Welcome to the topic on Getting Started.
In this session, we will get started using SAP Business One.

After this session you will be able to log on to and navigate in SAP Business One. You will also be able to set personal settings.
In SAP Business One, a company is represented as a database.

When you log into SAP Business One, you choose the company to log into.

Why would a small business have more than one company? Perhaps the company has two legal entities within their business, a situation that requires maintaining separate databases.

Besides specifying the company, you enter a user and a password to log in.

Once you log in, the main menu opens. The menu arranges the functions of the individual applications in a tree structure.

The company name and the name of the current user display on the top left.

If you need to change companies while logged in, you can use the Choose Company transaction in the Administration menu.

The next time you log in, you will be directed to the same company database. If you wish to log into a different one, choose Change Company in the login window.
The SAP Business One menu bar displays at the top of the screen. The menu bar contains the Windows standard menu (File, Edit, Window, Help) as well as generic SAP Business One functions.

A row of toolbars displays under the menu bar. Each toolbar is a collection of icon buttons that grant you easy access to commonly-used functions. The functions represented by the buttons are also available in the menu bar.

Active functions appear in color, and inactive functions gray out.

This graphic shows only two of the toolbars available to you. You can choose which toolbars will be displayed or hidden. To hide or show a toolbar, right-click in the toolbar row and check or uncheck the appropriate toolbar.
Online help can be accessed several ways. The Context Help icon is found on the right edge of the toolbar. This icon will give you context-sensitive help about the particular screen you are on. Another way to access context-sensitive help is to press the F1 key.

- By highlighting a field and pressing Shift + F1, you can get Field Level Help.
- The System Messages Log displays up to the last 50 system messages that appeared on the application window for the current user since the last login. The window displays errors, warnings or information messages. This pane appears at the bottom part of SAP Business One application, but you can close it, move it, and re size it as required, like any other application window.
- A hyperlink to relevant help files may appear in the row. Click on it to read more detailed information about the message. When available, the system message will display an eight or nine digit unique identifier. You can use this ID as a search key in the online help.
There are two types of users: superusers and normal (or end) users.

- Superusers have access to everything, therefore, they typically view the full menu.
- End users are restricted to certain actions and menu items due to authorizations. Therefore, end users typically see a subset of the main menu tailored to their role.
- Generally a company will have a small number of superusers, with most users set up as end users.
All users can further customize the menu to show the modules and menu options they need.

Personalizing the main menu can be done in the Form Settings window.

In Form Settings, the “Visible” checkbox controls whether a module or menu item appears. If this box is checked, the menu item displays on the main menu. If this box is cleared, the menu item will not display.

An end user can select the Apply Authorization button to set the main menu to display only authorized modules and menu items. This makes using the system much more efficient and avoids frustration.

The Form Settings window is also available for other windows. For example, you can show or hide columns in a document using Form Settings.
Another option besides the menu is to activate personalized cockpits for users.

The cockpit enables easy navigation to frequent transactions.

Users can choose widgets and position them easily.

- Another option besides the menu is to activate personalized cockpits for users.
- The cockpit enables easy navigation for a user’s frequently used transactions.
- Users can choose their favorite widgets and position them where they like. Widgets are available for open documents, common transactions, messages and alerts. There are also browser widgets for displaying URLs.
There is a three step process to setting up a cockpit for a user.

1. First, you need to enable the cockpit for your company in the General Settings transaction under System Initialization in the Administration module.

2. Then once the cockpit is enabled for the company, a user can choose the menu item “Enable my Cockpit” in the Cockpit menu under Tools.

3. Lastly, the user chooses which widgets they would like to use from the widget gallery.

Note that dashboards require additional integration through the use of the B1i integration platform.
A company is represented as a database inside SAP Business One. When you log into SAP Business One, you choose the company to log into.

The SAP Business One menu bar displays at the top of the screen. Commonly-used menu bar functions are represented as icons in a toolbar.

There are two types of users: superusers and normal (end) users.

Form Settings allow you to display or hide menu items or fields in a window.

You can personalize SAP Business One by setting up cockpits for users. A cockpit enables easy navigation to a user’s frequently used transactions.
You have completed the topic for Getting Started.
Thank you for your time.