SAP Business One 10.0
Basics – First Steps

EN-SBO1000

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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
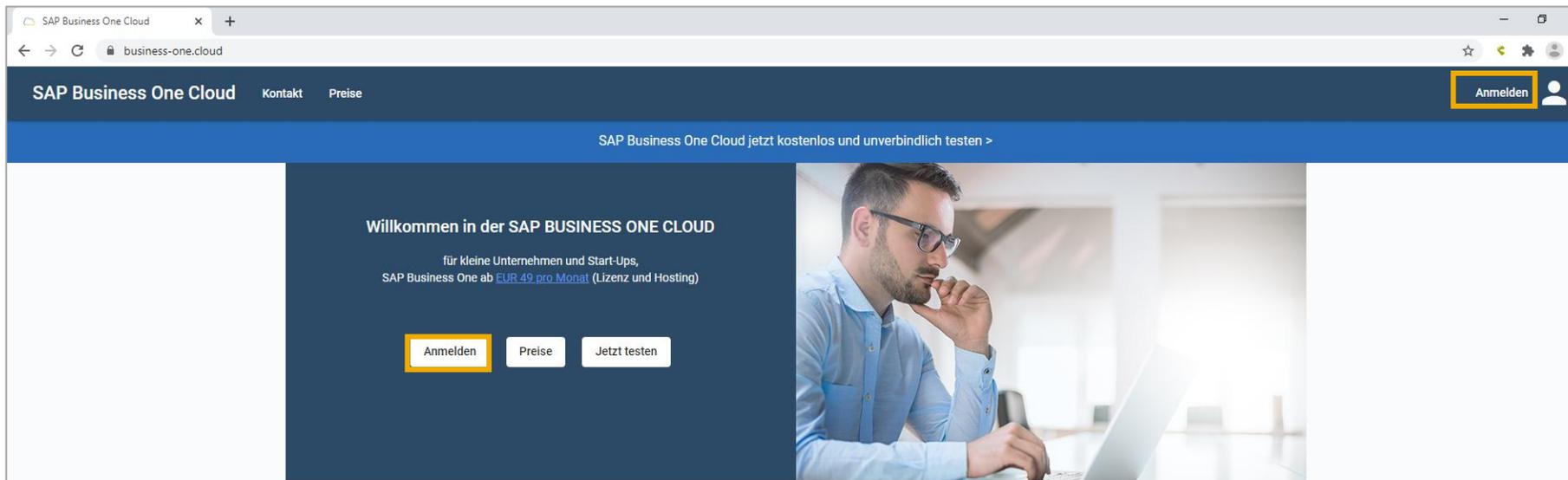
1. Ideally, enter the following URL in Firefox or Chrome browser: https://www.business-one.cloud/
2. Log in, enter your user ID and password
3. Select database and access by clicking on the corresponding tile. In this basic training we us Browser Access.
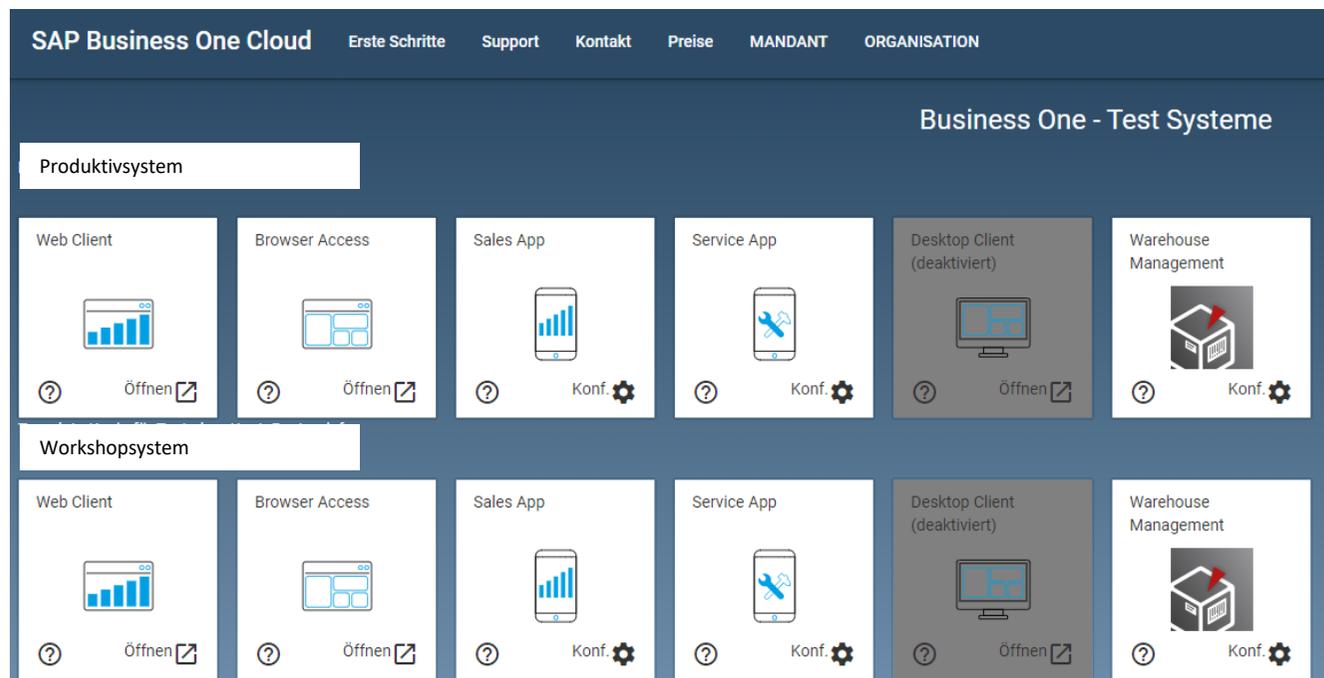
Basic structure and navigation

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.

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 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
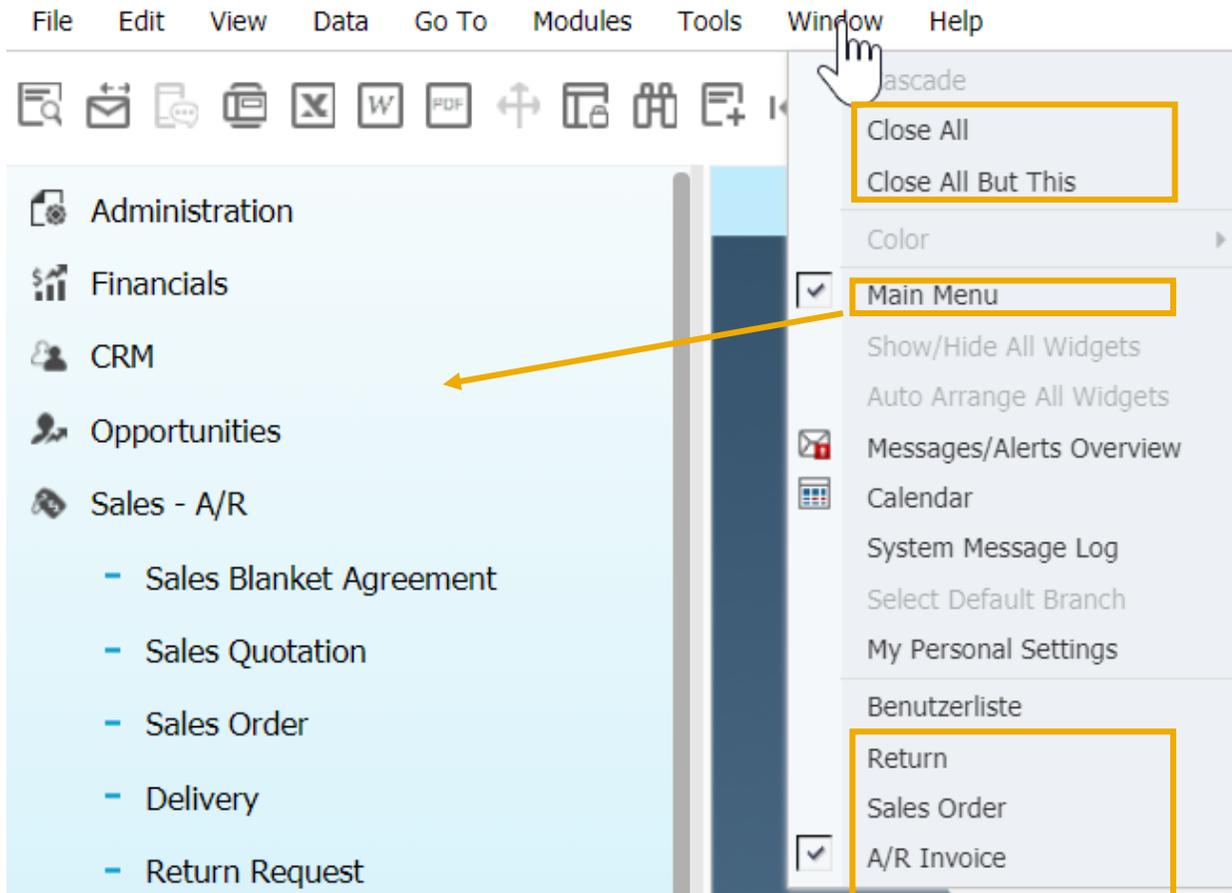
Close All /
Close All But This
All or all but the active window can be closed with one click.

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

Document preview

Send the document by email to the email address of the contact person

Create PDF

Lock application

Binoculars + Arrows
Search — New data set
First to last data record, scroll through the documents

Open base document
You can use this function to switch from the invoice to the delivery or the sales order

Form settings
Columns in documents and tables can be added or hidden

Personal Settings / Users Setup

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

Users - Setup		
☐ Superuser	☐ Mobile User	☐ Support User

User Code
User Name
Defaults

| General | Services | Display |

Bind with Microsoft Windows Account
Employee →
E-Mail
Mobile Phone
Mobile Device ID
Fax

Branch — Haupt
Department — Verwaltung
Groups — Finance; Sales; Purchase; ...

Password
☑ Password Never Expires
☐ Change Password at Next Logon
☐ Locked

Personal Data Protection
☐ Natural Person
Status — None

OK   Cancel   Copy Form Settings

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

Users - Setup		
☐ Superuser	☐ Mobile User	☐ Support User

User Code
User Name
Defaults

| 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

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

Restore Defaults

OK   Cancel   Copy Form Settings   Send Mobile Setting

Users - Setup		
☐ Superuser	☐ Mobile User	☐ Support User

User Code
User Name
Defaults

| General | Services | Display |

Skin Style
Color
Language — English (United States)
Font
Font Size
Preview

AaBbYyZz - abcd

Language of the user interface

Background
Preview

Image Display
Ext. Image Processing

Restore Defaults

OK   Cancel   Copy Form Settings   Send Mobile Setting

Find vs. Add Mode

Documents always start in add mode. Other dialogues may tart in find mode.

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..
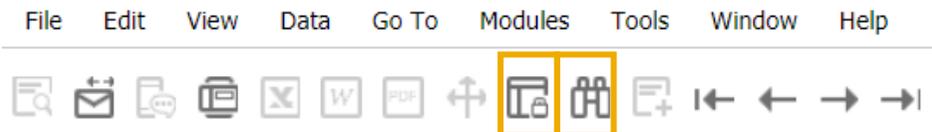
Search in SAP Business One
You can either enter the exact name of an item in the description field and press Enter (Example: "JB Multifunction Printer 1420" + Enter), or you can enter an asterisk (*) in combination with part of the item description (Example: "* JB" + Enter or * printer + Enter). In the 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.

Select table format

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 Mausklick

Liste nach Feld gruppieren
Haken setzen für gruppieren

Transferring form settings from one user to another

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.

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.

Filter lists

Lists can be filtered according to a variety of criteria.

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		
Search function for customers or articles starting with certain letters	Entering letters * Tab	Sort table by column in descending order	ALT + Double click on column heading
Multiple choice	Strg or Shift + Selection of entries	In table: Display detailed information for a series	Strg + L
Show user-defined fields	Strg + Shift + U	In table: Jump to the first row	Strg + H
Show next document	Strg + ->	In table: Jump to the last row	Strg + E
Show previous document	Strg + <-	In table: Copy from cell above	Strg + [arrow up]
Switch to add mode	Strg + A	In table: Calculate gross profit	Strg + G
Switch to find mode	Strg + F	In table: Select payment method	Strg + Y
Modify field name	Strg + Double click on field names	In table: Calculate volume and weight	Strg + W
		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)

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Hinweise

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

Belegnr.
⇒ 90000064
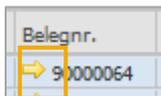
- Über schwarze Pfeile und den Button „Expandieren" kann ein Bericht expandiert, also in einer weiteren Detailtiefe aufgerufen werden.

Kostenstelle	Expandieren	Komprimieren
▶ 1000-Business		

- Oftmals bekommt man einen Bericht in einem tieferen Detailgrad, wenn man am Anfang einer Zeile auf die Positionsnummer einen Doppelklick macht.

Umsatzanalyse na
Doppelklick auf Zeile

#	Kundencode
1	⇒ 100000
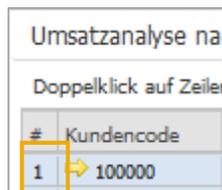
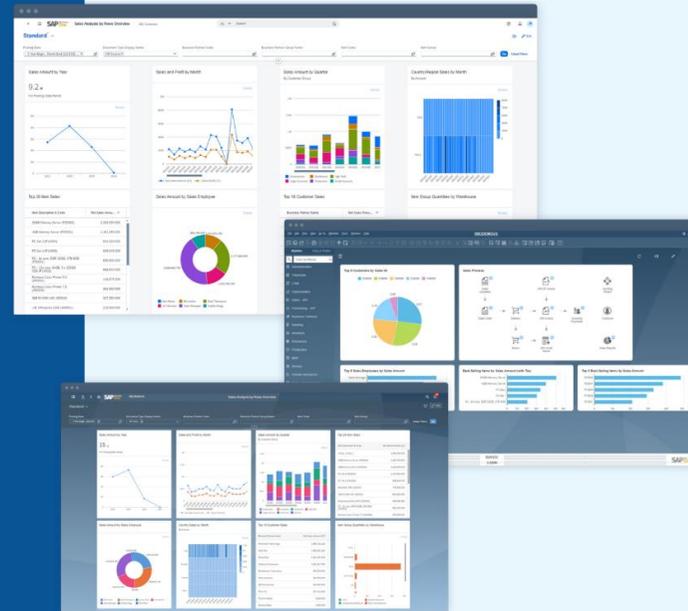# Your own SAP Business One demo system.

Ready for you in 2 minutes.

Don't believe us?
Then try it now!

> **Free Online-Demo**

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