SAP Business One 10.0
Basics First Steps
October 2020

SBO1000-EN

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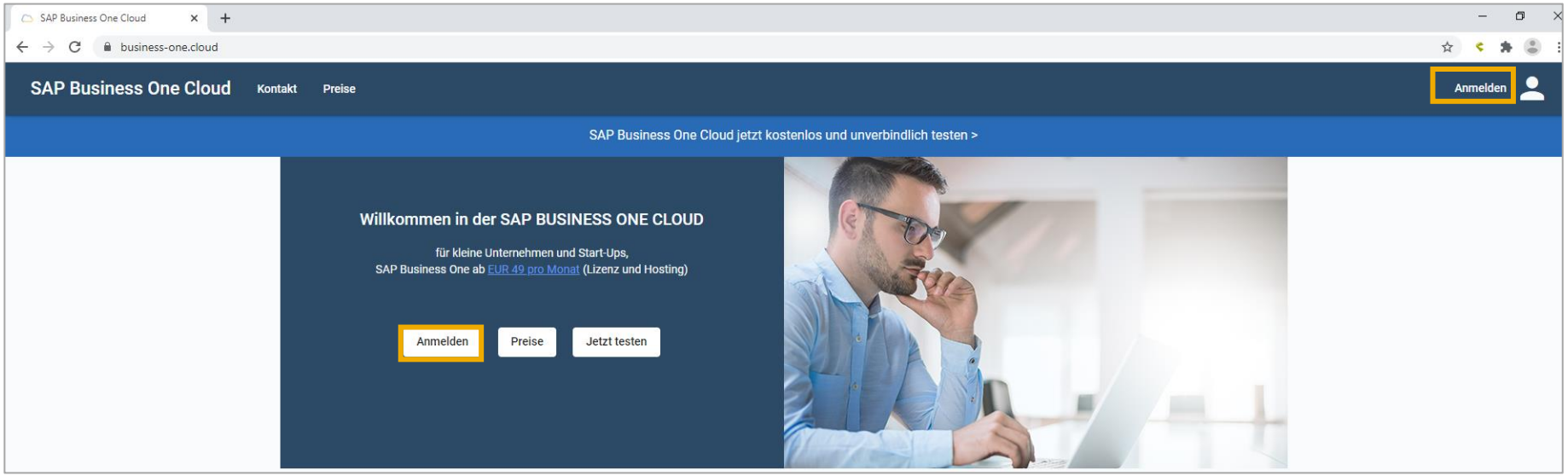
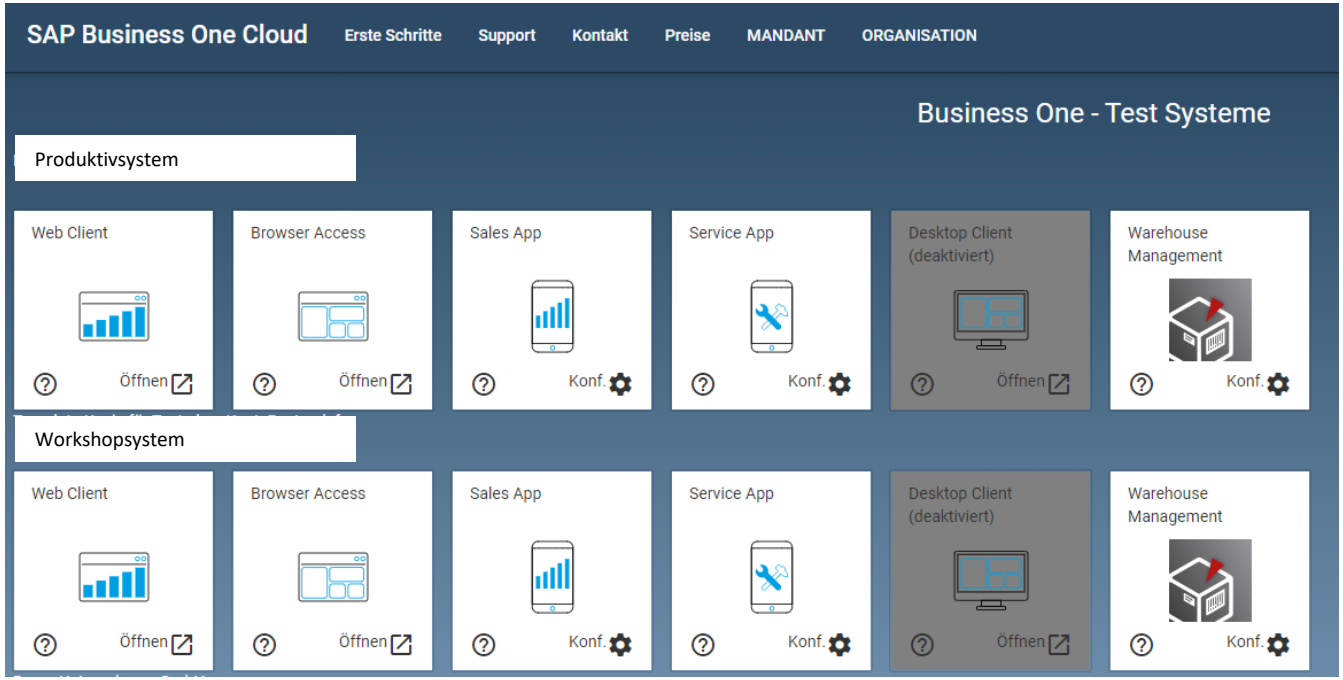
Set user data and password initially

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.

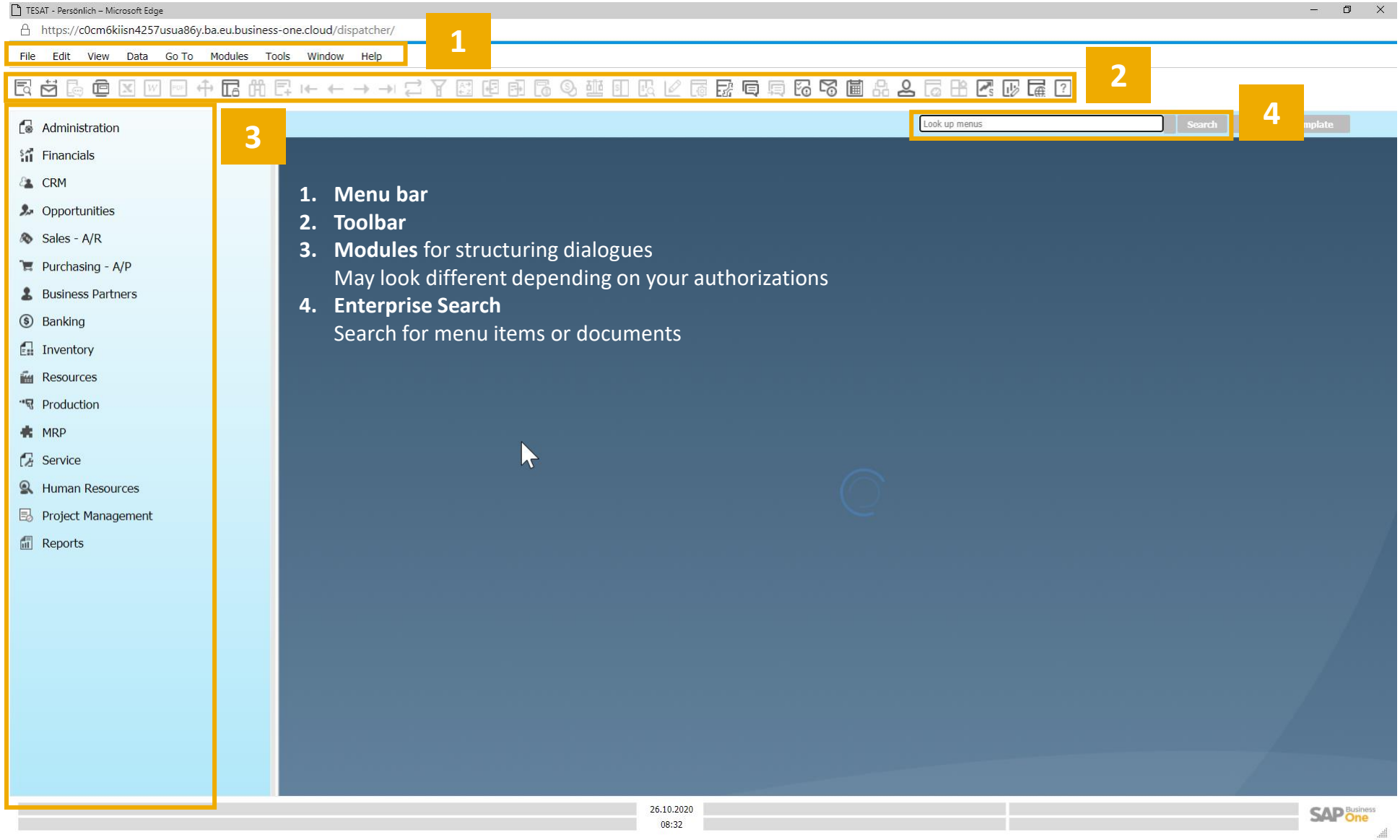
Login to SAP Business One



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.



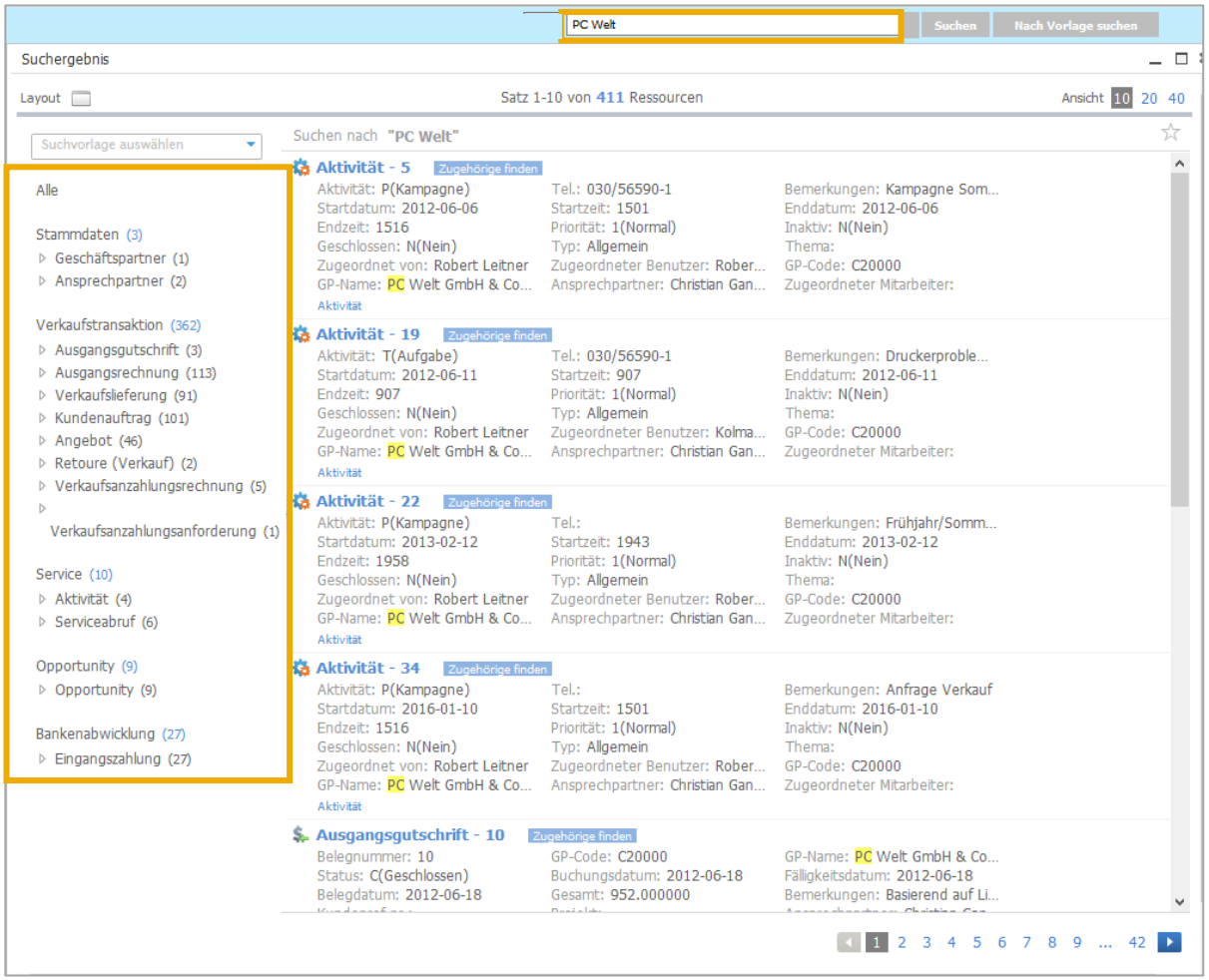
Basic structure and navigation



Enterprise Search

The Enterprise Search is the intelligent search function of SAP Business One. It can be searched for:

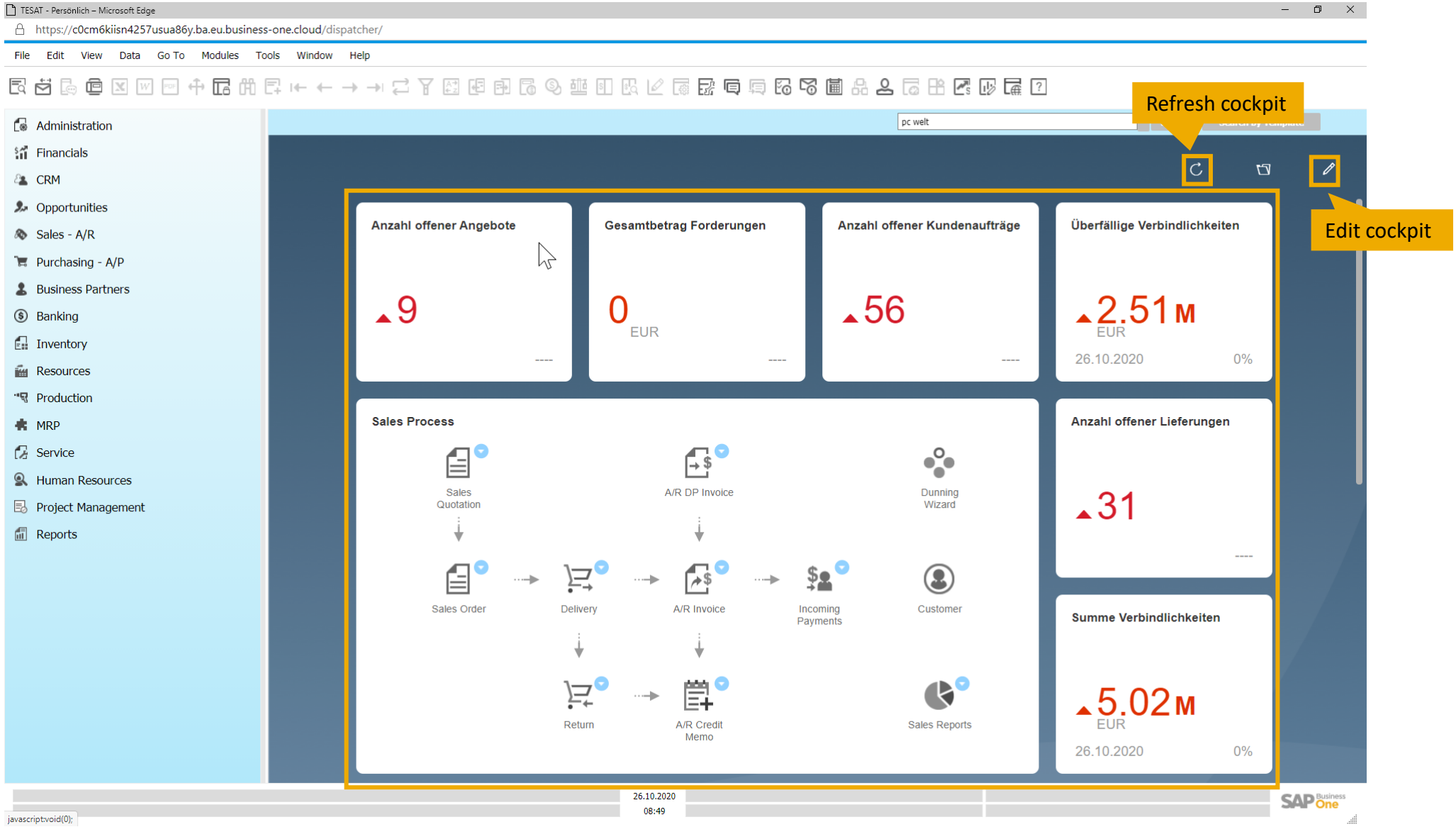
1. Menus (search example: "Invoice"): As a result, all suitable functions are displayed.
2. Master data / documents (search examples: customer name, document number or invoice amount): As a result, the business partner master, article master and all documents associated with the search term are displayed. 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)

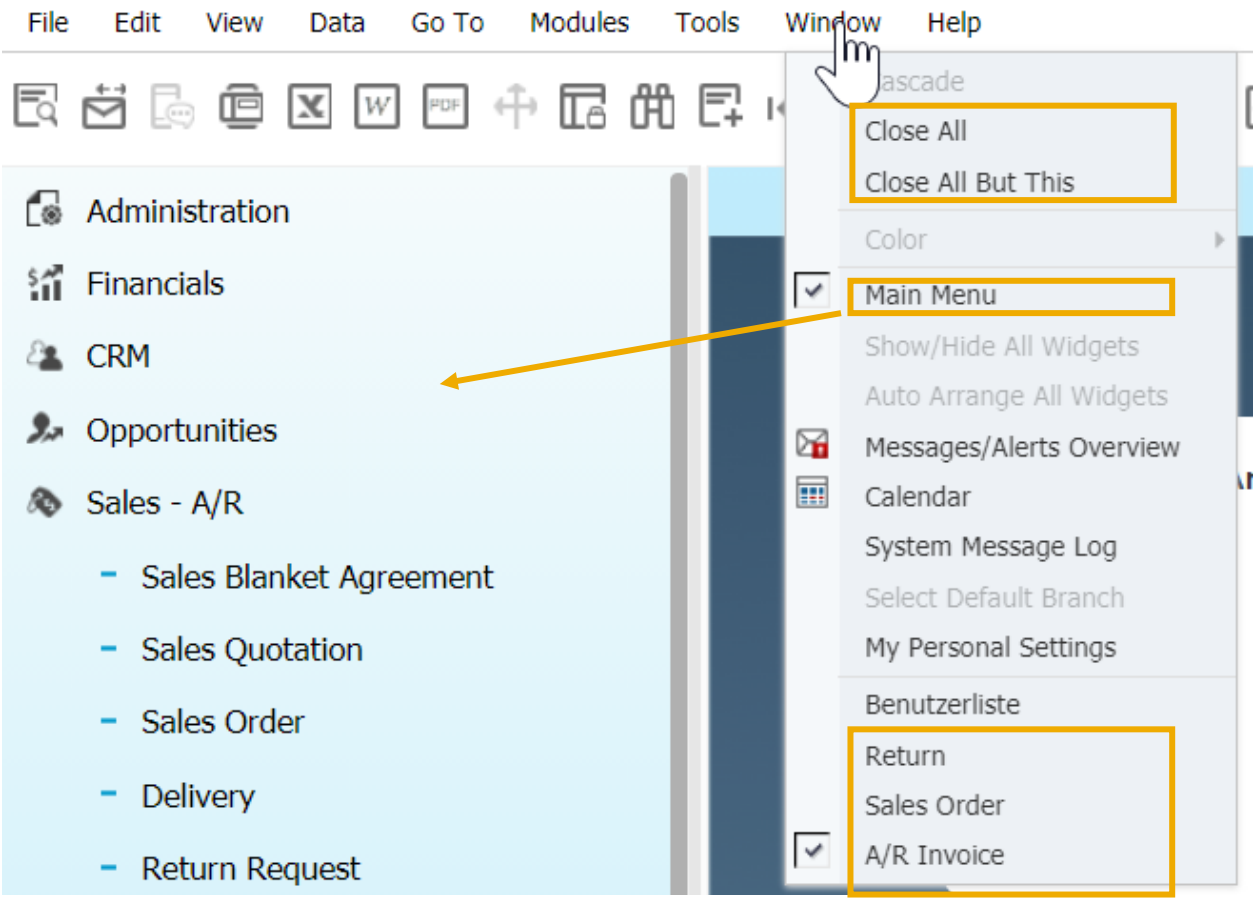
There are 4 cockpit templates in SAP Business One Standard: Finance, Sales, Purchase und Inventory.



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

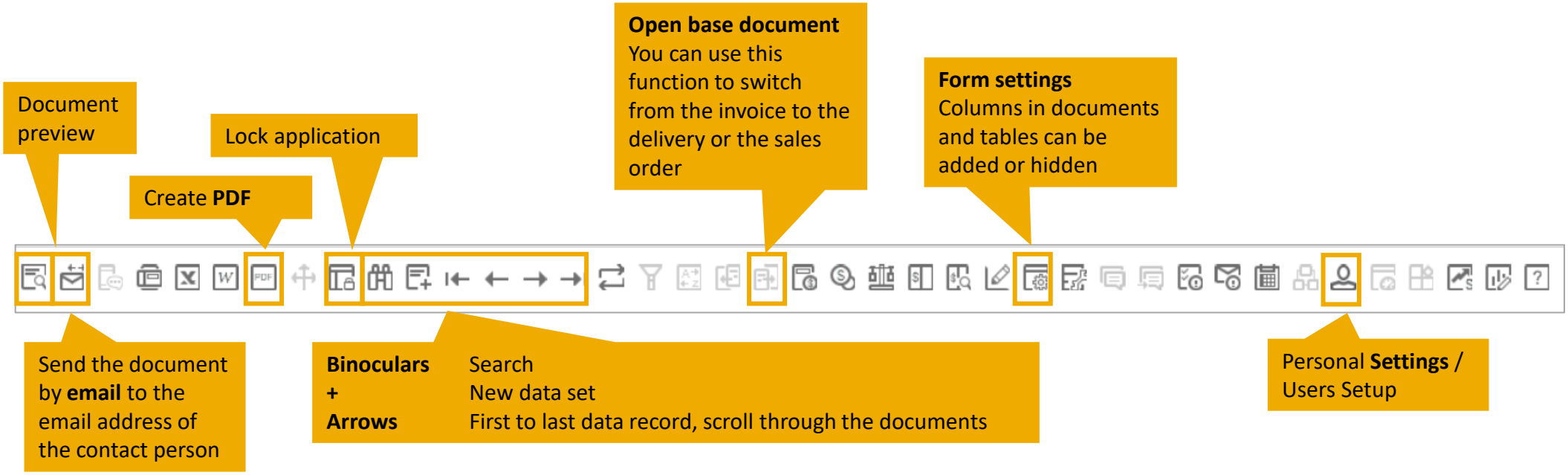


Close All / Close All But This
All or all but the active window can be closed with one click.

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

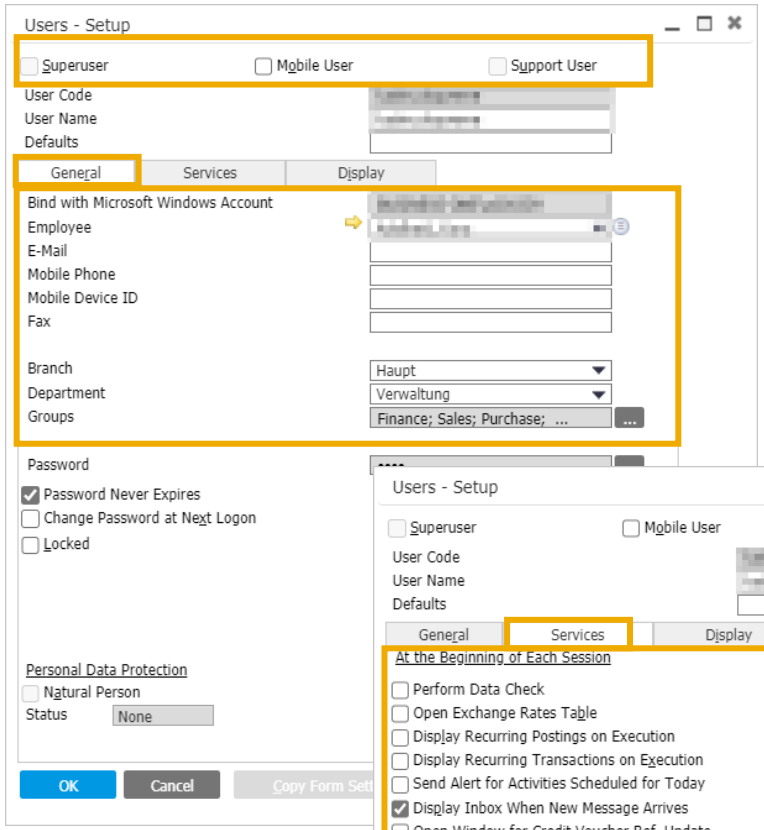

Document preview
Lock application
Create **PDF**
Open base document
You can use this function to switch from the invoice to the delivery or the sales order
Form settings
Columns in documents and tables can be added or hidden
Send the document by **email** to the email address of the contact person
Binoculars Search
+ New data set
Arrows First to last data record, scroll through the documents
Personal **Settings** / Users Setup

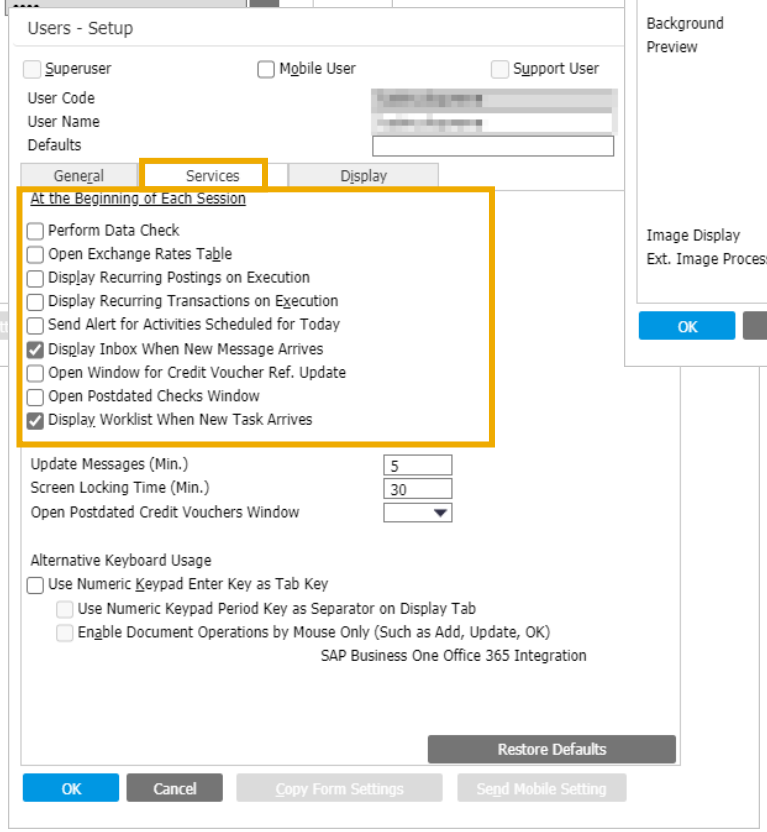
Personal Settings / Users Setup

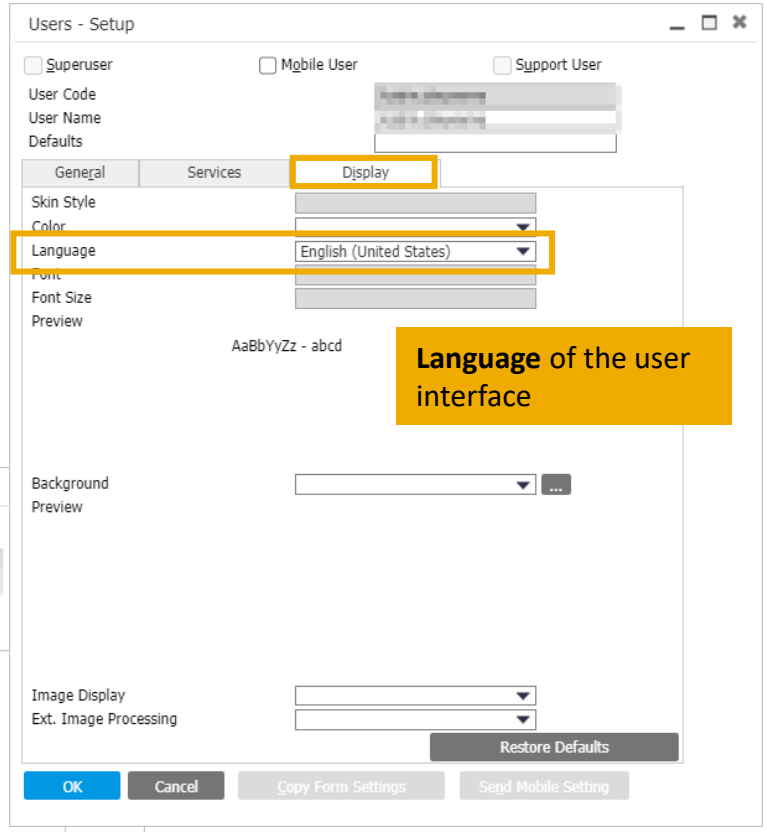
Toolbar > Symbol Personal Settings / Users Setup

User types, user code and name informative

Contact information and affiliation to branch, department, group are specified in the General tab





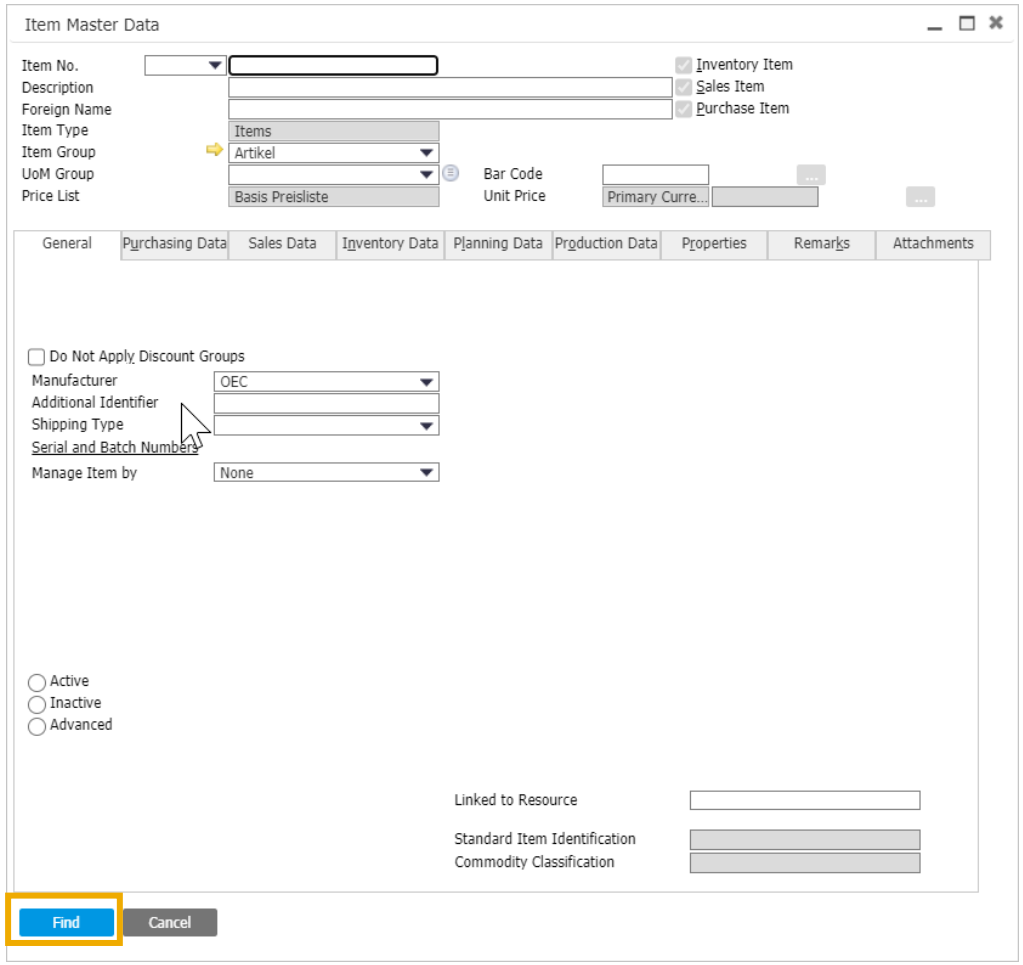


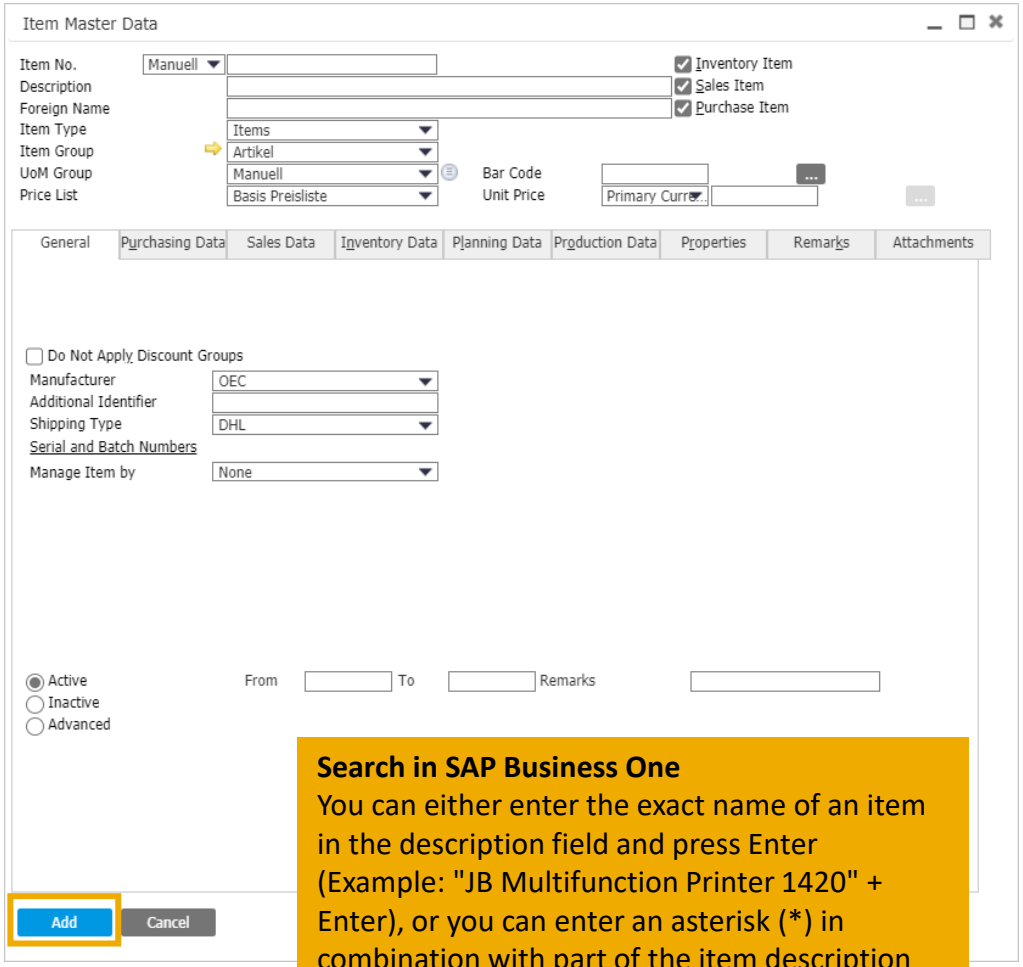
Language of the user interface

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

Find vs. Add Mode

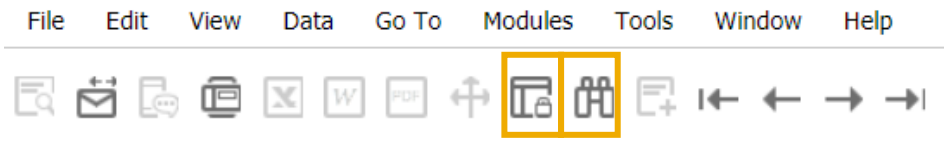
Documents always start in add mode. Other dialogues may tart in find mode.





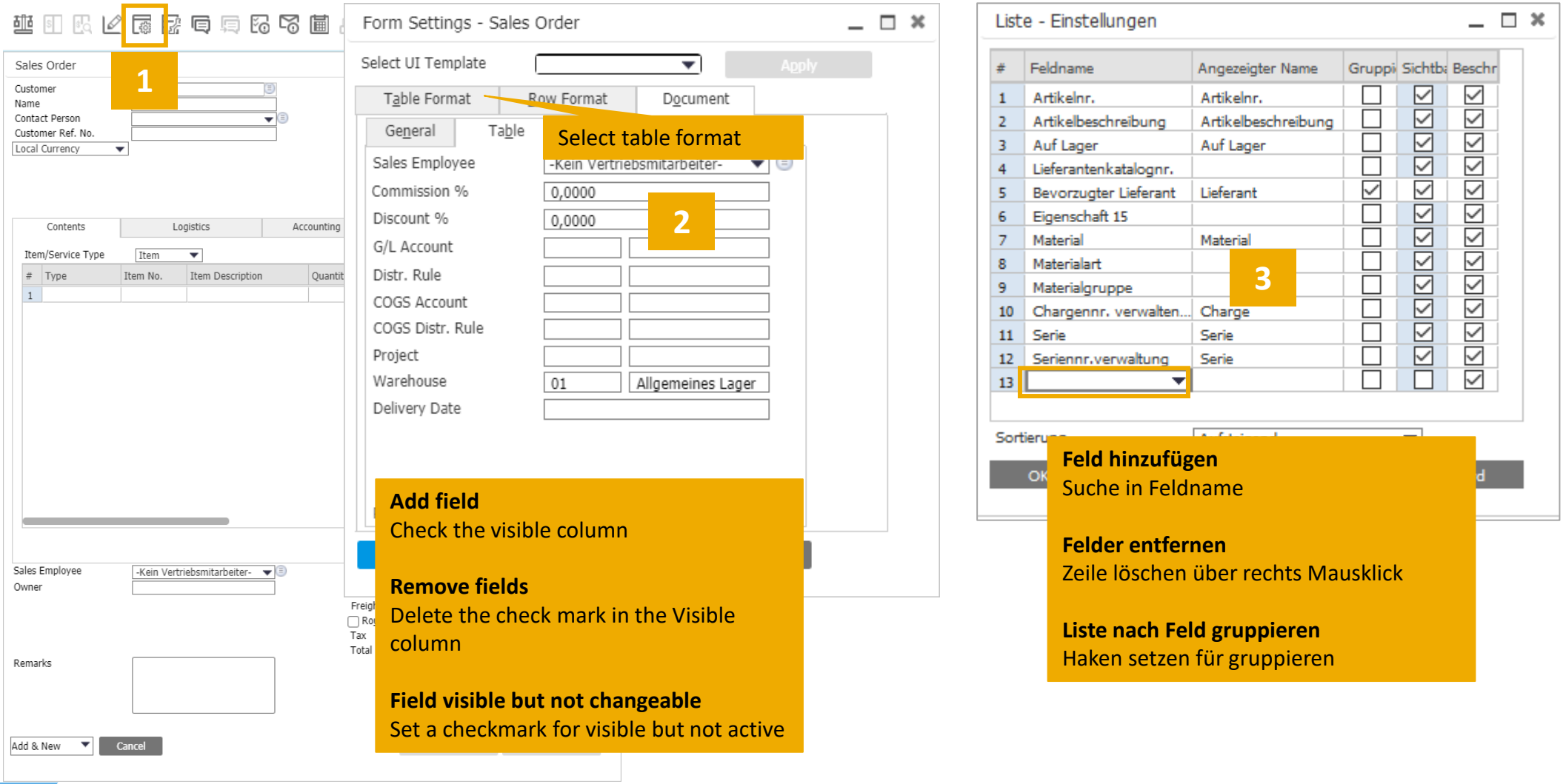
Search in SAP Business One
You can either enter the exact name of an item in the description field and press Enter (Example: "JB Multifunction Printer 1420" + Enter), or you can enter an asterisk (*) in combination with part of the item description (Example: "* JB" + Enter or * printer + Enter). In the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

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..



Adding standard columns in forms

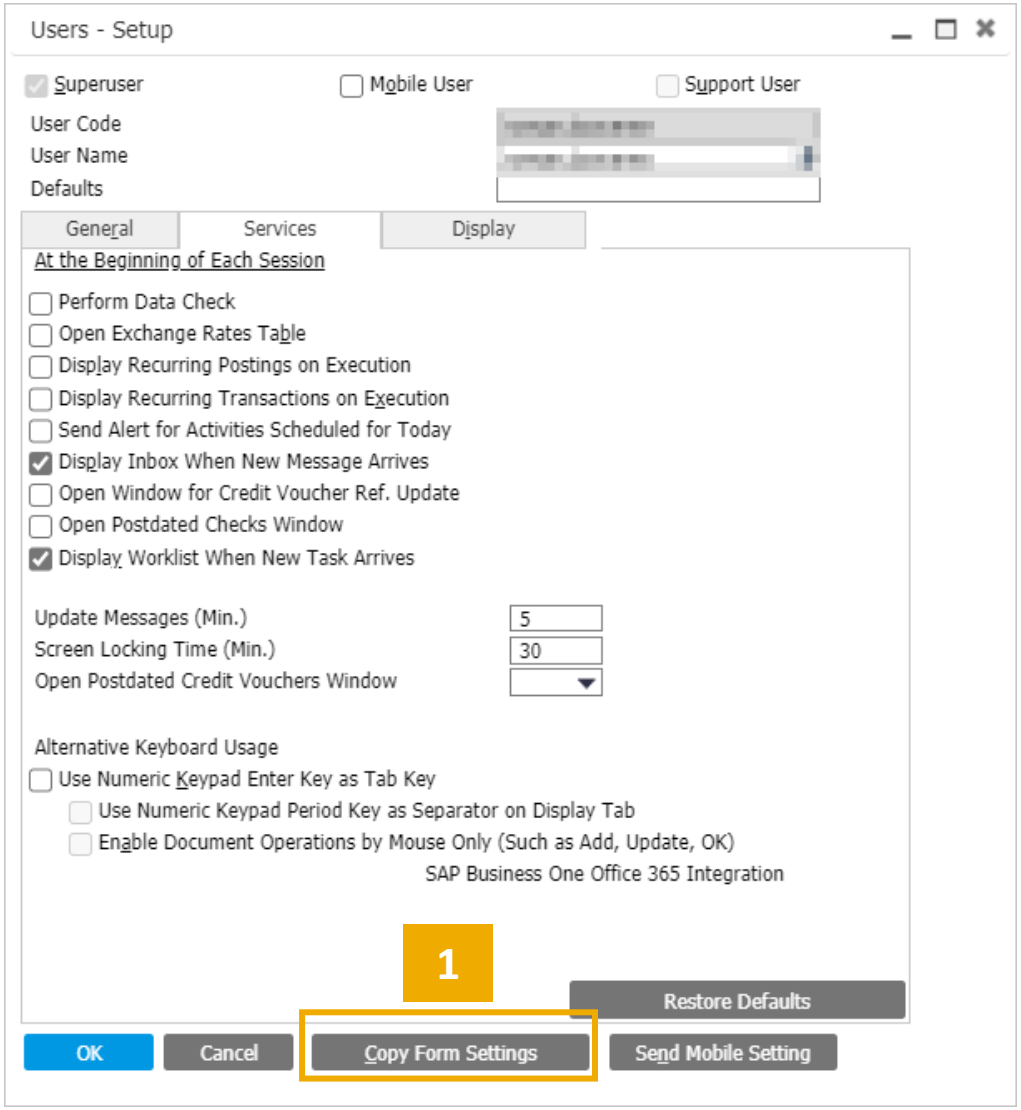
Columns in documents, lists and reporting tables can usually be expanded. This is done via the form settings (1). The form settings dialog looks different depending on the source. All fields are displayed directly in the dialog that is opened when you want to add documents (2). Newly added fields (this 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.

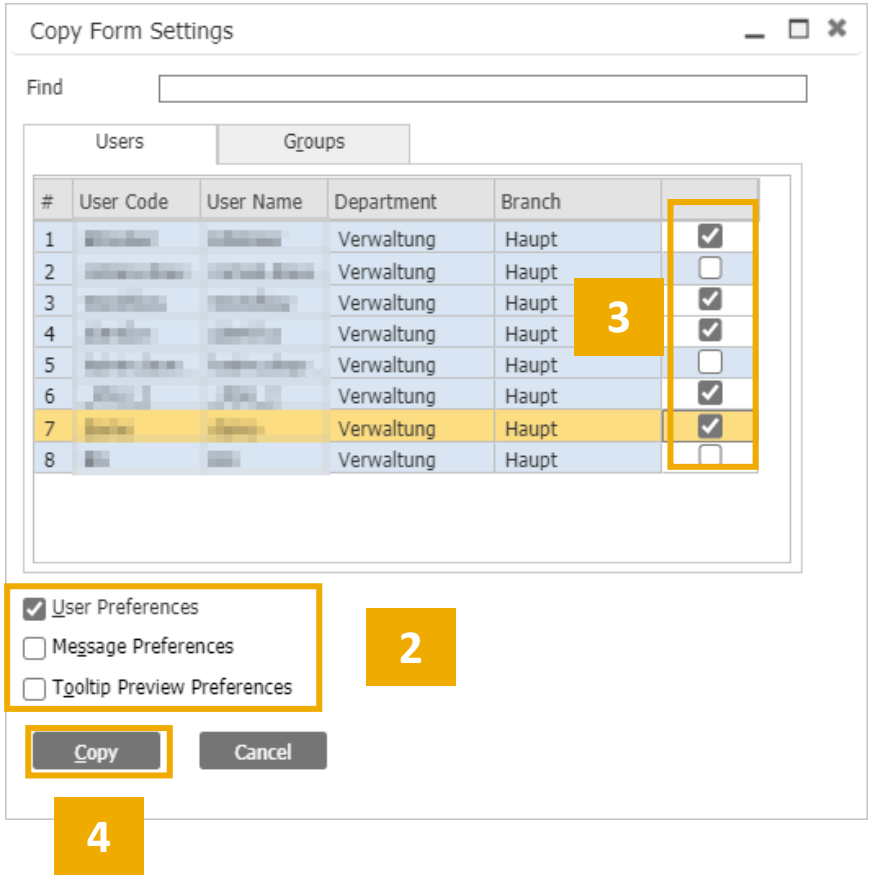


Transferring form settings from one user to another

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.



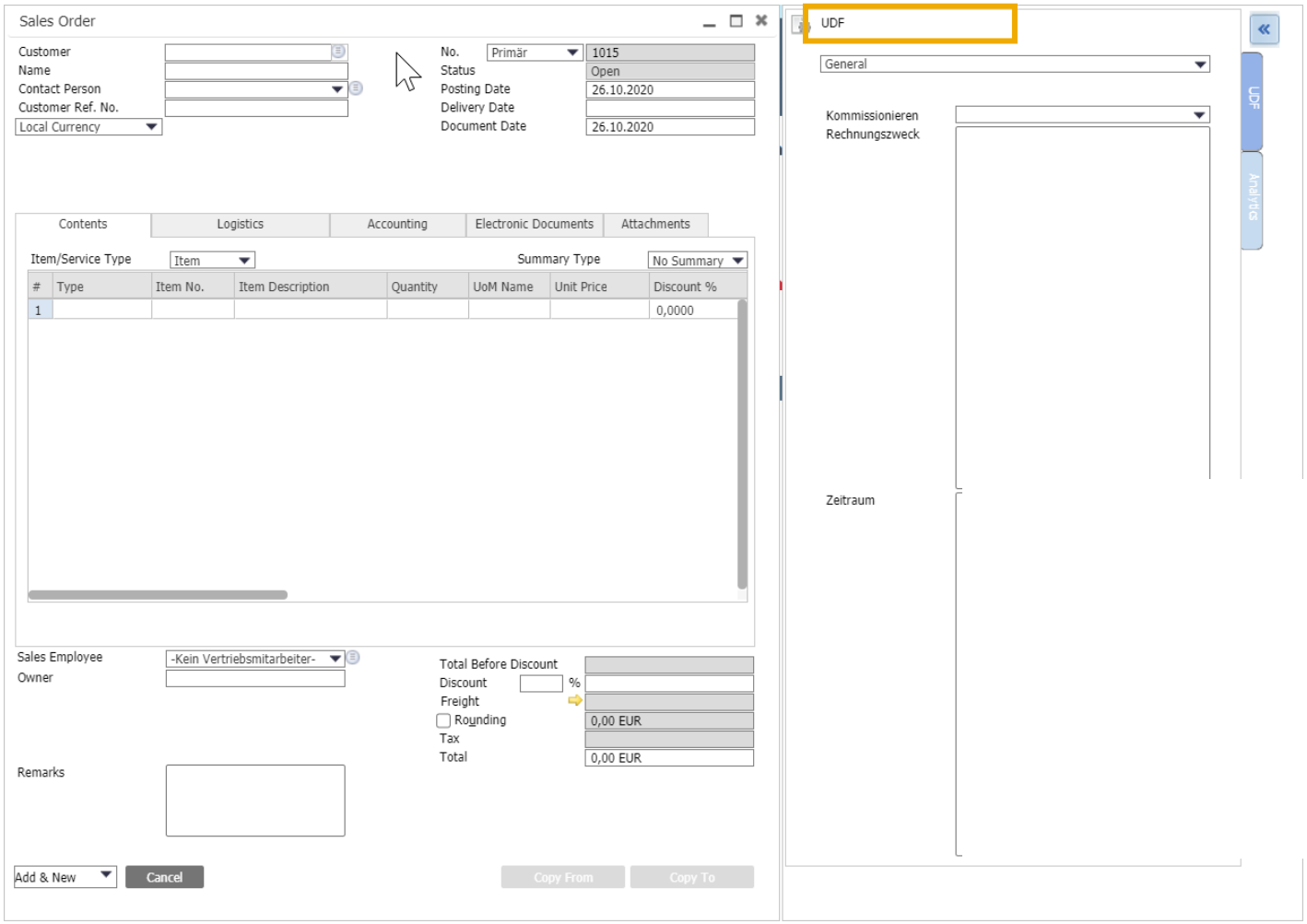


1. „Copy Form Settings“
2. Check User Preferences
3. Select users that receive the settings
4. Copy

Display user-defined fields (UDFs) and automatisms

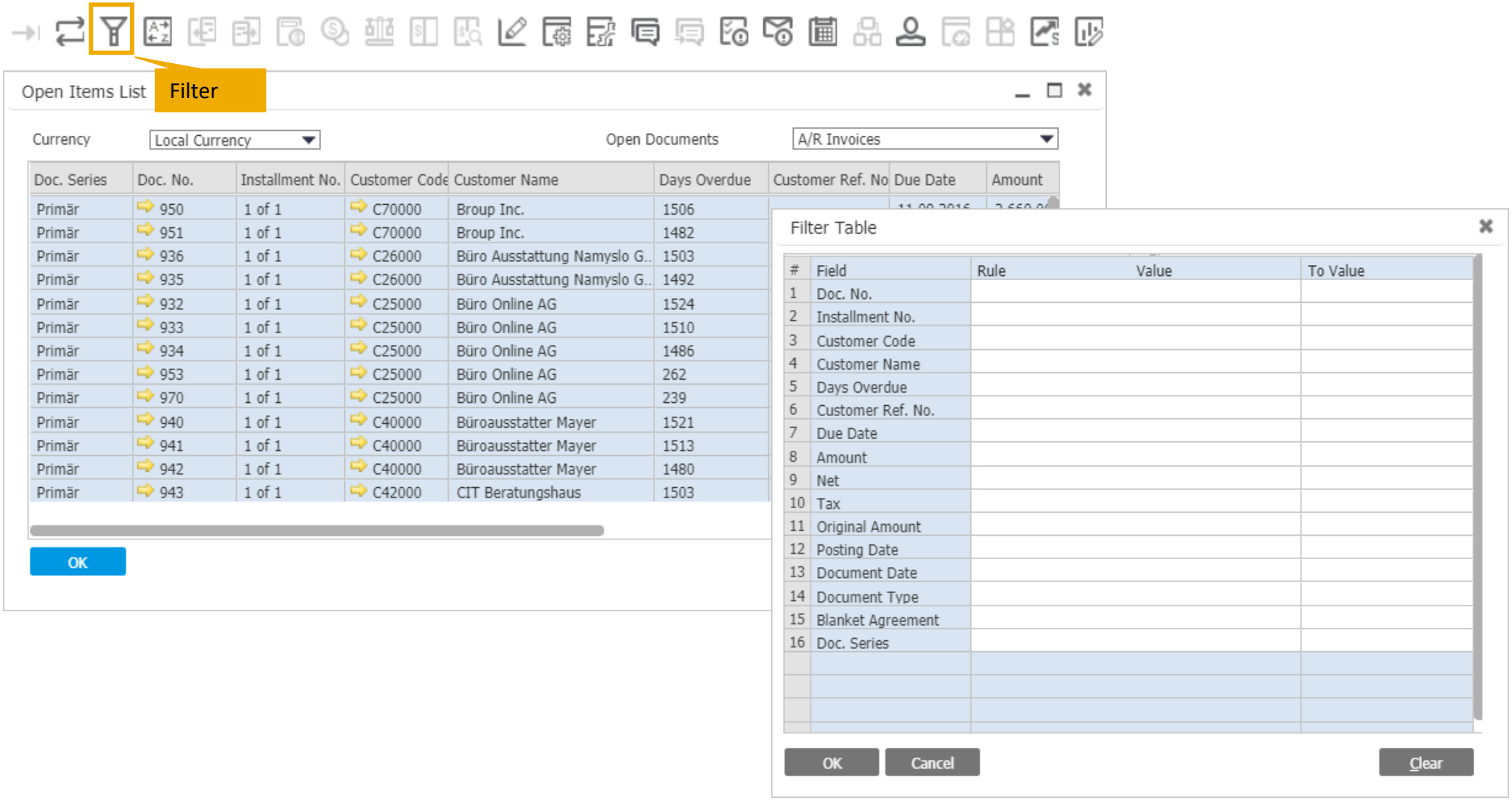
Master data masks and receipts have a large number of standard fields in SAP Business One.
If these fields are not sufficient, user-defined fields can be created.
It is also possible to fill existing or new fields with automatisms.

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.



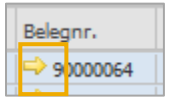
Shortcuts

Action	Shortcut
Print current document	Strp + P
Display transaction journal	Strg + J
Close SAP Business One	Strg + Q
Undo	Strg + Z
Redo	Strg + Shift + Z
Cut	Strg + X
Copy	Strg + C
Paste	Strg + V
Search function for customers or articles starting with certain letters	Entering letters * Tab
Multiple choice	Strg or Shift + Selection of entries
Show user-defined fields	Strg + Shift + U
Show next document	Strg + ->
Show previous document	Strg + <-
Switch to add mode	Strg + A
Switch to find mode	Strg + F
Modify field name	Strg + Double click on field names
Show alternative item	Strg + Tab in the Item number field
Enter current date	Any key (except numbers) + Tab
Enter any date in the current month	Tag + Tab
Enter any date in the current year	Tag + Month + Tab

Action	Shortcut
Close all windows except for the main menu	Shift + Close the window using X.
Open new windows	Enter
Close current window	Esc
In table: add a row	Strg + I
In table: duplicate a row	Strg + M
In table: delete a row	Strg + K
Sort table by column in ascending order	Double click on column heading
Sort table by column in descending order	ALT + Double click on column heading
In table: Display detailed information for a series	Strg + L
In table: Jump to the first row	Strg + H
In table: Jump to the last row	Strg + E
In table: Copy from cell above	Strg + [arrow up]
In table: Calculate gross profit	Strg + G
In table: Select payment method	Strg + Y
In table: Calculate volume and weight	Strg + W
In table: Open base document	Strg + N
In table: open target document	Strg + T
In table: Select a serial number for an item	Strg + Tab (in the quantity field of the item)
In table: Show last prices	Strg + Tab (in the price field of the item)
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)

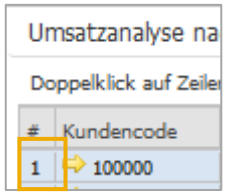
Hinweise

- 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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