Starting right now: Your SAP Business One Cloud test system will be ready in 3 minutes>

SAP Business One 10.0
Web Client – Basics
October 2024

SBO1000-EN

Table of contents

Log on to the web client

1. Open the SAP Business One Cloud with your browser (preferably Mozilla Firefox and Google Chrome) and enter the URL:
   https://www.business-one.cloud/en/

2. You can now log in.

3. The portal is opened.
   There you can select the Web Client tile.

Log off from the web client

The web client is logged off via the User icon.
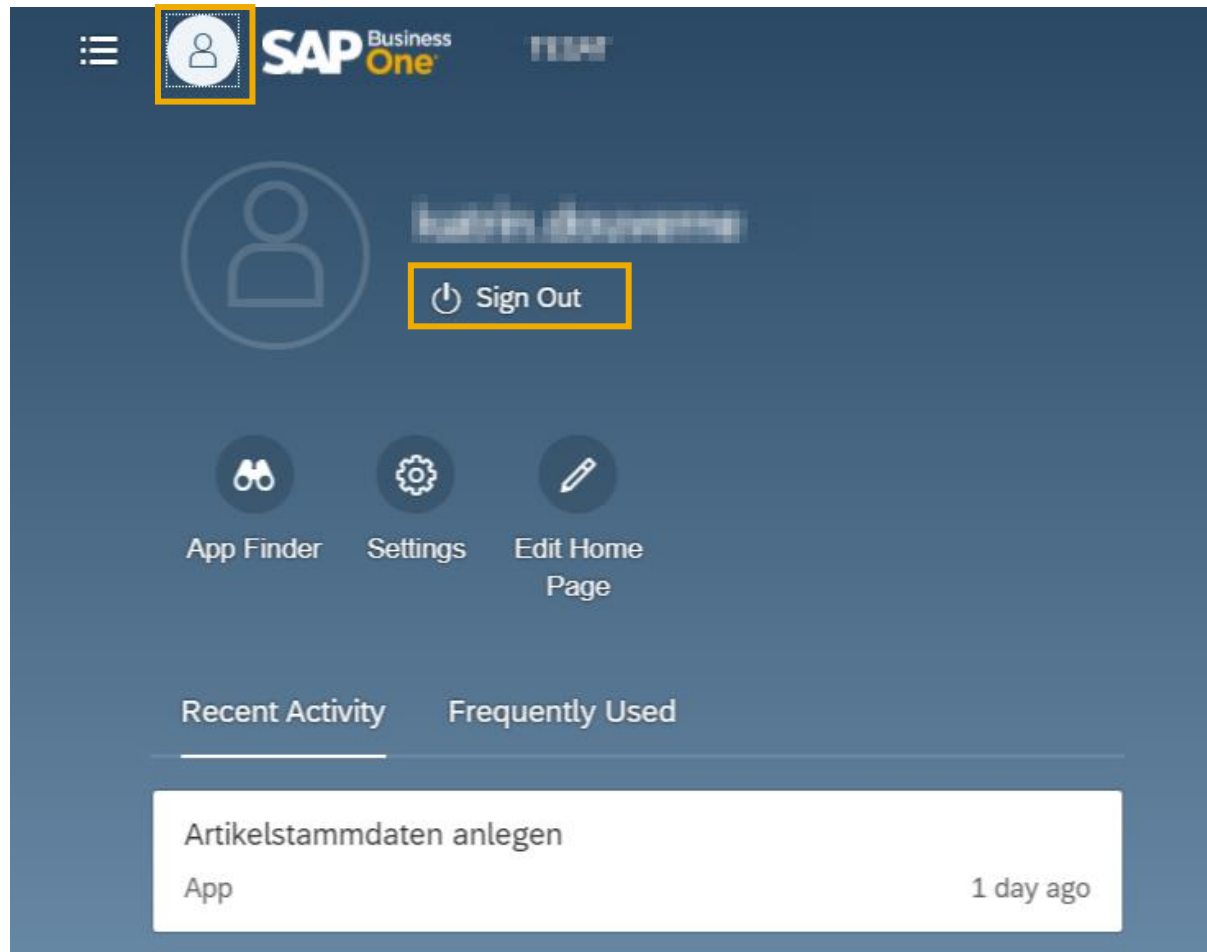
Home page

Home page

Me area

Company name

Enterprise Search

Notifications

TESAT

Home

My Home Sales Purchases Business Partners Analytics Useful Links User-Defined Tables

Sales Quotations
2
now   Open

Sales Orders
18
now   Open

Purchase Orders
10
now   Open

Create Sales Order

Sales Analysis by Rows Overview
Sales YTD by Customer Group
0
Einzelhandel   8.25K
Konstruktion   245.31K
...   3.3M
now

Business Partners

Road Map to SAP Business One

SAP Customer Influence
SAP Business One

Deliveries
6
now   Open

A/R Invoices
38
now   Open

Sales Drafts

User Guide

The number in the tile shows my open A/R invoices

Sales

Sales Quotations
2
now   Open

Create Sales Quota-tion

Sales Orders
18
now   Open

Create Sales Order

Sales Drafts

Docs in Approval Process
0
now

Deliveries
6
now   Open

Create Delivery

A/R Invoices
38
now   Open

Create A/R Invoice

Returns
0
now   Open

A/R Credit Memos
0
now   Open

Items

Create Item

38

These functions are not explained in this training module. Check corresponding training material for details.
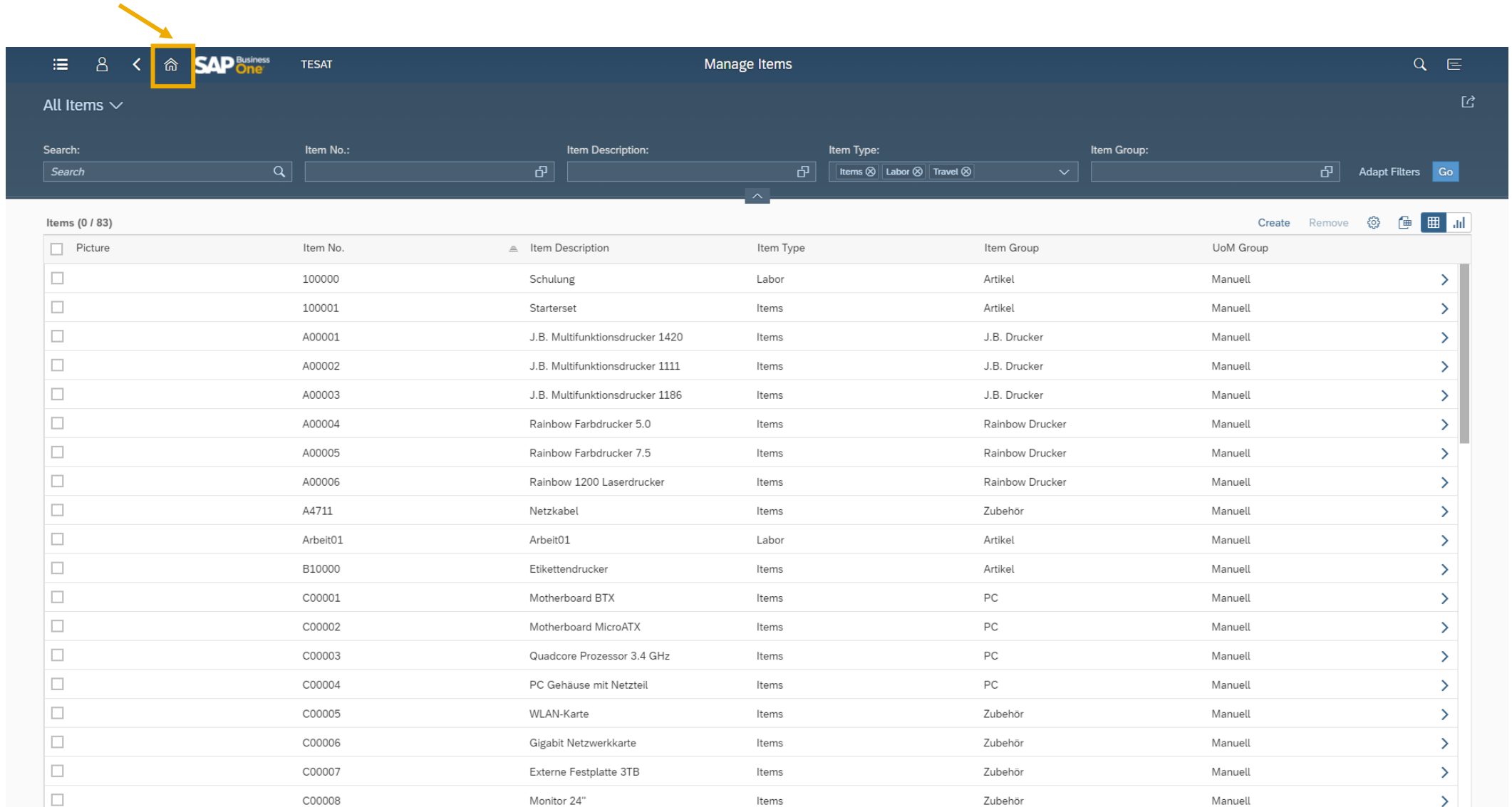
Functions are shown as tiles

Functions are assembled in groups (Sales, Purchasing, Business Partners, Analytics, Useful Links and Custom Tables)

In the top menu the corresponding function groups are shown and can be used for navigation

Go to the home page

If you are not on the home page, the home page can be called up via the house icon.

	Picture	Item No.	Item Description	Item Type	Item Group	UoM Group	
☐		100000	Schulung	Labor	Artikel	Manuell	>
☐		100001	Starterset	Items	Artikel	Manuell	>
☐		A00001	J.B. Multifunktionsdrucker 1420	Items	J.B. Drucker	Manuell	>
☐		A00002	J.B. Multifunktionsdrucker 1111	Items	J.B. Drucker	Manuell	>
☐		A00003	J.B. Multifunktionsdrucker 1186	Items	J.B. Drucker	Manuell	>
☐		A00004	Rainbow Farbdrucker 5.0	Items	Rainbow Drucker	Manuell	>
☐		A00005	Rainbow Farbdrucker 7.5	Items	Rainbow Drucker	Manuell	>
☐		A00006	Rainbow 1200 Laserdrucker	Items	Rainbow Drucker	Manuell	>
☐		A4711	Netzkabel	Items	Zubehör	Manuell	>
☐		Arbeit01	Arbeit01	Labor	Artikel	Manuell	>
☐		B10000	Etikettendrucker	Items	Artikel	Manuell	>
☐		C00001	Motherboard BTX	Items	PC	Manuell	>
☐		C00002	Motherboard MicroATX	Items	PC	Manuell	>
☐		C00003	Quadcore Prozessor 3.4 GHz	Items	PC	Manuell	>
☐		C00004	PC Gehäuse mit Netzteil	Items	PC	Manuell	>
☐		C00005	WLAN-Karte	Items	Zubehör	Manuell	>
☐		C00006	Gigabit Netzwerkkarte	Items	Zubehör	Manuell	>
☐		C00007	Externe Festplatte 3TB	Items	Zubehör	Manuell	>
☐		C00008	Monitor 24''	Items	Zubehör	Manuell	>

Edit home page: Add tiles, assign and remove groups

1. All available functions (apps) are available through the app finder (use the user icon to navigate to the app finder)

2. Functions with a white pin are not pinned to your home page and can be added to the home page by clicking on the pin.
   When you click on the pin, the function can also be assigned to one or more groups.

3. Functions with a dark blue pin are already included on your home page and can be removed from the start screen by clicking on the pin.

Edit home page: Structure existing tiles

1. The "Edit home page" function is accessed from the Me area.

The following options are offered:

2. Tiles can be moved within a group or from group to group using drag and drop.

3. Tiles can be deleted from the start page.

4. New groups can be created.

5. Existing groups can be hidden or deleted.
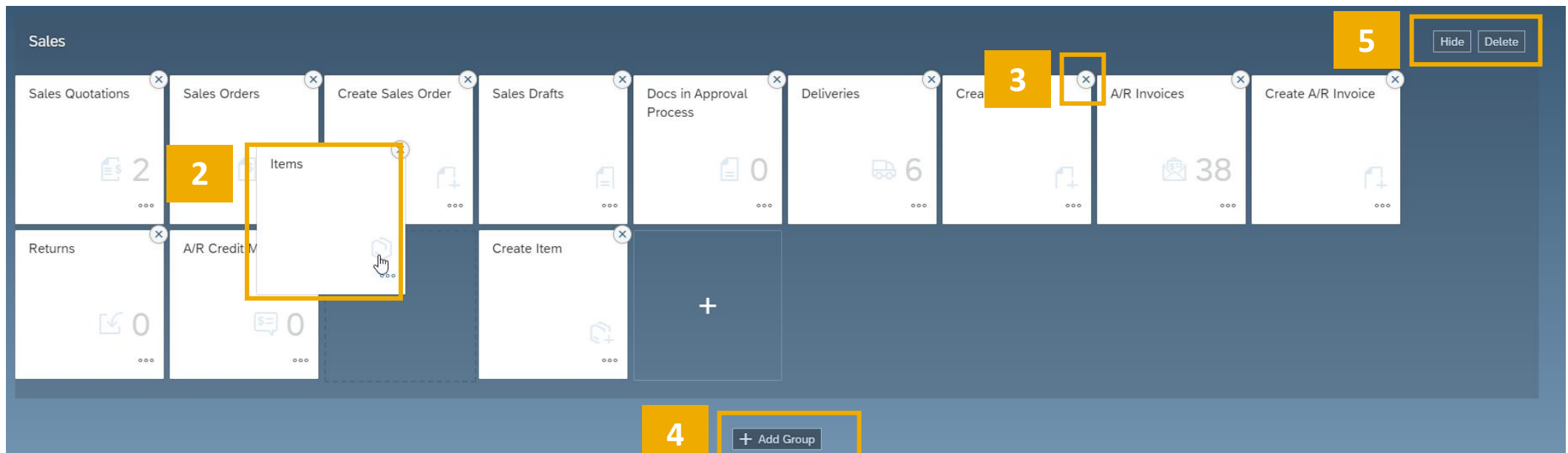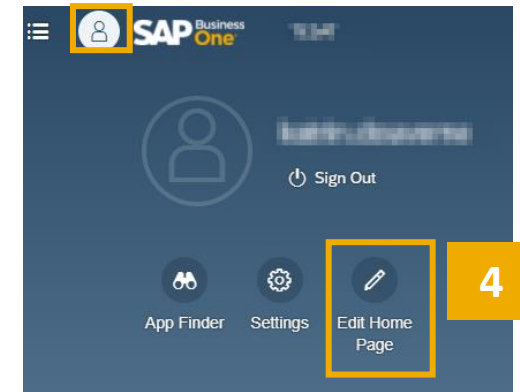
Maintain settings

The settings are called using the User icon. The users can maintain the following functions for themselves:

1. Appearance: You can choose between 3 different interfaces in the Theme tab. The size and spacing of the controls as well as the choice of animation can be determined in the Display Settings tab.

2. Home Page: The home page shows your tiles and links grouped together. You can choose whether you want to display all groups on one page or one group at once. The single group display may be more suitable for groups with many apps.

3. Language & Region: The language and the time format are defined here.

4. User Activities: In the Me area, the Web Client shows a dynamic list of the 30 most recently used apps and the 30 most frequently used apps. The history can be deleted here.

5. Notifications: Activity reminders can be displayed. You can de/activate functionality here. You can define if the corresponding information should be displayed on the home page and and how many days the information may go back.

6. General settings: It is determined whether a quick view should be displayed. For many functions there are golden arrows that enable the user to e.g. jump from the customer order to the business partner master data. This function is very helpful and informative in practice.
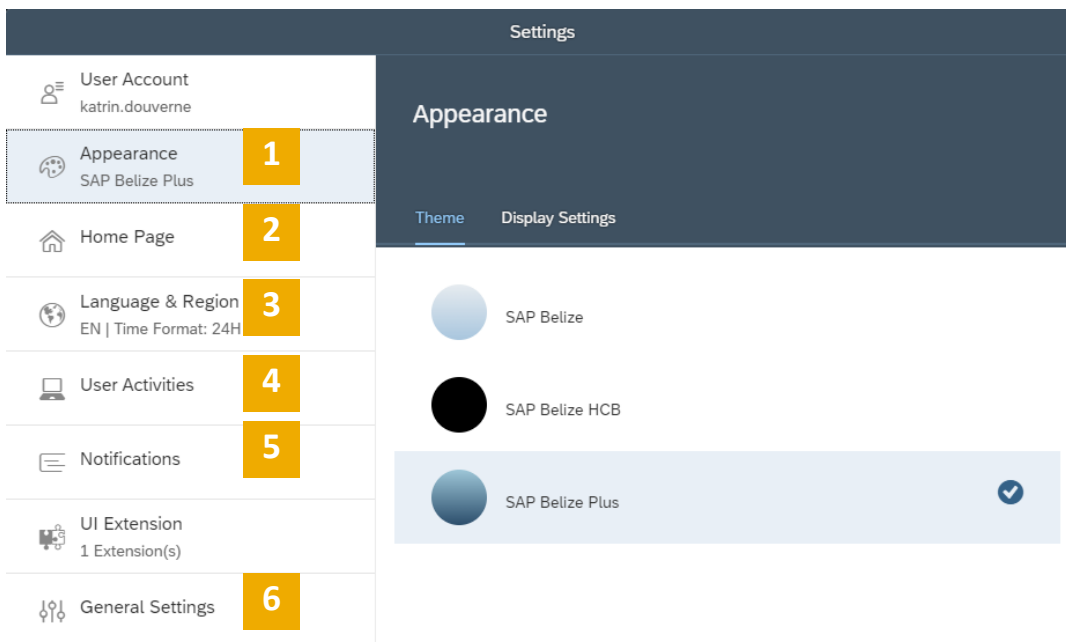
Recently used / frequently used

The history of the most recently used functions as well as the most frequently used functions can be viewed in the Me area.
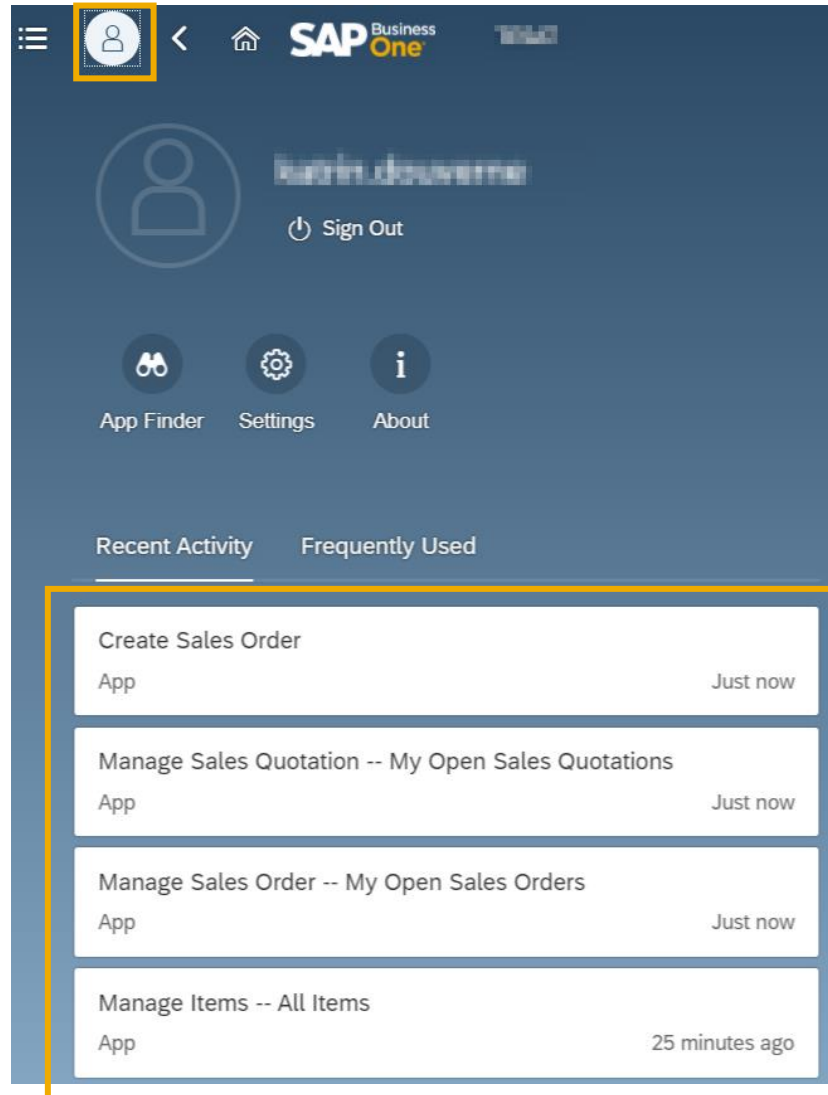
Call functions

1. Apps can be accessed using the tiles on the home page or
2. the main menu can be used.
3. Hidden function can be found using the search function in the main menu or
4. using the enterprise search.

Enterprise Search (1)

Enterprise Search is the intelligent search function of SAP Business One. You can search for:

1. Functions (search example: "Invoice"): As a result, all suitable functions are displayed.

2. Data (search example: customer name (2a), document number (2b) or invoice amount (2b)): The result is the business partner master or article master and all processes associated with the search term.

If the search term is regularly used, it can be placed as a tile on the start page.

If the data available in SAP Business One is searched for a term, the associated master sheets and processes are displayed. You can use the filter to get to the result quickly.

Enterprise Search (2)

The Enterprise Search is the intelligent search function of SAP Business One. It can be searched for:

1. Functions (search example: "Article"): All matching functions are displayed as a result.

2. Data (search example: customer name (2a), document number (2b) or invoice amount (2b)): The result is the business partner master or article master and all processes associated with the search term. You can use the filter to get to the result quickly.
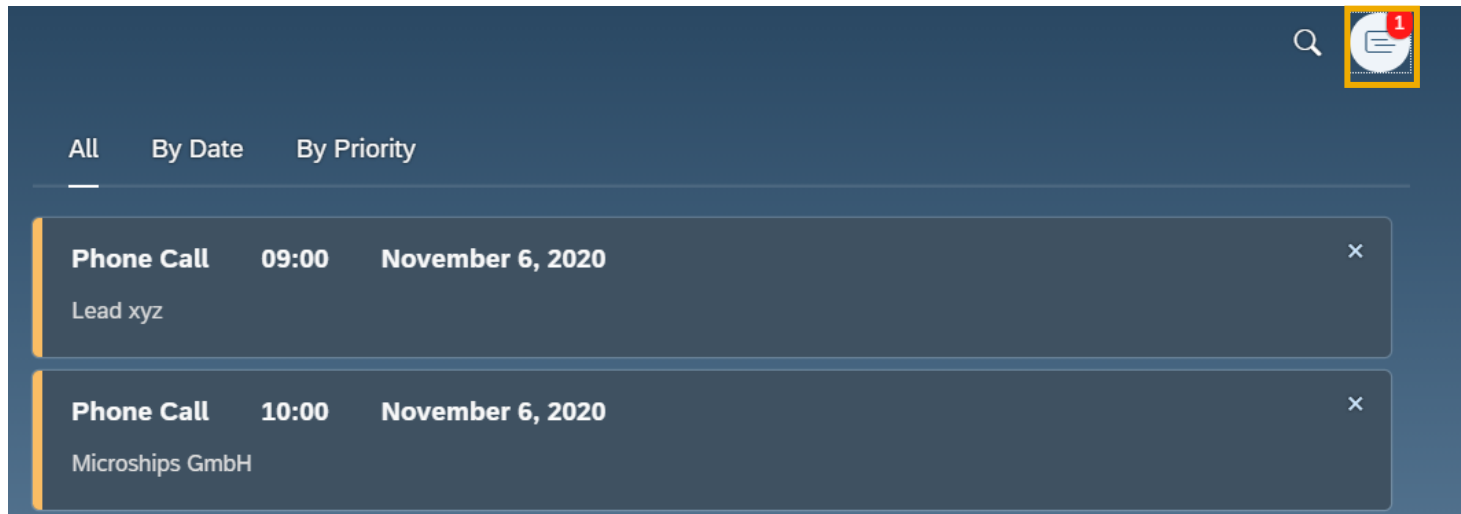

If the data available in SAP Business One is searched for a term, the associated master sheets and processes are displayed. You can use the filter to get to the result quickly. In this example a number is searched for, master data sheets are now displayed in which the number is used, document numbers, reference numbers and invoice amounts that match the search number are also displayed.
By clicking on the filter, the filter can be set on a more detailed level. In the case of an outgoing invoice, for example, it can be limited to:
Contact person, BP name, posting date, due date, status, document date, sales representative.

Notifications

Here you can view a list of activity notifications, including notifications about approval processes for the author of an approval process (currently only supported for customer orders), and delete all irrelevant notifications (X). The "By Date" tab shows the notifications grouped by date. On the "By Priority" tab, activity notifications appear by priority: high (red) first, followed by normal (yellow) and low (green) priority. By clicking on an entry, the corresponding activity is opened.
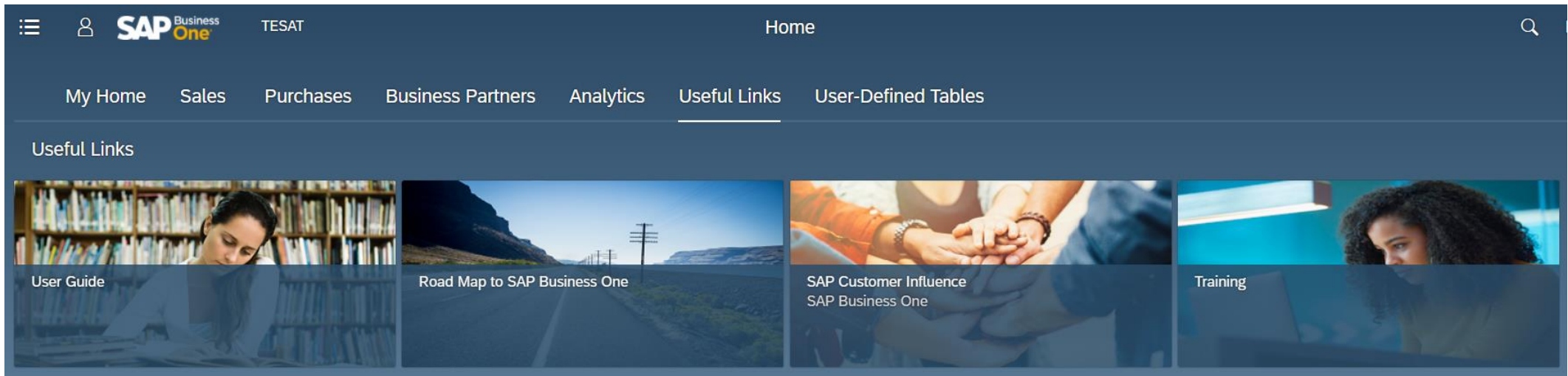
Useful links

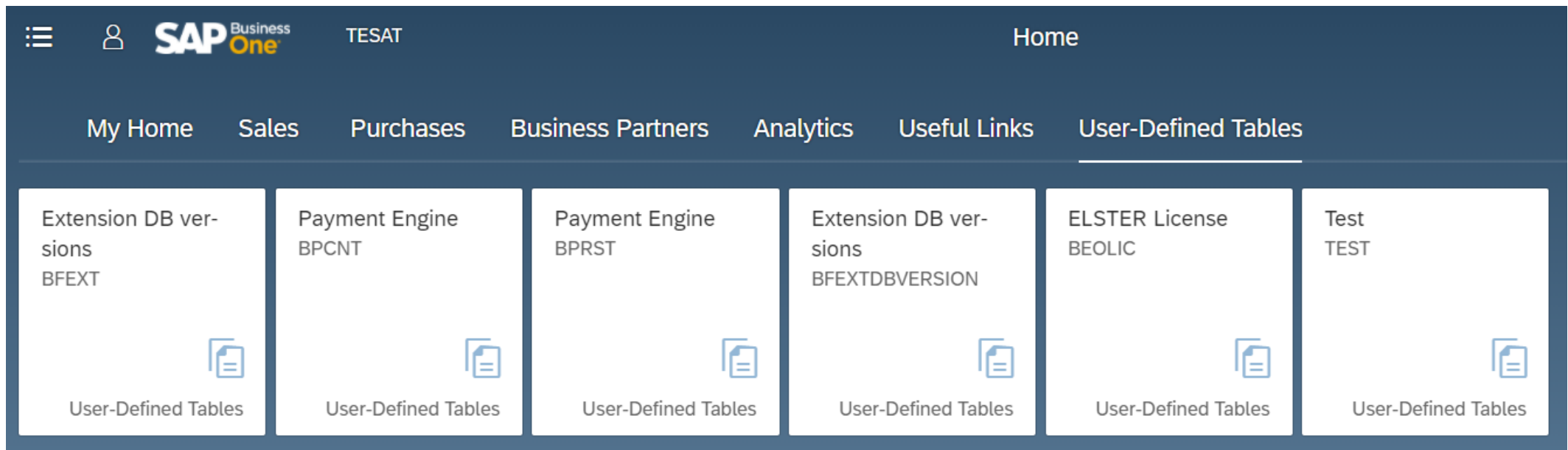The following external functions are visible as a tile:

- User guide

- Roadmap for SAP Business One:
  After registering with your S-User, you can look up which functions are planned for the web client in the future

- SAP Customer Influence:
  After logging in with your S-User, you can submit suggestions for improvement for SAP Business One and vote for suggestions that other users have already submitted

- Training
  Videos about the Web Client

User-defined tables

List of add-ons that are connected to the current SAP Business One system.

Disclaimer of liability

The information in this publication was compiled from data that were assumed to be correct; however, we do not assume any liability or guarantee for the correctness and completeness of the information.

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conesprit GmbH
Eduard-Breuninger-Straße 6/1
71522 Backnang
conesprit.de
business-one-consulting.com

Contact person
Katrin Douverne
Email: katrin.douverne@conesprit.de
Tel.: +49 7191 18 70 190
Fax: +49 7191 18 70 191