

## User Guide

CUSTOMER

SAP Business One 10.0 FP 2008

SAP Business One 10.0 FP 2008, version for SAP HANA

SAP Business One Cloud 1.1 PL16

Document Version: 1.3 – 2020-08-02

# Web Client for SAP Business One

# Typographic Conventions

Type Style	Description
<i>Example</i>	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
<b>Example</b>	Emphasized words or expressions.
EXAMPLE	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
Example	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
<b>Example</b>	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
<Example>	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
EXAMPLE	Keys on the keyboard, for example, F2 or ENTER.

# Document History

Version	Date	Change
1.0	2019-11-11	First version.
1.1	2020-01-02	<ul style="list-style-type: none"> <li>• General editing and formatting: Use of new template to display chapter and section numbering for easier reading and searching</li> <li>• Introduction: Support for these additional localizations: Argentina, Chile, China, Japan, South Korea, Mexico, Russia, Singapore, Ukraine</li> <li>• Section 6: Terminology changes and other UI fine tuning performed on sales orders</li> <li>• Section 6.2: Support for browsing in Google Maps with address information</li> <li>• Section 6.3: Operations enabled for originator to manage documents undergoing approval process</li> <li>• Section 12 Analytics: The analytic charts have been extended to include Sales Quotations, which are supported as follows: <ul style="list-style-type: none"> <li>○ Sales Quotation Header Overview and Charts</li> <li>○ Sales Quotation Detail Overview and Charts</li> </ul> </li> <li>• Section 14: Exchange Rate Entry: It is now possible to manually enter exchange rates in Web Client</li> </ul>
1.2	2020-04-20	<ul style="list-style-type: none"> <li>• Introduction: Support for these additional localizations: India, Brazil; United Kingdom localization encompasses Great Britain and Northern Ireland</li> <li>• Section 5.2.1: List View screen adjustments</li> <li>• Section 6.1: Cancel option for Invoice and Delivery</li> <li>• Section 6.1.1: Authorizations - fine tuning performed</li> <li>• Section 6.1.2: Freight support</li> <li>• Section 6.2: Support for approval process for originator</li> <li>• Section 6.5: Relationship Map added which lets you visualize the relations between a sales business object and its related sales documents</li> <li>• Section 7: Initial support for A/P (Purchasing) documents - read-only list views</li> <li>• Section 11 Analytics: A new General Overview screen can contain cards from all existing analytic cubes</li> </ul>
1.2.1	2020-06-16	<ul style="list-style-type: none"> <li>• Section 1: How to add the Training tile to the home page</li> </ul>
1.3	2020-08-02	<ul style="list-style-type: none"> <li>• Section 1: References to the Administrator's Guides</li> <li>• Section 4: Sub section numbers have changed</li> </ul>

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Version	Date	Change
		<ul style="list-style-type: none"><li>• Section 6.2: Support notifications for approval process also for Sales Quotation, Delivery and A/R Invoice</li><li>• Section 6.5: Label with base documents details in Relationship Map</li></ul>

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# 1 Introduction

This document guides you through the available features and functions in Web Client for SAP Business One. There are two versions of the application:

- The first version is based on SAP Fiori design principles, on top of SAP Business One 10, version for SAP HANA.
- The second version is based on MS SQL Server operations, on top of SAP Business One 10. Some features are not supported in the SQL version; these are mentioned in the corresponding sections in this guide.

For information about the installation and configuration of the Web Client component, see the Administrator's Guide:

SAP Business One, version for SAP HANA:

[https://help.sap.com/doc/4e7c047f2c9e4cbe97800ffaf7b68f8e/10.0/en-US/B1\\_for\\_SAP\\_HANA\\_Admin\\_Guide.pdf](https://help.sap.com/doc/4e7c047f2c9e4cbe97800ffaf7b68f8e/10.0/en-US/B1_for_SAP_HANA_Admin_Guide.pdf)

SAP Business One: [https://help.sap.com/doc/601fbd9113be4240b81d74626439cfa9/10.0/en-US/AdministratorGuide\\_SQL.pdf](https://help.sap.com/doc/601fbd9113be4240b81d74626439cfa9/10.0/en-US/AdministratorGuide_SQL.pdf)

## Note

To add the *Training* tile to your home page, in the *Me Area* choose the *Edit Home Page* option. Use the "+" icon to open the *App Finder* and add the tile from the *Useful Links* menu.

## 1.1 Localization support

Currently, the following localizations are supported:

Argentina, Australia, Austria, Belgium, Brazil\*, Canada, Chile, China, Costa Rica, Cyprus, Czech Republic, Denmark, Egypt, Finland, France, Germany, Greece, Guatemala, Hong Kong, Hungary, India\*, Ireland, Israel, Italy, Japan, Lebanon, Mexico, Netherlands, New Zealand, Norway, Oman, Panama, Poland, Portugal, Puerto Rico, Qatar, Russia, Saudi Arabia, Singapore, Slovakia, South Afrika, South Korea, Spain, Sweden, Switzerland, Turkey, Ukraine, United Arab Emirates, United Kingdom (Great Britain and Northern Ireland), and United States of America

\* Only view mode is supported for all sales documents

## 2 Glossary

Term	Description
<b>Web Client</b>	Abbreviated name for Web Client for SAP Business One. Available as follows: <ul style="list-style-type: none"> <li>On top of SAP Business One 10, version for SAP HANA; design based on SAP Fiori concept</li> <li>On top of SAP Business One 10 using MS SQL Server</li> </ul>
<b>SAP Business One</b>	SAP Business One client
<b>Home Page</b>	The screen that appears once you log in to Web Client. Functions as the “desktop” of Web Client and can be customized by the user.
<b>Tile</b>	A shortcut that opens an app. The appearance of a tile depends on the app it represents. For example, a tile that opens an app of type “List View” shows the number of open documents of the given object and can be refreshed by the user at any time. Tiles can open Web Client functions and external assets such as “SAP Business One Product Road Map”. In addition, you can also define your own tiles as shortcuts to views, searches, or analytical content.
<b>App</b>	Main function. It enables you to perform a single task or multiple tasks related to a specific object, or to generate reports, for example, create a sales order, close several drafts and so on.
<b>List View</b>	An app that lists records of a specific object and encapsulates extensive capabilities for filtering, sorting, and grouping the displayed records, as well as applying certain actions to multiple records, for example, closing several sales orders.
<b>View</b>	A set of filtering, grouping and sorting parameters applied to records in a list view. Web Client is provided with a set of predefined views for the various list views, for example “My Open Activities”. You can save your own views based on your preferences and set these views as private or public.
<b>Detailed View</b>	A form that displays and enables you to create a single record of a given object, for example, a sales order or an item master data record.
<b>Quick View</b>	A dialog that opens when you click a golden arrow and shows summarized information related to a detail connected to the golden arrow – such as the “tooltip preview” in SAP Business One. For example, clicking the golden arrow next to a customer code displays information about the specific customer.
<b>Overview Screen</b>	A screen that provides multiple simultaneously filtered analytic views of business data where each analytic view is presented as an Analytic Card.
<b>Analytic Card</b>	A card that presents an analytic view. An Overview Screen comprises multiple Analytic Cards.
<b>Analytic Chart</b>	A screen that provides a chart presentation of a filtered analytic view of business data.

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## 3 Access & Login

Access Web Client from within SAP Business One by choosing the Web Client option under the Administration module in the Main Menu, or by clicking the Web Client icon on the toolbar.

Alternatively, click the URL provided to you by your SAP Business One partner.

For an optimized user experience, launch Web Client in either a desktop computer or tablet, using one of the following Web browsers:

- Google Chrome
- Mozilla Firefox
- Apple Safari (Mac and iPad)

In the login screen, choose your company database and enter your SAP Business One user name and password. You can log in to SAP Business One and to Web Client in parallel.

### Note

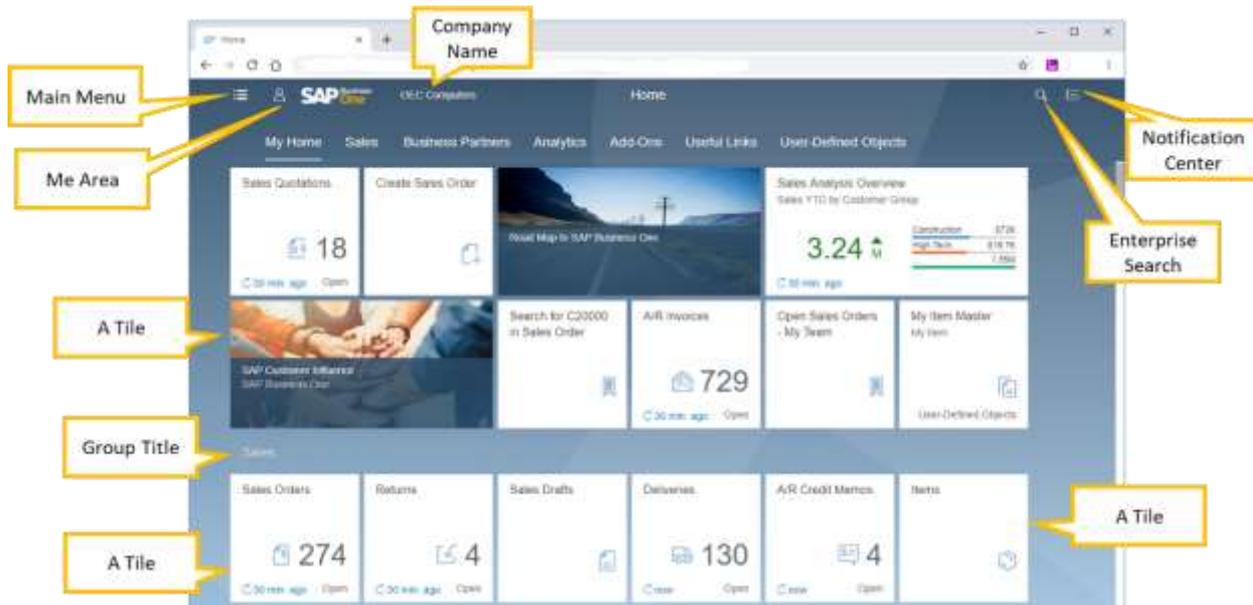
The SAP Business One client provides an entry to Web Client. However, as part of the login process to Web Client, you have to choose the relevant company database in the login screen. If you switch to a different company database in the SAP Business One client, it will not impact the company database you logged in to in Web Client and vice-versa.

For information about installation, deployment, and upgrade of Web Client, see the Administrator's Guide:

[https://help.sap.com/doc/4e7c047f2c9e4cbe97800ffaf7b68f8e/10.0/en-US/B1\\_for\\_SAP\\_HANA\\_Admin\\_Guide.pdf](https://help.sap.com/doc/4e7c047f2c9e4cbe97800ffaf7b68f8e/10.0/en-US/B1_for_SAP_HANA_Admin_Guide.pdf)

## 4 Home Page Structure

The home page appears after login, introducing the following elements:



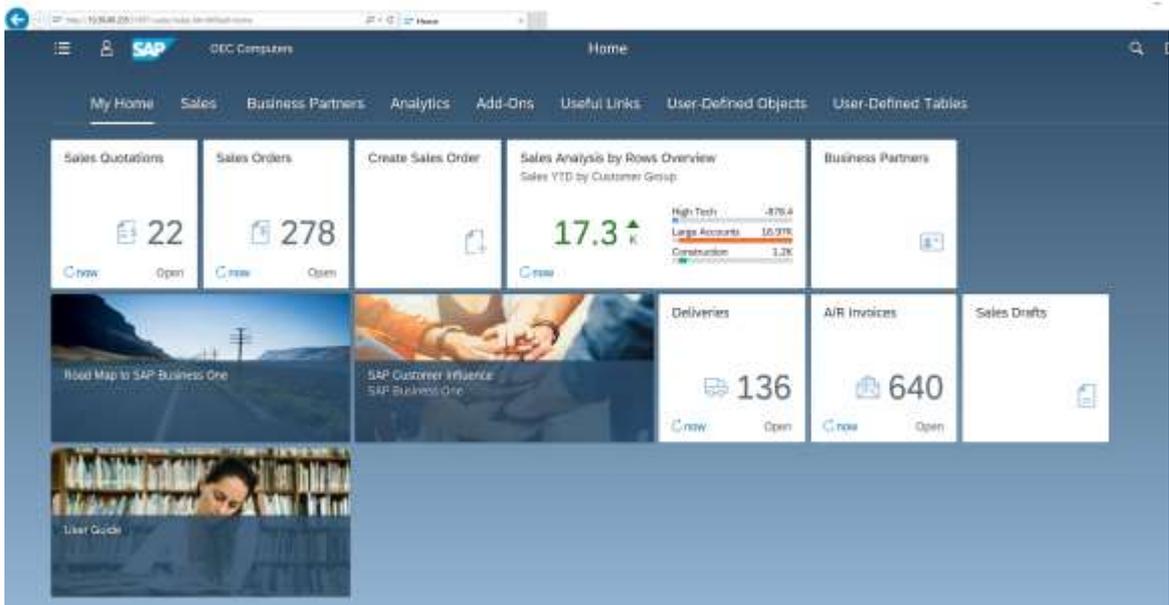
### 4.1 My Home

This is the first category that appears in the home page and is the first entry in the Main Menu (see below).

The tiles in the screen and sequence list below are the default tiles of My Home; however, the appearance of any individual tile depends on your authorizations. For example, if you have read-only authorization for Sales Orders, the Create Sales Order tile will not appear. If your authorizations change, the appropriate tiles will appear at the next login.

#### Sequence of default tiles:

- Sales Quotations
- Sales Orders
- Create Sales Order
- Sales Analysis Overview
- Business Partners
- Roadmap to SAP Business One
- Deliveries
- A/R Invoices
- Sales Drafts
- User Guide



You can add other tiles as needed; for example, the SAP Customer Influence tile, which also appears in the screen, is not a default tile (see [Editing the Home Page](#) below for information about adding tiles). Any customizations that you make will be preserved.

## 4.2 Main Menu

Click this icon  to open the main menu.

A menu with a structure similar to the SAP Business One [Main Menu](#) appears on the left side of the screen.

The structure of the menu reflects the default sequence of tiles in the home page.

The search box enables you to enter a search term and find the relevant entry in the menu.

To hide the menu, click the menu icon again.

## 4.3 Me Area

The [Me Area](#) lets you personalize and customize Web Client for your convenience. Click this icon  to open the [Me Area](#). The following options are available:

### 4.3.1 App Finder

Click this icon  to open a catalog of all available apps.

- Here you can add more apps (tiles) to your home page and remove the irrelevant ones.

- You can either review the whole list or focus on a specific group (click *All* or click the group name, respectively, in the left panel).
- The apps marked with the highlighted blue pin  are already on your home page; click the pin to edit the app location, or to remove the app.

In the following screen, the current group of an app is selected.

- To add the app to additional groups, select these groups.
- To remove the app from your home page, deselect the current group(s).
- To move the app to another group, select the required group and deselect the current one.
- To assign the app to a new group, click the option *New Group*. Enter a name for the new group and click *OK*. The new group is added to the navigation bar, displaying the assigned app.

Similar options are available for apps that are not included yet in your home page.

To view the home page after your changes, click the *Home* icon  next to the SAP Business One logo.

## 4.3.2 Settings

Click this icon  to open the *Settings* area, where you can view and set personal preferences.

### 4.3.2.1 Appearance

In the **THEME** section, you can choose the user interface theme for Web Client. By default, *SAP Belize Deep* is selected. For high-contrast user interface, choose *SAP Belize HCB*.

In the **DISPLAY SETTINGS** section, you can choose your preferred spacing and animation options.

Click *Save* to apply your choices.

### 4.3.2.2 Home Page

Here you can set whether to display the tiles of all groups (by default) - with this option, the group names in the navigation bar serve as anchors - or to display one group of tiles at a time. The selected option also affects the navigation within detailed view pages:

- Show all content - the whole record is displayed so you can scroll up/down or use the tabs as anchors to the required section in the detailed view page.
- Show one group at a time - the content of the header and current tab are displayed. To view content of other tabs, click the relevant tab; the data is refreshed accordingly.

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### 4.3.2.3 Language and Region

Here you can change the display language of Web Client. Note that by default, the display language of Web Client is identical to the display language in SAP Business One. Choosing a different language in Web Client affects the display language in SAP Business One and vice versa.

### 4.3.2.4 User Activities

For your convenience, Web Client maintains a dynamic list of the 30 recent functions you have used, and the 30 functions you use most frequently. The two lists are available in the *Me Area*. The setting in this section allows you to turn off this function. In addition, you can clear your usage history in Web Client by choosing the *Clear* button, thereby emptying these lists.

### 4.3.2.5 Notifications

The Notifications Center on the right-hand side lists notifications for activities. The settings in this section allow you to:

- Show notification previews on the home page
- Decide whether to pop up activity reminders; applies only to the activities where reminders are set
- Define the number of days for which notifications should be displayed; by default, 30 days are defined

### 4.3.2.6 General Settings

Here you can turn on/off the appearance of the *Quick View* when clicking the golden arrow; by default, this switch is set to **On**.

## 4.3.3 Editing the Home Page

Click the pencil icon to customize the home page according to your preferences; the icon is available only when the home page is displayed.

- Click *Add Group* to create a new group.
- Click the "+" icon on an empty tile to open the *App Finder* and add more tiles to your home page.
- You can *Hide* or *Delete* the group, as well as *Save* your changes.
- Click the **X** in the upper-right corner of a tile to remove it.
- Click the ellipsis (...) button in the lower-right corner of a tile and then click *Move* to move the given tile to a different group. Alternatively, you can drag tiles on the home page to place them in the required location.
- To save your changes, choose the *Close* button in the bottom-right corner.

## 4.3.4 Recent Activity & Frequently Used

These lists are generated automatically based on your activity. Clicking an entry in the list opens the respective app.

## 4.4 Enterprise Search

### **i** Note

Enterprise search is supported by the Web Client version for SAP HANA only.

This feature enables you to search for data.

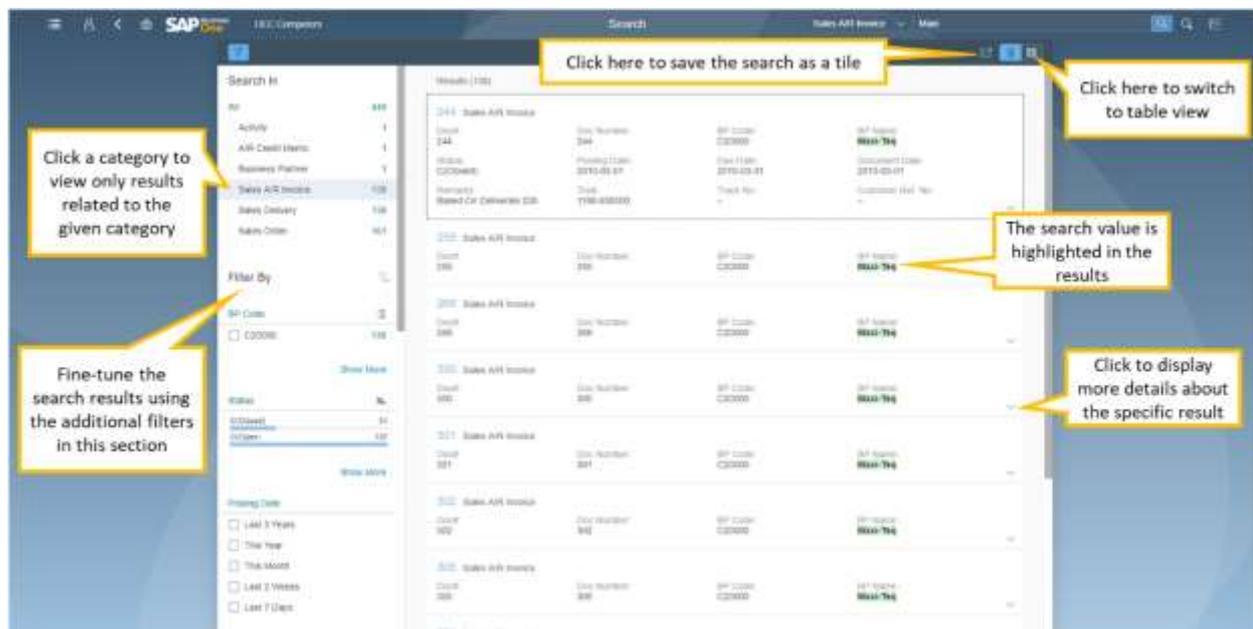
Click the search icon  on the upper-right side of the screen and enter a value to search. By default, the search runs through the entire database. To narrow down your search, choose a specific category, such as a certain object or app.

When you initiate the search from within a certain app, the search is applied to the given object by default. You can change the search scope manually if needed.

You can filter the search results by various parameters based on the selected object, and choose whether to display it as a list, bar chart or pie chart.

In each parameter, you can click the *Show More* option. This enables you to further fine-tune the specific filter and best fit it to your needs.

Search results are displayed as follows:



The screenshot shows the SAP Enterprise Search interface. On the left, there is a 'Search In' sidebar with categories like 'Activity', 'AW Credit Memo', 'Business Partner', 'Sales AC Invoice', 'Sales Delivery', and 'Sales Order'. Below this is a 'Filter By' section with 'BP Code' and 'C0000' selected. A 'Showing Date' section has radio buttons for 'Last 3 Years', 'One Year', 'This Month', 'Last 2 Weeks', and 'Last 7 Days'. The main area displays search results in a table view. Callouts point to various features: 'Click here to save the search as a tile' points to a tile icon; 'Click here to switch to table view' points to a table view icon; 'The search value is highlighted in the results' points to the search term 'C0000' in the results; 'Click to display more details about the specific result' points to a magnifying glass icon; 'Click a category to view only results related to the given category' points to the 'Sales AC Invoice' category; and 'Fine-tune the search results using the additional filters in this section' points to the 'Filter By' section.

Using the icons in the upper-right corner, you may switch the results display between list (the default option) and table. When a table display is applied, you can choose which columns to display and in what order by clicking the *Select Columns* icon.

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To save the search as a tile, click the *Share* icon in the top-right corner next to the *Display as List* and *Display as Table* icons. The *Save as Tile* dialog appears. The search parameters are populated automatically in the *Title* field. You can change the title if needed, adding a subtitle and description, and assign the tile to the relevant group. Whenever you click this tile on your home page, up-to-date results will appear.

Clicking the *Share* icon lets you choose the option *E-Mail*. When you choose it, an email appears with the URL to the search results embedded in it. You can send it to a colleague or manager and if they have sufficient authorizations, they will be able to access the search results via the URL in the mail.

## 4.5 Notification Center

Click this icon  in the upper-right corner of the Web Client screen to open/close the notification center. Here you can view a list of activity notifications, including approval process notifications for the originator of an approval process, and delete (X) any irrelevant notifications.

The *By Date* tab shows the notifications grouped by date.

On the *By Priority* tab, the notifications for activities appear according to priority: high (red) first, followed by normal (yellow) and low (green) priority.

Click a notification to open the respective activity.

Click the **X** icon on the right side of the notification to dismiss it. The respective activity is not affected.

In addition, if you set reminders for activities, you can view them in the notification center. To activate or disable this option see sections 4.3.2 and 4.3.2.5.

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# 5 Apps

## 5.1 External Apps

Clicking a tile that represents a web site or a document opens the respective asset. The following tiles are available:

- SAP Customer Influence (previously known as “idea place”), the SAP Business One space
- SAP Business One product road map
- User Guide

## 5.2 Apps for Managing Records

These are apps named by objects, such as Sales Orders and Items, as well as user-defined objects.

Clicking a tile opens a list view, which displays the existing records of that object. To view a specific record, click anywhere on the row of the relevant record.

The tiles related to Sales Quotations, Sales Orders, Deliveries, Returns, A/R Invoices, Returns, A/R Credit Memos and Activities display the number of respective open records for the current user.

Clicking the *Refresh* icon in the bottom-left corner of the tile displays an updated number. Next to the *Refresh* icon, you can see the last time this KPI was refreshed.

### 5.2.1 Working with List Views

Clicking the tile of an app for managing records opens a list view.

For each object, there is a default predefined view that determines which records are presented when you open the list view for the first time. The current view appears in the top-left corner above the filter bar. Clicking the dropdown icon opens the list of available views for the given list view.

The list view is divided into two main areas:

- Filter Bar - where you can set filters to apply on the record to be displayed in the table area
- Table - lists the records of the given object according to the filters set in the filter bar

The following adjustments have been made to the Web Client list view screens:

- You can now select multiple measures in all chart views of list views.
- You can now select all measures and dimension fields in all chart views of all list views, irrespective of which fields are visible in the table view of the list view.
- All chart views now have sorting capability.

## 5.2.1.1 Filter Bar

In this area you can set a filter so only the sales orders you want to see will appear in the list in the table area.

- Search box - free text search. The search applies to the displayed columns only.
- Filter fields - in each field you can either enter manually the required value or choose from a list of available values. You can enter multiple values in each field.

For example, clicking the icon  in the *Delivery Date* filter field opens a form that lets you define precisely the conditions for your delivery date.

Filtering by delivery date is highly flexible; you can define multiple sets of ranges, specific dates and date offset, such as "this month", "last X number of weeks" and so on. The defined ranges are then listed for your review under the *Selected Items* section at the bottom of the form.

Click *OK* to populate the filter fields in the filter bar with the entered values.

- You can enter manually multiple values in a filter field according to the following syntax:
  - For entering a few specific values, such as multiple customer codes, type the first value, press the `Enter` key, and repeat. For example, if you type **C30000**, press `ENTER`, type **C20000**, press `ENTER`, type **C40000**, press `ENTER`, the following syntax is populated in the *Customer Code* filter field:
  - For entering a range of values, type the first and last values, separated by two dots. For example, a range of BP Codes from **C20000** to **C40000** should be entered as: **C20000 . . C40000**.
  - For entering ranges of values that are smaller / greater, earlier / later, use the `<` and `>` signs, respectively. For example, to set a range of dates later than May 1st, 2019, type **>05012019**.

Additional examples for useful offset date filter formulations for date ranges are:

- -1 Year -2 Quarter: Begin -3 Day...12/18/2018
- -1 Year -2 Quarter: Begin -3 Day...Today
- -1 Year -2 Quarter: Begin -3 Day...+1 Year: End
- 12/18/2018...+1 Year: End
- ...-1 Year -2 Quarter: Begin -3 Day
- ...12/18/2018
- -1 Year -2 Quarter: Begin -3 Day...
- 12/18/2018...
- To move from one filter field to the next, use the Tab key or the mouse.
- To add / remove filter fields, click *Adapt Filters* at the bottom right of the screen.

The form that appears lists all the fields that can be used as filter fields in the filter bar for the given object.

- Scroll down for additional fields or use the search box.
- Select the checkboxes of the fields you want to display in the filter bar.
- You can set values for filtering according to a specific field without showing the field and the values in the filter bar.
- To apply your settings, click *Go*.

## 5.2.1.2 Table Area

The table in the list view displays the data according to the filters set in the filter bar. The toolbar of the table contains the following features:

- Tasks - depending on the object and user authorizations, various tasks can be performed for the given object, for example, create, close, remove and so on.
- View Settings icon  - opens the *View Settings* form, enabling you to:
  - Select the columns to be displayed and set their sequence using navigational arrows (*Columns* tab). To display selected columns only, click *Show Selected*.
  - Sort the data according to one or more columns (*Sort* tab).
    - Only columns that are already displayed in the table appear in the sort list.
    - Sorting columns can be removed or added using the icons ( ) , respectively.
  - Filter the data presented in the table (*Filter* tab). You can set one or more filter ranges to be included in the table or excluded from the data in the table.  
**Note** that the filters you define here are applied to the data filtered by the filter bar, that is, this is a secondary filter.
  - Group the data presented in the table (*Group* tab).
    - Choose a grouping field from the dropdown lists of any of the fields displayed on the left side of the screen.
    - Click the icons ( ) to remove or add, respectively, a grouping field.

To apply your changes, choose *OK*.

To see the parameters you have chosen, click the link next to the record counter:

- Managing Views - you can save a set of filters defined in the filter bar, along with the adjustments made in the *View Settings* form, as a view, so you can use it in the future without having to redefine the filters.

To do so:

1. Click the *Views* menu and choose *Save As*.
2. Enter a unique name for your view and click *OK*. Your view is now listed in the *Views* menu.
  - To define your view as the default view, select the option *Set as Default*.
  - To allow other users to use your view and make it visible in their *Views* menu, select the option *Public*.
  - To create a tile for a view, click the *Share* icon in the top-right corner  and then click *Save as Tile*.

To update an existing user-defined view:

1. Click this icon  to open the list of views.
2. Click *Manage*.
3. Make your changes in the *Manage Views* form that appears.

### Note

Predefined views provided by SAP cannot be changed or removed.

If needed, you can also send the URL of a list view to a colleague or authorized user through e-mail.

- Export to Excel  icon - click this icon to export all the records displayed in the table to a MS Excel file. Grouping and sorting done in the *View Settings* form will be reflected in the Excel file as well.
- To view a specific record, click anywhere on its line or the arrow at the end of the line.

- Switch to chart view  - click this icon to switch from the table view to the chart view. The table view icon  beside the chart lets you switch back. In the chart view, you can filter data by using the filter bar; to apply your changes, click the [Go](#) button.

You can also:

- Choose dimensions for displaying data
- Switch between chart types 
- Zoom in/out and show/hide the legend 
- Hover over a data element to view a tooltip with relevant information
- Focusing on specific data elements - to view additional information about a specific data element, click it (press the `Ctrl` key and use the mouse to choose multiple data elements). The respective information (generally including the total value of the selected data elements) is displayed to the left of the legend icon. Clicking away from the chart area will deselect any selected data elements.
- Hovering over any specific data element in the chart view will display a tooltip with data related to that element.

## 5.3 Apps for Creating Records

The following tiles open their respective object form in Add mode for creating a new record:

- [Create Item](#)
- [Create Sales Order](#)
- [Create Business Partner](#)
- [Create Sales Quotation](#)
- [Create Delivery](#)
- [Create A/R Invoice](#)
- [Create Activity](#)

After entering all relevant details, choose one of the following options:

- [Add & View](#) - saves the record to the database and displays it on the screen for your review
- [Add & New](#) - saves the record to the database and displays an empty form in Add mode to let you create another record
- [Add & Back](#) - saves the record to the database and returns to the previous screen you were using before initiating the creation of the new record

## 5.4 Analytic Apps

See the *Analytics* chapter.

# 6 Sales

## 6.1 Managing Sales Orders

Click the [Sales Orders](#) tile or the [Sales Orders](#) entry in the main menu to open the [Manage Sales Orders](#) list view. The sales orders that fit the selected view are displayed.

You can perform the following actions:

- Choose another view or apply different filters and view settings to fine tune the displayed list
- Choose the [Create](#) button to add a new sales order or sales order draft
- Select one or more sales orders and apply the relevant action:
  - [Preview](#) - preview the selected sales orders in sequence, using Crystal Reports layout. You can then print the documents from within the browser.
  - [Close](#) - choose to set the status of the selected sales orders to Closed.
  - [Cancel](#) - choose to cancel the selected sales orders
  - [Copy To](#) - choose to copy one or a few sales orders to a delivery and A/R invoice,

**Note:** You can do the following:

- Select to copy only sales orders from the same BP at once
- Select only the same document type (Service type or Item type)
- Select documents which have the same price mode (net or gross price mode)

### 6.1.1 Editing Sales Orders

By default, when opened, an existing sales order appears in View mode. Click any tab to view its content or scroll down (depends on your settings). The [Sales Order](#) form is divided into header and body:

- **Header Area** - includes details such as document number, customer code and name, the total amount of the document, and document status. In addition, navigation arrows allow you to browse through sales orders: previous, next, first, and last.

You can collapse the header area to leave more room for the document body by clicking the icon  (Collapse header) in the lower-center part of the header.

Click the  icon in the lower-right part of the header to pin the header and keep it displayed.

In the upper-right part of the header, an operation bar contains some or all of the following options:

- Edit - click to switch to edit mode
- New - opens an empty form for creating a new sales order
- The [Copy To](#) action is now supported for all documents that are exposed in [Create](#) mode in Web Client. You can choose to copy a sales order to a delivery or A/R invoice
- Close - sets the status **Closed** to the sales order
- Cancel - cancels the sales order

- Duplicate - click to duplicate the sales order. A copy of the sales order appears in add mode. You can change and update relevant details, for example, change the customer code or dates. Respective details such as prices and discounts are updated accordingly.
- New Activity - opens a form to create a new activity for the customer that appears in the sales order, and to have the sales order automatically populated on the linked document tab in the Activity detailed view
- Related Activities - opens the list of activities created for the given sales order. A bracketed number next to the button indicates the number of related activities (including closed activities) that exist for the sales order. If your sales order has no related activities, this button will not appear.
- Relationship Map - opens a new window displaying the relationships between the sales order object and its referenced documents.

For full details, see section 6.5 Relationship Map.

- Preview - click to view the sales order in the assigned print layout. Only Crystal layouts are supported.
- The ellipsis icon (...) - opens a menu which lists additional options. This is a dynamic menu that appears and changes according to the screen size.
- **Document body** – the area below the header is divided into tabs displaying various types of information. Once you click the *Edit* button, editable fields appear on all the tabs, with frames for entering or updating data/values.

To save your changes, choose the *Update* button.

## 6.1.2 Creating Sales Orders

1. To create a new sales order, choose **one** of the following options:
  - From the *Manage Sales Orders* list view choose the *Create* button.
  - From an existing sales order choose the *New* button.
  - Click the *Create Sales Order* tile.
  - Choose the *Create Sales Order* entry from the main menu.
2. On the *General* tab, specify the mandatory fields: *Customer (or lead) code* and *Delivery Date*. The document header is updated accordingly.
  - After you select the Business Partner, a *Copy From* button appears in the header. Clicking the button displays a list of all the sales quotations for this BP, from which you can choose to copy data from one or more related sales quotations.
  - In the MS SQL Server version of Web Client, it is not possible to manually specify an entry in a choose from list field. An "Invalid entry" message is displayed if you type in a value. You must choose a value from the list.
  - Enter additional details as needed.

### Note

If you need to create a new customer master data, you can do so from the sales order via the customer choose from list form.

After you have created the customer, press the *Add & Back* button, which closes the form and returns you to the sales order in create mode, with the newly created BP code populated in the sales order *BP Code* field

This feature applies to Items as well.

3. On the *Contents* tab, fill in the details of the items or services:

The *Total* field in the header is updated according to the data entered on the *Contents* tab.

- Click  to open the list of items. After you add items to the table, the system automatically adds an empty row after the last item row.
- Click  to delete selected rows.
- Click  to choose columns and their sequence.
- To duplicate selected rows, choose the *Duplicate* button. The duplicated rows will be added after the last row of the table.
- Use the *Copy* and *Paste* buttons to copy selected rows and to paste into this sales order the rows copied from the current document or a different document.
- Use the *Close* button to close open rows.
- To view the gross profit of each line, click the  icon on the left side above the table, and choose the option *Gross Profit*. The relevant data will be populated in the table accordingly.
  - For service type sales orders, you can set the default gross profit rate in the respective field above the table.
  - For item type sales orders, you may choose the price list to be used for the gross profit calculation from the *Base Price By* field positioned on the left side above the table.
  - In all the tables you can select the columns to be displayed and their sequence.
- In item type sale orders, you can view the volume and weight calculations for the listed items. This information is available by choosing the option *Volume & Weight* in the  menu directly above the table, on the left side.

 Note

If you make changes to the volume and weight calculation units, a pop-up appears informing you that the updated units will affect only the document total and will not update the row items.

- You can view the freight charges of each item by clicking the  icon on the left side above the table and choosing the option *Freight*.

 Note

You can add freight charges for line freight (individual line items in the matrix) and header freight (entire shipment), just below the item matrix.

Freight tax will be included in the *Total* tax of the header level, as the summary calculation is performed in the SAP Business One client.

Freight-related fields appear only if you have selected *Manage Freight in Documents* on the *General* tab of the *Document Settings* window (*Main Menu* → *Administration* → *System Initialization* → *Document Settings*).

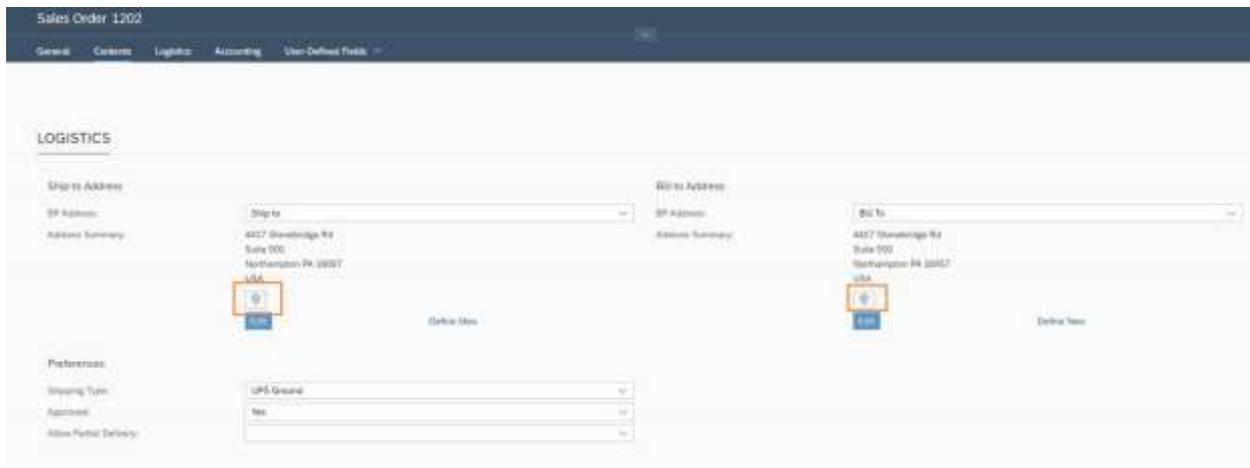
4. On the *Logistics* tab you can do the following:

- Review the ship to & bill to addresses populated according to the default settings of the business partner.
- Assign to the sales order a different address from the addresses already defined for the business partner or define a new address.

When defining a new address, you can choose whether to save it to the business partner or to apply it to the current sales order only.

- Locate an address using Google Maps.

The *Address Summary* field of both the *Ship-to Address* and the *Bill-to Address* has a location button. Click the location button to open a Google Maps page with the address displayed.



Additional settings related to the sales order are available under the *Preferences* section.

5. On the *Accounting* tab, you can set payment terms, cancellation and required dates. See section 5.2.1.1 for information on the various supported methods of entering dates and defining date offsets.
6. The *User-Defined Fields* tab contains the UDFs related to the sales order, divided by categories.
7. After entering all the data, choose how to add the sales order using the multiple-choice button on the bottom-right side of the document.
8. You can save a sales order as a draft, which then appears in the Sales Drafts app.
  - o Choose the *Save as Draft & New* button to save and open an empty form in Create mode, for creating another document or another draft.
  - o Click the  icon next to this button and choose *Save as Draft & View* to save and display the draft you have just created.
9. You can copy an already created sales order (view mode) to a delivery or invoice

## 6.2 Managing Documents in Approval Process

When trying to add or update a sales order that triggers an approval process, you see that this sales order is saved as a draft. After the authorizers approve the draft from the SAP Business One client, you can continue adding or updating the draft in Web Client.

This function also supports quotation, delivery and A/R invoice documents.

### Prerequisite:

The approval process is enabled in the SAP Business One client.

### Workflow

1. When creating or updating a document in Web Client, you are notified by the system that an approval is required.
2. You become the originator of the approval process and a draft is created.

3. The authorizers review the draft and either approve or reject the request in the SAP Business One client.
4. The originator receives a notification that the document was approved/rejected by the authorizer.
5. To view the approval status and proceed with the process, click the [Docs in Approval Process](#) tile; the [Manage Docs in Approval Process](#) list view opens. (Alternatively, you can access the draft from the notification as well.)  
In the list view you can:
  - Filter, sort, group, and access the relevant drafts.
  - Add approved drafts
  - Cancel approval processes for selected drafts
  - Restore approval processes for selected drafts
6. Depending on the approval status, you can either generate a document(choose [Edit](#) → [Add & View](#)) or update the draft (click [Edit](#)) to trigger a new approval process.

## 6.3 Additional Sales Documents

### 6.3.1 Sales Quotations

Sales quotations are supported in both the list view and the detailed view.

**Note:** You can also manage **drafts** for sales quotations, deliveries and invoices.

Clicking the [Sales Quotations](#) tile opens the list view, where you can perform the following actions:

- Filter, sort, and group the documents according to your preferences
- Manage views and save them as tiles
- Create a new sales quotation
- Copy one or a few sales quotations to a sales order, delivery and A/R invoice
- Close the selected sales quotations
- Cancel the selected sales quotations
- Preview one or more documents
- Export the list to MS Excel
- Switch between table and chart views

To view a sales quotation, click its row or click the arrow at the end of the row. The detailed view of the sales quotation is displayed in view mode, where you can switch to edit mode to do the following:

- Create a new sales quotation
- Copy a sales quotation to a sales order, delivery and A/R invoice
- Set the status **Closed** to the sales quotation
- Cancel the sales quotation
- Duplicate the sales quotation
- Create a new activity from the sales quotation
- View a Relationship Map between the sales quotation and any related base, target and referenced documents
- Preview the sales quotation in the assigned print layout

See Sales

Managing Sales Orders for detailed instructions on performing all the above actions.

## 6.3.2 Other Documents

Deliveries, A/R invoices, returns and A/R credit memos are supported as list views and detailed views.

### Note

Returns and A/R credit memos are supported in **view mode only**. You can drill into the document from the list view to see its details, but you cannot edit the document or create new documents.

**List view:** Clicking each tile opens the list view for the respective document, where you can:

- Filter, sort, and group the documents according to your preferences
- Copy a delivery to an invoice
- Close a delivery
- Cancel a delivery and invoice
  - Cancellation documents will not appear on the screen but are added behind the scenes with SAP Business One default values in the document fields.
  - If it is not possible to cancel the delivery or invoice (for example, it is already canceled, closed, exceeds cancellation days, and so on) the cancellation operation will fail, and a relevant system information message appears.
- Manage views and save them as tiles
- Preview one or more documents
- Export the list to Excel
- Switch between table and chart view

**Detailed view:** Clicking the arrow at the end of the row of a record opens the details of the record.

The information is provided on the [General](#), [Contents](#), [Logistics](#), and [Accounting](#) tabs. In addition, the [User-Defined Fields](#) tab displays a list of UDFs used in the record.

You can switch to edit mode to do the following:

- [Create](#) a new record
- [Copy to](#) and [Copy from](#) documents
  - Copy an A/R invoice from a sales quotation, sales order and delivery
  - Copy a delivery **to** an invoice and **from** a sales quotation and sales order
- [Close](#) the current record; a **Warning** message appears stating that this action is irreversible and asking if you want to continue

**Note:** It is not possible to close an A/R invoice.
- [Duplicate](#) the open record
- Create a new activity and view related activities
- [Cancel](#) the open record
- View a [Relationship Map](#) between the open record and any other related base, target and referenced documents
- [Preview](#) any changes

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See Sales

Managing Sales Orders for detailed instructions on performing all the above actions.

## 6.4 Exchange Rate Entry

When creating a new document in Web Client for SAP Business One, you can now enter exchange rates directly into Web Client using the [Enter Exchange Rate](#) dialog box.

Exchange rate entries in Web Client are updated in the SAP Business One backend.

The following scenarios display the [Enter Exchange Rate](#) dialog box, allowing you to enter the exchange rate:

- **Scenario 1:** You are creating a new document in Web Client and the system currency (SC) is different from the local currency (LC).
- **Scenario 2:** You are creating or editing a new document in Web Client and the exchange rate is missing for the business partner currency; you select the business partner.
- **Scenario 3:** The rate for the business partner currency is missing for the selected posting.  
Similarly, you change the posting date and the new posting date does not have an exchange rate.
- **Scenario 4:** You edit the currency in a document item (for example, the unit price currency of a sales order line), and the related exchange rate is missing.

## 6.5 Relationship Map

Currently the Relationship Map is relevant for sales type documents only, for example, sales quotation, sales order, delivery, A/R invoice.

The relationship map is supported in all localizations according to the respective supported documents.

This feature displays as a flow chart that provides a comprehensive view of the connections between business objects and their relevant documents (base, target, and reference).

For example, displaying the relationship map of a delivery object would illustrate the relationship between the delivery and its base sales order document and possibly its target documents.

- Click the [Relationship Map](#) button from the actions bar of a business object to open the dialog with the relationship map in process flow view.
- All base, target and reference documents are presented, with their status and other relevant information.
- To see the base documents of a specific business object in a label, click the  icon located on the connection line itself. In the pop-up label the base documents details appear, such as document type, document number, BP code, and document status.
- To show/hide the referenced documents of the main object, click the [Referenced Documents](#) button.

### 6.5.1 Layout Structure:

The process flow has a layout structure; the default layout contains fixed sections that are filled with content.



- Header - appears below the bar, consists of multiple steps/categories, each of which is visualized by a circled icon. Each icon is surrounded by a circular chart to indicate the distribution of statuses per column. Categories with no document do not appear in the flow header
- Flow map - lies beneath the header. The elements belonging to a certain step are vertically aligned beneath one another. Arrows point to the next (follow-up) element or multiple elements.
- Element - each element represents a different section:
  - Header (mandatory): brief description and number, for example: Sales Order 14 (Customer Code + name)
  - Status- indicates by color and icon the state of the document, enabling you to decide how and when to deal with a particular document:
    - Green: Canceled or Closed document (nothing to do)
    - Natural: Open document which is not due yet (any decision can wait)
    - Yellow: Open document which is due in 2 days (timely reminder)
    - Red: Open document that has passed its due date (deal with this first!)



## Display

Specific colors identify objects in the process flow as follows:

- Main document – dark blue
- All documents in the flow – gray
- Referenced document – light blue, if it exists (references main document)

### Authorization

Access to object details from within the process flow adheres to regular authorization rules.

For example, if you have authorization for the Sales Order object but not for the Delivery object, when you click [Relationship Map](#), you can see only the sales order details but not the details of the delivery document based on that sales order.

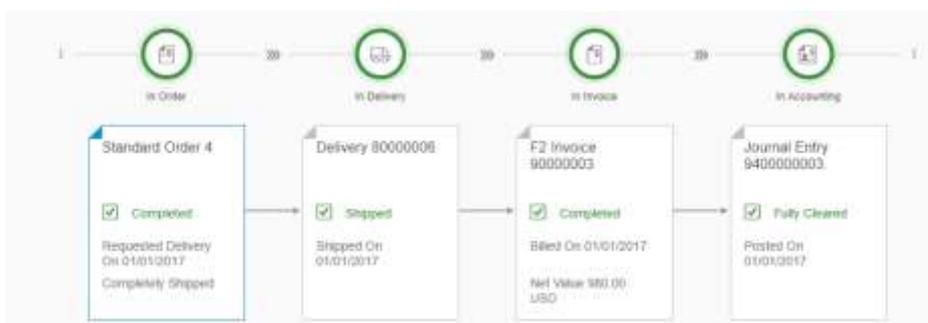
- A message on the object states, "You are not authorized to view Deliveries."
- If you nevertheless try to open the document, the same message appears as an Alert. Click [OK](#) to return to the flow view.

## 6.5.1.1 Zoom

The process flow reacts to the size of the container into which it is put; detailed information is added or removed depending on the zoom level. Using the mouse wheel, you can zoom in or out to affect the amount of information displayed in the container.

### Zoom levels:

- Level 1: (largest) Larger elements provide the most space for textual information, however, fewer elements fit on the screen.



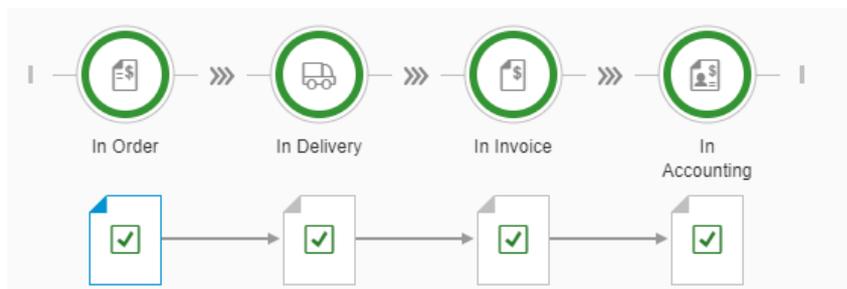
- Level 2: Standard size; provides the best combination of content information and overview.



- Level 3: Elements are reduced to header and status information to provide a better overview for large flows.



- Level 4: The smallest zoom level; provides a maximum overview of the flow while the information about each element is reduced to a status icon.



## 6.6 Managing Sales Drafts

You can create and process drafts of sales orders only.

To create a sales order draft, open a sales order detailed view in add mode, enter all relevant details and choose one of the options in the multi-choice button:

- [Save as Draft & New](#) - for adding the sales order draft and opening a sales order detailed view in add mode for creating another document in sequence
- [Save as Draft & View](#) - for adding the sales order draft and having it displayed for further review

In the [Manage Sales Drafts](#) list view, you can perform the following tasks for single or multiple drafts:

- [Remove](#) - removes the selected drafts from the database
- [Close](#) - sets the status **Closed** to the drafts
- [Reopen](#) - opens closed drafts and changes to [Close](#) for open drafts, as in list view
- [Add](#) - adds the drafts as official sales orders
- [Add and Remove](#) - adds the drafts as official sales orders and removes them from the database

By default, the list view shows drafts created by the current user.

To view a certain draft, click its row. The header displays the status **Draft** for all drafts, whether open or closed. The following actions are available:

- [Remove](#) - choose this button to delete the draft
- [Reopen / Close](#) - changes the draft status from **Closed** to **Open** for closed drafts / **Open** to **Closed** for open drafts
- [New Activity](#) - creates an activity for the business partner that appears in the draft. The draft is automatically added to the [Linked Document](#) section of the activity.

- 
- [Related Activities](#) - opens a list view showing the activities created for the given draft

As with other documents, when you open a draft with draft status **Open**, it appears in view mode. You need to click [Edit](#) in order to switch to create mode. The editable fields are framed.

After editing the draft, you can save it as an official sales order or as a draft, the same as when creating a new sales order.

### Note

Sales documents are created in Web Client for SAP Business One with a generation type of Not Relevant that is visible only on the Electronic Documents tab in SAP Business One client. To process documents created in Web Client for SAP Business One as electronic documents, you must manually adjust the generation type in SAP Business One client. For more information about working with electronic documents, see online help for SAP Business One.

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# 7 Purchasing

## 7.1 Managing Purchasing Documents

The purchasing process encompasses all purchasing-related documents and procedures, from purchase orders through the processing of A/P invoices. Furthermore, various reports help to analyze purchasing information such as purchase volume analysis, pricing information, vendor liabilities aging, and so on.

Currently Web Client supports read-only list views for the following purchasing documents:

- Purchase quotations
- Purchase orders
- Goods receipt PO
- A/P invoices
- Goods returns
- A/P credit memos

The A/P - Purchasing module appears as a separate tile on the Home page.

Click the [Purchases](#) tile or the [Purchases](#) entry in the main menu to open the [Manage Purchases](#) list view. The purchase orders that fit the selected view are displayed.

Click the arrow to the right of a specific purchase document to open a read-only detailed view.

You can perform the following actions for any displayed document:

- Preview purchase document
- Print purchase document

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## 8 Managing Business Partners

Click the [Business Partners](#) tile to open the Manage Business Partners list view. Here you can filter, sort, group, and access the relevant business partner master data records.

- Above the table area on the right, you can click [Create](#) to add a new business partner record.
- To delete business partners from the company database, select the relevant records and choose [Remove](#).
- To view the details of a specific business partner, click its row. Alternatively, you can find it using the enterprise search box.

The business partner master data record appears in view mode. You can perform the following actions:

- View business partner details
- Navigate between business partner master data records using the navigation buttons on the upper-left side, next to the business partner code
- Edit the business partner master data record
- Create a new business partner
- Delete the business partner from the company database, but only if no open transactions exist and the balance is zero
- Duplicate the business partner master data record
- View the activities created for the business partner
- Create an activity for the business partner
- Create a sales order for the business partner

### 8.1 Editing Business Partner Master Data

Choose [Edit](#) to switch to edit mode. The details that can be updated are framed. Note that the header part cannot be edited.

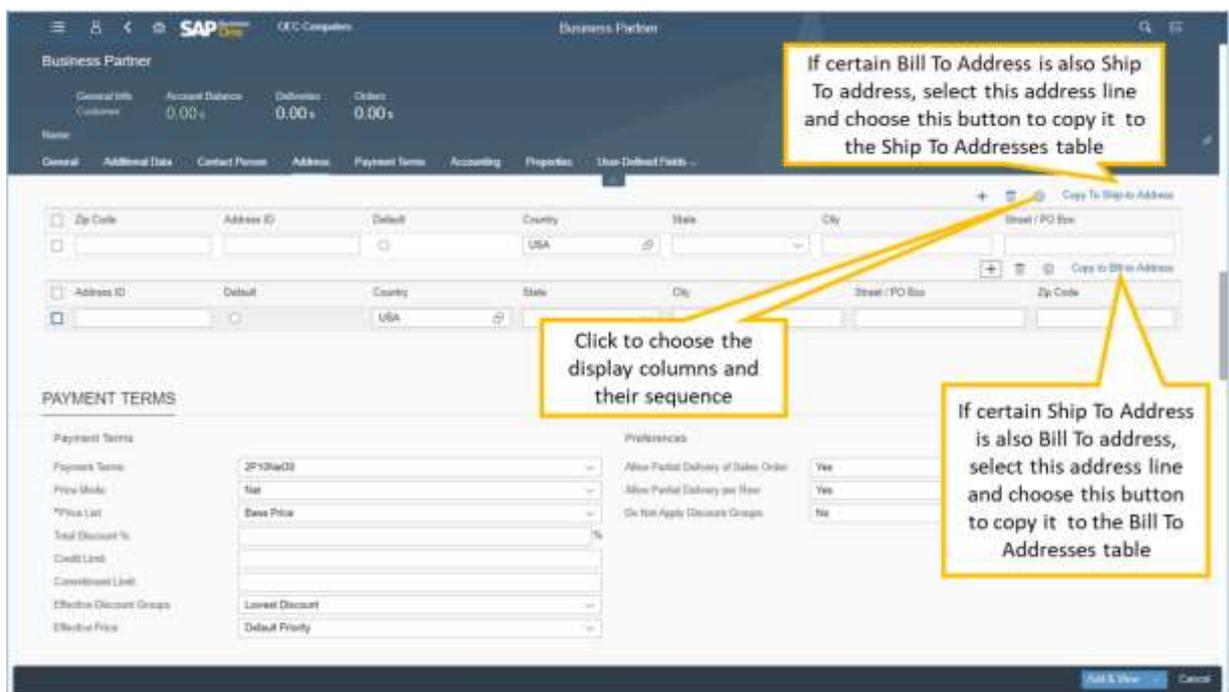
The contact persons and addresses are organized in tables. For each table you can change the displayed columns and their sequence by clicking the [Settings](#) icon on the left side above the relevant table.

- To add a new contact person or address, click the "+" icon above the respective table
- If you add a new ship-to address which is also a bill-to address or vice versa, just choose the [Copy to Bill-to Address](#) or the [Copy to Ship-to Address](#) button above the relevant table.
- To delete a contact person or address, select it and click the bin icon above the respective table.
- The default contact person and addresses are marked by a radio button in the [Default](#) column. To change the current default, select the radio button of the new default.

To save your changes, choose [Update](#).

## 8.2 Creating New Business Partners

- To create a new business partner, choose one of the following options:
  - From the Manage Business Partners list view, choose the [Create](#) button.
  - From an existing business partner, choose the [New](#) button.
  - Click the [Create Business Partner](#) tile.
  - Click the [Create Business Partner](#) entry in the main menu.
- On the [General](#) tab enter all relevant business partner data:
  - Note that [Code](#) is a mandatory field.
  - Under the [Additional Data](#) section, click the + icon to upload an image, for example, the company logo of the business partner. The image will be displayed in the header, under the business partner code.
  - To define a business partner active date range, select the [Active/Inactive](#) checkbox.
- On the [Contact Person](#) tab, enter the details of the BP contacts, and set the default contact person.
- On the [Addresses](#) tab, enter the billing and shipping addresses:



- On the [Payment Terms](#) and [Accounting](#) tabs, enter the relevant details.
  - For the [BP Project](#) field on the [Accounting](#) tab, the choose from list form displays only active BP projects. After you choose the project, the field displays the BP Project Code and BP Project Name.
  - It is not possible to create a new project from the choose from list form.
- The [Properties](#) tab provides a list of properties related to the origins of the business partner and the nature of the BP's company. Select the checkboxes of the appropriate information.
- The [User Defined Fields](#) tab lists all the UDFs defined for business partner master data.
- To add the new business partner to the company database, choose one of the following: [Add & View](#), [Add & New](#), [Add & Back](#).

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## 9 Managing Items

Click the *Items* tile to open the *Manage Items* list view. Here you can filter, sort, group, and access the relevant item master data records.

- Above the table area on the right, you can click *Create* to add a new item record.
- To delete items from the company database, select the relevant records and choose *Remove*.
- To view the details of a specific item, click its row. Alternatively, you can find it using the enterprise search box.

Click a row to access the details of the given item. The item master data record appears in view mode. The picture of the item (if uploaded) appears in the header below the item code. The on-hand, committed, ordered, and available quantities are displayed in the header. In addition, you can browse through different items by using the navigation arrows: next, previous, first and last.

On the upper-right side, the following buttons are available:

- Choose *Edit* for updating the displayed item master data.
- To create an item, choose the *New* button.
- To delete the item from the company database, choose *Remove*. Only items with no transactions can be removed.
- To duplicate the item master data record, choose *Duplicate*.
- To view activities created for this item, choose *View Related Activities*.
- To create an activity for this item, choose *Create Activity*. The *Activity* form appears in add mode, with the preferred vendor of the item populated in the *Customer* field and the item code appearing on the *Linked Document* tab.

### 9.1 Editing Items

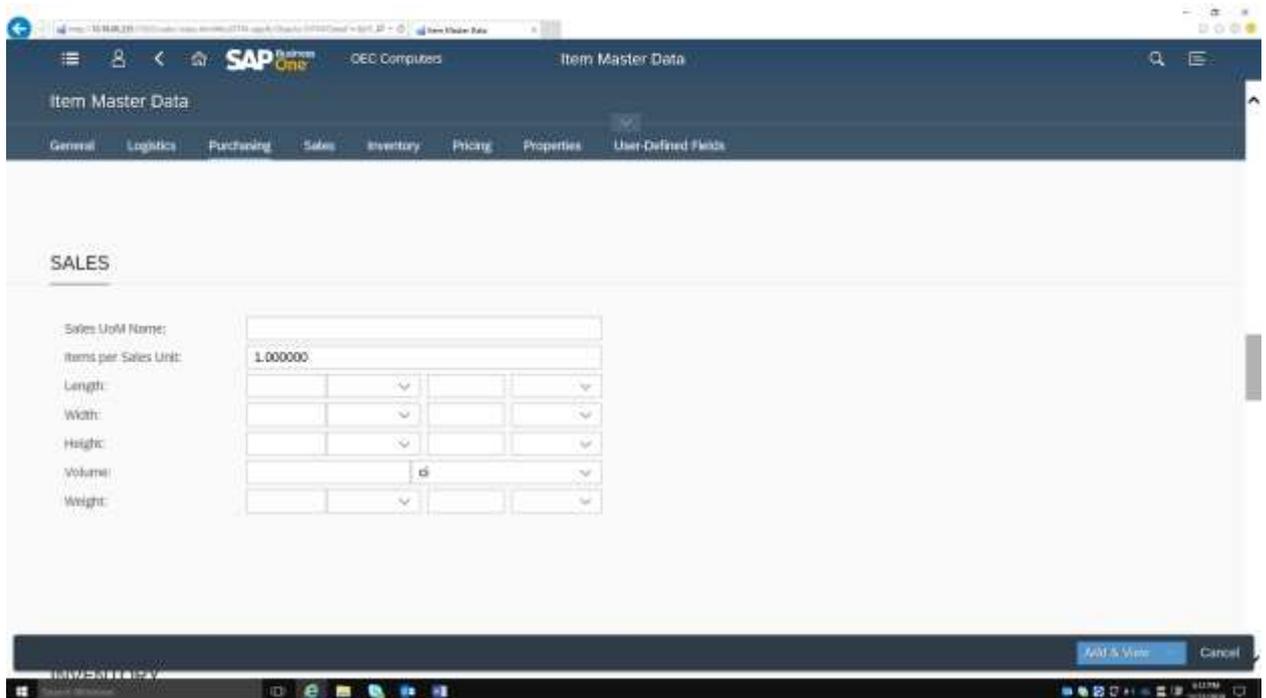
Display the item master data record that you want to edit and choose the *Edit* button; the editable fields are framed to let you enter or update information.

To save your changes, choose the *Update* button.

### 9.2 Creating New Items

1. To create a new item, choose one of the following options:
  - From the *Manage Items* list view, choose the *Create* button.
  - From an existing item, choose the *New* button.
  - Click the *Add Items* tile.
  - Click the *Add Items* entry in the main menu.
2. On the *General* tab, enter all relevant data:

- Note that *Item No.* is a mandatory field.
  - Click the + icon to upload an item image; it will be displayed in the item's header.
3. On the *Logistics* tab, set the serial or batch numbers management method for the item and add barcodes, if used.
  4. On the *Purchasing* and *Sales* tabs, enter relevant measurements.
    - In the case of items with a UoM group other than Manual, these tabs display a table form for defining the *UoM* and *Package Types*.
    - You can add a new line, remove lines, and define a default UoM and package type.



5. On the *Inventory* tab, set weight, valuation method, and manage warehouses values.
6. On the *Pricing* tab, you can define a price for the item for the relevant units of measure, pricing units, and price lists.
7. On the *Properties* tab, select the checkboxes of the item properties you need to include in the master data record.
8. On the *User-Defined Fields* tab, you can enter relevant values for the listed UDFs.
9. To add the new item to the company database, choose the relevant button: *Add & View*, *Add & New*, or *Add & Back*.

# 10 Managing Activities

Click the [Activities](#) tile or choose the [Activities](#) entry in the main menu. The [Manage Activities](#) list view appears. Here you can filter, sort, and group activities as needed. Above the table, on the right side, the operation bar enables you to perform the following actions:

- To create a new activity, choose the [Create](#) button.
- To preview an activity or activities using the assigned Crystal layout, select the relevant records and choose [Preview](#). Multiple activities will appear in sequence on a single web browser tab. You can print the activities from within the preview screen.
- To set the status of a selected activity or activities to **Closed**, choose the [Close](#) button.
- To delete a selected activity or activities from the company database, choose [Remove](#).
- To change the status of a selected activity or activities from **Closed** to **Open**, choose [Reopen](#).
- To view an activity, click its row. The detailed view of the activity is displayed in view mode. The activity's header displays its number, type, start date and time, status, and subject.

## 10.1 Editing Activities

When opened, an existing activity appears in view mode.

Choose the [Edit](#) button to make changes. The editable fields are framed.

To save your changes, choose [Update](#).

## 10.2 Creating New Activities

1. To create a new activity, choose one of the following options:
  - From the [Manage Activities](#) list view, choose the [Create](#) button.
  - From an existing activity, choose the [New](#) button.
  - Click the [Create Activity](#) tile.
  - Click the [Create Activity](#) entry in the main menu.
2. On the [General](#) tab, enter the relevant details. You can assign an activity to a single recipient - user or employee - or to a recipient list.
3. On the [Scheduling](#) tab, set a date, time and location for the activity:
  - In the [Time](#) section, enter a date and time, and set a reminder if needed.
  - In the [Address](#) section, enter the address details for the activity. If you have entered customers' details on the [General](#) tab, you can choose the relevant customer's address. The address details are entered automatically in the address fields.
4. To add the activity, choose the relevant button: [Add & View](#), [Add & New](#), or [Add & Back](#).

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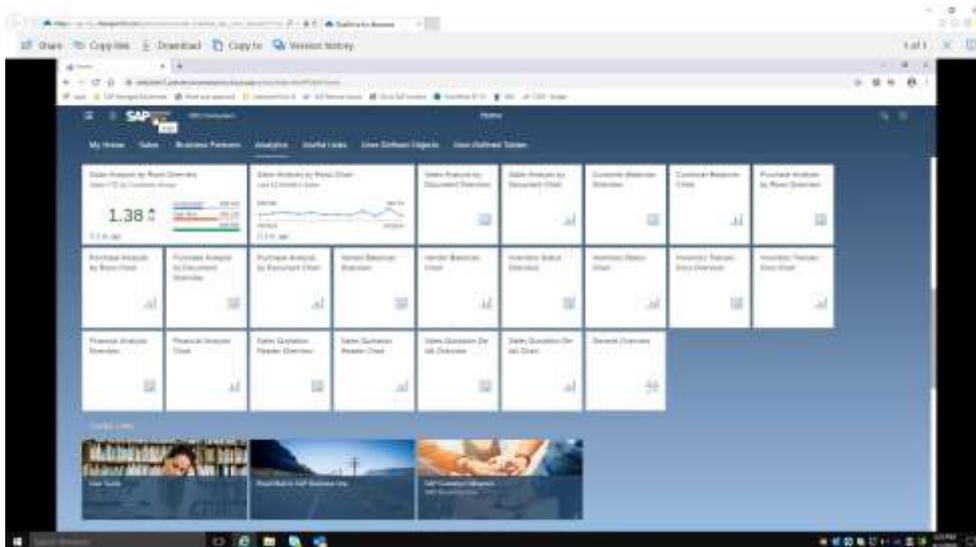
# 11 Analytics

## Note

This feature is supported only by the Web Client version for SAP HANA.

Web Client for SAP Business One provides built-in analytics capabilities and content. Under the *Analytics* group you will find the following specific, individual Overview tiles and their corresponding Chart tiles, as well as the General Overview tile:

- Sales Analysis by Rows Overview
- Sales Analysis by Rows Chart
- Sales Analysis by Document Overview
- Sales Analysis by Document Chart
- Purchase Analysis by Rows Overview
- Purchase Analysis by Rows Chart
- Purchase Analysis by Document Overview
- Purchase Analysis by Document Chart
- Customer Balances Overview
- Customer Balances Chart
- Vendor Balances Overview
- Vendor Balances Chart
- Inventory Status Overview
- Inventory Status Chart
- Inventory Transactions Overview
- Inventory Transactions Chart
- Financial Analysis Overview
- Financial Analysis Chart
- Sales Quotation Header Overview
- Sales Quotation Header Chart
- Sales Quotation Detail Overview
- Sales Quotation Detail Chart
- General Overview



Every *Overview* screen (and view thereof) can be added as a tile to your home page to serve as a potential entry point for further analytics. Clicking an *Overview* screen opens a page displaying the cards (reports) that you have added as part of your analytics activities.

- Clicking the *Edit* button at the top right of the page lets you edit the *Overview* screen and the displayed cards. This button becomes the *Finish Edit* button to enable you to return to the *Overview* screen upon completion of editing.
- Clicking the *Adapt Filters* button just below the *Edit* button lets you configure a different set of filters so as to produce a different set of data.

All these changes/additions/adaptations are conducted in the Overview Screen Designer environment.

## 11.1 Overview Screen Designer

The Overview Screen Designer provides a flexible, user-configurable environment to create multiple relevant dashboard screens.

The existing *Overview* screen is designed to do the following:

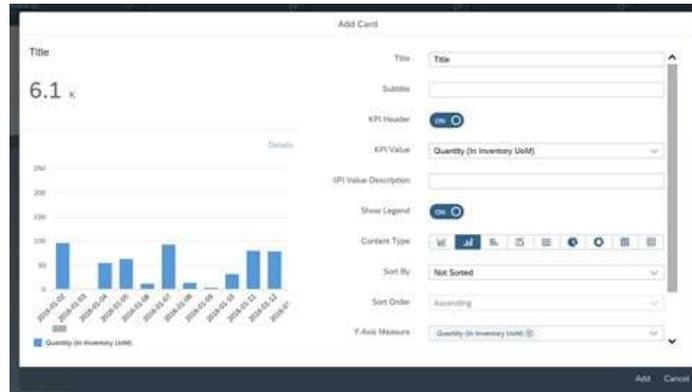
- Provide in-depth analysis of a single data area.
- Support global screen filtering to allow you to change filters at runtime (either manually or by selecting from pre-saved views) that apply to all Cards displayed in the *Overview* screen simultaneously.
- Allow you to save the changed filters as views and link to home page tiles to enable those views to be opened directly from the home page.

Click an *Overview* screen to open the designer, enabling you to edit the cards and adapt filters to display the required data in those cards.

Click the *Edit* button to perform the following operations:

## Adding a card

Click the blank card that displays the + sign in the middle. The card editor opens as a dialog box with a card preview on the left and display options, such as sorting, measures and dimensions, content type, and so on, on the right.



- Although neither the *Title* nor *Subtitle* field is mandatory, we highly recommend giving a title to the new card.
- The KPI Header toggle enables/disables the KPI header. If not enabled, no KPI value will be shown at the top of the card.
- The *KPI Value* field has a pull-down list box, allowing you to choose a single chart *Measure* field. The calculated KPI value is the total value of that selected *Measure* field for all records filtered by the *Overview* screen filters.
- *Content Type*: Depending on the chart selected, the *Measure* and *Dimension* fields will have the following values:

Chart Type	X-Axis	Y-Axis	Color	Segment
Line	Dimension	Measure	Dimension	
Column	Dimension	Measure	Dimension	
Bar Chart	Measure	Dimension	Dimension	
Stacked Column	Dimension	Measure	Dimension	
Stacked Bar	Measure	Dimension	Dimension	
Pie			Dimension	Dimension
Donut			Dimension	Dimension
Heat Map	Dimension	Dimension	Measure	

- *Sort By*: The selectable sort options depend on the type of Chart selected in the *Content Type* field.
- *Sort Order*: Choose between **Ascending** (Default) and **Descending**.

If you select **Natural Sort** for *Sort By*, then the sort order will be set to **Ascending** and this field will be set to **Read Only**.

Enter all the required specifications and click *Add*.

---

## Editing a card

Click the *Edit* icon (pencil) in the top-right corner of the card you want to change. The card editor opens, allowing you to adjust the display features.

- The *Preview* card in edit mode has all the features of a fully working card.
- Click *Save* to save your changes.

## Duplicating a card

After editing a card, click *Save as* to save the changes as a new card.

## Reordering cards in the Overview Screen

Drag and drop a card to a new location on the screen.

## Deleting a card

Click the X icon in the top-right corner of the card you want to delete. The card is removed.

### 11.1.1 Adapting Filters

Being in filtering mode lets you create and adapt filters for the types of data to be displayed in the analytic cards.

On the right side of the filter bar, click the *Adapt Filters* button.

In the displayed *Adapt Filters* form, you can:

- Enter the condition you require for any new filter and select its checkbox to display it in the filter bar. Clicking the icon on the right side of each filter opens a new form that lets you refine the condition.
- Remove the conditions for any filter you no longer want to use and deselect its checkbox so that it does not appear in the filter bar.
- After you have completed adapting the filters, click *Go* to return to the *Overview* page.
- Click *Cancel* to close the form without saving any changes.

Once you have completed your editing, click the *Finish Edit* button to exit Edit mode:

- All card changes currently active are saved when saving a view or when saving as a tile.
- Clicking the card header opens the corresponding *Chart* screen with the same filters and chart type/measure/dimension/sort selections as the current card.

#### Note

The *Finish Edit* button only impacts and finalizes the **cards**; it has no connection to setting filters.

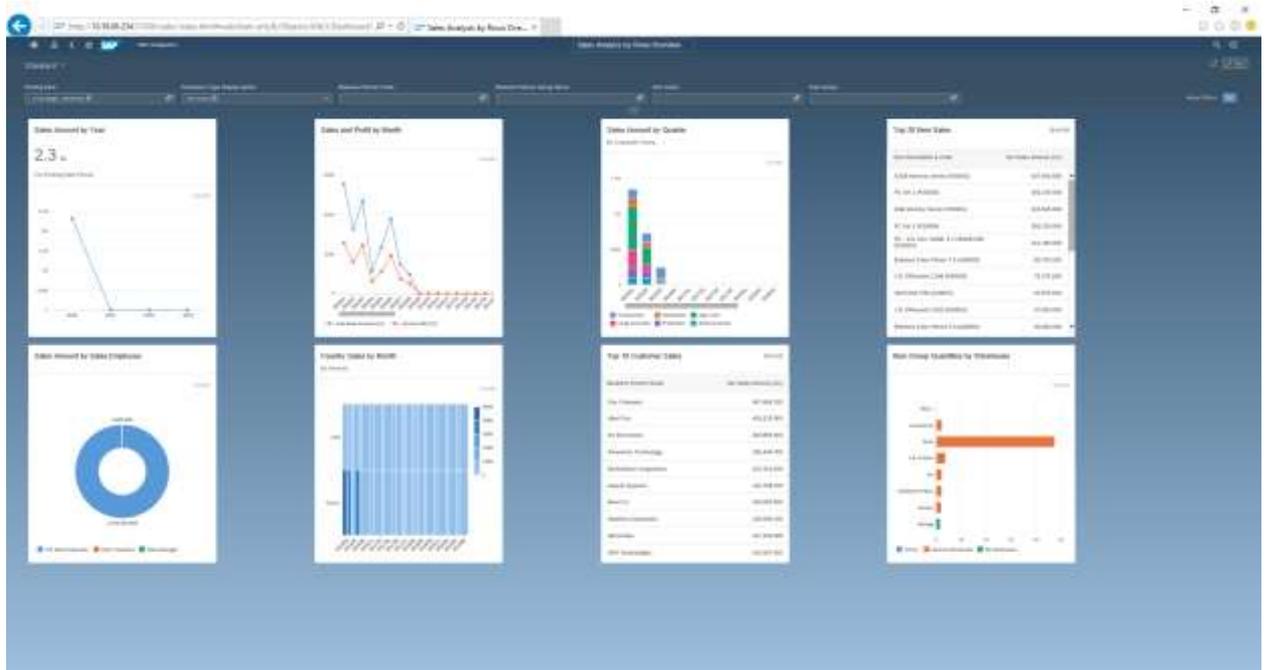
Filters are set in the *Adapt Filters* screen when you choose the *Adapt Filters* button.

When you save a view, either within the *Overview* screen or as a tile, both the card configuration and the filters are saved as a view (or as a tile).

## 11.1.2 Example: Sales Analysis by Rows Overview screen

To demonstrate some of the capabilities of the Overview Designer, we will use this screen, available by clicking the *Sales Analysis by Rows Overview* tile under the *My Home* group.

As do all overview pages, the *Sales Analysis by Rows Overview* page consists of a filter bar and analytic cards.



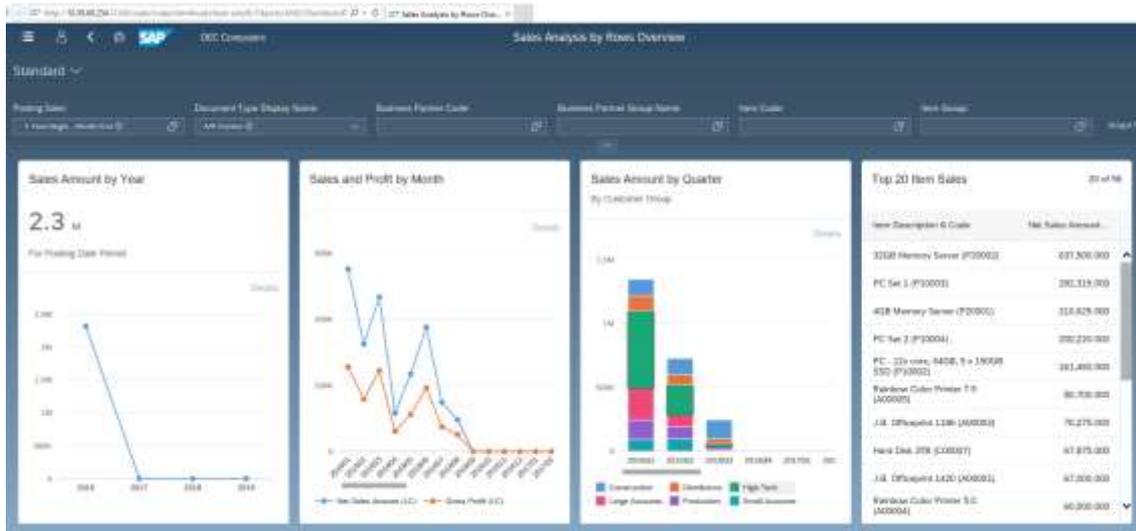
Each card represents a different sales report. The data in all the cards are determined by the filters created in the filter bar. Filters can be removed, added and/or changed to display the data you need to see.

When you adapt the filters according to your preferences, the data in all the cards is updated accordingly.

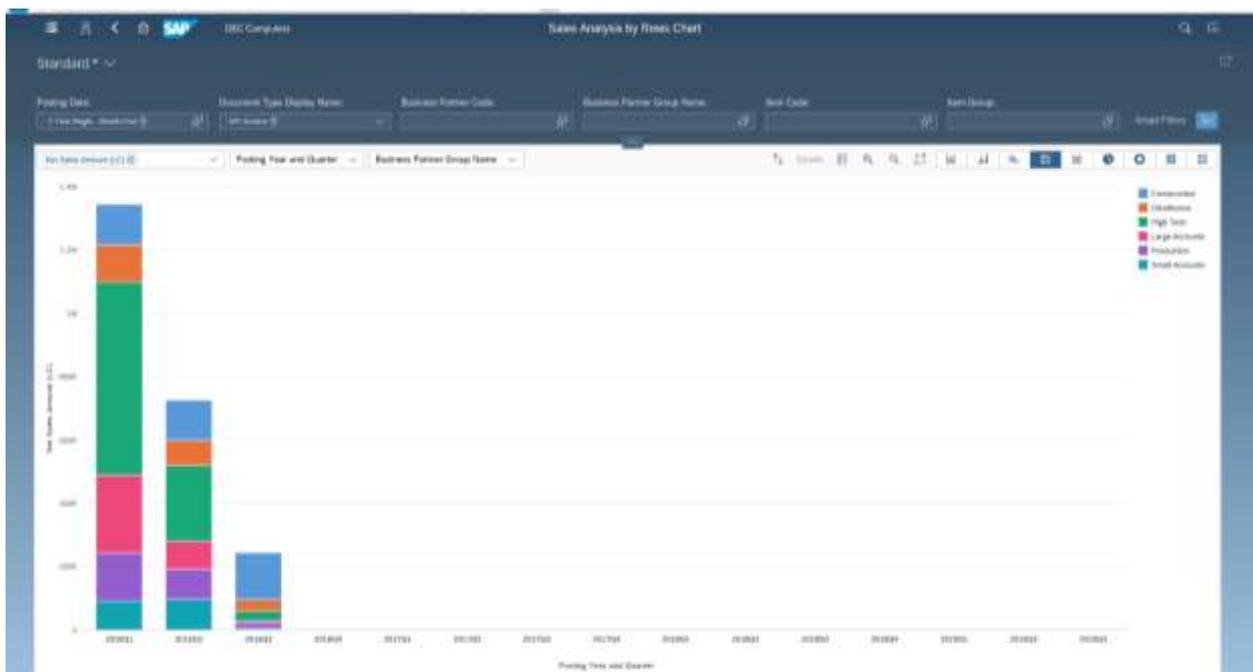
As in list views, you can:

- Define and save your own views for the *Sales Analysis by Rows Overview* page
- Zoom in to a specific chart by clicking the header of the card

For example, to open the *Sales Amount by Quarter, By Customer Group* chart, click the card's header:



The detailed report appears:



- Adapt the filters and click [Go](#) to update the chart.
- In the chart options, choose the chart measure and then choose the dimensions for the X and Y axes and the data elements, respectively.
- Use the magnifying glass icons (or `ctrl`+ scroll action) to zoom in and out.

As in the [Sales Analysis by Rows Overview](#) screen, you can define and save your own views for the specific report. To maximize the chart display, click the icon .



On the upper-right side of the chart, you can switch between various chart types.

## 11.2 General Overview

The General Overview tile opens the *General Overview* screen, which can contain cards from any of the existing analytic cubes.

The functionality of this screen is similar to the individual overview screens. However, unlike those overview screens, *General Overview* does not contain filter fields in the header. Since each card comes from a different analytic cube, it contains its own independent set of queries (local filters). A global filter for all the cubes would not be meaningful.

When you are in the Designer view, for each individual analytics card on this screen, you can do the following, using the **Configuration** and the **Adapt Filters** tabs on the Edit Card:

1. Select the relevant semantic layer query upon which this card is based.

The **Configuration** tab contains all the fields currently visible in the Edit Card view.

In addition, a new field *Data Source* at the top of the tab lets you select a data source from any of the analytic cubes available in Web Client. It displays a list box populated by the query names of all Semantic Layer queries currently supported by the system:

- Sales Analysis by Rows
- Sales Analysis by Document
- Purchase Analysis by Rows
- Purchase Analysis by Document
- Customer Balances
- Vendor Balances
- Inventory Status

- Inventory Transactions
- Financial Analysis
- Sales Quotation Header
- Sales Quotation Detail

By default, the first query is selected.

If you select a different query, all the displayed settings on both tabs are replaced by the default settings of the new query.

If you change the query after making any changes on either tab, the following confirmation dialog appears: "Changes made will be lost. Do you want to continue?" Yes/No"

**Yes:** all changes are lost, and the new query is selected

**No:** the changes remain, and the old query stays selected

2. Set local filters relevant for the card you are designing.

The **Adapt Filters** tab is used for filter setting:

- It contains all the fields relating to the query you selected on the first tab.
- It enables you to set filters for each field.
- It enables you to have all the associated functionality related to selecting multiple filter ranges.
- It has the Search for Filter ability.
- It displays the filter fields in 2 columns.

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## 12 Multiple Branches

If you have enabled multiple branches in SAP Business One, the multi-branch feature is visible and functional in Web Client.

The multi-branch option allows businesses that operate branches or multiple business units to record the activity of the various units in one database and generate reports per unit/branch. This obviates the need to maintain multiple databases, simplifies reporting and supports data consistency. For example:

- A department store can maintain separate units for furniture, housewares, clothing, books, cosmetics and so on.
- An exclusive jewelry brand operates four stores only, so the activity of the four branches is recorded to one database while referencing each transaction to the respective branch.

At this stage, the multi-branch function is available in the following usages:

- Assigning a branch when creating sales documents
- Analytics by branch
- Filtering in a marketing document list view
- Managing data ownership by branch

### Note

Data ownership by branches is enabled only when the company manages data ownership by branches (like the behavior in SAP Business One).

Complete documentation about multi-branch capability is available in the online help at:

<https://help.sap.com/viewer/68a2e87fb29941b5bf959a184d9c6727/10.0/en-US/50b1c1bc2752475c8fe052c33d15c28f.html>

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## 13 User-Defined Objects, Tables, and Fields

User-defined objects created in SAP Business One appear under the *User-Defined Objects* group in Web Client.

User-defined fields for headers of documents and master data can be displayed as columns in the table area of the respective list views and can be used as filters. In detailed view, UDFs appear on the *User-Defined Fields* tab. User-defined fields for row level appear in the grids of the respective detailed view.

At this stage, you cannot create new UDFs, UDTs, and UDOs from within Web Client, but if you add such elements in SAP Business One, they will be visible and functional through Web Client.





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