Web Client for SAP Business One
User Guide

THE BEST RUN SAP

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INTRODUCTION

This document guides you through the available features and functions in the Web client for SAP Business One. It is based on SAP Fiori design principles, on top of SAP Business One 10, version for SAP HANA.

Currently, the following localizations are supported:

Australia, Austria, Belgium, Canada, Costa Rica, Cyprus, Czech Republic, Denmark, Egypt, Finland, France, Germany, Greece, Guatemala, Hungary, Ireland, Israel, Italy, Lebanon, Netherlands, New Zealand, Norway, Oman, Poland, Portugal, Qatar, Saudi Arabia, Slovakia, South Afrika, Spain, Sweden, Switzerland, Turkey, United Arab Emirates, United Kingdom, and United States of America.

GLOSSARY

Term	Description
Web Client	The Web client for SAP Business One. Available on top of SAP Business One 10, version for SAP HANA; design based on SAP Fiori concept
SAP Business One	SAP Business One client
Home Page	The screen that appears once you log in to the Web client. Functions as the "desktop" of the Web client and can be customized by the user
Tile	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
App	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.
List View	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.
View	A set of filtering, grouping and sorting parameters applied to records in a list view. The 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 their preferences and set these views as private or public.
Detailed View	A form that displays and enables you to create a single record of a given object, for example, a sales order or item master data.
Quick View	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.
Overview Screen	A screen that provides multiple simultaneously filtered analytic views of business data where each analytic view is presented as an Analytic Card.
Analytic Card	A card that presents an analytic view. An Overview Screen comprises multiple Analytic Cards.
Analytic Chart	A screen that provides a chart presentation of a filtered analytic view of business data.

ACCESS & LOGIN

Access the 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 the 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 the Web client. However, once you log on to the Web client, the company database you choose and the login status in the Web client are relatively independent from the SAP Business One client. The significance of that is, from the Web client login screen, you can shift to a different company database in the Web client without impacting the current company database in the SAP Business One client. In turn, any change of company database in the SAP Business One client will not impact the opened Web client.

HOME PAGE STRUCTURE

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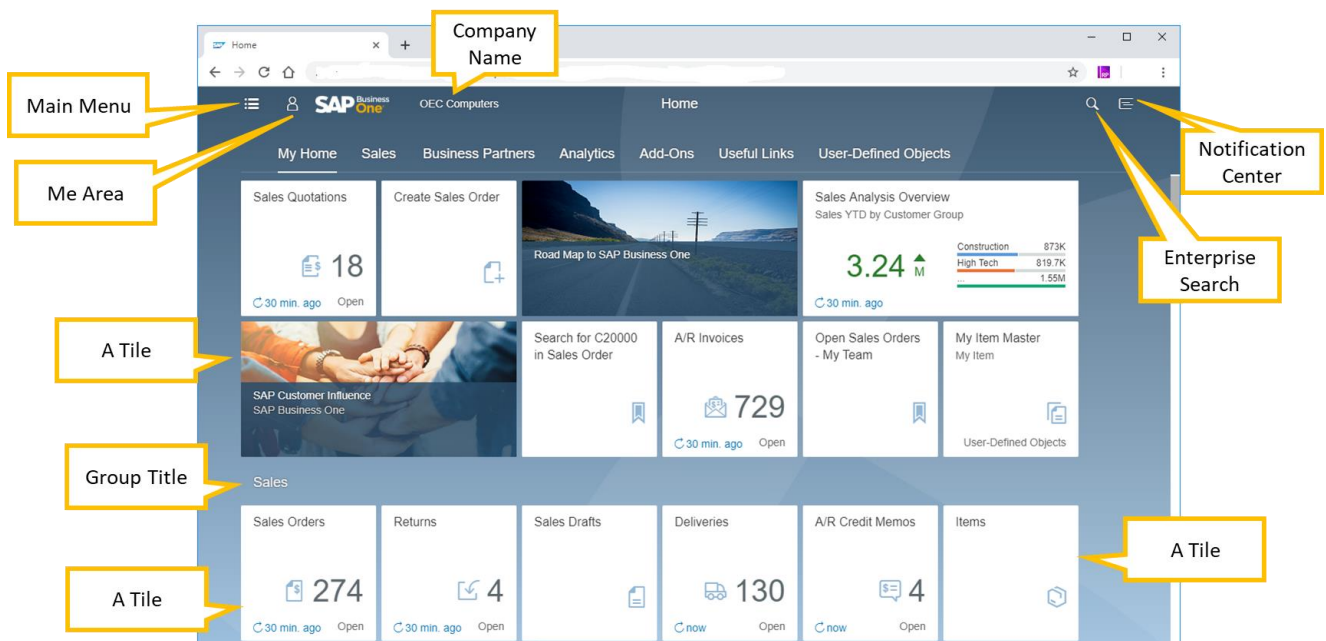
Note:

By default, the My Home category does not appear in the home page at the first login. However, it does appear as the first entry in the Main Menu (see below). Since no tiles have been added to it yet, clicking the entry will not display anything.

Once you add some tiles to My Home, the category will appear in the home page upon login. See *Editing the Home Page* below for information about adding tiles to the My Home category.

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.

Me Area

The Me Area lets you personalize and customize the Web client for your convenience. Click this icon 👤 to open the Me Area. The following options are available:

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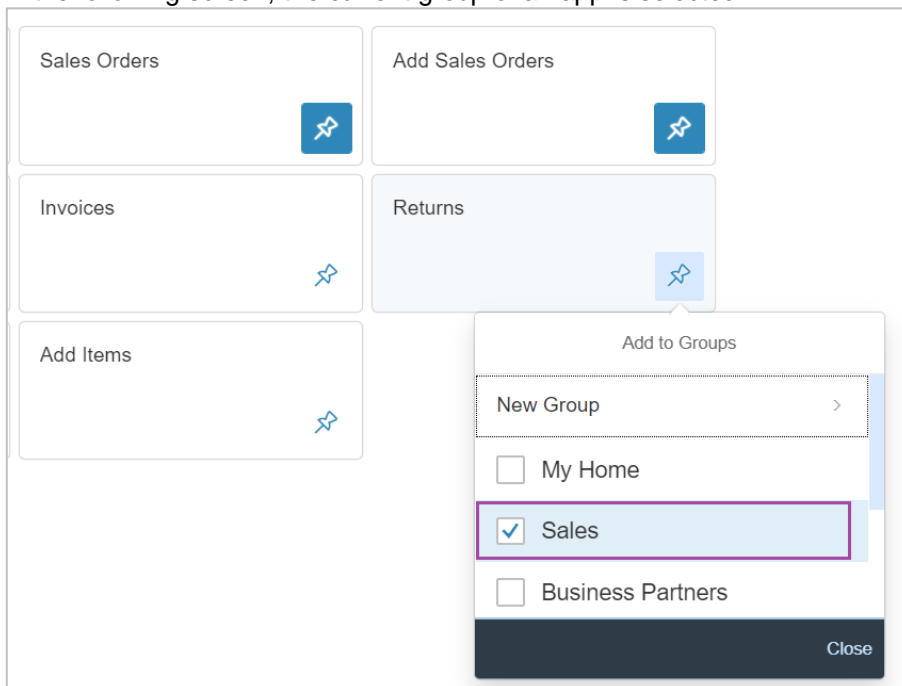
- To add the app to additional groups, select these groups.
- To remove the app from your home page, deselect the current group(s).
- To move the app to another group, select the required group, and deselect the current one.
- To assign the app to a new group, click the option *New Group*. Enter a name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

Settings

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

Appearance
In the THEME section, you can choose the user interface theme for the 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.

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 will be refreshed accordingly.

Language & Region
Here you can change the display language of the Web client. Note that by default, the display language of the Web client is identical to the display language in SAP Business One. Choosing another language in the Web client affects the display language in SAP Business One and vice versa.

User Activities
For your convenience, the 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 the Web client by choosing the *Clear* button, thereby emptying these lists.

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

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".

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 (**…**) 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.

Recent Activity & Frequently Used
These lists are generated automatically based on your activity. Clicking an entry in the list would open the respective app.

Enterprise Search
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 would enable you to further fine tune the specific filter and best fit it to your needs.

Search results are displayed as follows:

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.

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.

You can also send the URL of the search results to a colleague or other authorized user through e-mail.

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 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 the Me Area chapter.

APPS

The following types of apps are available:

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

Apps for Managing Records
Apps named by objects, such as Sales Orders, 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.

Working with List Views
Clicking the tile of an app for managing records opens a list view. The list view is divided into two main areas:
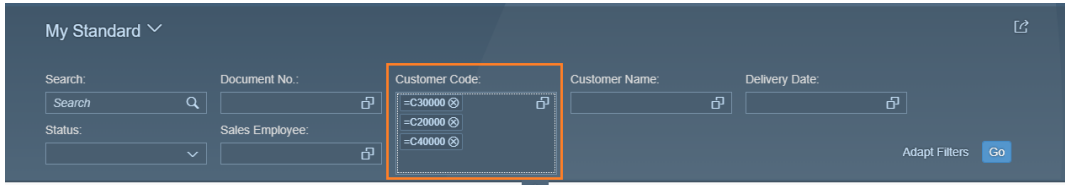- Filter Bar - where you can set filters to apply on the record to be displayed in the table area
- Table - lists the records of the given object according to the filters set in the filter bar

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. A view is a set of filters, sorting, grouping and display parameters. 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.

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

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, various tasks can be performed for the given object, for example, create, close, remove etc.

- View Settings icon ⚙ - opens the *View Settings* form, enabling you to:
    o Select the columns to be displayed and set their sequence using navigational arrows (*Columns* tab). To display selected columns only, click *Show Selected*.
    o 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.
    o 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: The filters you define here are applied to the data filtered by the filter bar, that is, this is a secondary filter.
    o 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:
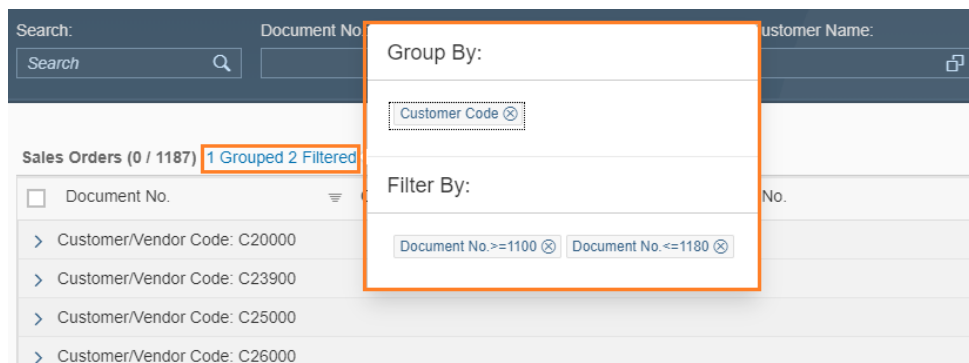
- Managing Views - you can save a set of filters defined in the filter bar, along with the adjustments made in the *View Settings* form, as a view, so you can use it in the future without having to redefine the filters.
  To do so:

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, click this icon ∨ to open the list of views, and then click *Manage*. 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 the 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
- 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

  o 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 is displayed to the left of the legend icon:
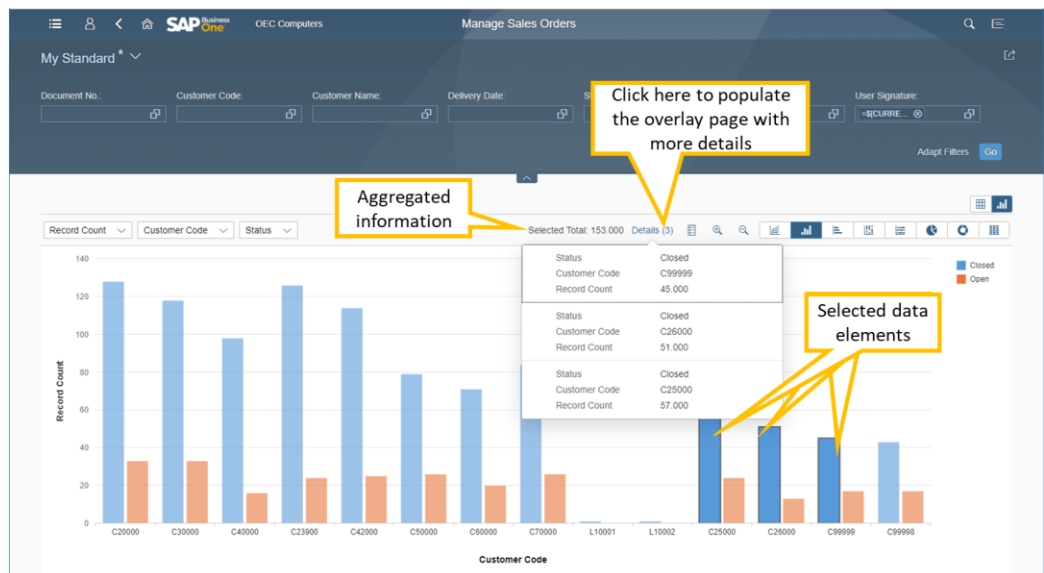
To hide the overlay page, click anywhere on the screen.

Apps for Creating Records

The tiles *Create Item*, *Create Sales Order*, *Create Business Partner*, and *Create Activity* open their respective object form in *Add* mode for creating a new record.

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 (like the behavior in SAP Business One)
- *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

Analytic Apps
See the Analytics chapter.

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 this button to set the status of the selected sales orders to *Closed*. A system message notifying you about success or failure appears afterwards.
  - *Cancel* - choose this button to cancel the selected sales orders.

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 this button to switch to edit mode
  - *New* - opens an empty form for creating a new sales order
  - *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 will be updated accordingly.
  - *New Activity* - opens a form for creating 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
  - *Preview* - click to view the sales order in the assigned print layout. Only Crystal layouts are supported.
  - The 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.

Creating Sales Orders
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 *Add Sales Orders* tile.
- Choose the *Add Sales Orders* entry from the main menu.

1. On the *General* tab, specify the mandatory fields: *Customer* (or lead) code and *Delivery Date*. The document header is updated accordingly. Enter additional details as needed.
2. 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.
    - To add another row, click the ➕ icon.
    - 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 in this sales order rows copied from the current document or different document.

   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 & weight calculation for the listed items. This information is available by clicking the option *Volume & Weight* in the ⌄ menu directly above the table on the left side.
3. On the *Logistics* tab you can review the ship to & bill to addresses populated according to the default settings of the business partner.

   On this tab you can 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.

   Additional settings related to the sales order are available under the *Preferences* section.
4. On the *Accounting* tab, you can set payment terms, cancellation and required dates.
5. The *User-Defined Fields* tab contains the UDFs related to the sales order, divided by categories.
6. 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.
7. You can save a sales order as a draft, which then appears in the *Sales Drafts* app.
    - Choose the *Save as Draft & New* button to save and open an empty form in *Create* mode, for creating another document or another draft.
    - Click the ⌄ icon next to this button and choose *Save as Draft and View* to save and display the draft you have just created.

Triggering 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 the Web client.

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

The workflow is as follows:
1. When creating or updating a document in the Web client, you are notified by the system that an approval is required.
2. You become the originator of the approval process and a sales order draft is created.
3. The authorizers review the draft and either approve or reject the request in the SAP Business One client.
4. To view the approval status and proceed with the process, click the *Approval Status* tile; the *Manage Docs in Approval Process* list view opens.

   In the list view you can filter, sort, group, and access the relevant sales order drafts.
5. Depending on the approval status, you can either generate a sales order (choose *Edit → Add & View*) or update the draft (click *Edit*) to trigger a new approval process.

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ADDITIONAL SALES DOCUMENTS

Sales Quotations, Deliveries, A/R Invoices, Returns, and A/R Credit Memos are supported as list views only. Clicking each tile opens the list view for the respective marketing document. Accessing the detailed view of these documents, as well as updating or creating new documents of these types, is not available.
In the list view you can:
- Filter, sort, and group the documents according to your preferences
- Manage views and save them as tiles
- Preview and print one or more documents
- Export the list to Excel
- Switch between table and chart views

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's 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

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 parsons and addresses are organized in tables. For each table you can change the displayed columns and their sequence by clicking the Settings icon at the left side above the relevant table.
- To add 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, you can simply choose the *Copy to Bill-to Address* or *Copy to Ship-to Address* buttons above the relevant table
- To delete 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*.

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.

1. 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 date range in which the BP is not active, select the *Inactive* checkbox.
2. On the *Contact Person* tab, enter the details of the BP contacts, and set the default contact person.
3. On the *Addresses* tab, enter the billing and shipping addresses:
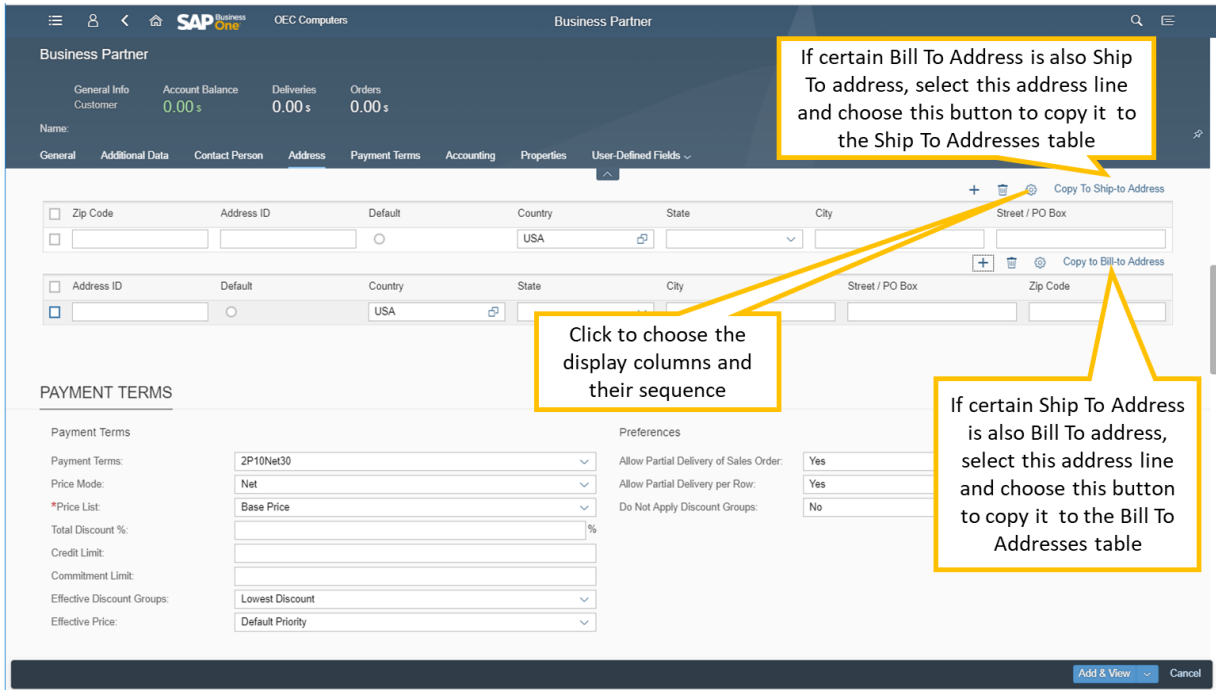
4. On the *Payment Terms* and *Accounting* tabs, enter the relevant details.
5. The *User Defined Fields* tab lists all the UDFs defined for business partner master data.
6. To add the new business partner to the company database, choose: *Add & View*, *Add & New*, or *Add & Back*.

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.

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.*
   - 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.

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.

Creating New Items
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.

1. 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.
2. On the *Logistics* tab, set the serial or batch numbers management method for the item and add barcodes, if used.
3. On the *Purchasing* and *Sales* tabs, enter relevant measurements.
4. On the *Inventory* tab, set weight, valuation method, and manage warehouses.
5. On the *Pricing* tab, you can define a price for the item for the relevant units of measure, pricing units, and price lists.
6. On the *User-Defined Fields* tab, you can enter relevant values for the listed UDFs.
7. To add the new item to the company database, choose the relevant button: *Add & View*, *Add & New*, or *Add & Back*.

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.

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*.

Creating New Activities
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.
1. 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.
2. On the *Scheduling* tab, set a date, time and location for the activity:
    - In the *Time* section, enter the 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.

3. To add the activity, choose the relevant button: *Add & View*, *Add & New*, or *Add & Back*.

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* - changes *Closed* drafts to *Open*
- *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. For closed drafts, the following actions are available:

- *Remove* - choose this button to delete the draft
- *Reopen* - changes the draft status from *Closed* to *Open*
- *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 opposed to other documents, when you open a draft with draft status *Open*, it appears in *Edit* 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.

ANALYTICS

The Web client provides built-in analytics capabilities and content. Under the *Analytics* group you will find the following Overview tiles and their corresponding Chart tiles. The analytic charts have been extended to include all the following:

- o Sales Analysis by Rows Overview
- o Sales Analysis by Rows Chart
- o Sales Analysis by Document Overview
- o Sales Analysis by Document Chart
- o Purchase Analysis by Rows Overview
- o Purchase Analysis by Rows Chart
- o Purchase Analysis by Document Overview
- o Purchase Analysis by Document Chart
- o Customer Balances Overview
- o Customer Balances Chart
- o Vendor Balances Overview
- o Vendor Balances Chart
- o Inventory Status Overview
- o Inventory Status Chart
- o Inventory Transactions Overview
- o Inventory Transactions Chart
- o Financial Analysis Overview
- o Financial Analysis Chart

Every Overview screen (and variant 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.

Overview Screen Designer

The Overview Screen Designer provides a flexible, user-configurable environment to create multiple relevant dashboard screens. It also supports 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. You can save the changed filters as views and link to home page tiles to enable those views to be opened directly from the home page.

The existing Overview Screen is designed to provide in-depth analysis of a single data area.

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.
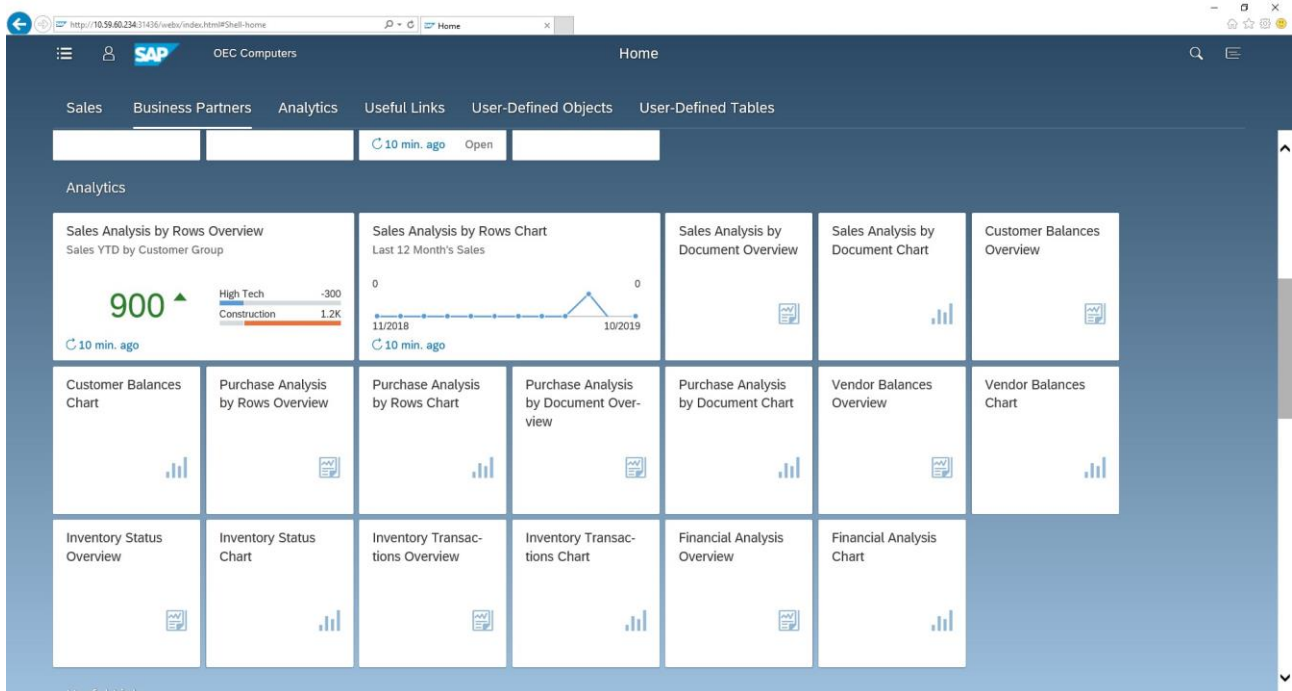
Click the Edit button to perform the following operations:

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.
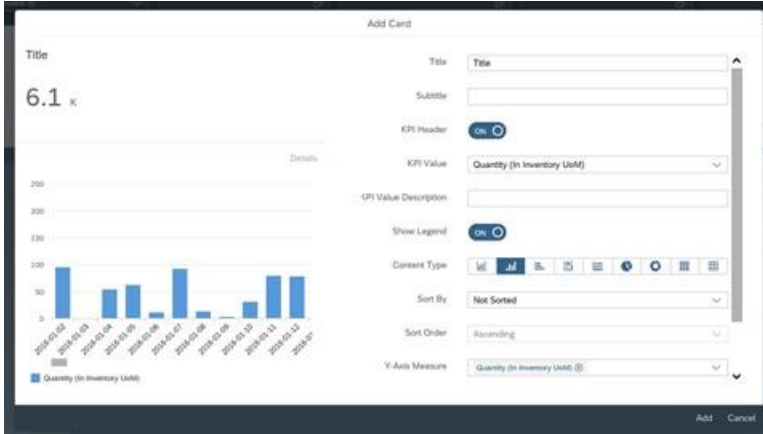
- Although neither the *Title* nor *Subtitle* field is mandatory, we highly recommend giving a title to the new card.
- The KPI Header toggle enables/disables the KPI header. If not enabled, no KPI value will be shown at the top of the card.
- The *KPI Value* field has a pull-down list box, allowing you to select 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			
Table					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. Click Save to save your changes.

Duplicating a card
After editing a card, click Save as to save the changes as a new card. The original card is not deleted or overwritten.

Reordering a card
Drag and drop a card in a new location on the page.

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

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

1. On the right side of the filter bar, click the *Adapt Filters* button.
2. 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.
   - Click the *Restore* button to reset the default status of the filter checkboxes. This affects only the visibility status of the filter, not the filter condition; restoring/changing the condition must be done manually.
   - Once 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 variant 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.

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:
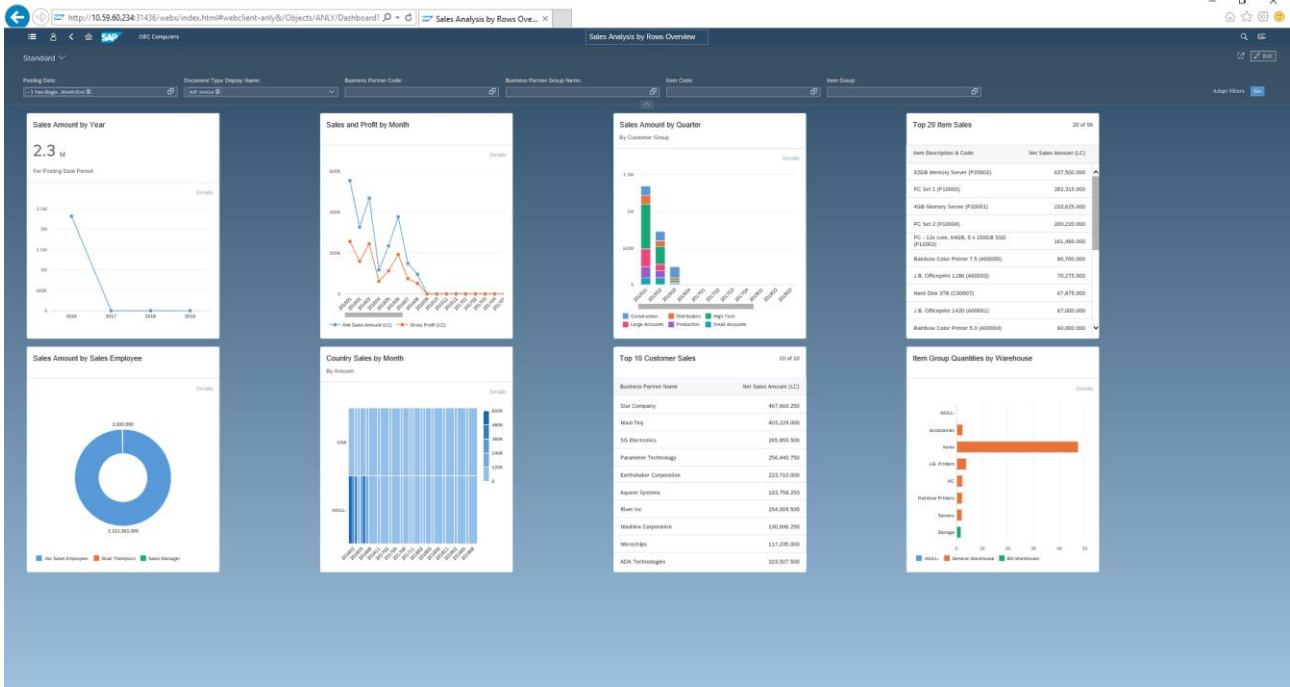

Each card represents a different sales report. The data in all the cards are determined by the filters created in the filter bar. Filters can be removed, added and/or changed to display the data you need to see.

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 report by clicking the header of the card

For example, to open the *Sales Amount by Quarter, By Customer Group* report, click the card's header:
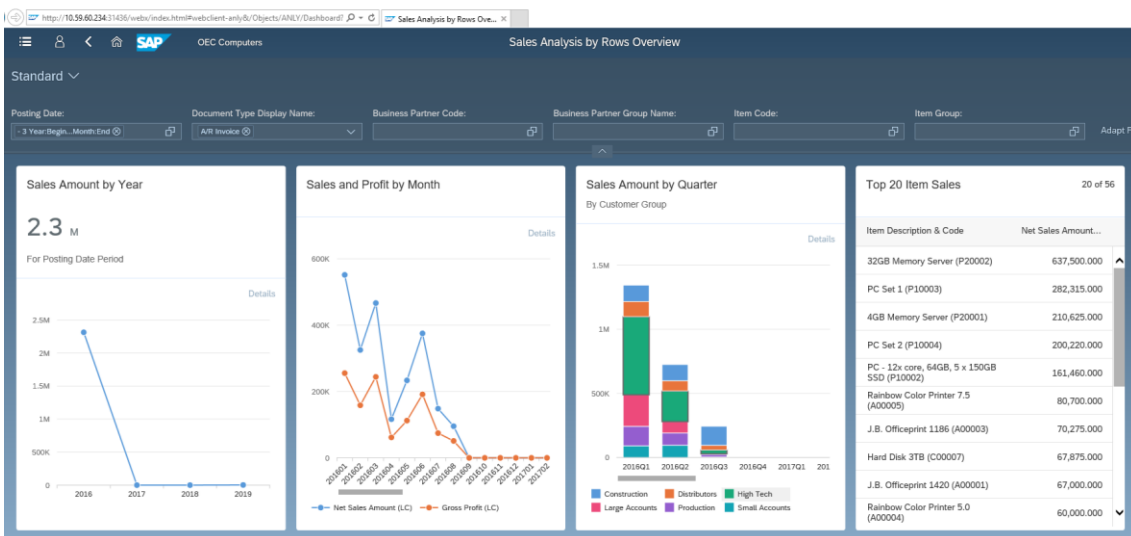
The detailed report appears:
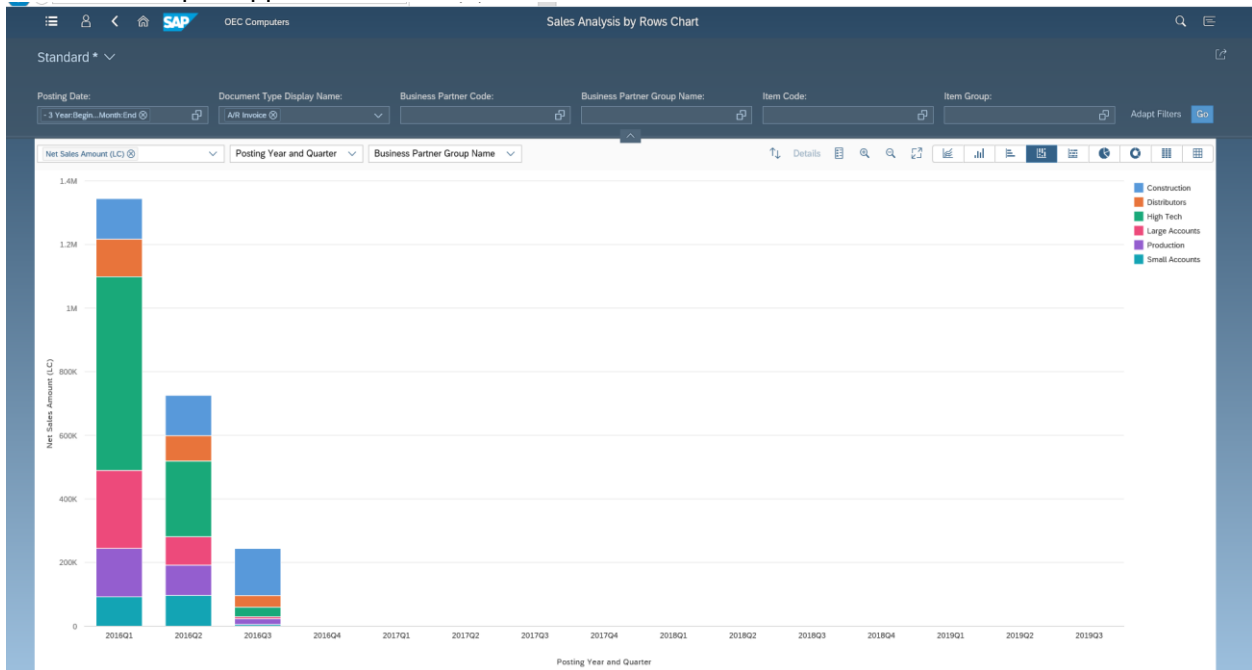
- Adapt the filters and click **Go** to update the report.
- In the first 3 filter fields, choose the dimensions for the X and Y axes and the data elements, respectively.
- Use the magnifying glass icons to zoom in and out.

As in the *Sales Analysis by Rows Overview* screen, you can define and save your own views for the specific report.

To maximize the report display, click the icon ⤢:
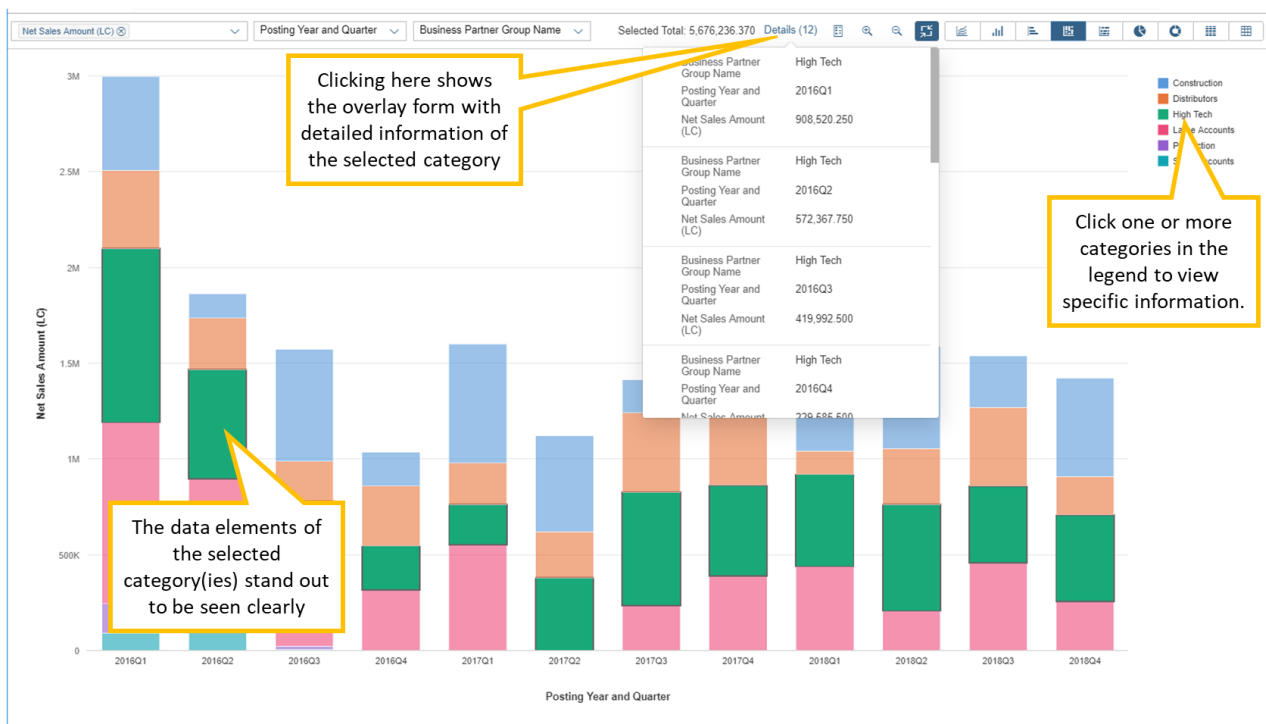
On the upper-right side of the report, you can switch between various chart types.

MULTIPLE BRANCHES

If you have enabled multiple branches in SAP Business One, the multi-branch feature is visible and functional in the 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 in a Sales Order detailed view

- Assigning a branch in an Activity detailed view

- 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

USER-DEFINED OBJECTS, TABLES, AND FIELDS
User-defined objects created in SAP Business One appear under the *User-Defined Objects* group in the 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 the Web client, but if you add such elements in SAP Business One, they will be visible and functional through the Web client.

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