

Solutions



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.

Start SAP Business One by choosing **Start → SAP Business One** or by double clicking the SAP Business One icon on your desktop.

In the window *Welcome to SAP Business One*, press the *Choose Company* button. The *Choose Company* window opens. Choose the appropriate database as directed.

Enter the *User Code* and *Password* and choose *OK*.

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.

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

Choose the *Display* tab and enter your preferences.

Choose *OK* to save your settings.

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.

Choose *Tools* → *My Shortcuts* → *Customize*.

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

Choose *Allocate*.

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

Choose *Allocate*.

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

Choose *Allocate*.

Check the allocations you made in the *List* tab.

Choose *OK*.

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.

Choose *Administration* → *System Initialization* → *General Settings*

Choose the *Cockpit* tab.

Select the checkbox *Enable Cockpit at Company Level*.

Choose *Update*.

Acknowledge the system message with **OK**.

Choose **OK** again to close the window.

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

Choose **Tools** → **Cockpit** → **Enable My Cockpit**

Ensure that there is a checkmark by *Enable My Cockpit*.

Log off SAP Business One by choosing **File** → **Exit** from the menu bar.
Choose **Yes**.

Choose SAP Business One from the icon or start menu.

Enter your user ID and password. Choose **OK**.

Note that you do not have to enter the *Choose Company* window. The company you entered the last time is the default company.

Now you will see a tab and menu called *My Cockpit*.

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

Choose the menu tab **Modules**.

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

Choose your user name on the left.

In the Find field type **Coc** to find the Cockpit & Widget authorization area.

Since your user is a superuser, you will have full authorization.

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

For end users, you would need to either give full authorization for the cockpit or choose appropriate authorizations at the level of each widget.

Choose **Cancel** to close the window.

1-3-4 Choose widgets for your cockpit.

Choose the **My Cockpit** menu tab.

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

Widget Name
Open Documents
Messages and Alerts
Common Functions
Browser

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

Choose the icon in the top right corner of the **Open Documents** widget.

Choose **Settings**.

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

Field Name or Data Type	Values
<i>Document</i>	Sales Quotations
<i>Document</i>	Sales Orders
<i>Document</i>	Deliveries

<i>Document</i>	A/R Invoices
<i>Document</i>	Purchase Orders

Choose OK.

Now the **Open Documents** widget will display the number of open documents for each document type.

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.

Choose the **Modules** tab of the main menu to display the **Modules** menu.

Add the **Item Master Data** transaction:

Open the **Inventory** menu.

Drag the **Item Master Data** menu item and drop it in the widget.

Add the **Sales Quotation** transaction:

Open the **Sales – A/R** menu.

Drag the **Sales Quotation** menu item and drop it in the widget.

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, choose the icon in the top right corner of the **Browser** widget.

Choose **Settings**.

Enter a URL.

Then choose **OK**.