

# Exercises



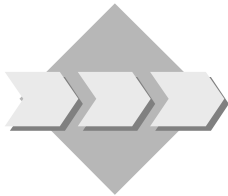
**Unit: SAP Business One Basics**

**Topic: Getting Started**



At the conclusion of this exercise, you will be able to:

- Log into SAP Business One
- Set display parameters
- Set up and use a cockpit
- Navigate through records
- View Online Help



In this exercise, you begin exploring SAP Business One. After logging into the system, you will set display parameters and set up shortcut keys.

You will set up a cockpit with frequently used transactions.

Please note that the exercises were written for the British localization with the language set to English (United States). Menu paths, default settings, and some data may vary based on the localization and language you use.

1-1 You want to get started with the SAP Business One.

1-1-1 Log on to the SAP Business One system and choose a database.

1-1-2 You would like to work with the SAP Business One system with the language and other display parameters which you prefer.

Choose the language and date format appropriate to your region.

1-2 You would like to set up some shortcut keys for frequently used transactions.

1-2-1 You already know that the transactions for sales orders, purchasing orders, and business partner maintenance are the transactions that you will use most often. Assign these transactions to the functions keys F3, F4, and F5.

<b>Field Name or Data Type</b>	<b>Values</b>
<i>Shortcut</i>	<b>F3</b>
<i>Module</i>	<b>Sales – A/R</b>
<i>Window</i>	<b>Sales Order</b>

<b>Field Name or Data Type</b>	<b>Values</b>
<i>Shortcut</i>	<b>F4</b>
<i>Module</i>	<b>Purchasing – A/P</b>
<i>Window</i>	<b>Purchase Order</b>

<b>Field Name or Data Type</b>	<b>Values</b>
<i>Shortcut</i>	<b>F5</b>
<i>Module</i>	<b>Business Partners</b>
<i>Window</i>	<b>Business Partner Master Data</b>

1-3 Personalize SAP Business One by setting up a cockpit with useful widgets.

1-3-1 Enable the cockpit for your company in the General Settings transaction.

1-3-2 Enable the cockpit for your user.

1-3-3 Review the options for user authorizations for widgets in the cockpit.

Open the Cockpit & Widget authorization area to see the levels at which you can control authorization.

1-3-4 Choose widgets for your cockpit.

Choose the following widgets to add to your cockpit. Drag each one to a position inside the cockpit.

<b>Widget Name</b>
<b>Open Documents</b>
<b>Messages and Alerts</b>
<b>Common Functions</b>
<b>Browser</b>

1-3-5 Define the content for the *Open Documents* widget.

Select the following document types and any additional types you wish.

Field Name or Data Type	Values
<i>Document</i>	<b>Sales Quotations</b>
<i>Document</i>	<b>Sales Orders</b>
<i>Document</i>	<b>Deliveries</b>
<i>Document</i>	<b>A/R Invoices</b>
<i>Document</i>	<b>Purchase Orders</b>

Click on one of the document types to view a list of open documents.

1-3-6 Define the content for the *Common Functions* widget.

Add the **Item Master Data** transaction.

Add the **Sales Quotation** transaction:

Feel free to add any additional transactions you would like.

1-3-7 Open the Item Master Data transaction from the *Common Functions* widget and navigate through item master data records using all four navigation icons.

Click on the link for *Item Master Data*.

Navigate to the first item using the **First Data Record** icon in the tool bar.

Use the **Next Record** icon to find the next record.

Choose the **Last Data Record** icon record to go to the last master data record.

Choose the **Previous Record** icon.

1-3-8 Use online help to find out more about this transaction.

Choose **F1** to get context sensitive help for the window.

Choose **Shift +F1** in the *Description* field to get information about it..

Close the **Help** and *Item Master Data* windows by clicking on the upper right corner when you are finished.

1-3-9 Define the content for the *Browser* widget. (Optional)

If you would like to change the website shown in the browser widget, enter your preferred URL in the settings.

