

# SAP Business One



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SAP Business One 10.0  
Web Client – Processes  
October 2024

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

The screenshot illustrates the SAP Business One interface with several callouts (1-6) highlighting different methods to access the 'Create Sales Order' dialog:

- 1:** A tile labeled 'Create Sales Order' on the main dashboard.
- 2:** The 'Create Sales Order' option in the main menu.
- 3:** The search function in the main menu.
- 4:** The 'Create Sales Order' option in the Enterprise Search dropdown.
- 5:** The 'New' button in the 'Sales Order 1018' document header.
- 6:** The 'Create' button in the 'Sales Order' list table.

**Sales Order 1018 Details:**

Customer	Total	Status
C40000 Büroausstatter Mayer	653,31 EUR	Open

**Sales Order List:**

Document No.	Customer Code	Customer Name	Customer Ref No.	Posting Date	Delivery Date
1020	C20000	PC Welt GmbH & Co.KG		10/31/2020	10/31/2020
1018	C40000	Büroausstatter Mayer		10/28/2020	10/28/2020
1014	C42000	CIT Beratungshaus		07/28/2020	08/13/2020
1013	C25000	Büro Online AG		07/28/2020	08/14/2020
1012	C30000	Computerhandel Müller		07/28/2020	08/30/2020

# 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 displays the SAP Sales Order 1018 interface. At the top, the title bar shows 'Sales Order 1018' with navigation icons and a menu bar containing 'Edit', 'New', 'Close', 'Cancel', 'Duplicate', 'New Activity', 'Copy To', 'Relationship Map', and 'Preview'. The 'Copy To' menu is open, showing 'Delivery' and 'A/R Invoice' options. Below the title bar, key information is displayed: Customer 'C40000 Büroausstatter Mayer', Total '653,31 EUR', and Status 'Open'. The main content area is divided into 'Customer Details' and 'Document Details' sections. The 'Customer Details' section includes 'Contact Person: Jürgen Walter' and 'Customer Ref No.:'. The 'Document Details' section includes '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'. A 'Remarks:' field is also visible in the Customer Details section.

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: C20000  
PC Welt GmbH & Co.KG

Total: 0,00 EUR

Status: Open

Copy From  
Sales Quotations

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

# 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 displays the SAP Sales Order 1018 interface. At the top, the title bar shows "Sales Order 1018" and a toolbar with buttons for "Edit", "New", "Close", "Cancel", "Duplicate" (highlighted with a yellow box), "New Activity", "Copy To", "Relationship Map", and "Preview". Below the title bar, the customer information is shown: "Customer > C40000 Büroausstatter Mayer", "Total 653,31 EUR", and "Status Open". The main content area is divided into tabs: "General", "Contents", "Logistics", "Accounting", and "User-Defined Fields". The "General" tab is active, showing "Customer Details" and "Document Details". A dialog box titled "Message" is overlaid on the screen, asking "Do you want to copy the relevant business partner to your new document?" with "Yes" and "No" buttons. The "Yes" button is highlighted with a blue dotted border. The "CONTENTS" section is visible at the bottom of the interface.

# 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 Copy From ▾

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

General Contents Logistics Accounting User-Defined Fields

<b>Customer Details</b>	<b>Document Details</b>
*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 Duplicate Copy Paste 🗑️ ⚙️

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

arges

Remarks Tax Code

📄

**Total Summary**

Total Before Discount:		4.440,00 EUR
Discount:	0,0000 %	0,00 EUR
Freight:		0,00 EUR
Rounding:	<input type="checkbox"/>	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.

The screenshot displays the SAP Sales Order 1023 interface. The top navigation bar includes 'General', 'Contents', 'Logistics', 'Accounting', and 'User-Defined Fields'. The 'Logistics' tab is active, showing 'Ship-to Address' and 'Bill-to Address' sections. The 'Ship-to Address' section has a BP Address of 'Lieferadresse' and an Address Summary of 'Neumannstr. 35, 13189 Berlin GERMANY'. A pin icon is highlighted with a yellow box, and a 'Define New' button is also highlighted. The 'Bill-to Address' section has a BP Address of 'Rechnungsempfänger' and an Address Summary of 'Goethestr. 24, 10625 Berlin GERMANY'. A 'Define New' button is also present. Below these sections is the 'Preferences' area, including 'Shipping Type: UPS Ground', 'Use Bill to Address to Determine Tax: No', 'Approved: Yes', and 'Allow Partial Delivery: Yes'. A yellow arrow points from the 'Define New' button in the 'Ship-to Address' section to a 'New Address' dialog box. The dialog box contains fields for 'Address Summary', 'Street/PO Box', 'Street No.', 'Block', 'City', 'Zip Code', 'County', 'State', 'Country', and 'Building/Floor/Room'. At the bottom, there are fields for 'Address Name 2', 'Address Name 3', 'GLN', 'Update Existing Rows' (set to 'Yes'), and 'Update BP Master Data' (set to 'No'). The dialog box has 'OK' and 'Close' buttons at the bottom right.

# 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.

The image shows two screenshots of the SAP Sales Order 1023 interface. The top screenshot displays the 'Accounting' tab, which includes fields for 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, and Use Shipped Goods Account (No). The bottom screenshot displays the 'User-Defined Fields' tab, which includes a 'General' section with fields for Kommissionieren, Rechnungszweck, and Zeitraum.

**Sales Order 1023** Copy From ▾

General Contents Logistics Accounting User-Defined Fields

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** Copy From ▾

General Contents Logistics Accounting User-Defined Fields

General

Kommissionieren:

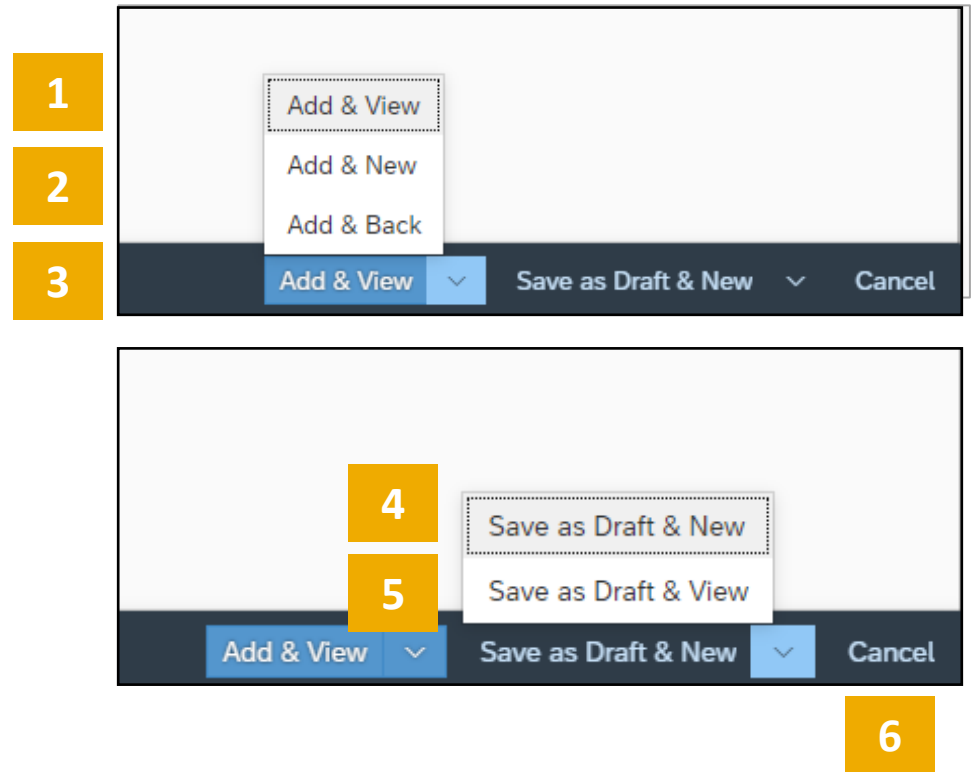
Rechnungszweck:

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



# 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.

The screenshot displays the SAP Sales Order 1023 interface. At the top, the title bar shows 'Sales Order 1023' with navigation icons and a 'Preview' button highlighted in a yellow box. Below the title bar, the customer information is shown: Customer ID 'C20000' (PC Welt GmbH & Co.KG), Total amount '157,08 EUR', and Status 'Open'. The interface is divided into tabs: 'General', 'Contents', 'Logistics', 'Accounting', and 'User-Defined Fields'. The 'General' tab is active, showing two main sections: 'Customer Details' and 'Document Details'. The 'Customer Details' section includes 'Contact Person: Christian Gander' and 'Customer Ref No.'. The 'Document Details' section includes 'Series / No.: Primär 1023', 'Posting Date: 11/08/2020', '\*Delivery Date: 11/08/2020', 'Document Date: 11/08/2020', 'Sales Employee: Bill Armstrong', and 'Owner: Armstrong, Bill'. A 'Remarks' field is also present but empty.

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 displays the SAP Business One 'Manage Sales Drafts' interface. The top navigation bar includes the SAP Business One logo and the title 'Manage Sales Drafts'. A search bar on the left contains the text 'draft'. Below it, a sidebar shows 'Sales' and 'Sales Drafts'. The main area features a filter section with fields for Search, Document Type, Customer Code, Customer Name, Posting Date, Due Date, Draft Status (set to 'Open'), and User Signature (showing '1 Item'). A 'Go' button is present. Below the filters is a table titled 'Sales Drafts (0 / 3)' with columns: Document No., Draft No., Temp Doc. No., Customer Code, Customer Name, Posting Date, Due Date, Document Total, and Draft Status. The table lists three draft invoices for 'conesprit GmbH' and a total row.

Document No.	Draft No.	Temp Doc. No.	Customer Code	Customer Name	Posting Date	Due Date	Document Total	Draft Status
A/R Invoice	7	992	> 1	conesprit GmbH	06/04/2020	07/04/2020	1.690,79	Open
A/R Invoice	6	986	> 1	conesprit GmbH	06/03/2020	07/03/2020	449,82	Open
A/R Invoice	5	970	> 1	conesprit GmbH	01/29/2020	02/28/2020	516,00	Open
							<b>2.656,61</b>	

# 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 Sales Order list interface. At the top, there is a header bar with the text "My Open Sales Orders" and a dropdown arrow. A yellow box labeled "1" highlights this dropdown. Below the header is a search and filter bar. A yellow box labeled "2" highlights the "Search:" field with a "Search" button. Another yellow box labeled "3" highlights the "Document No.:" field. Below the search bar are fields for "Customer Code:", "Customer Name:", "Delivery Date:", and "Status:". The "Status:" field has a dropdown menu with "Open" selected. Below these fields are "Sales Employee:" and "User Signature:" fields. The "User Signature:" field has a dropdown menu with "=[CURRENT\_USER]" selected. A yellow box labeled "3" highlights the "Sales Employee:" field. At the bottom right of the search bar are "Adapt Filters" and "Go" buttons. Below the search bar is a table with the following columns: Document No., Customer Code, Customer Name, Customer Ref No., Posting Date, Delivery Date, Document Total, and Printed. The table contains 9 rows of data. A yellow box labeled "3" highlights the "Sales Order (0 / 19)" text above the table. At the top right of the table are buttons for "Create", "Copy To", "Close", "Cancel", "Preview", and a settings icon. At the bottom left of the table are icons for a calendar, a list view, and a bar chart.

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 displays the SAP Sales Order list interface. The main list shows columns for Delivery Date, Document Total, and Status. Annotations 1 through 7 highlight specific actions:

- 1:** Cog icon in the top right of the list.
- 2:** Columns selection dialog box.
- 3:** Sort dialog box.
- 4:** Filter dialog box.
- 5:** Group dialog box.
- 6:** Sort and Group menu items.
- 7:** Excel export icon.

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

# 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).

The screenshot displays the SAP Fiori 'All Sales Orders' analysis interface. At the top, a filter bar (labeled '3') includes fields for Document No., Customer Code, Customer Name, Delivery Date, Status, and Sales Employee, along with a 'Go' button. Below the filters is a toolbar (labeled '1') with icons for various chart types: line, bar, stacked bar, pie, and ring. The main area shows a pie chart representing sales data by customer name. A callout box (labeled '2') is shown over a segment of the pie chart, displaying the following data:

Customer Name	Record Count
PC Welt GmbH & Co.KG	09,000

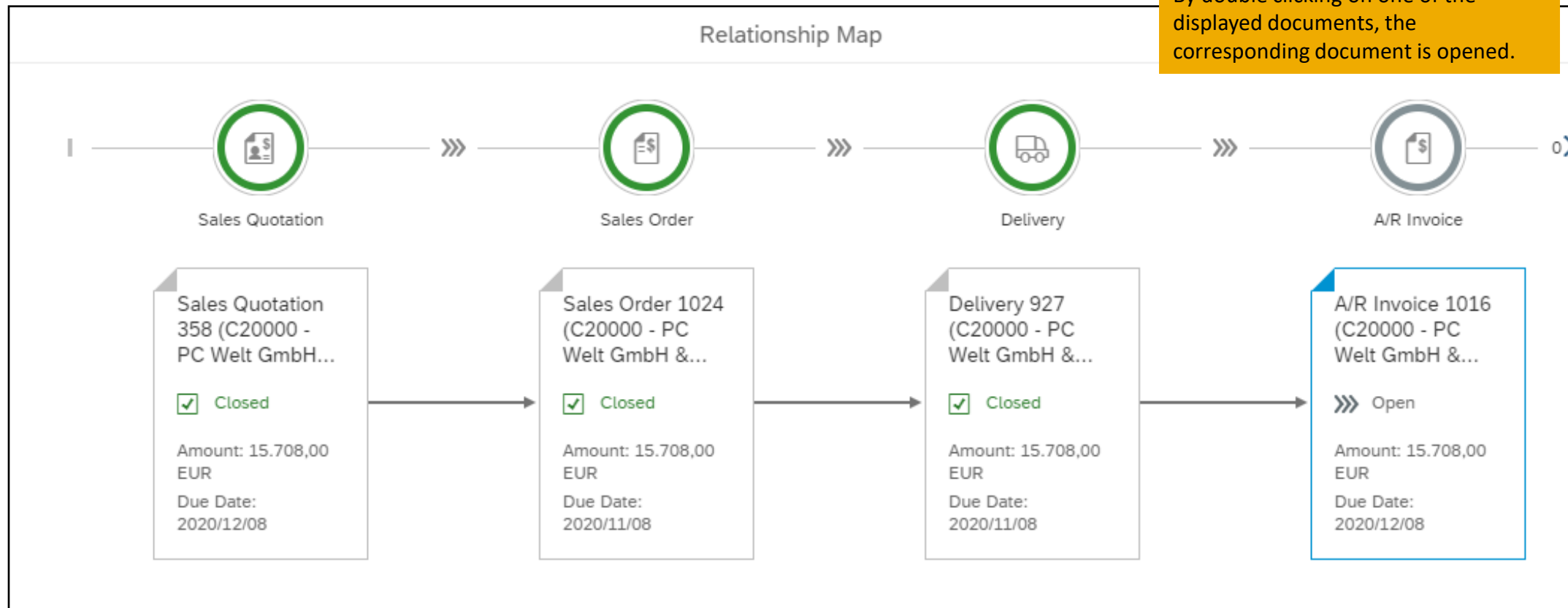
# Sales process: From quotation to outgoing invoice

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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conesprit GmbH  
Eduard-Breuninger-Straße 6/1  
71522 Backnang  
[conesprit.de](http://conesprit.de)  
[business-one-consulting.com](http://business-one-consulting.com)

Contact person  
Katrin Douverne  
**Email:** [katrin.douverne@conesprit.de](mailto:katrin.douverne@conesprit.de)  
**Tel.:** +49 7191 18 70 190  
**Fax:** +49 7191 18 70 191