

SAP Business One 10.0 Basics – First Steps

EN-SBO1000

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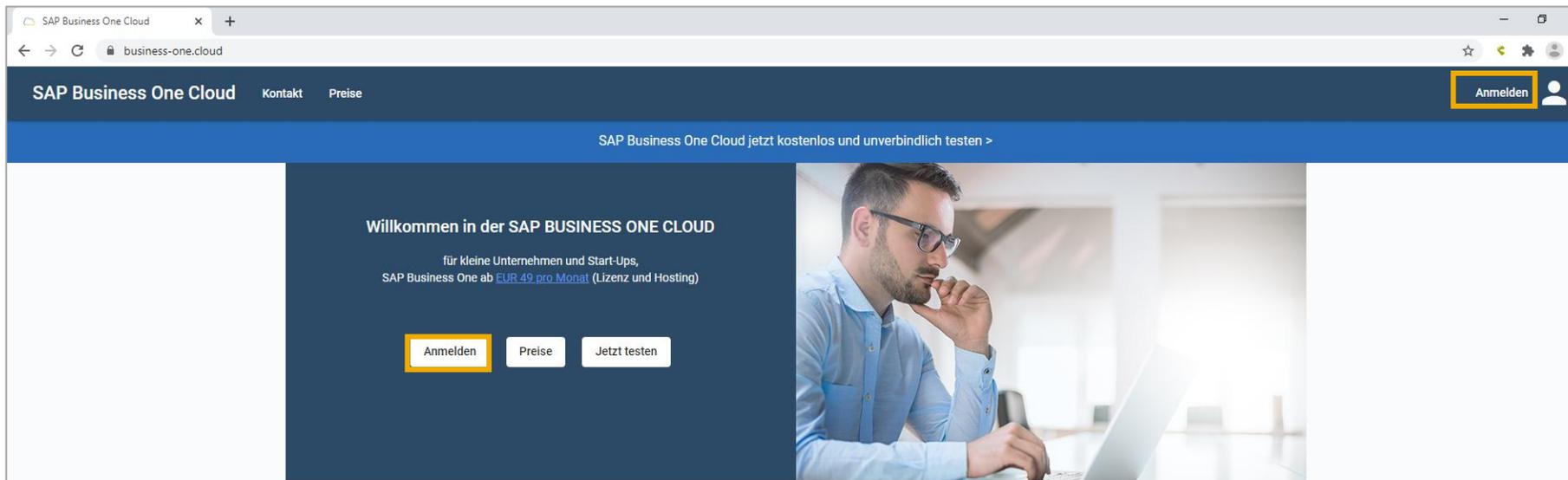
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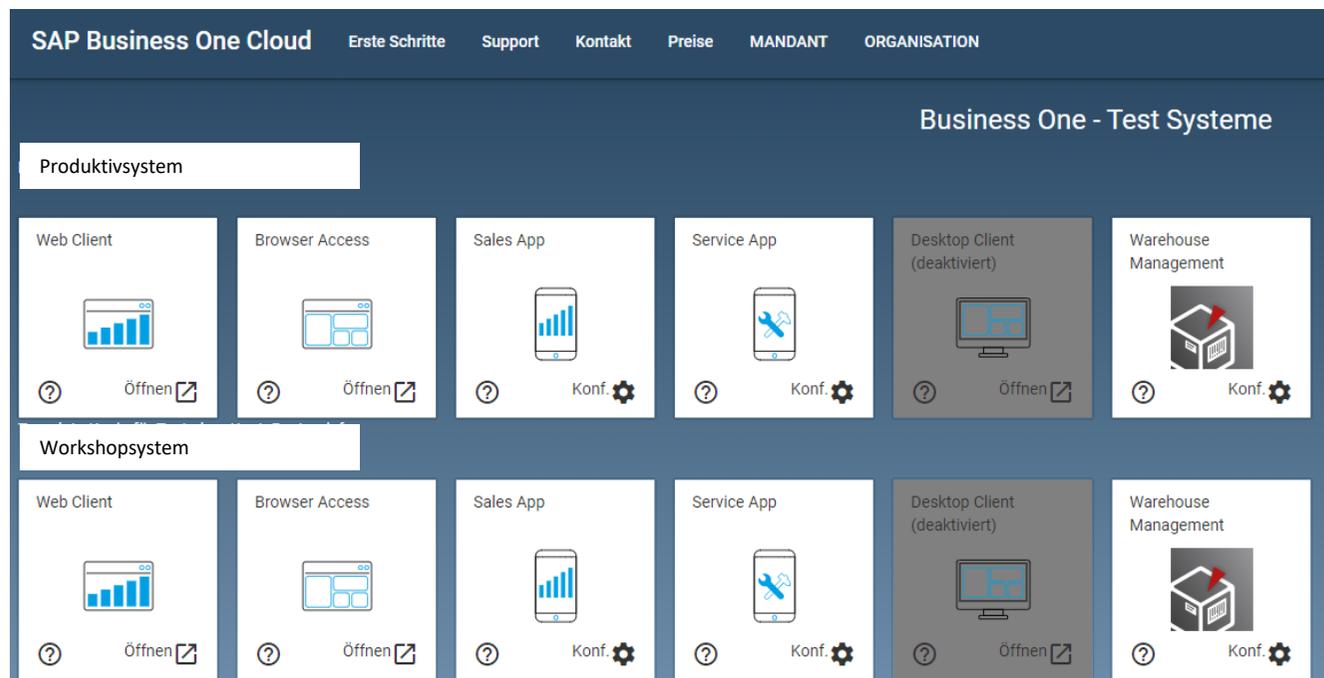
Set user data and password initially

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 browser address bar shows the URL: <https://c0cm6kiisn4257usua86y.ba.eu.business-one.cloud/dispatcher/>. The interface includes a menu bar (1), a toolbar (2), a left-hand navigation menu (3) listing various modules, and an enterprise search bar (4) with the text "Look up menus" and a "Search" button. The main content area is currently blank with a blue background and a loading spinner. The footer displays the date "26.10.2020" and time "08:32", along with the SAP Business One logo.

- 1. Menu bar**
- 2. Toolbar**
- 3. Modules** for structuring dialogues
May look different depending on your authorizations
- 4. Enterprise Search**
Search for menu items or documents

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 shows the SAP Enterprise Search interface. At the top, there is a search bar containing 'PC Welt' and buttons for 'Suchen' and 'Nach Vorlage suchen'. Below the search bar, the results are displayed in a table format. On the left side, there is a navigation pane with a tree structure of categories: 'Alle', 'Stammdaten (3)', 'Verkaufstransaktion (362)', 'Service (10)', 'Opportunity (9)', and 'Bankenabwicklung (27)'. The main area shows search results for 'PC Welt', grouped by activity type. Each group includes details such as activity name, start/end dates, time, priority, and user information. The results are paginated, showing 'Satz 1-10 von 411 Ressourcen'.

Activity Group	Activity Name	Start Date	End Date	Time	Priority	User	GP-Code
Aktivität - 5	P(Kampagne)	2012-06-06	2012-06-06	1501	1(Normal)	Robert Leitner	C20000
Aktivität - 19	T(Aufgabe)	2012-06-11	2012-06-11	907	1(Normal)	Robert Leitner	C20000
Aktivität - 22	P(Kampagne)	2013-02-12	2013-02-12	1943	1(Normal)	Robert Leitner	C20000
Aktivität - 34	P(Kampagne)	2016-01-10	2016-01-10	1501	1(Normal)	Robert Leitner	C20000
Ausgangsgutschrift - 10	Belegnummer: 10	2012-06-18					C20000

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. On the left is a navigation menu with categories like 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 area contains several KPI cards and a process flow diagram. A yellow box highlights the cockpit content, with callouts for 'Refresh cockpit' (a circular arrow icon) and 'Edit cockpit' (a pencil icon). The date '26.10.2020' is visible at the bottom of the cockpit area.

KPI Card	Value	Unit	Change
Anzahl offener Angebote	9		▲
Gesamtbetrag Forderungen	0	EUR	
Anzahl offener Kundenaufträge	56		▲
Überfällige Verbindlichkeiten	2.51 M	EUR	▲
Anzahl offener Lieferungen	31		▲
Summe Verbindlichkeiten	5.02 M	EUR	▲

Sales Process Flow:

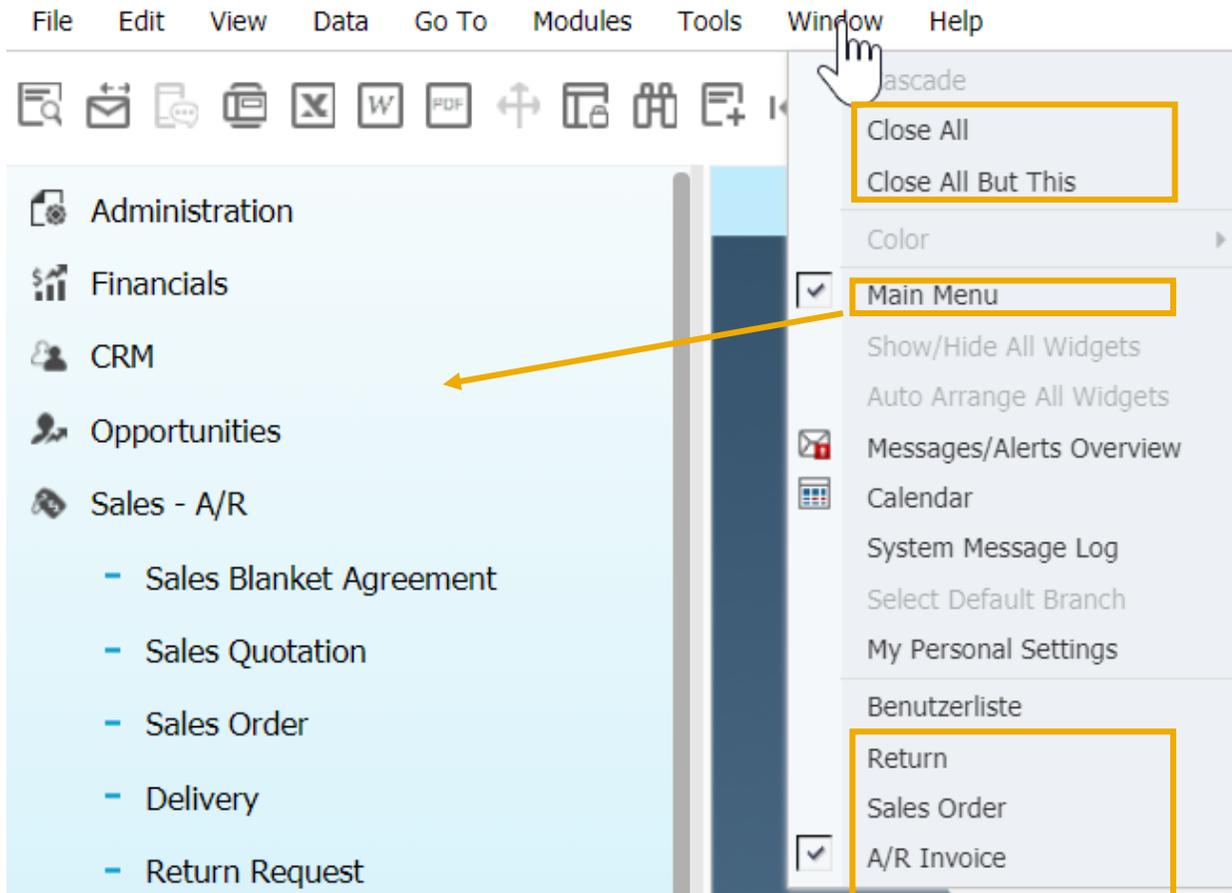
```
graph TD; SQ[Sales Quotation] --> SO[Sales Order]; SO --> D[Delivery]; D --> RI[Return]; SQ --> A/R DP Invoice; A/R DP Invoice --> A/R Invoice; A/R Invoice --> A/R Credit Memo; A/R DP Invoice --> Dunning Wizard; A/R Invoice --> Incoming Payments; Incoming Payments --> Customer; Customer --> Sales Reports;
```

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

The image shows a horizontal toolbar with various icons. Several icons are highlighted with yellow boxes and callout boxes providing their functions:

- Document preview**: Callout for the first icon (document with magnifying glass).
- Create PDF**: Callout for the PDF icon.
- Lock application**: Callout for the padlock icon.
- Open base document**: Callout for the document with magnifying glass icon, explaining it switches from invoice to delivery or sales order.
- Form settings**: Callout for the gear icon, explaining columns and tables can be added or hidden.
- Send the document by email to the email address of the contact person**: Callout for the envelope icon.
- Binoculars + Arrows**: Callout for the binoculars and arrow icons, explaining search for new data sets and navigation through records.
- Personal Settings / Users Setup**: Callout for the user profile icon.

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

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

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 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

Linked to Resource
Standard Item Identification
Commodity Classification

Find Cancel

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

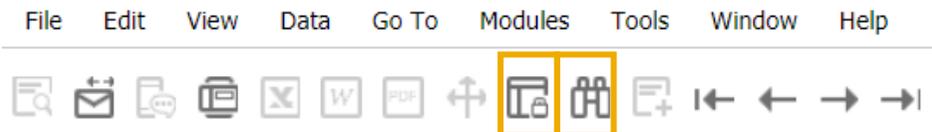
Do Not Apply Discount Groups
Manufacturer OEC
Additional Identifier
Shipping Type DHL
Serial and Batch Numbers
Manage Item by None

Active
 Inactive
 Advanced

From To Remarks

Add Cancel

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..



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.

The image shows two SAP Business One dialog boxes. The left one is 'Form Settings - Sales Order' and the right one is 'Liste - Einstellungen'.

Form Settings - Sales Order: This dialog has tabs for 'Table Format', 'Row Format', and 'Document'. The 'Table Format' tab is active, showing a list of fields with input boxes for their values. A yellow box labeled '1' highlights the 'Add field' icon in the top toolbar. A yellow box labeled '2' highlights the 'Commission %' field.

Liste - Einstellungen: This dialog shows a table of fields with columns for '#', 'Feldname', 'Angezeigter Name', 'Grupp', 'Sichtb', and 'Beschr'. A yellow box labeled '3' highlights the search input field at the bottom.

Annotations:

- 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
- 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 **2**
 Message Preferences
 Tooltip Preview Preferences

Copy Cancel

4

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 main window is titled 'Sales Order' and contains various input fields for customer information, posting date, and item details. A sidebar on the right is titled 'UDF' (User-Defined Fields) and is highlighted with a yellow box. The sidebar contains a 'General' dropdown menu and a large empty text area for user-defined fields. The main window also features a 'Contents' tab with sub-tabs for Logistics, Accounting, Electronic Documents, and Attachments. A table with columns for Item No., Item Description, Quantity, UoM Name, Unit Price, and Discount % is visible. At the bottom, there are fields for Sales Employee, Owner, and a summary section with 'Total Before Discount', 'Discount', 'Freight', 'Rounding', 'Tax', and 'Total'.

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

Total Before Discount	
Discount	%
Freight	
<input type="checkbox"/> Rounding	0,00 EUR
Tax	
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			

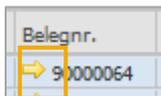
OK Cancel Clear

Shortcuts

Action	Shortcut	Action	Shortcut
Print current document	Strp + P	Close all windows except for the main menu	Shift + Close the window using X.
Display transaction journal	Strg + J	Open new windows	Enter
Close SAP Business One	Strg + Q	Close current window	Esc
Undo	Strg + Z	In table: add a row	Strg + I
Redo	Strg + Shift + Z	In table: duplicate a row	Strg + M
Cut	Strg + X	In table: delete a row	Strg + K
Copy	Strg + C	Sort table by column in ascending order	Double click on column heading
Paste	Strg + V	Sort table by column in descending order	ALT + Double click on column heading
Search function for customers or articles starting with certain letters	Entering letters * Tab	In table: Display detailed information for a series	Strg + L
Multiple choice	Strg or Shift + Selection of entries	In table: Jump to the first row	Strg + H
Show user-defined fields	Strg + Shift + U	In table: Jump to the last row	Strg + E
Show next document	Strg + ->	In table: Copy from cell above	Strg + [arrow up]
Show previous document	Strg + <-	In table: Calculate gross profit	Strg + G
Switch to add mode	Strg + A	In table: Select payment method	Strg + Y
Switch to find mode	Strg + F	In table: Calculate volume and weight	Strg + W
Modify field name	Strg + Double click on field names	In table: Open base document	Strg + N
Show alternative item	Strg + Tab in the Item number field	In table: open target document	Strg + T
Enter current date	Any key (except numbers) + Tab	In table: Select a serial number for an item	Strg + Tab (in the quantity field of the item)
Enter any date in the current month	Tag + Tab	In table: Show last prices	Strg + Tab (in the price field of the item)
Enter any date in the current year	Tag + Month + Tab	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

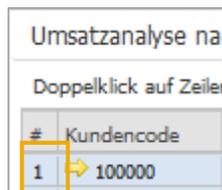
- Über goldene Pfeile können Sie in Berichten eine Ebene tiefer gehen.



- 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.

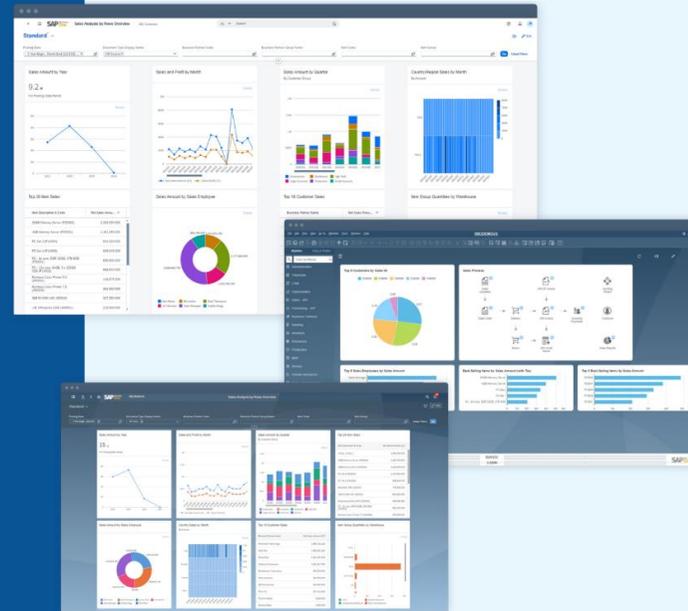


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