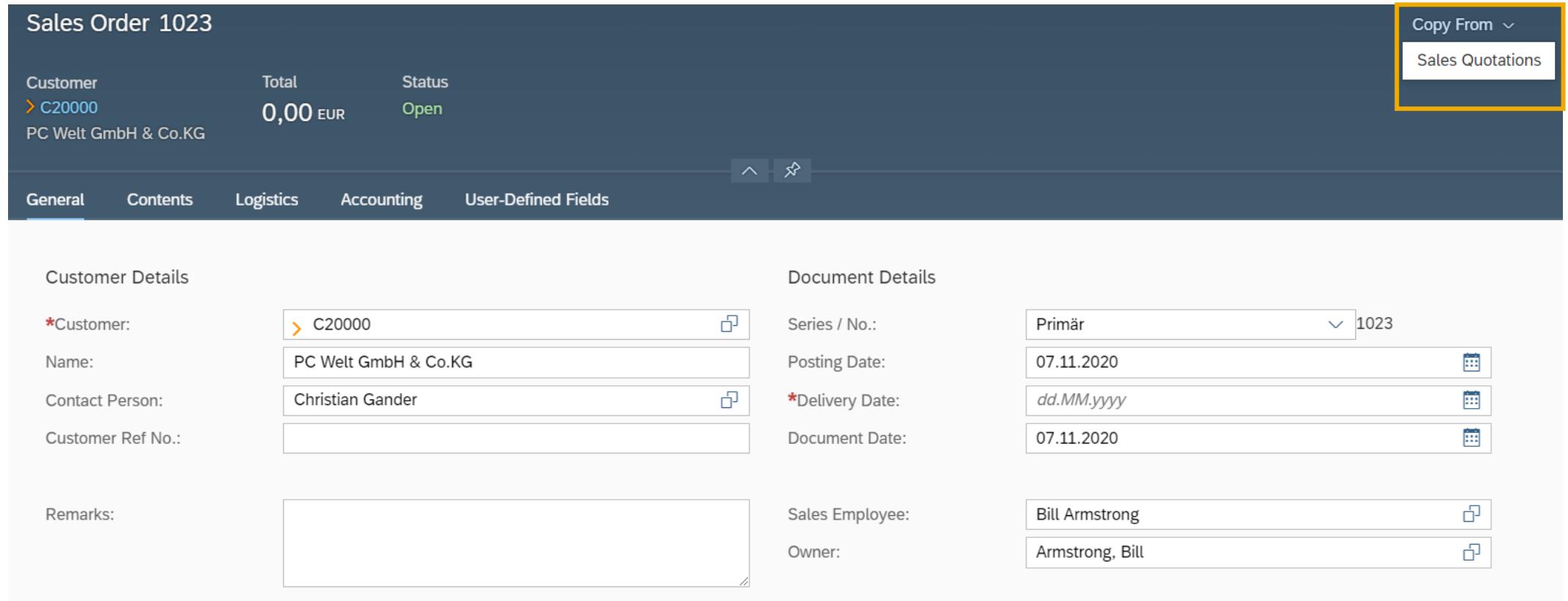
\*Customer: C20000  
Name: PC Welt GmbH & Co.KG  
Contact Person: Christian Gander  
Customer Ref No.:

**Document Details**

Series / No.: Primär 1023  
Posting Date: 07.11.2020  
\*Delivery Date: dd.MM.yyyy  
Document Date: 07.11.2020

Remarks:

Sales Employee: Bill Armstrong  
Owner: Armstrong, Bill

A screenshot of the SAP Fiori Sales Order interface. At the top right, a 'Copy From' button is highlighted with a yellow box. Below it, a dropdown menu shows 'Sales Quotations'. The main area displays a Sales Order for Customer C20000 (PC Welt GmbH & Co.KG) with a value of 0,00 EUR and an Open status. The 'General' tab is selected. On the left, 'Customer Details' are listed: Customer, Name, Contact Person, and Customer Ref No. On the right, 'Document Details' are listed: Series / No., Posting Date, Delivery Date, and Document Date. A 'Remarks' text area is also present. The SAP Fiori header is visible at the bottom.

# Duplicate

Open the document to be duplicated and copy its contents to a new document using the "Duplicate" function.

Example: Sales Order document. Open existing sales orders using the Sales orders tile on the start page. Once the document in question is opened, the contents can be transferred to a new sales order using the "Duplicate" function. There are two options: The document can be copied with all contents, including the existing business partner, or, alternatively, all contents except the business partner can be copied.

The screenshot shows the SAP Fiori interface for a Sales Order. The top navigation bar includes 'Edit', 'New', 'Close', 'Cancel', 'Duplicate' (which is highlighted with a yellow box), 'New Activity', 'Copy To', 'Relationship Map', and 'Preview'. Below the header, there's a summary row for 'Customer' (C40000, Büroausstatter Mayer), 'Total' (653,31 EUR), and 'Status' (Open). A navigation bar at the bottom has tabs for 'General', 'Contents', 'Logistics', 'Accounting', and 'User-Defined Fields'. The main content area is divided into 'Customer Details' and 'Document Details'. In 'Customer Details', fields include 'Contact Person' (Jürgen Walter) and 'Customer Ref No.' (1018). In 'Document Details', fields include 'Series / No.' (Primär), 'Posting Date' (10/28/2020), and 'Owner' (Kora). A modal dialog box titled 'Message' is displayed, asking 'Do you want to copy the relevant business partner to your new document?'. It contains 'Yes' and 'No' buttons. The entire dialog box is also highlighted with a yellow box. The footer contains a 'CONTENTS' section.

# Integrated financial accounting – Change documents/close documents

SAP Business One has an integrated financial accounting. This means that when documents are created, the corresponding journal entries are automatically inserted. For this reason, posting-relevant information in documents cannot be changed after the document has been added. Quotations and sales orders do not insert journal entries. They can be modified until they are closed. A document is considered closed when it has been cancelled or when it has been transferred to a subsequent document using the "Copy To" or "Copy From" function. The following table shows the possibilities to modify the different sales documents.

Sales documents	Quotation	Sales order	Delivery	A/R Returns	A/R Invoices	A/R Credit Memos
Can the document be changed again after it has been added?	Yes, until it is closed	Yes, until it is closed	No, because there is a journal entry in the background	No, because there is a journal entry in the background	No, because there is a journal entry in the background	No, because there is a journal entry in the background
How can the document be closed?	Sales order with the same or a higher quantity / cancellation	Delivery with the same or a higher quantity / cancellation	A/R invoice with the same quantity / returns in the same quantity or combination of A/R invoice and return	-	A/R credit memo with same quantity / incoming payment or combination of both	-

# Create sales order – General

Using the field **customer** a customer can be selected from the business partner master

As **contact person**, SAP Business One offers the standard contact person, but it is also possible to select another person

In the field **customer reference number** e.g. the PO number of the customer can be entered. field is printed in the conesprit standard documents.

The **remarks** field is for free text that is not printed in the document

Depending on the defined document numbering, a consecutive number is assigned in the **document number** field

The **posting date** determines the date on which the document is created as a journal entry

Sales Order 1023

Customer > C20000 Total 0,00 EUR Status Open  
PC Welt GmbH & Co.KG

General Contents Logistics Accounting User-Defined Fields

Customer Details		Document Details	
*Customer:	C20000	Series / No.:	Primär 1023
Name:	PC Welt GmbH & Co.KG	Posting Date:	07.11.2020
Contact Person:	Christian Gander	*Delivery Date:	dd.MM.yyyy
Customer Ref No.:		Document Date:	07.11.2020
Remarks:		Sales Employee:	Bill Armstrong
		Owner:	Armstrong, Bill

The **document date** is visible on the printed document

The **delivery date** is mandatory, the sales order cannot be completed without this information

# Create sales order – Contents

If a different **currency** is stored in the BP master than the local currency, you can select between the BP and the local currency

Select “Item” in the **item/service type field** if items from the item master data are sold. In a “Service” document, the service and the associated price can be freely entered independently of existing item master data.

In the **detail rows**, the items to be sold can be selected from the item master data with the prices from the price list stored for this business partner.

Using the gear wheel at the top right-hand edge of the detail list, further columns can be displayed, such as free text or discount at item level. Rows can also be duplicated, copied and inserted or deleted (1). Using the arrow (2) below the Details heading, the view of the rows can be changed. You can choose between product (standard view), gross profit based on a price list and volume and weight.

Sales Order 1023 Copy From ▾

General Contents Logistics Accounting User-Defined Fields

Preferences

Currency: Local Currency Item/Service Type: Item

Details 1

Product 2

	Item No.	Item Description	Quantity	Unit Price	Discount %	Price after Discou
<input type="checkbox"/>	A00001	J.B. Multifunktionsdrucker 1420	20,000	132,00 EUR	0,0000 %	132,00 EU
<input type="checkbox"/>	C00001	Motherboard BTX	20,000	66,00 EUR	0,0000 %	66,00 EU
<input type="checkbox"/>	C00005	WLAN-Karte	20,000	24,00 EUR	0,0000 %	24,00 EU
<input type="checkbox"/>						

Duplicate Copy Paste 1 2 3

Targets ⚙️

Remarks	Tax Code
<input type="checkbox"/>	

Total Summary

Total Before Discount: 4.440,00 EUR

Discount: 0,0000 % 0,00 EUR

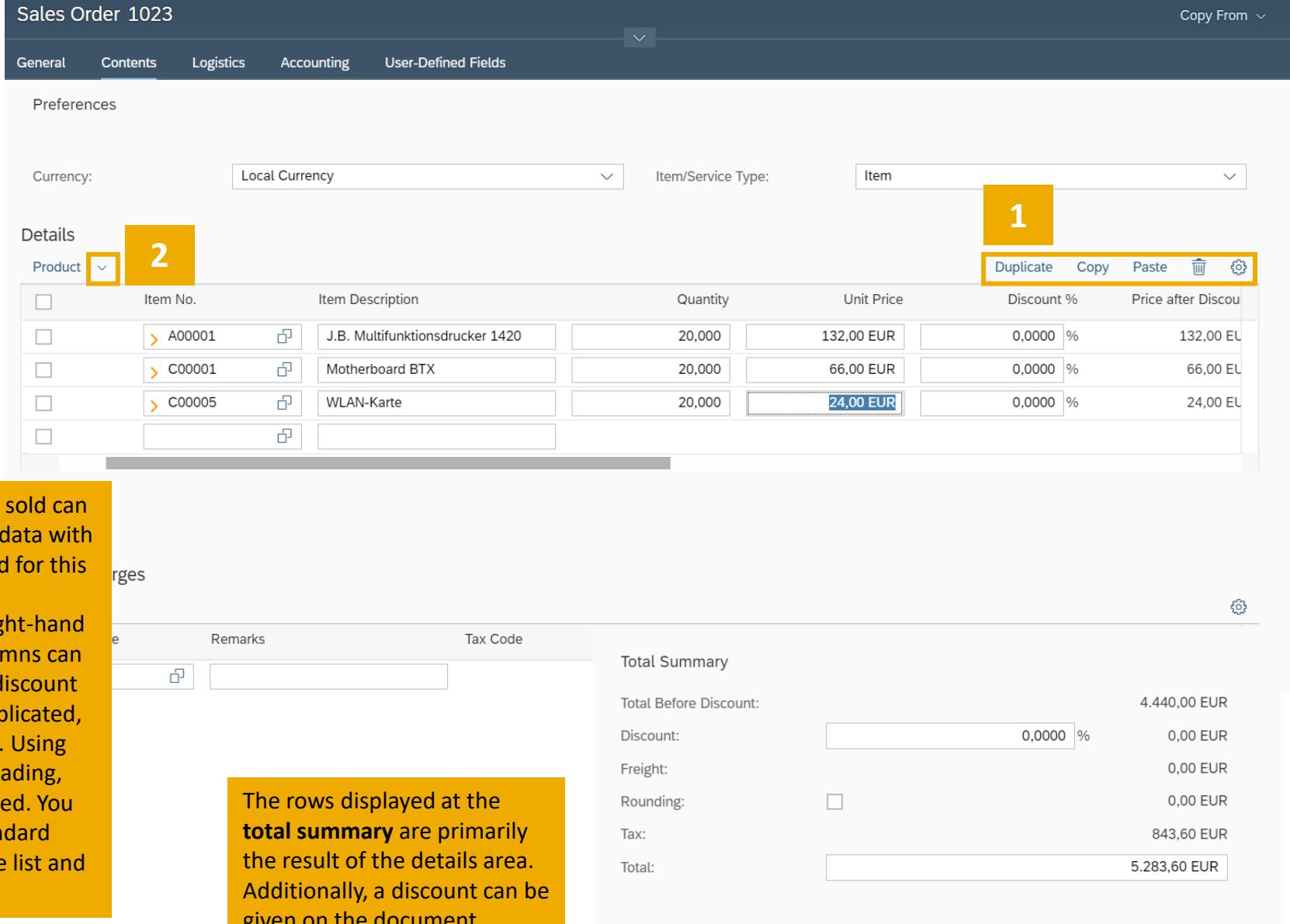
Freight: 0,00 EUR

Rounding:  0,00 EUR

Tax: 843,60 EUR

Total: 5.283,60 EUR

The rows displayed at the **total summary** are primarily the result of the details area. Additionally, a discount can be given on the document.



# Create sales order – Logistik

Several **ship-to** and **bill-to** addresses may be stored in the BP master. The default address is always displayed in the document. You can select another address.

Alternatively, a new address can be created via “**Define New**”. This address can be transferred to the BP master data record.

The **pin** symbol opens Google Maps and shows the address on the map.

The **shipping type** that is stored in the BP master is displayed. A different shipping method can be determined manually.

It is possible to implement an **approval process**. As a result the sales order is created, but not approved. It cannot be further processed without the approval.

In the standard system, the approval process is disabled. So the sales order is approved upon creation.

Sales Order 1023

General Contents Logistics Accounting User-Defined Fields

Ship-to Address

BP Address: Lieferadresse

Address Summary: Neumannstr. 35  
13189 Berlin GERMANY

Edit Define New

Bill-to Address

BP Address: Rechnungsempfänger

Address Summary: Goethestr. 24  
10625 Berlin GERMANY

Edit Define New

Preferences

Shipping Type: UPS Ground

Use Bill to Address to Determine Tax: No

Approved: Yes

Allow Partial Delivery: Yes

New Address

Address Summary: Street/PO Box: Street No.: Block: City: Zip Code: County: State: Country: Building/Floor/Room:

Address Name 2: Address Name 3: GLN: Update Existing Rows: Yes Update BP Master Data: No

OK Close

Detailed description: The screenshot shows the SAP Fiori Sales Order 1023 interface. On the left, there are four yellow callout boxes with text. The first box discusses multiple addresses and selecting one. The second box shows a pin icon opening Google Maps. The third box shows the shipping type (UPS Ground) and manual override. The fourth box discusses the approval process being disabled. The main area shows the Sales Order 1023 screen with Ship-to and Bill-to address sections. A yellow arrow points from the 'Define New' button in the Ship-to section to the 'Define New' button in the Bill-to section. A yellow box highlights the 'Address Name 2' and 'Address Name 3' fields in the 'New Address' dialog that appears when the 'Define New' button is clicked.

# Create sales order – Accounting and user-defined fields

The **payment terms** and **payment method** that are assigned in the BP master are pre-selected. Another term can be selected manually.

A document can be assigned to a **project**.

In SAP Business One, additional individual **user-defined fields** can be added to the fields created by SAP.

Sales Order 1023

General    Contents    Logistics    Accounting    User-Defined Fields    Copy From ▾

Payment Terms:	C 8 days 2% discount, 30 days net	
Payment Method:	SEPA_DD_B2B	
BP Project:		
Cancellation Date:	dd.MM.yyyy	
Required Date:	dd.MM.yyyy	
Federal Tax ID:		
Use Shipped Goods Account:	No	

Sales Order 1023

General    Contents    Logistics    Accounting    User-Defined Fields    Copy From ▾

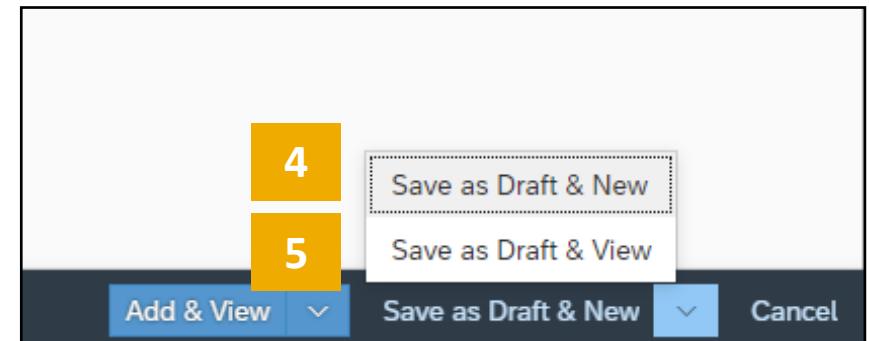
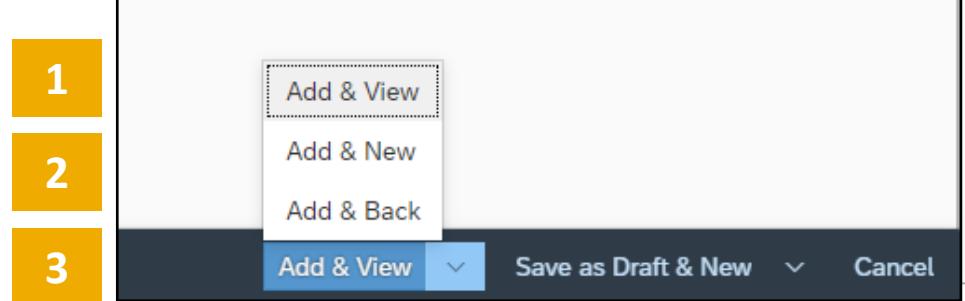
General

Kommissionieren:	
Rechnungszweck:	
Zeitraum:	

# Create sales order – Add sales order

Once, the sales order is filled out, it can be

1. added and then immediately viewed for reconciliation
2. added and then a new empty sales order can be opened
3. added and then the previous dialog opens
4. saved as a draft and a new sales order can be opened immediately
5. saved and displayed as a draft
6. canceled



6

# Create sales order – Mail sales order

Once the sales order is added, it can be printed. For this purpose, the function **Preview** is pressed. The document opens in a pdf. This can now be saved and sent by email or printed and sent by post.

Sales Order 1023 ⌂ ⌃ ⌄ ⌅

Customer > C20000 Total 157,08 EUR Status Open

Edit New Close Cancel Duplicate New Activity Copy To Relationship Map Preview

General Contents Logistics Accounting User-Defined Fields

Customer Details		Document Details	
Contact Person:	Christian Gander	Series / No.:	Primär 1023
Customer Ref No.:		Posting Date:	11/08/2020
		*Delivery Date:	11/08/2020
		Document Date:	11/08/2020
Remarks:		Sales Employee:	Bill Armstrong
		Owner:	Armstrong, Bill

# Open sales documents in draft mode

The “Sales Drafts” list can be opened via the tile on the start page, the main menu, the search function in the main menu or via the Enterprise Search.

All documents in state draft are displayed.

When working with the approval process, documents that are in the approval process are managed in this list.

The screenshot shows the SAP Business One interface with the title "Manage Sales Drafts". The left sidebar has a search bar with "draft" and a dropdown menu with "Sales" and "Sales Drafts" selected. The main area is titled "My Open Sales Drafts". It includes search fields for "Search", "Document Type", "Customer Code", "Customer Name", and "Posting Date", and filters for "Due Date", "Draft Status", and "User Signature". Below these are buttons for "Adapt Filters" and "Go". A table titled "Sales Drafts (0 / 3)" lists three A/R Invoice entries. The columns are: Document ..., Draft No., Temp Doc. No., Customer Code, Customer Na..., Posting Date, Due Date, Document Total, Draft Status, and a right-align arrow. The first row has a checkbox checked. The second and third rows have checkboxes unchecked. The total document total is 2.656,61.

Document ...	Draft No.	Temp Doc. No.	Customer Code	Customer Na...	Posting Date	Due Date	Document Total	Draft Status		
<input checked="" type="checkbox"/>	A/R Invoice	7	992	> 1	conesprit GmbH	06/04/2020	07/04/2020	1.690,79	Open	>
<input type="checkbox"/>	A/R Invoice	6	986	> 1	conesprit GmbH	06/03/2020	07/03/2020	449,82	Open	>
<input type="checkbox"/>	A/R Invoice	5	970	> 1	conesprit GmbH	01/29/2020	02/28/2020	516,00	Open	>

# View, search and filter documents

Here we will look at the sales order document as an example.

The sales order list can be accessed via the tile on the start page, the main menu, the search function in the main menu or via the Enterprise Search.

Using the arrow to the right of the “My Open Sales Orders” heading, the following sales order views are available: My Open Sales Orders, All Sales Orders (all employees), My Sales Orders (open and closed), Open Sales Orders, Sales Orders Backorder (all employees) (1).

The search (2) and filter function (3) can be used to edit and evaluate sales orders.

The screenshot shows the SAP Fiori Sales Order list interface. At the top left is a button labeled "My Open Sales Orders" with a dropdown arrow (1). Below it is a search bar with a "Search" button (2). To the right of the search bar are filters for "Document No.", "Customer Code", "Customer Name", "Delivery Date", and "Status". Further down are filters for "Sales Employee" and "User Signature", with the latter showing a placeholder value of "\${CURRENT\_USER}" (3). The main area displays a table titled "Sales Order (0 / 19)" with columns for Document No., Customer Code, Customer Name, Customer Ref No., Posting Date, Delivery Date, Document Total, Printed, and a details icon. The table lists several sales orders with their respective details.

Document No.	Customer Code	Customer Name	Customer Ref No.	Posting Date	Delivery Date	Document Total	Printed
1023	> C20000	PC Welt GmbH & Co.KG		11/08/2020	11/08/2020	157,08 EUR	Original >
1020	> C20000	PC Welt GmbH & Co.KG		10/31/2020	10/31/2020	157,08 EUR	Original >
1018	> C40000	Büroausstatter Mayer		10/28/2020	10/28/2020	653,31 EUR	Original >
1014	> C42000	CIT Beratungshaus		07/28/2020	08/13/2020	327,25 EUR	Original >
1013	> C25000	Büro Online AG		07/28/2020	08/14/2020	94.307,50 EUR	Original >
1012	> C30000	Computerhandel Müller		07/28/2020	08/30/2020	13.090,00 EUR	Original >
1011	> C20000	PC Welt GmbH & Co.KG		07/27/2020	08/27/2020	141.372,00 EUR	Original >
1007	> 1	conesprit GmbH		07/01/2020	06/22/2020	1.229,72 EUR	Original >
1005	> 1	conesprit GmbH		06/11/2020	06/11/2020	794,46 EUR	Original >

# Extend, sort, filter, group and export document list to Excel

Here we will look at the sales order document as an example.

Using the cog at the top right of the document list (1), columns can be added and removed (2), the list can be sorted (3), the contents can be filtered (4) and the contents can be grouped (5). The Sort and Group functions can also be called by clicking on a column header of the list (6).

The Excel export icon (located next to the cog icon) allows the list to be exported to Excel for further processing (7).

The screenshot shows the SAP Fiori interface for managing sales orders. On the left, there's a sidebar with various filters like Customer Name, Delivery Date, and Status. The main area displays a list of sales orders with columns for Document No., Delivery Date, Document Total, and Status. Several UI elements are highlighted with orange boxes and numbers:

- 1**: A cog icon in the top right corner of the main list area.
- 2**: A checkbox in the sidebar under 'Status' for 'Allow Partial Delivery'.
- 3**: The 'Sort' button in the top navigation bar of the main list.
- 4**: The 'Filter' button in the top navigation bar of the main list.
- 5**: The 'Group' button in the top navigation bar of the main list.
- 6**: The 'Sort Ascending' and 'Sort Descending' icons in the top right of the main list.
- 7**: An Excel export icon in the top right of the main list.

The main list table contains the following data:

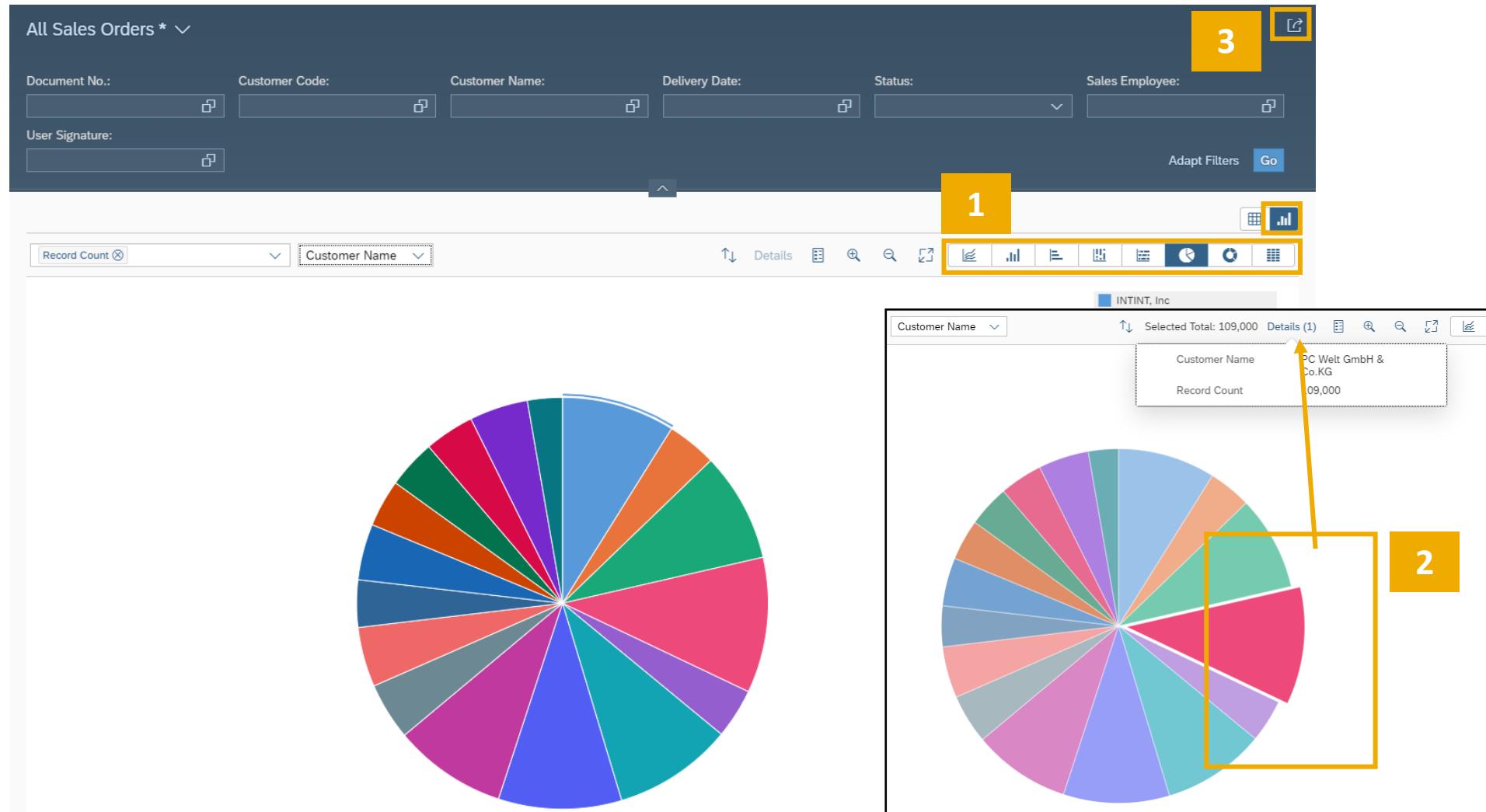
Delivery Date	Document Total	Status
2020	157,08 EUR	Open
2020	1.428,00 EUR	Closed
2020	1.190,00 EUR	Closed
2020	157,08 EUR	Open
2020	157,08 EUR	Closed
2020	653,31 EUR	Open
2020	356,41 EUR	Closed
2020	285,60 EUR	Closed
2020	1.428,00 EUR	Closed

At the bottom left, there are SAP Silver Partner and con-esprit logos. At the bottom right, there are 'OK' and 'Cancel' buttons.

# Analyze documents

Here we will look at the sales order document as an example.

Sales orders can be evaluated in respect to many fields. Line, column, bar, stacked column, pie and ring charts as well as a heat maps are available for analysis purposes (1). The details below the chart can be made visible by clicking on data segments (2). If the analysis is used regularly, it can be placed as a tile on the start page (3).



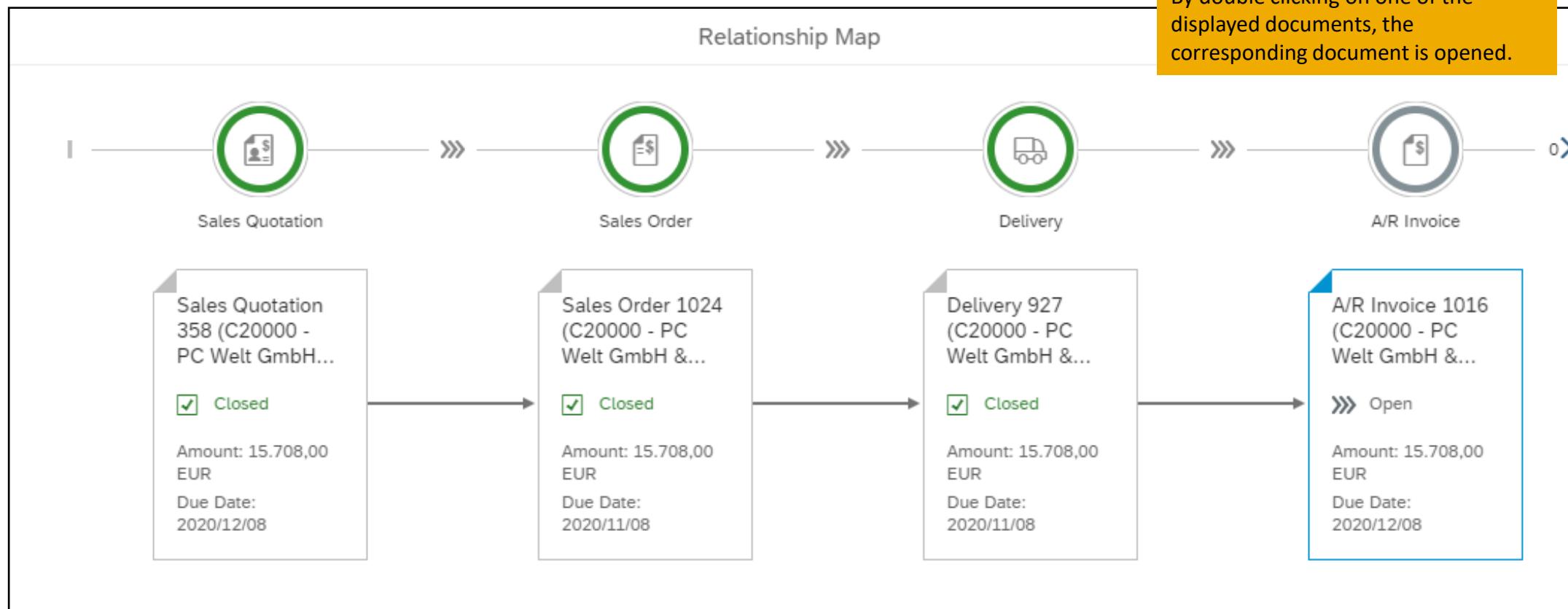
# Sales process: From quotation to outgoing invoice

Example:

1. A quotation is created for 100 printers
2. A sales order is created based on the quotation using the "Copy To" function
3. A delivery is created based on the sales order using the "Copy To" function
4. Based on the delivery, an A/R invoice for 100 printers is created using the "Copy To" function

The Relationship Map is called via:  
E.g. tile A/R invoice > open single  
invoice > relationship map

By double clicking on one of the  
displayed documents, the  
corresponding document is opened.



Note:

Returns and sales credits are only available in the Web Client in read-only mode.

Not every document in the relationship map needs to be created in the sales process. For example, the delivery can be left out, in which case the A/R invoice is created directly from the sales order by "Copy to".

# Purchasing process

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The target group of the SAP Business One Web Client are: sales representatives, internal sales representatives and managers. For this reason, purchasing documents are only available read-only and cannot be created in the Web Client.



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