



Unit: Administration Tools

Topic: Document Numbering and Printing

In this exercise, you will create a new user account so that you can assign a new document numbering series.

1-1 Document Numbering

1-1-1 Create a new user account

Choose *Administration* → *Setup* → *General* → *Users* and create a new user account.

| Field Name | Values |
|-------------------|---|
| <i>User Code</i> | marc |
| <i>User Name</i> | Marc Seller |
| <i>Superuser</i> | |
| <i>Department</i> | Sales |
| <i>Password</i> | <p>Deselect the <i>Change Password at Next Logon</i> checkbox.</p> <p>Set a password in accordance with the password policy and confirm the password.</p> <p>Password _____</p> <p>Choose Update.</p> |

Choose *Add*.

1-1-2 Define a New Document Numbering Series

A new sales employee, Marc Seller, needs a different numbering series for sales documents. You will implement this by creating a new document numbering series.

Choose *Administration* → *System Initialization* → *Document Numbering*.

Double-click the row for the *Sales Order* document to open the *Series – Setup* window.

In the **Primary** series row, right-mouse click and choose **Add Row** from the context menu.

Enter the following information:

| Series - Setup | Values |
|------------------|----------------|
| <i>Name</i> | Series2 |
| <i>First No.</i> | 2000 |

| | |
|---------------|--|
| | Note: If you have a Primary series defined in your system, you must enter 1999 in the Last No. field for the Primary series so that there are no gaps |
| <i>Prefix</i> | S2- Note: Prefix is optional. |
| <i>Group</i> | Choose 2 from the list. |

Choose **Update** to add the new series. Leave the window open.

Select the row for **Series2** then choose the **Set as Default** button.

Set the new series as default for the user **Marc Seller**.

Choose OK.

Choose **Update**.

Choose OK.

Choose **Update**. **Note:** You must update both windows for the new series to take effect.

1-1-3 Set General Authorization to the new series

Note: All new user accounts have by default no authorizations, unless the user is a super user. Therefore authorization must be granted to a document numbering series.

Choose *Administration* → *System Initialization* → *Authorizations* → *General Authorizations*.

Select the user **marc**.

Enter **Series** in the Find field.

Select *Full Authorization* for the **Series – Group No. 2**.

Note: Make sure that the user also has Full Authorization to the *Sales A/R* menu.

Choose **Update**.

1-1-4 Assign a license (temporary) to the new user

In order to test the new numbering series, you must assign a license to the user Marc Seller.

Choose *Administration* → *License* → *License Administration*.

Select the user **marc** and assign a license. If you only have one license, uncheck the license allocation for the user **manager**.

1-1-5 Test the new series

Open up a new copy of the SAP Business One client and login as **Marc Seller**.

Choose **Sales A/R**.

Create a sales order.

Select a customer and item.

You will see that the sales order document number is 2000 and the series is Series2.

Choose the *Print Preview* icon to preview the print layout. You will see that the prefix is visible in the layout in front of the document number.

Log out from this copy of SAP Business One.

Note: If you assigned your license to **marc**, remember to assign it back to the user **manager**.

2-1 Change a Document Menu Name

Choose *Administration* → *System Initialization* → *Document Numbering*.

Scroll to the right of the **Document Numbering – Setup** window.

Enter a new name for the Sales Order document in the *Change Menu Names* column.

Choose **Update**.

Choose OK.

3-1 Master Data Numbering

Choose *Administration* → *System Initialization* → *Document Numbering*.

Double-click the row for **Business Partners – Customers**.

Right-mouse click the first row and choose **Add Row**.

Enter the following information:

| Series - Setup | Values |
|-----------------------|--|
| <i>Name</i> | Series2 |
| <i>First No.</i> | 222222 |
| <i>Group</i> | Choose 2 from the list. |
| <i>Prefix</i> | C- Note: Prefix is optional. |
| <i>No. of Digits</i> | 6 Note: This field is mandatory. |

Choose **Update**.

Select the row for the new series and choose the **Set as Default** button.

Select *Set as default for current user*.

Choose OK.

Choose **Update**.

Choose OK.

Choose **Update**.

Note: You must update both windows for the new series to take effect.

Choose *Business Partners* → *Business Partner Master Data*.

Switch to *Add* mode.

You will see the new master data record with the code C-222222 inserted.

Enter the customer name then choose **Add**.

The next customer code is incremented.

4-1 Print layouts

Open an existing sales order.

Choose the **Layout Designer** icon from the icon toolbar.

The default print layout is set as **bold**.

Select a different print layout from the list and choose the **Set as Default** button.

In the Default Layout window, choose *Set as Default for Current User*.

Choose OK.

Choose **Update**.

From the top menu choose the *Print Preview* icon to preview the new layout for the document.

Choose the **Layout Designer** icon again and select another print layout.

Set as default for the current user.

Print preview the layout.
