

SAP Business One *Tips and Tricks*



Agenda - Topics



1. General Functionality

2. Search Functionality

3. Customizations

4. HANA Analytics

5. Q&A

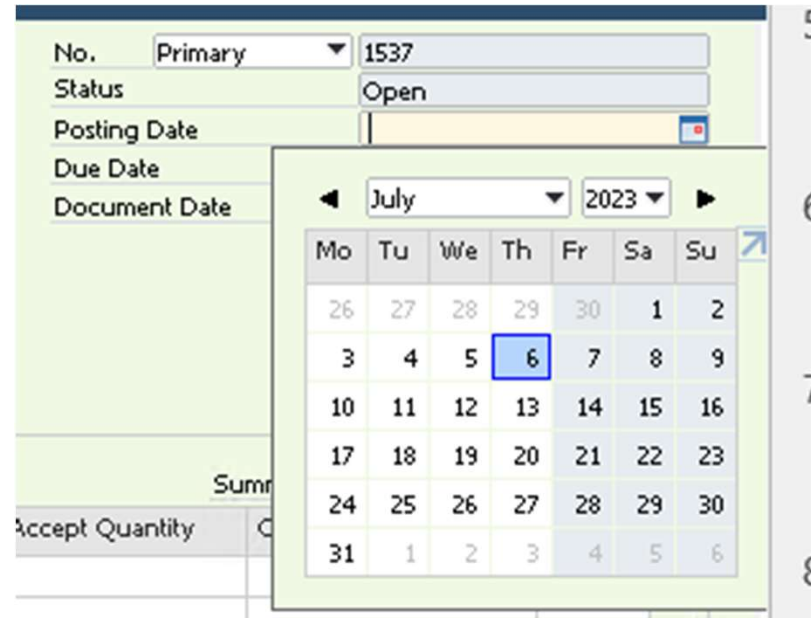
Hot Keys; Short Cuts

Ctrl + 0 (zero, not the letter O)	Display the SAP Business One main menu
Ctrl + P	Print the current document, report, journal entry
Ctrl + J	Display transaction journal
Ctrl + Q	Exit SAP Business One
Ctrl + Z	Undo
Ctrl + Shift + Z	Redo
Ctrl + X	Cut
Ctrl + C	Copy
Ctrl + V	Paste
Ctrl + Tab in Item Quantity field	Choose a serial number for an item
Ctrl + Tab in Item Price field	Check the latest prices
Ctrl + Tab in Item No. field	Display alternate items
Ctrl + Tab in Warehouse field	Display all warehouses and quantities

Date Fields; Input

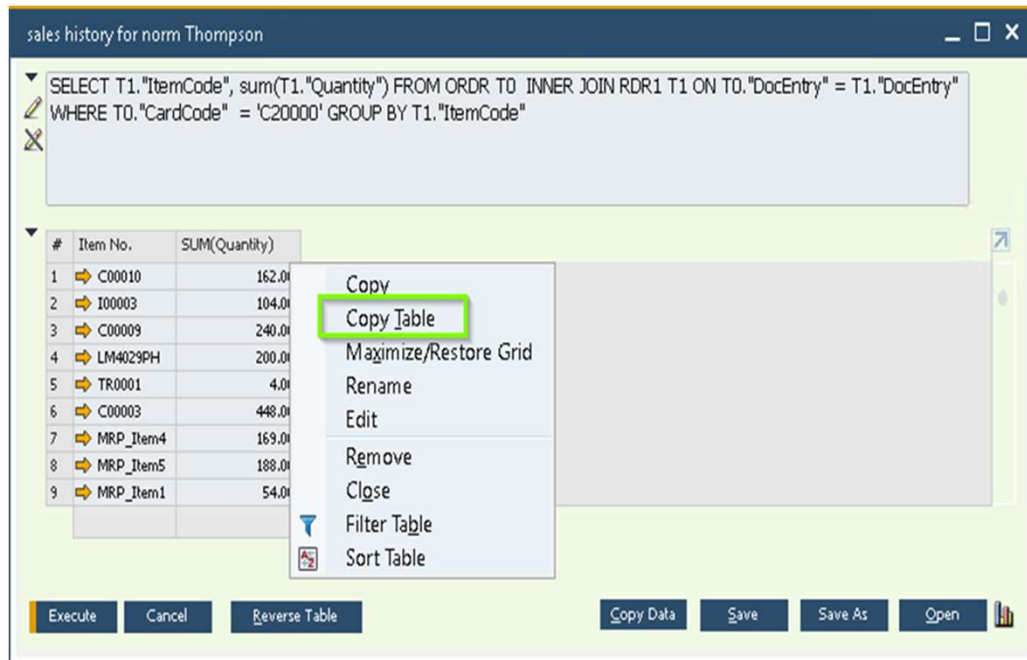
There are several shortcuts for entering dates, so the full date never needs to be entered into any marketing document unless you are trying to use a different year.

- At the end of any field that is set-up as a date: posting date, delivery date, document date, etc. there is an icon for a calendar at the end of the line. Once the date field is double clicked, it will populate the field
- Any alphanumeric key on your keyboard + TAB will populate today's date
- No need to enter slashes or dashes in your date: 010122, 060122
- To calculate a date in the past, enter the minus symbol(-) and the number of days prior to today that is needed. Ex. 10 days ago, enter -10 and click tab (v10.0)
- To calculate a date in the future, enter the add symbol (+) and the number after today that is needed. Ex 10 days in the future, enter +10 and click tab (v10.0)



Copy and Paste Functionality

9.1 and Higher



- Copy and paste an editable or visible field between SAP Business One documents, or between an SAP Business One document and a Microsoft Excel document
- Copy and paste a table from a Microsoft Excel document to an SAP Business One document
- Copy and paste a table between SAP Business One documents
- Copy and paste a table from an SAP Business One document to a Microsoft Excel document

[SAP Help Portal: Copying and Pasting Data](#)

Changing Field Descriptions

You can modify field names to match the terminology used in your company, enter new field descriptions, or change field formats.

The screenshot shows a software interface with a table and a dialog box. The table has columns: #, Item No., Quantity, Unit Price, Discount %, Tax Code, Total (LC), Bin Location Allocation, and UoM Code. The first row contains: 1, C00012, 1, 30.00 \$, 0.000, NY, 30.00 \$, and Manual. The dialog box, titled 'Changing Description', has the following fields and options:

Field	Value
Original Description	Item No.
New Description	Part #
Format	<input checked="" type="checkbox"/> Bold, <input type="checkbox"/> Italics

Buttons: Update, Cancel, Restore Defaults

The screenshot shows the same software interface as above, but with the 'Changing Description' dialog box removed. The table now shows 'Part #' as the header for the first column, and the first row contains: 1, C00012, 1, 30.00 \$, 0.000, NY, 30.00 \$.

#	Part #	Quantity	Unit Price	Discount %	Tax Code	Total (LC)	Bin Location Allocation
1	C00012	1	30.00 \$	0.000	NY	30.00 \$	

Last Price Report

This report displays the last purchasing and sales prices of an item, either for a specific business partner or for all business partners.

- In SAP 10.0 FP2011 the last prices report can now be accessed from the item master data screen

The screenshot shows the SAP Sales Order interface. At the top, there are fields for Customer (C20000), Name (Norm Thompson), Mfg # (Max Teq), Customer Ref. No., and Local Currency. Below this is a navigation bar with tabs for Contents, Logistics, Accounting, and Attachments. The main area contains a table with the following columns: #, Type, Item No., Vendor Par..., Item Description, Qty, Unit Price, Discount %, Tax Code, and Total (LC). The table has three rows of data:

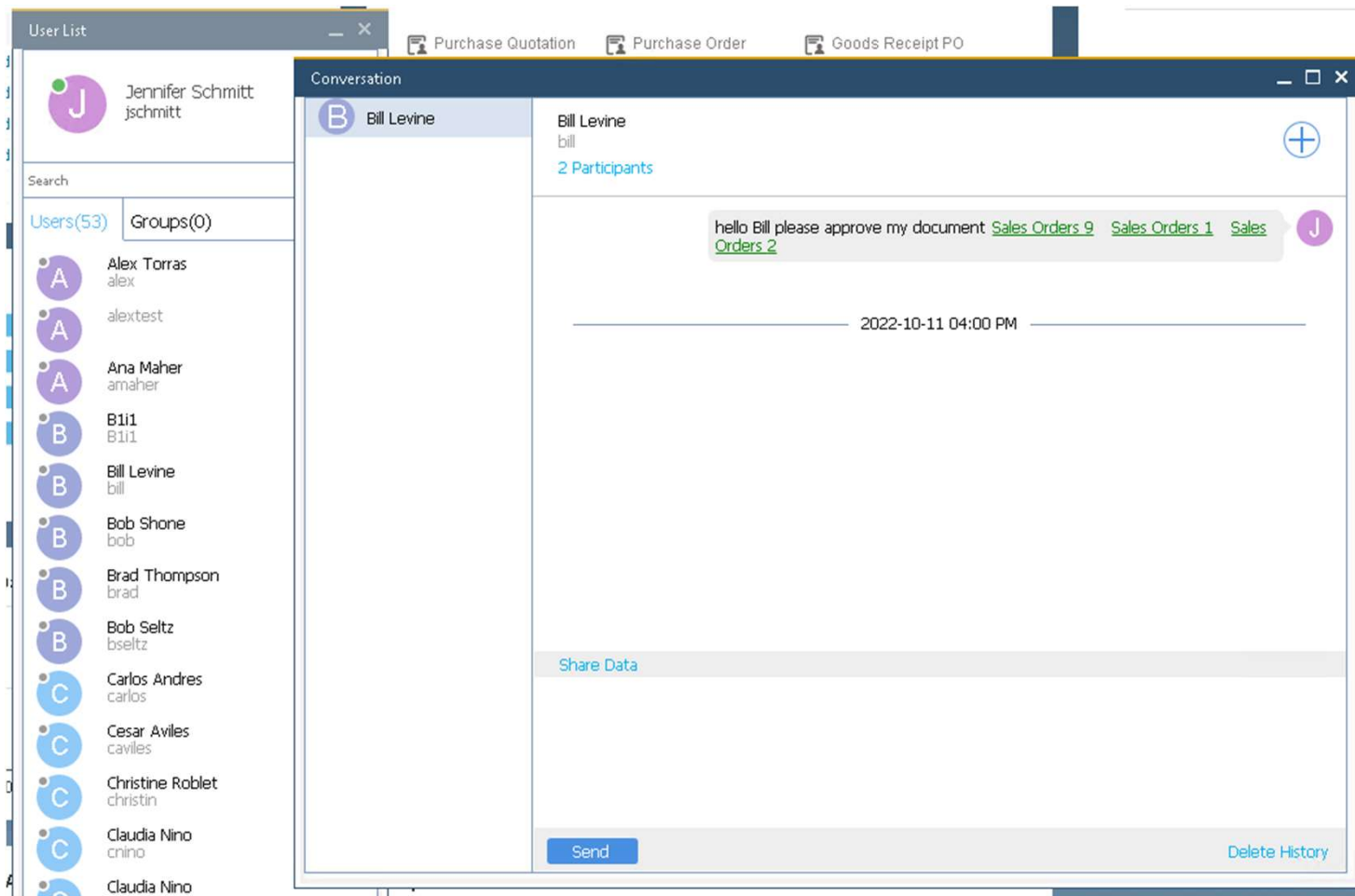
#	Type	Item No.	Vendor Par...	Item Description	Qty	Unit Price	Discount %	Tax Code	Total (LC)
1		02AA0008		Pressure Roller with Spring		12.50 \$	0.000	00	12.50 \$
2		LB0002		Hourly Service Labor Charge	1	125.00 \$			
3									

A context menu is open over the 'Unit Price' column of the first row, with the 'Last Prices' option highlighted. Other menu items include Cut, Copy, Copy Table, Paste, Delete, Maximize/Restore Grid, Rename, Edit, Cancel, Close, Duplicate, Add Row, Delete Row, Close Row, Duplicate Row, Open Calculator, Row Details..., New Activity, Payment Means..., Gross Profit..., and Volume and Weight Calculation...

Live Collaboration (Chat)

9.2 or Higher

These days we all need to collaborate. We send emails, files, documents, and discuss with colleagues whenever we work. SAP Business One offers a Live Collaboration messaging system to help users communicate with each other and improve efficiency.



Batch Close or Cancel

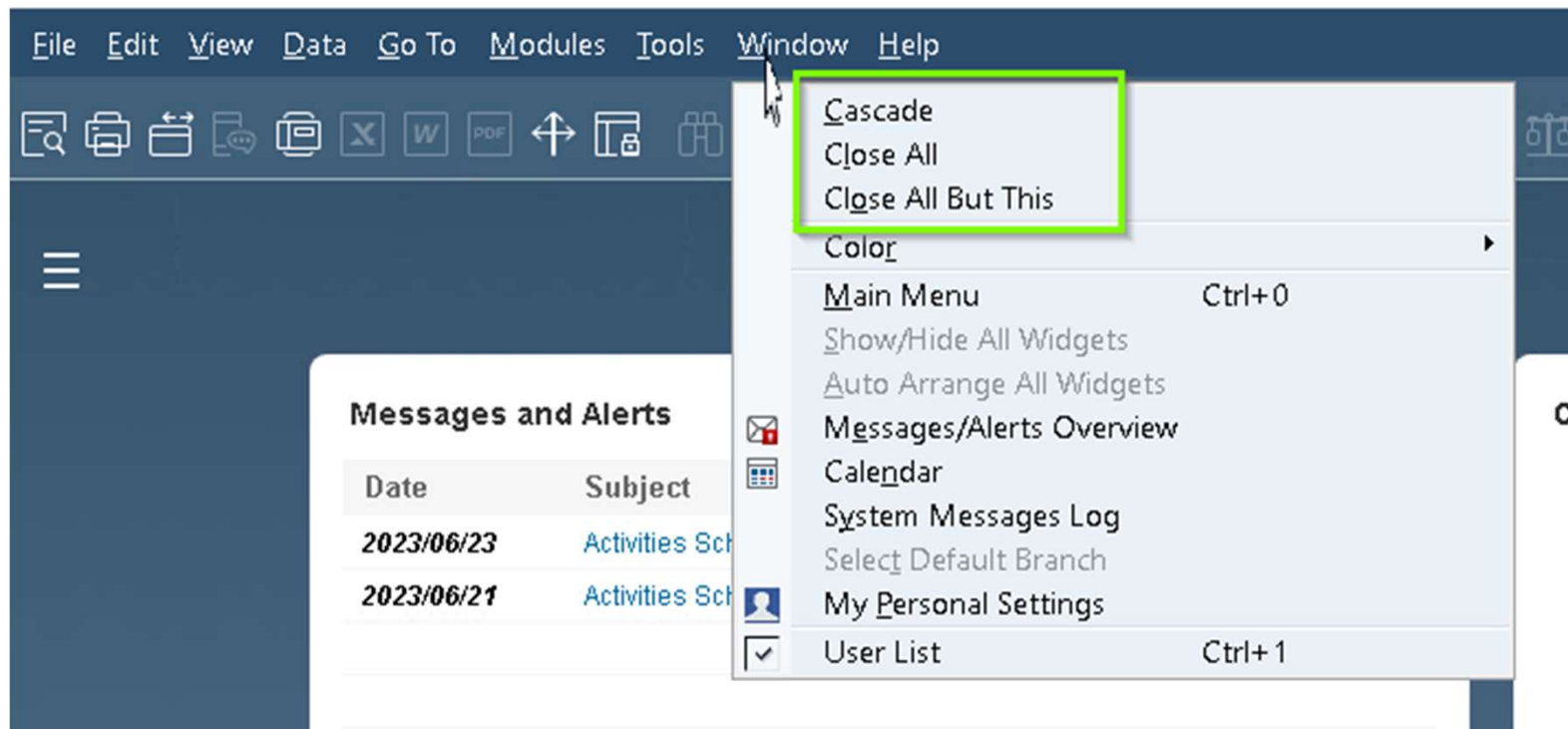
The report offers the possibility to close and cancel multiple documents. This feature is supported for these document types: Sales Quotation, Sales Order, Purchase Request, Purchase Quotation, Purchase Order, Return Requests and Goods Return Request documents

The screenshot shows a software window titled "Open Items List". At the top, there are two dropdown menus: "Currency" set to "Local Currency" and "Open Documents" set to "Sales Orders". Below these is a table with the following columns: "Select", "Doc. Series", "Doc. No.", "Customer Code", "Customer Name", "Customer Ref. No.", "Due Date", "Cancelatio...", and "Amount". The table contains 13 rows of data for "ADA Technologies" with various document numbers and amounts. The total amount at the bottom right is "35,987,565.26 \$ \$". At the bottom left is an "OK" button. At the bottom right, a "Change To" dropdown menu is open, showing "Closed" and "Canceled" as options.

Select	Doc. Series	Doc. No.	Customer Code	Customer Name	Customer Ref. No.	Due Date	Cancelatio...	Amount
<input checked="" type="checkbox"/>	Primary	730	C50000	ADA Technologies		01/08/2015	02/07/2015	12,481.50 \$
<input type="checkbox"/>	Primary	756	C50000	ADA Technologies		02/20/2015	03/22/2015	81,356.33 \$
<input checked="" type="checkbox"/>	Primary	800	C50000	ADA Technologies		04/11/2015	05/11/2015	15,794.00 \$
<input type="checkbox"/>	Primary	826	C50000	ADA Technologies		05/10/2015	06/09/2015	7,585.63 \$
<input checked="" type="checkbox"/>	Primary	931	C50000	ADA Technologies		10/06/2015	11/05/2015	53.00 \$
<input checked="" type="checkbox"/>	Primary	951	C50000	ADA Technologies		11/01/2015	12/01/2015	503.50 \$
<input type="checkbox"/>	Primary	958	C50000	ADA Technologies		11/25/2015	12/25/2015	954.00 \$
<input type="checkbox"/>	Primary	1066	C50000	ADA Technologies		04/04/2016	05/04/2016	75,882.75 \$
<input type="checkbox"/>	Primary	1091	C50000	ADA Technologies		05/04/2016	06/03/2016	6,167.88 \$
<input type="checkbox"/>	Primary	1101	C50000	ADA Technologies		05/15/2016	06/14/2016	58,565.00 \$
<input type="checkbox"/>	Primary	1119	C50000	ADA Technologies		06/15/2016	07/15/2016	16,377.00 \$
<input type="checkbox"/>	Primary	1136	C50000	ADA Technologies		07/20/2016	08/19/2016	97,480.25 \$
								35,987,565.26 \$ \$

Close Windows

- Occasionally you may have multiple documents open on your screen at one time. To close all documents at the same time, hold down the SHIFT key on your keyboard while clicking the X in the upper right corner of any document or master data window on your screen.
- To close multiple windows at one time open Window from your toolbar and choose Close All.



Relationship Map

The relationship map provides a visual presentation of connections between different business objects, for example, between base documents and target documents, between items and bills of materials.

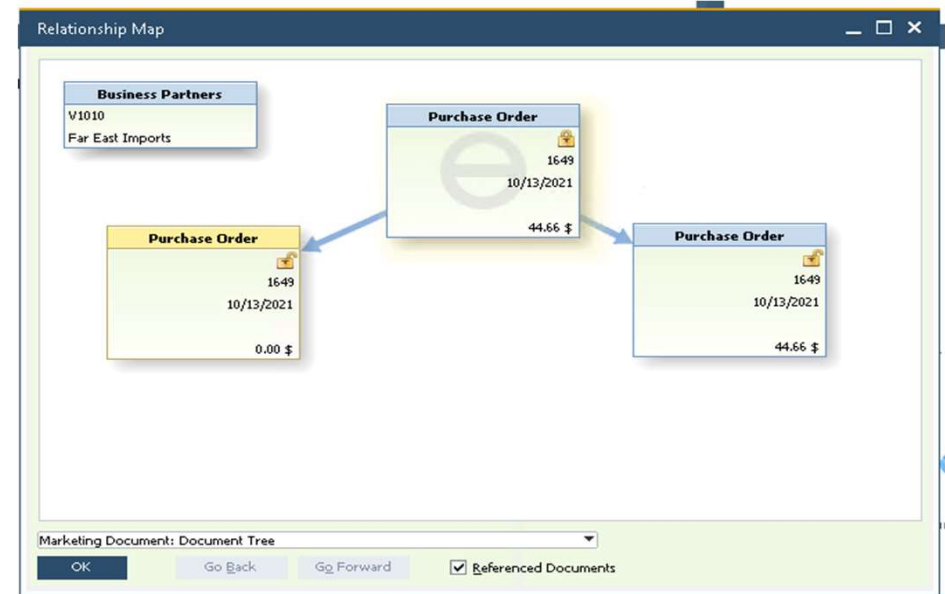
The screenshot shows a 'Purchase Order' form with the following details:

- Vendor: V1010 (Far East Imports)
- Contact Person: Lawrence Miles
- No.: Primary 1649 - 2
- Status: Open
- Posting Date: 10/13/2021
- Delivery Date: 10/13/2021
- Document Date: 10/13/2021

The 'Contents' tab is active, showing a table with the following data:

#	Item No.	Item Description	Quantity	Unit Price	Discount %	Tax Co
1	02AA7001	Apex 7000, Assembly, I	1		0.000	LA
2					0.000	

A context menu is open over the table, with the 'Relationship Map...' option highlighted in green.



Enterprise Search

HANA

Enterprise search enables you to search fields (such as Description, Amount, Remark, and so on) of the business objects in SAP Business One, version for SAP HANA that have been stored in the SAP HANA database server.

Layout Record 1-10 of 2180 resources View 10 20 40

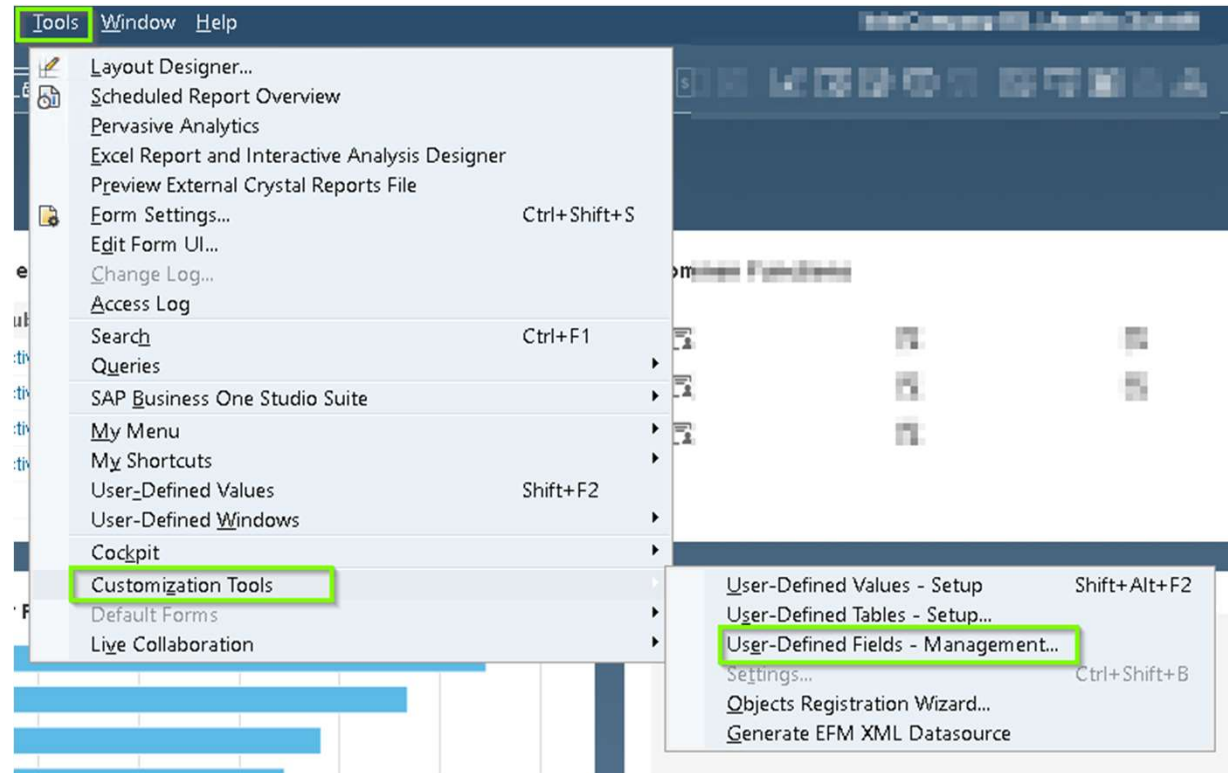
Select a search template

Search For "Paper" ☆

<ul style="list-style-type: none"> All Master Data (5) <ul style="list-style-type: none"> > Item (5) A/R Transaction (1360) <ul style="list-style-type: none"> > A/R Credit Memo (2) > Sales A/R Invoice (224) > Sales Delivery (324) > Sales Order (540) > Sales Quotation (270) Inventory (1) <ul style="list-style-type: none"> > Inventory Goods Receipt (1) Service (2) <ul style="list-style-type: none"> > Knowledge Base (2) A/P Transaction (812) <ul style="list-style-type: none"> > A/P Credit Memo (2) > A/P Invoice (251) > Goods Receipt PO (273) > Goods Return (4) > Purchase Order (282) 	<p>\$ A/P Credit Memo - 2 Find Related</p> <p>Doc Number: 2 BP Code: V23000 BP Name: Anthony Smith Status: C(Closed) Posting Date: 2007-07-03 Due Date: 2007-07-03 Document Date: 2007-07-03 Total Credit: 8118.750000 Remarks: Based On Purchase ... Vendor Ref. No.: Project: Contact: Matt Spanos Buyer: James Chan Shipping Type: Motor Express Open Balance: 0.000000 Owner: A/P Credit Memo</p> <hr/> <p>\$ A/P Credit Memo - 8 Find Related</p> <p>Doc Number: 8 BP Code: V10000 BP Name: Acme Associates Status: C(Closed) Posting Date: 2009-01-26 Due Date: 2009-01-26 Document Date: 2009-01-26 Total Credit: 35895.700000 Remarks: Based On Purchase ... Vendor Ref. No.: Project: Contact: Sarah Kierl Buyer: James Chan Shipping Type: UPS Ground Open Balance: 0.000000 Owner: A/P Credit Memo</p> <hr/> <p>\$ A/P Invoice - 87 Find Related</p> <p>Doc Number: 87 BP Code: V30000 BP Name: Blockies Corporation Status: C(Closed) Posting Date: 2007-04-26 Due Date: 2007-05-29 Document Date: 2007-04-26 Stamp No.: Total Payment Due: 10473.19... Remarks: N/A Vendor Ref. No.: Project: Contact: Michael Morgan Buyer: James Chan Shipping Type: FedEx ON Balance Due: 0.000000 Owner: A/P Invoice</p> <hr/> <p>\$ A/P Invoice - 88 Find Related</p> <p>Doc Number: 88 BP Code: V50000 BP Name: Lumax Status: C(Closed) Posting Date: 2007-05-11 Due Date: 2007-06-11 Document Date: 2007-05-11 Stamp No.: Total Payment Due: 28902.75... Remarks: Based On Goods Rec... Vendor Ref. No.: Project: Contact: Kyle Williams Buyer: James Chan Shipping Type: UPS Red Balance Due: 0.000000 Owner: A/P Invoice</p> <hr/> <p>\$ A/P Invoice - 94 Find Related</p> <p>Doc Number: 94 BP Code: V23000 BP Name: Anthony Smith Status: C(Closed) Posting Date: 2007-06-05 Due Date: 2007-07-05 Document Date: 2007-06-05 Stamp No.: Total Payment Due: 38840.10... Remarks: Based On Purchase ... Vendor Ref. No.: Project: Contact: Matt Spanos Buyer: James Chan Shipping Type: Motor Express Balance Due: 0.000000 Owner: A/P Invoice</p> <hr/> <p>\$ A/P Invoice - 95 Find Related</p> <p>Doc Number: 95 BP Code: V30000 BP Name: Blockies Corporation Status: C(Closed) Posting Date: 2007-05-31 Due Date: 2007-07-02 Document Date: 2007-05-31 Stamp No.: Total Payment Due: 3507.300... Remarks: Based On Purchase ... Vendor Ref. No.: Project: Contact: Michael Morgan Buyer: James Chan Shipping Type: FedEx ON Balance Due: 0.000000 Owner: A/P Invoice</p> <hr/> <p>\$ A/P Invoice - 101 Find Related</p>
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User Defined Data

- User defined fields are added to the system when there is not an SAP field that will allow them to enter specific data needed for a specific business process
- A field can be entered at header or row level
- User defined fields are searchable
- User defined fields can be added to queries or reports



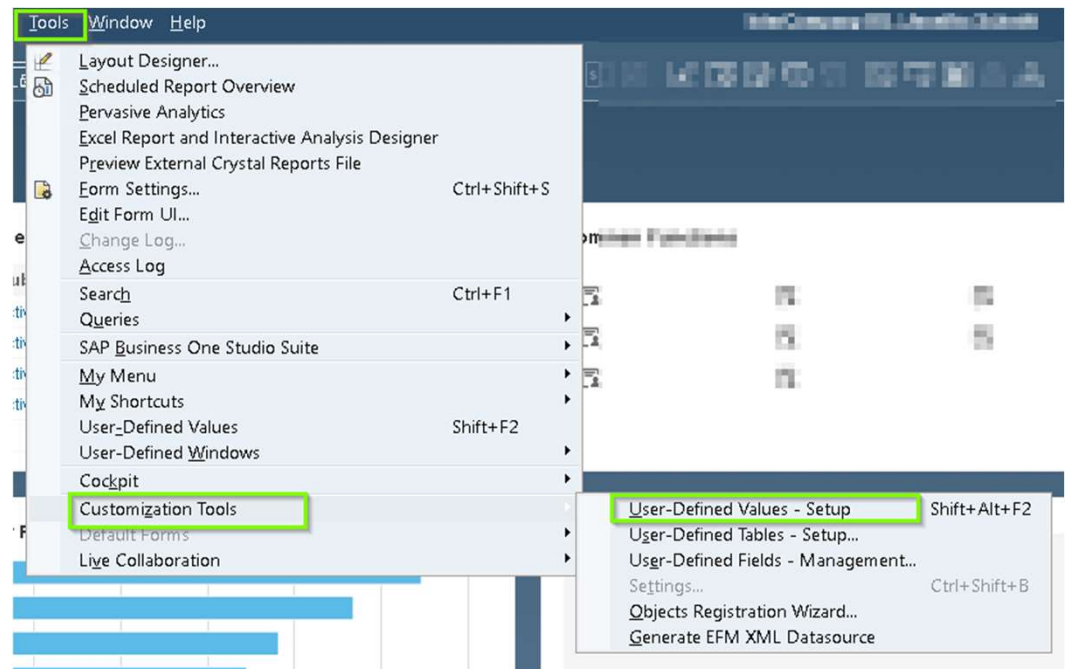
SAP Documentation: [User-Defined Fields and Tables](#)

Formatted Searches (User Defined Values)

The User-Defined Values function enables SAP Business One users to enter values, originated by a predefined search process, for any field in the system (including user-defined fields).

Examples of using this function include:

- Automatic entering of values into fields using various objects in the system
- Entering values into fields using a predefined list
- Automatic entering of values into fields via user-defined queries
- Creating dependence between fields in the system, i.e., the value in field X influences the value in field Y
- Displaying fields that can only be displayed using queries, i.e., User Signature, Creation Date, Open Checks Balance and so on



SAP Documentation: [Hot to Define and Use User-Defined Values](#)

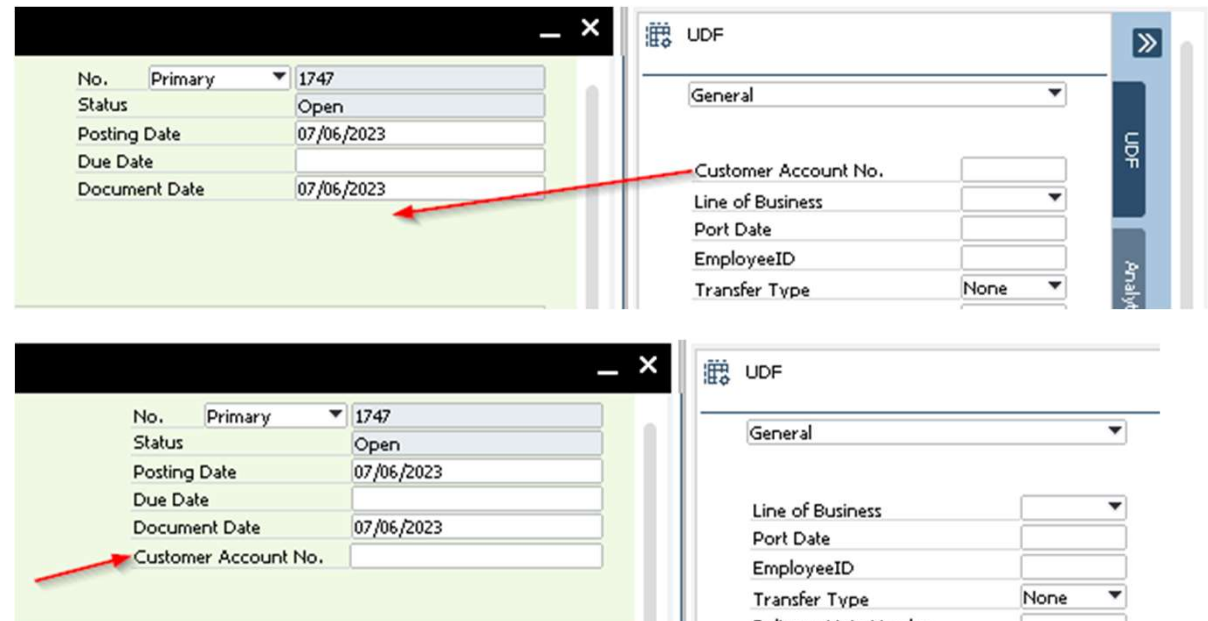
UI Configuration Template

9.3 and Higher

SAP Business One application forms include multiple fields, tabs, and options to support the various business needs of the company. Not all the options are used by all the businesses, and often, companies add user defined fields and make other customizations to the SAP Business One application, tailoring it to the size of the business. The Configurable UI Template takes the customization a big step further. It enables you to adjust the user interface of the most commonly used forms in the application, tailoring them to your business and its various users.

Using the Configurable UI Template, you can:

- Hide, disable, and move selected fields and tabs in forms
- Incorporate user defined fields seamlessly in a given form
- Set a default UI template or assign multiple UI templates to each user

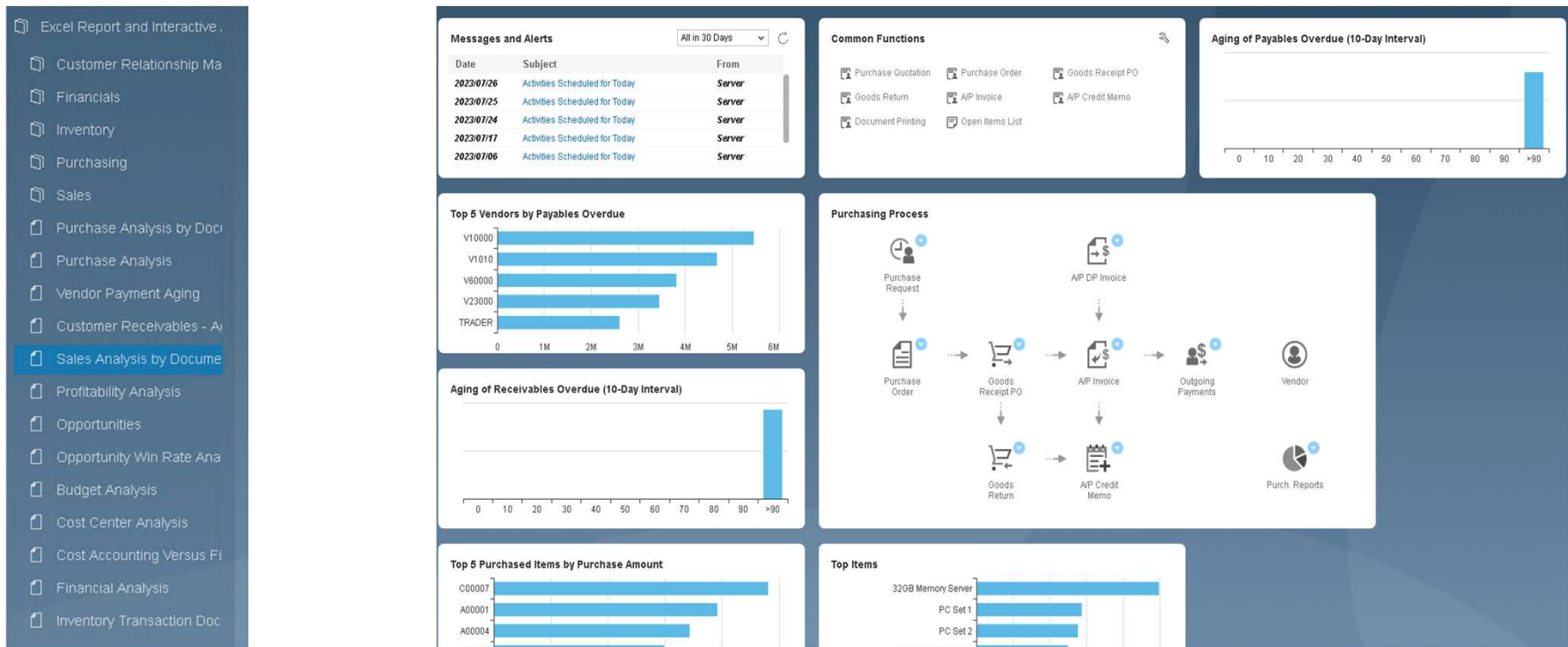


SAP Documentation: [How to Work w/Configurable UI Templates](#)

Excel Reports and Interactive Analysis

HANA

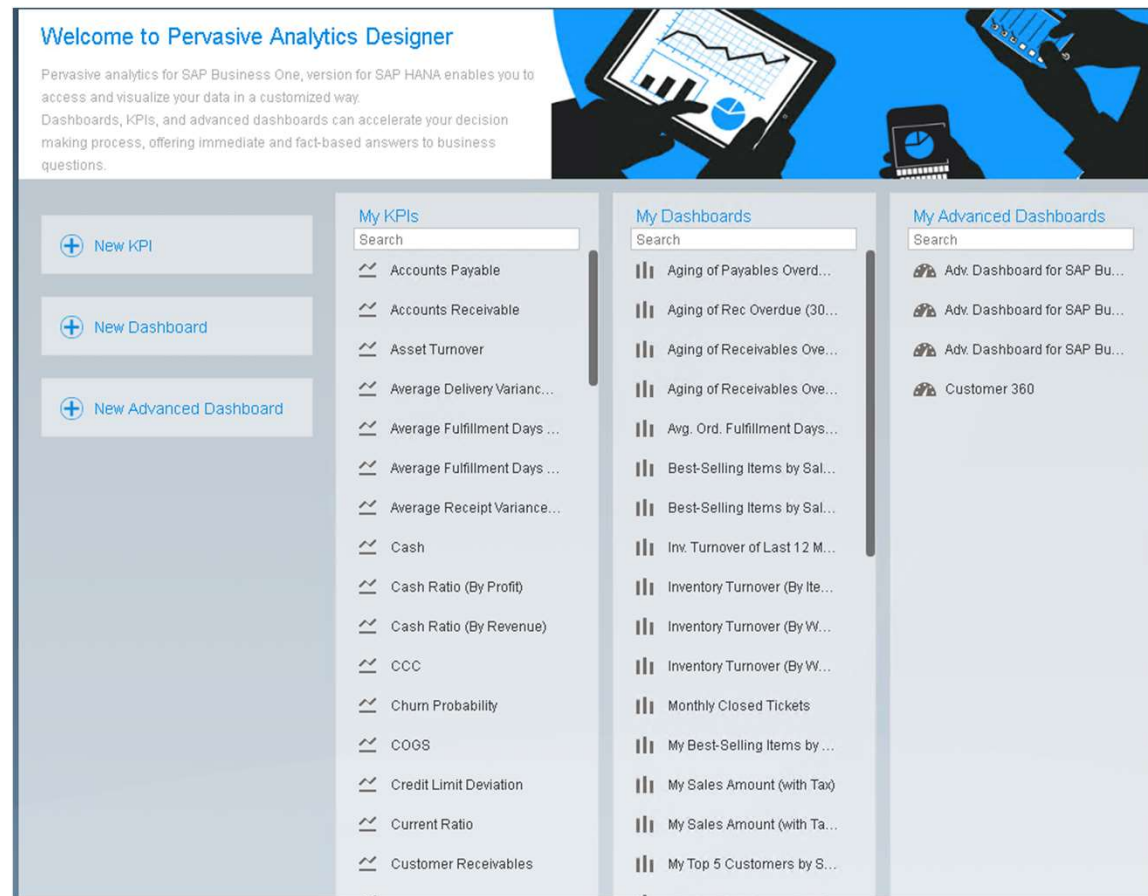
Excel Report and Interactive Analysis is a solution that provides a report designer and predefined reports. In the report designer, you can design and manage Excel reports and pivot tables on the EXCEL REPORT and INTERACTIVE ANALYSIS tabs, respectively. By leveraging the SAP in-memory computing technology, it provides real-time computing for your reports, giving you instantaneous access to your data



SAP Documentation: [How to Work with Excel Report and Interactive Analysis.pdf](#)

Pervasive analytics for SAP Business One, version for SAP HANA enables you to access and visualize your data in a customized way. The application provides three analytic tools that can accelerate your decision-making process, offering immediate and fact-based answers to business questions.

- **Key Performance Indicators (KPIs):** With queries and views, you can easily design KPIs and related actions that are customized to your specific needs. You can view the KPI and use its actions in the advanced dashboard or the cockpit.
- **Pervasive dashboard:** With queries and views, you can easily design pervasive dashboards and related actions that are customized to your specific needs. You can view the pervasive dashboard and use its actions in the advanced dashboard or the cockpit.
- **Advanced dashboard:** You can design advanced dashboards to contain various widgets. You can view the advanced dashboard in pages and retrieve specific data using filters.



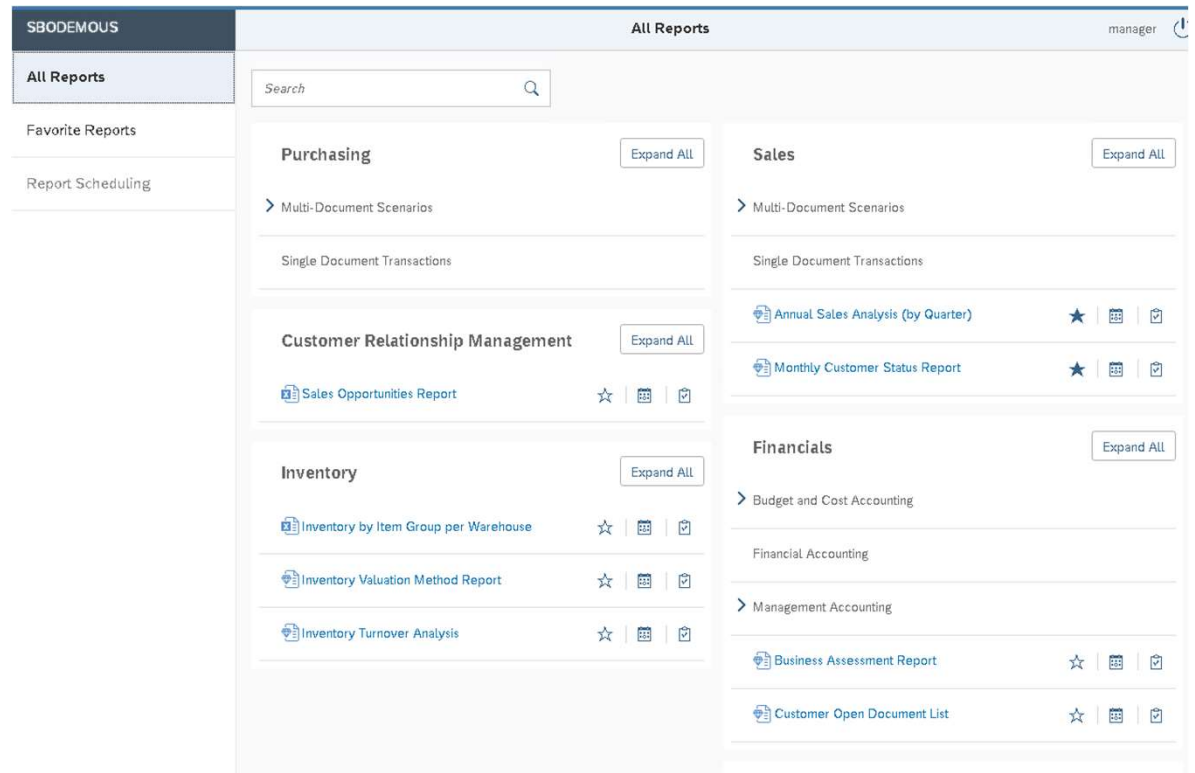
SAP Documentation: [How to Work w/Pervasive Analytics](#)

The Analytical Portal for SAP Business One, version for SAP HANA enables you to run your Crystal reports and Excel reports in real time through a web browser on your computer, tablet, or mobile device. With this portal, you can also schedule automatic report running and view report running history. It makes Crystal reports and Excel reports more accessible for the ones who have not installed the SAP Business One, version for SAP HANA client application or Microsoft Excel on their computer.

The Analytical Portal supports both SAP Business One, version for SAP HANA and SAP Business One Cloud.

In the current version of the Analytical Portal, you can perform the following operations:

- Run a designed Crystal report or an Excel report
- Report scheduling
- Distribute report results via email
- Download report results to local
- Viewing reports running history



[SAP Documentation: How to Work w/Analytic Portal](#)

Questions?

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