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SAP Business One 10.0
Web Client – Processes
October 2024

SBO1004-EN

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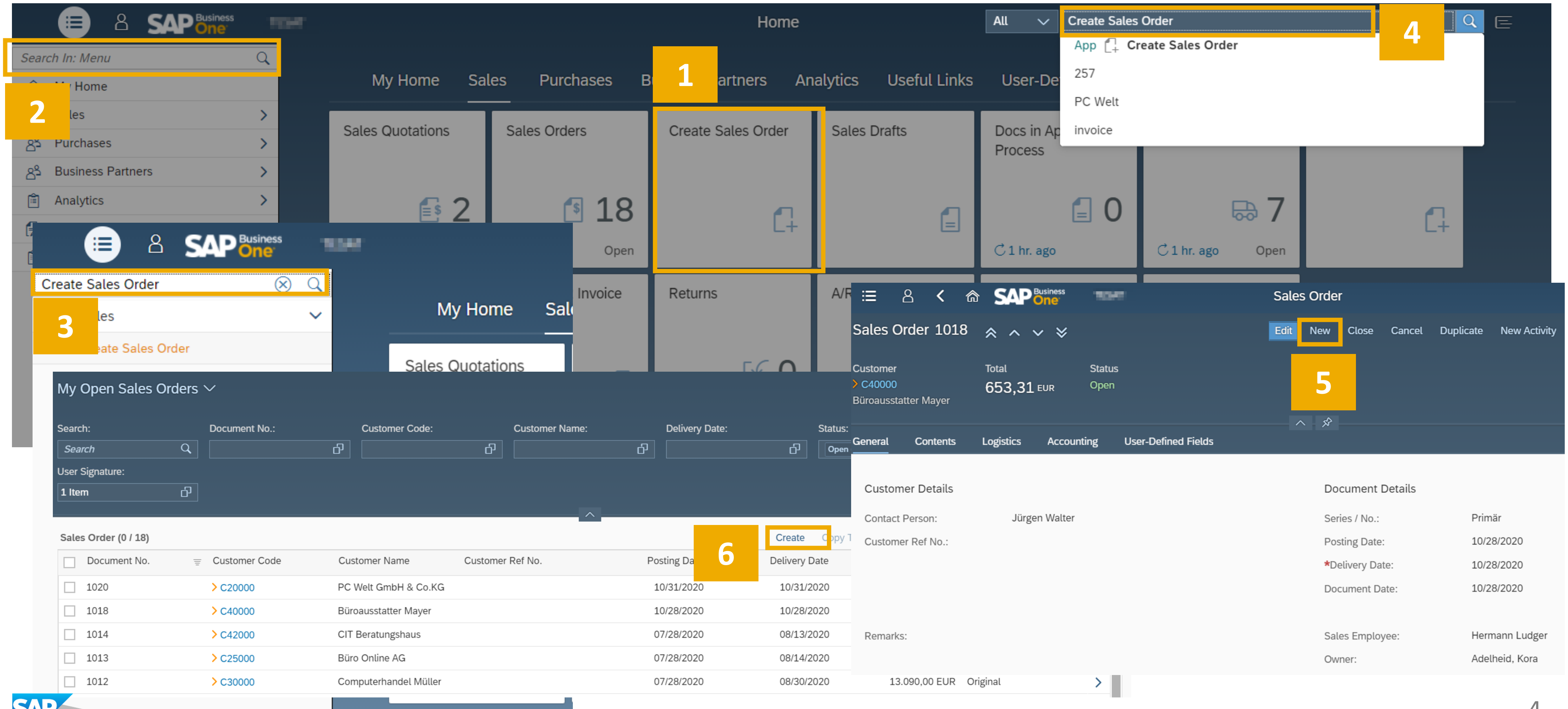
Create documents

There are several ways to create a document:

1. **Create new document**
   Open the dialog for the new document to be created and enter contents. Each document can be individually created without any prior document. E.g. an invoice does not require a sales order document. You can start directly creating an invoice.
2. **Function "Copy To“**
   Open any reference document and copy its contents to a new document using the "Copy to" function. The contents are copied.
3. **Function "Copy From“**
   Open a blank document, enter the customer or vendor code, and use the "Copy from" function to find the preceding document(s) from which you want to copy. This method takes a longer than "Copy to", but contents from several preceding documents can be copied. This procedure supports a fast creation of collective invoices.
4. **Duplicate document for the same business partner**
   Open the document to be duplicated and use the "Duplicate" function to copy its contents together with the BP into a new document.
5. **Duplicate document for another business partner**
   Open the document to be duplicated and copy its contents to a new document without the BP using the "Duplicate" function.

Open “Create document” dialog

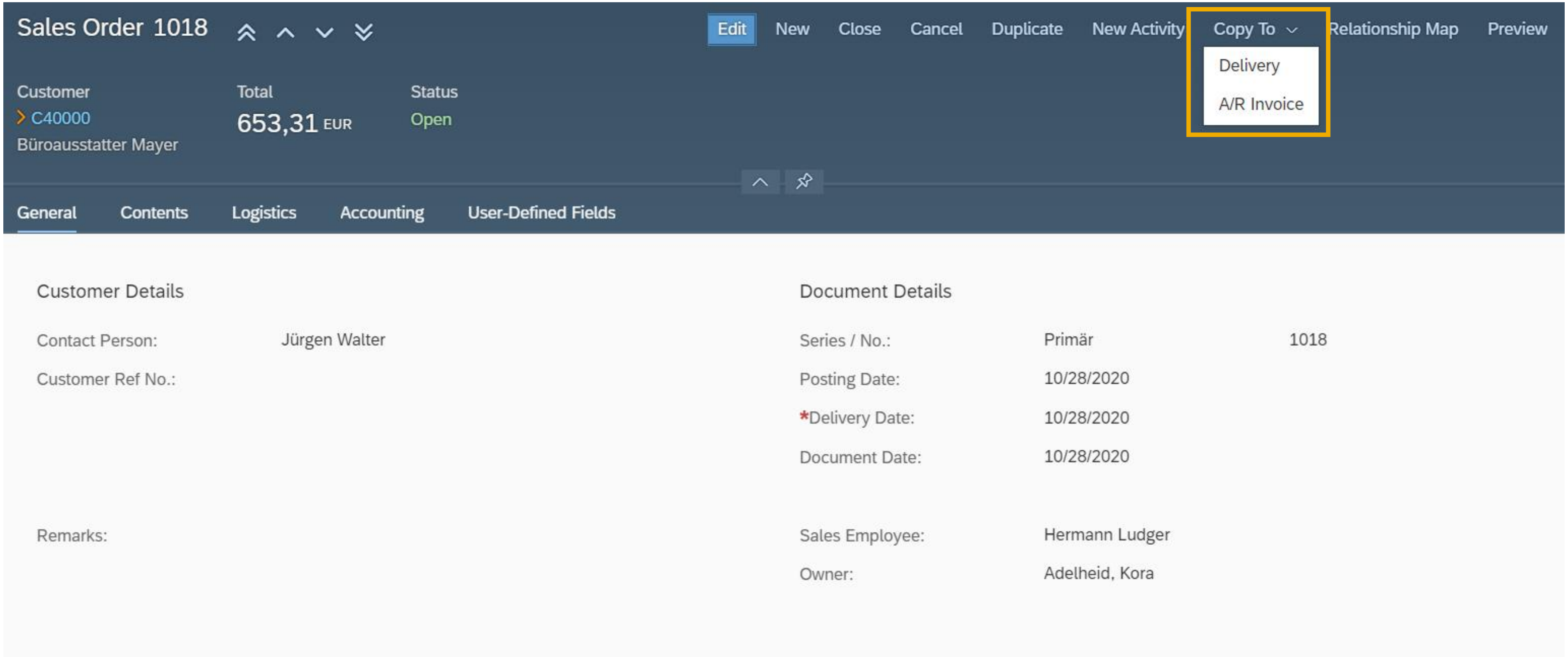
1. The dialog "Create document" (in this example the dialog "Create Sales Order") can be opened with the tile on the start page or
2. the main menu or
3. with the search function in the main menu or
4. can be accessed via the Enterprise Search
5. In an existing document there is the option to open a new document: New
6. From a document list there is the option to create a new document: Create



Copy To

Call the preceding document and copy its contents to a new subsequent document using the "Copy To" function. The contents are copied 1:1.

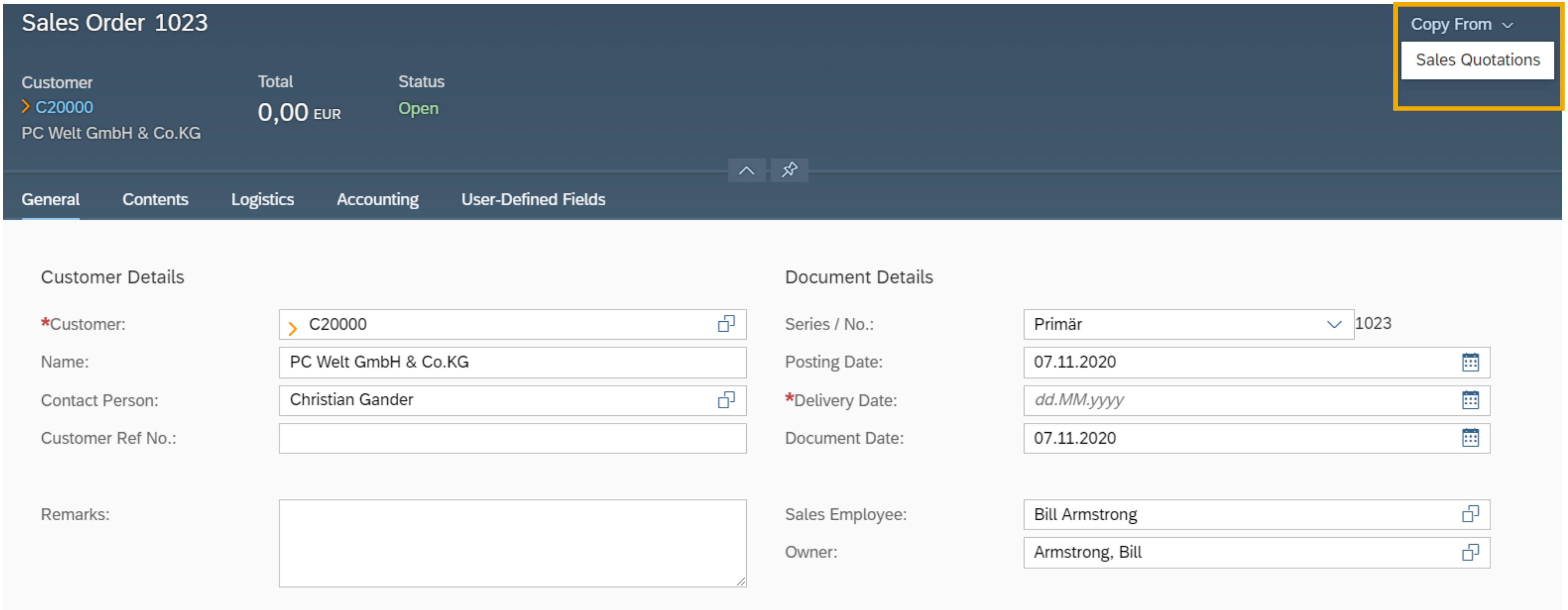
E.g. sales order document. Open existing sales orders with the sales orders tile on the start page. Open the document in question and use function “Copy To” to copy the contents into a subsequent document (delivery or A/R invoice).



Copy From

Open a new document and transfer the contents of one or more preceding documents to a new document using the "Copy From" function.

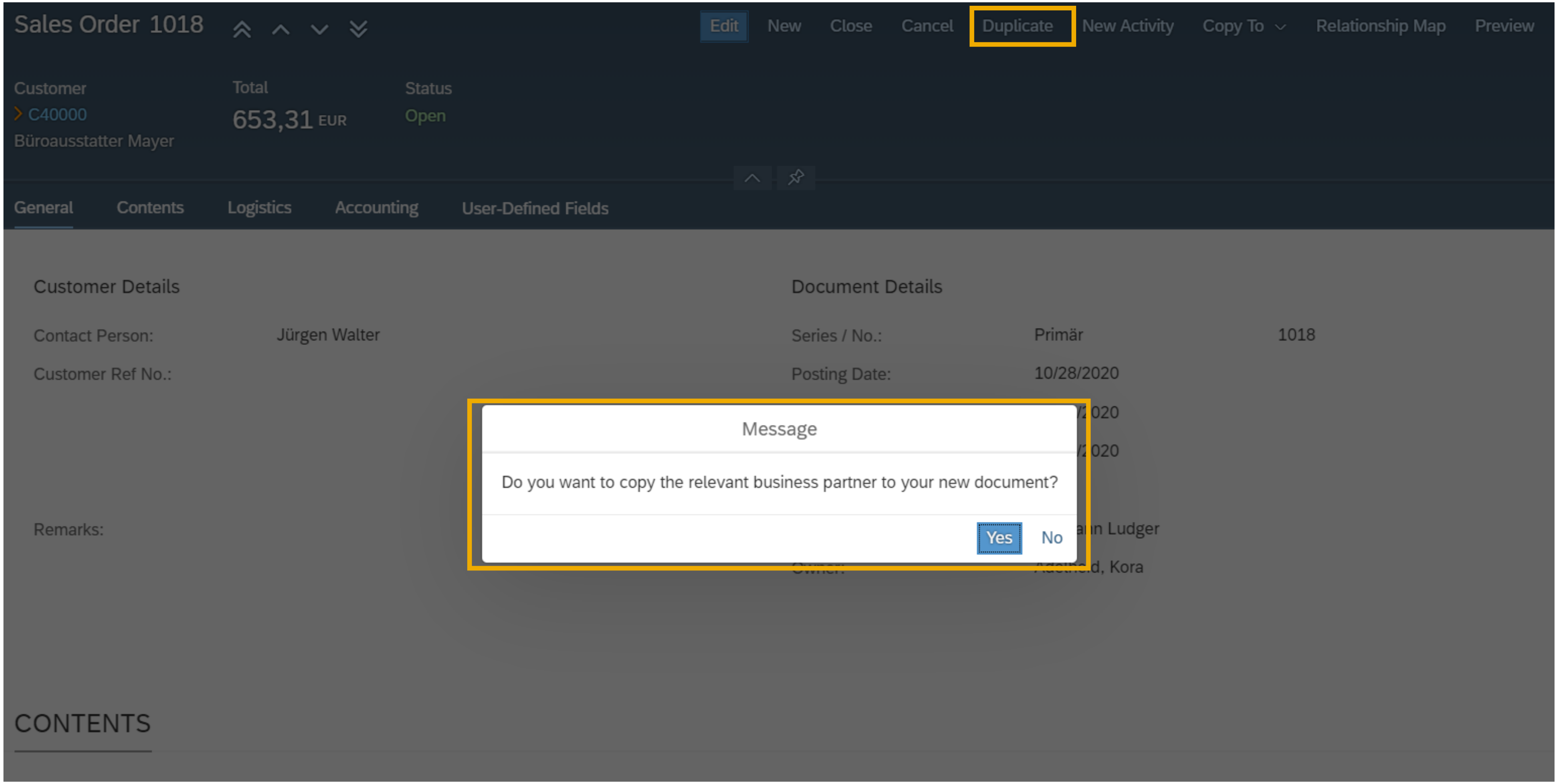
Example: Sales Order document. A new sales order can be created using the Sales orders tile on the start page. After the new sales order is opened and a customer is selected, the "Copy From" function is made visible. The contents of one or more preceding documents can now be copied.



Duplicate

Open the document to be duplicated and copy its contents to a new document using the "Duplicate" function.

Example: Sales Order document. Open existing sales orders using the Sales orders tile on the start page. Once the document in question is opened, the contents can be transferred to a new sales order using the "Duplicate" function. There are two options: The document can be copied with all contents, including the existing business partner, or, alternatively, all contents except the business partner can be copied.



Integrated financial accounting – Change documents/close documents

SAP Business One has an integrated financial accounting. This means that when documents are created, the corresponding journal entries are automatically inserted. For this reason, posting-relevant information in documents cannot be changed after the document has been added. Quotations and sales orders do not insert journal entries. They can be modified until they are closed. A document is considered closed when it has been cancelled or when it has been transferred to a subsequent document using the "Copy To" or "Copy From" function. The following table shows the possibilities to modify the different sales documents.

Sales documents	Quotation	Sales order	Delivery	A/R Returns	A/R Invoices	A/R Credit Memos
Can the document be changed again after it has been added?	Yes, until it is closed	Yes, until it is closed	No, because there is a journal entry in the background	No, because there is a journal entry in the background	No, because there is a journal entry in the background	No, because there is a journal entry in the background
How can the document be closed?	Sales order with the same or a higher quantity / cancellation	Delivery with the same or a higher quantity / cancellation	A/R invoice with the same quantity / returns in the same quantity or combination of A/R invoice and return	-	A/R credit memo with same quantity / incoming payment or combination of both	-

Create sales order – General

Using the field **customer** a customer can be selected from the business partner master

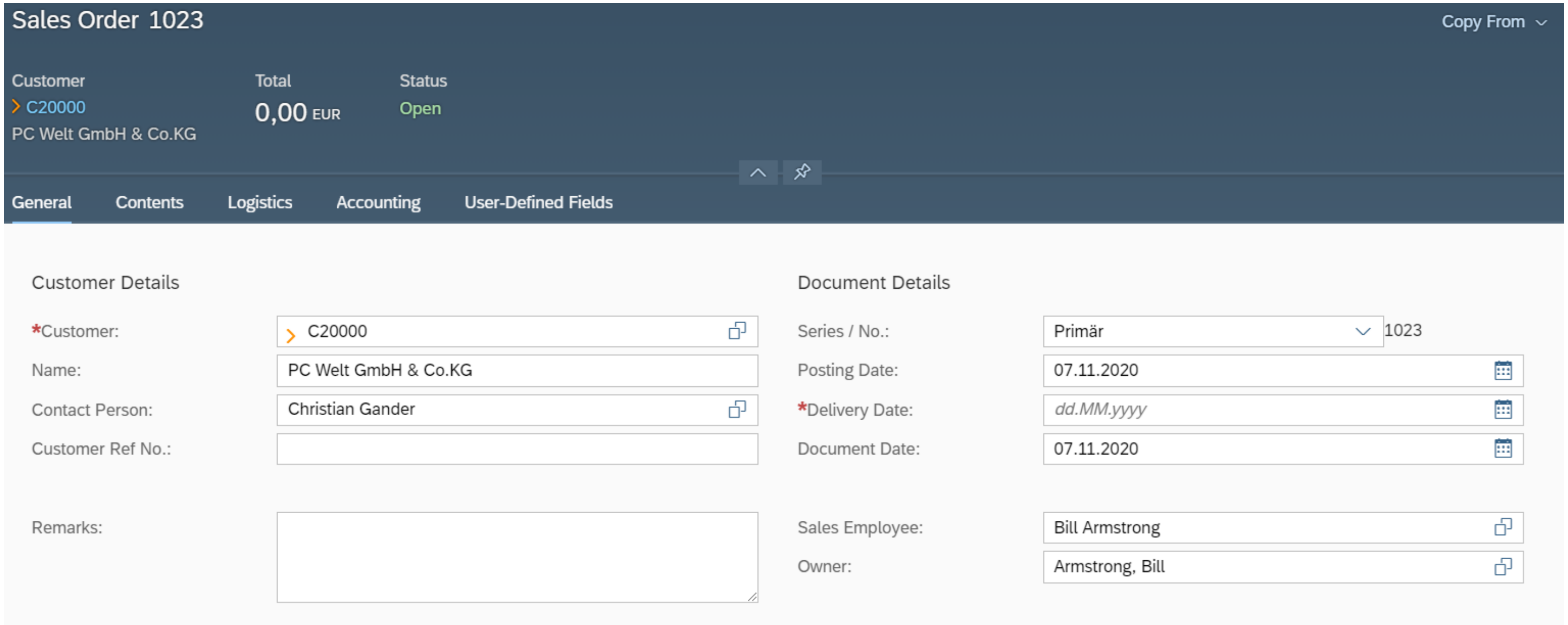
As **contact person**, SAP Business One offers the standard contact person, but it is also possible to select another person

In the field **customer reference number** e.g. the PO number of the customer can be entered. field is printed in the conesprit standard documents.

The **remarks** field is for free text that is not printed in the document

Depending on the defined document numbering, a consecutive number is assigned in the **document number** field

The **posting date** determines the date on which the document is created as a journal entry



The **document date** is visible on the printed document

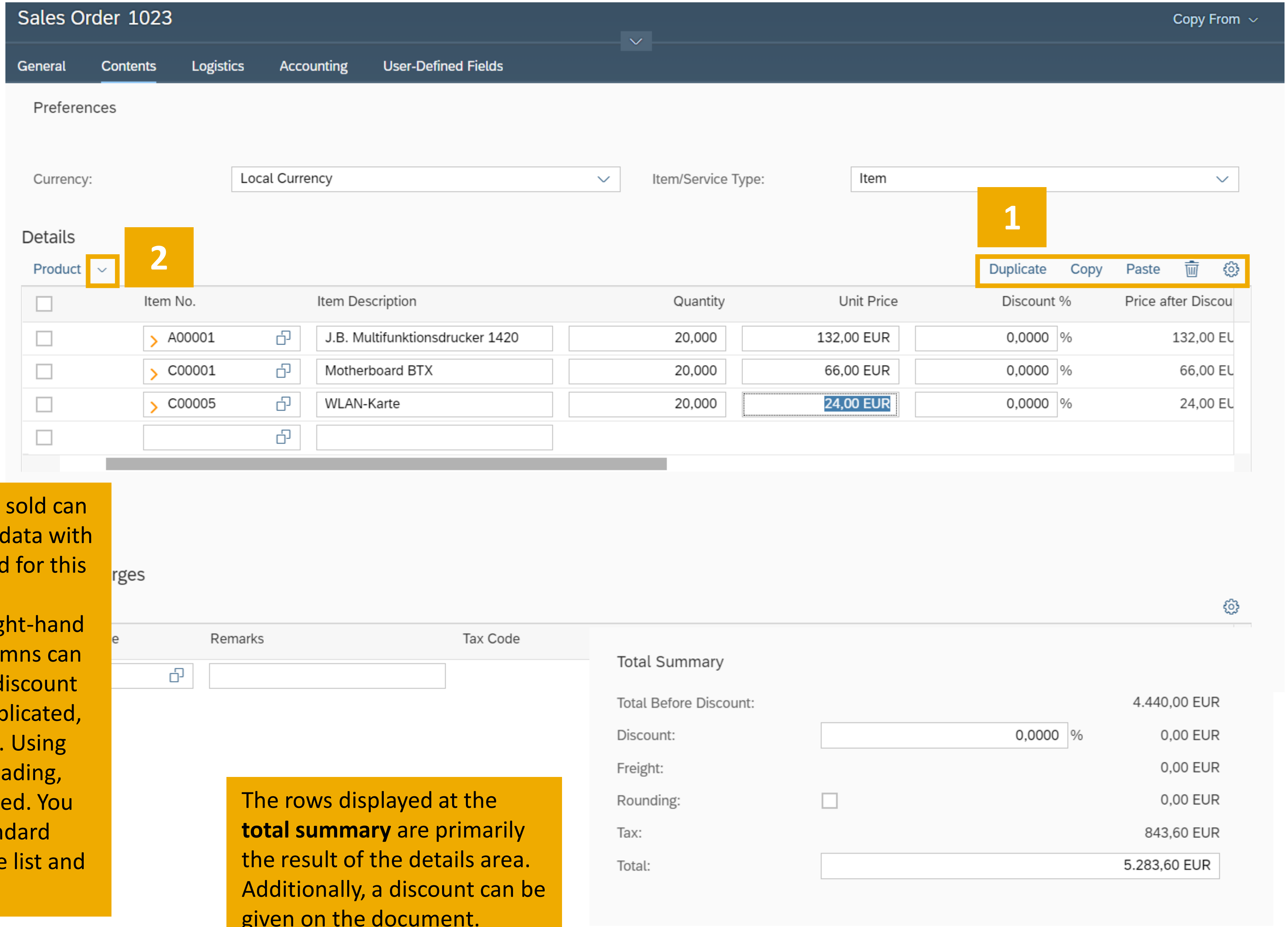
The **delivery date** is mandatory, the sales order cannot be completed without this information

Create sales order – Contents

If a different **currency** is stored in the BP master than the local currency, you can select between the BP and the local currency

Select “Item” in the **item/service type field** if items from the item master data are sold. In a “Service” document, the service and the associated price can be freely entered independently of existing item master data.

In the **detail rows**, the items to be sold can be selected from the item master data with the prices from the price list stored for this business partner.
Using the gear wheel at the top right-hand edge of the detail list, further columns can be displayed, such as free text or discount at item level. Rows can also be duplicated, copied and inserted or deleted (1). Using the arrow (2) below the Details heading, the view of the rows can be changed. You can choose between product (standard view), gross profit based on a price list and volume and weight.



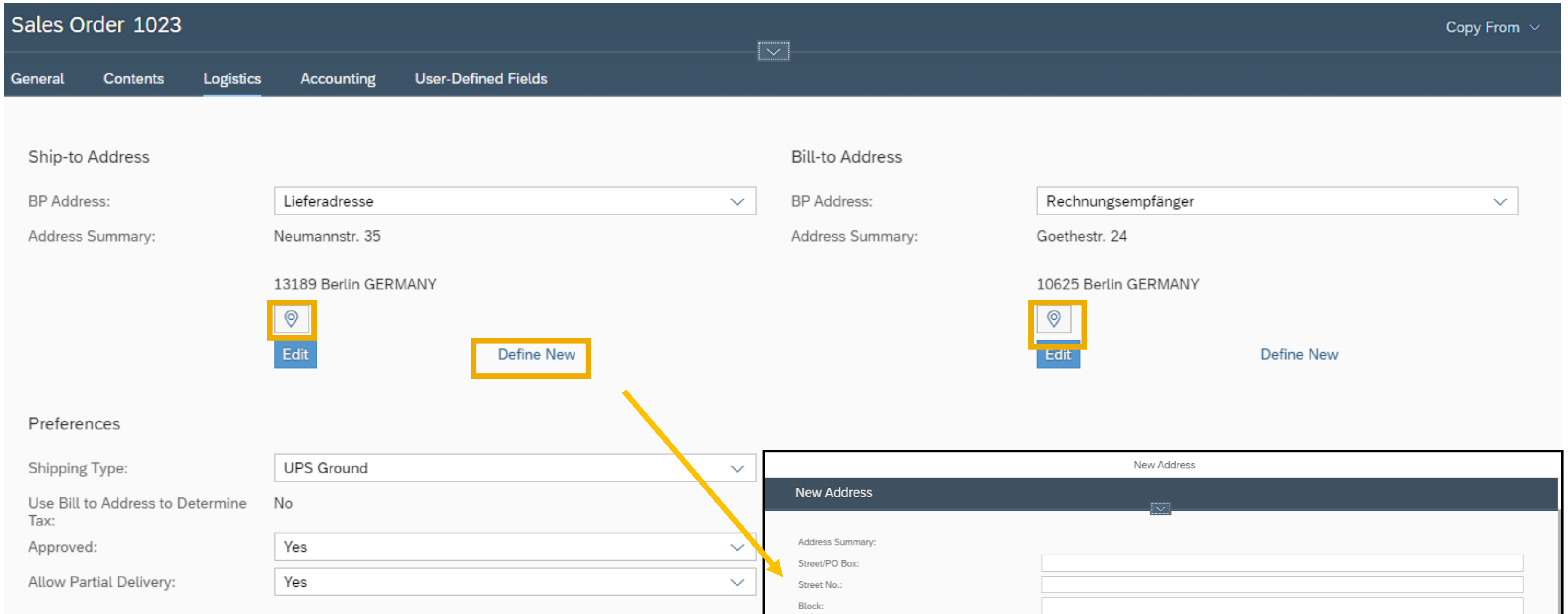
The rows displayed at the **total summary** are primarily the result of the details area. Additionally, a discount can be given on the document.

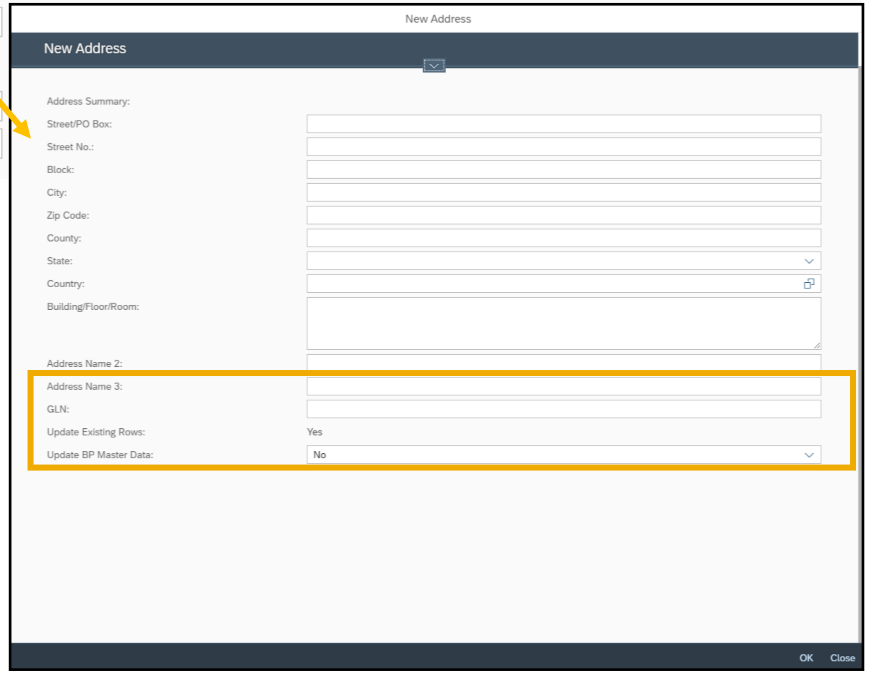
Create sales order – Logistik

Several **ship-to** and **bill-to addresses** may be stored in the BP master. The default address is always displayed in the document. You can select another address. Alternatively, a new address can be created via **"Define New"**. This address can be transferred to the BP master data record.

The **pin** symbol opens Google Maps and shows the address on the map.

The **shipping type** that is stored in the BP master is displayed. A different shipping method can be determined manually.





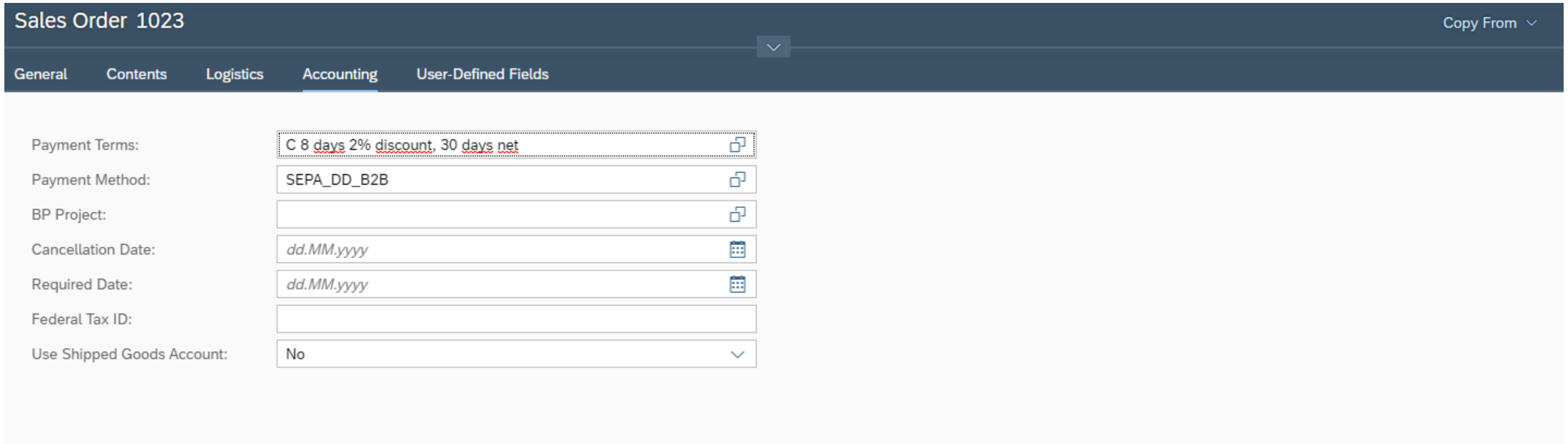
It is possible to implement an **approval process**. As a result the sales order is created, but not approved. It cannot be further processed without the approval.

In the standard system, the approval process is disabled. So the sales order is approved upon creation.

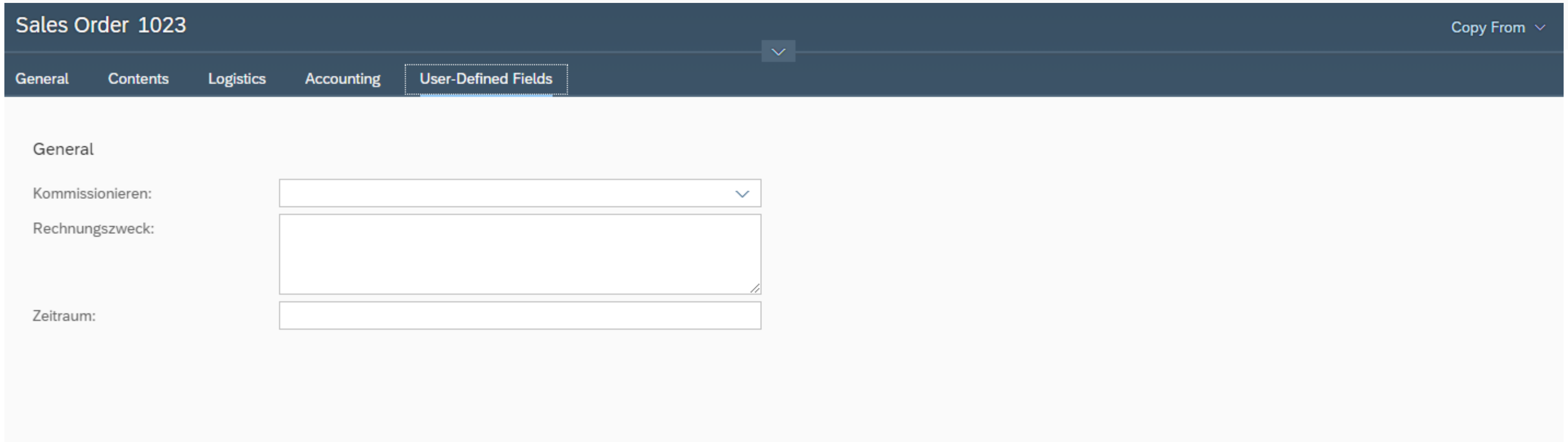
Create sales order – Accounting and user-defined fields

The **payment terms** and **payment method** that are assigned in the BP master are pre-selected. Another term can be selected manually.

A document can be assigned to a **project**.



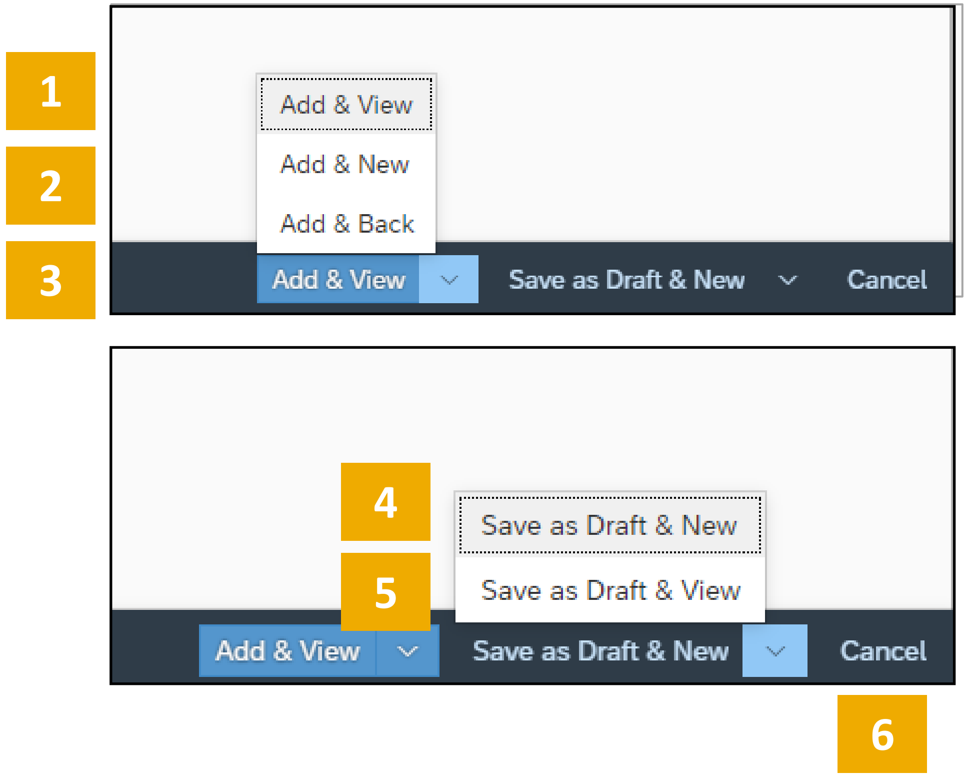
In SAP Business One, additional individual **user-defined fields** can be added to the fields created by SAP.



Create sales order – Add sales order

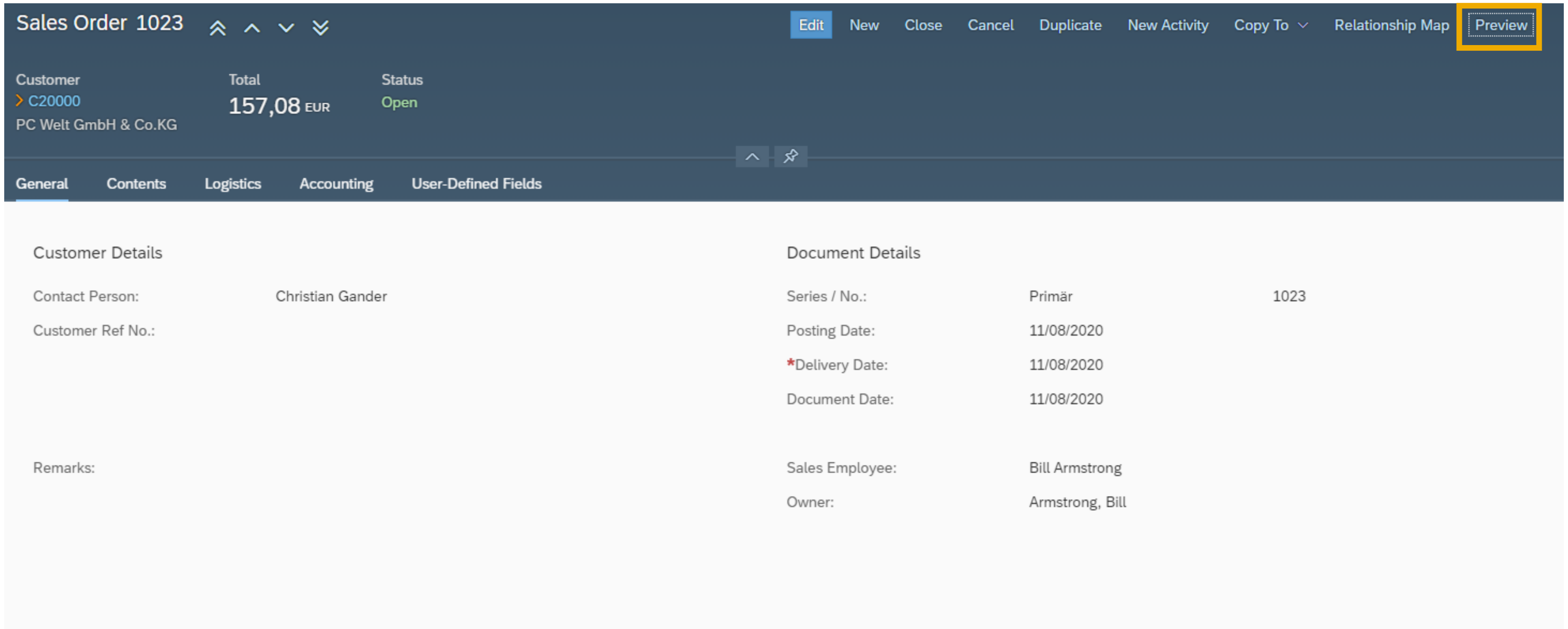
Once, the sales order is filled out, it can be

1. added and then immediately viewed for reconciliation
2. added and then a new empty sales order can be opened
3. added and then the previous dialog opens
4. saved as a draft and a new sales order can be opened immediately
5. saved and displayed as a draft
6. canceled



Create sales order – Mail sales order

Once the sales order is added, it can be printed.
For this purpose, the function **Preview** is pressed. The document opens in a pdf. This can now be saved and sent by email or printed and sent by post.

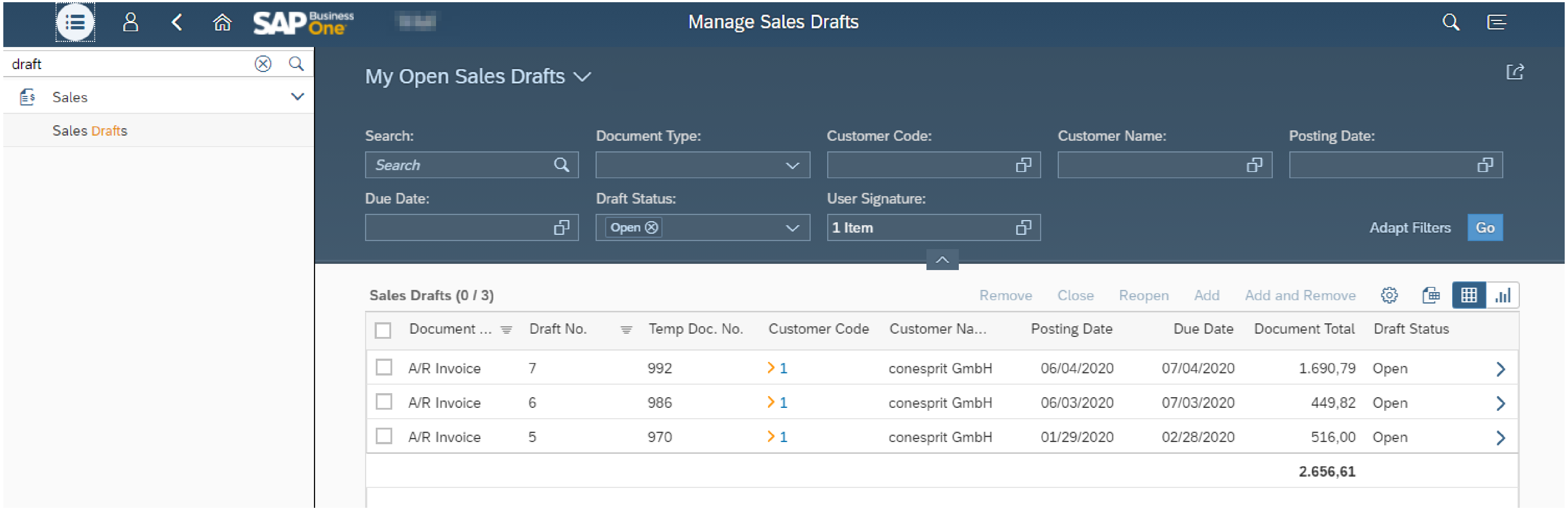


Open sales documents in draft mode

The “Sales Drafts" list can be opened via the tile on the start page, the main menu, the search function in the main menu or via the Enterprise Search.

All documents in state draft are displayed.

When working with the approval process, documents that are in the approval process are managed in this list.



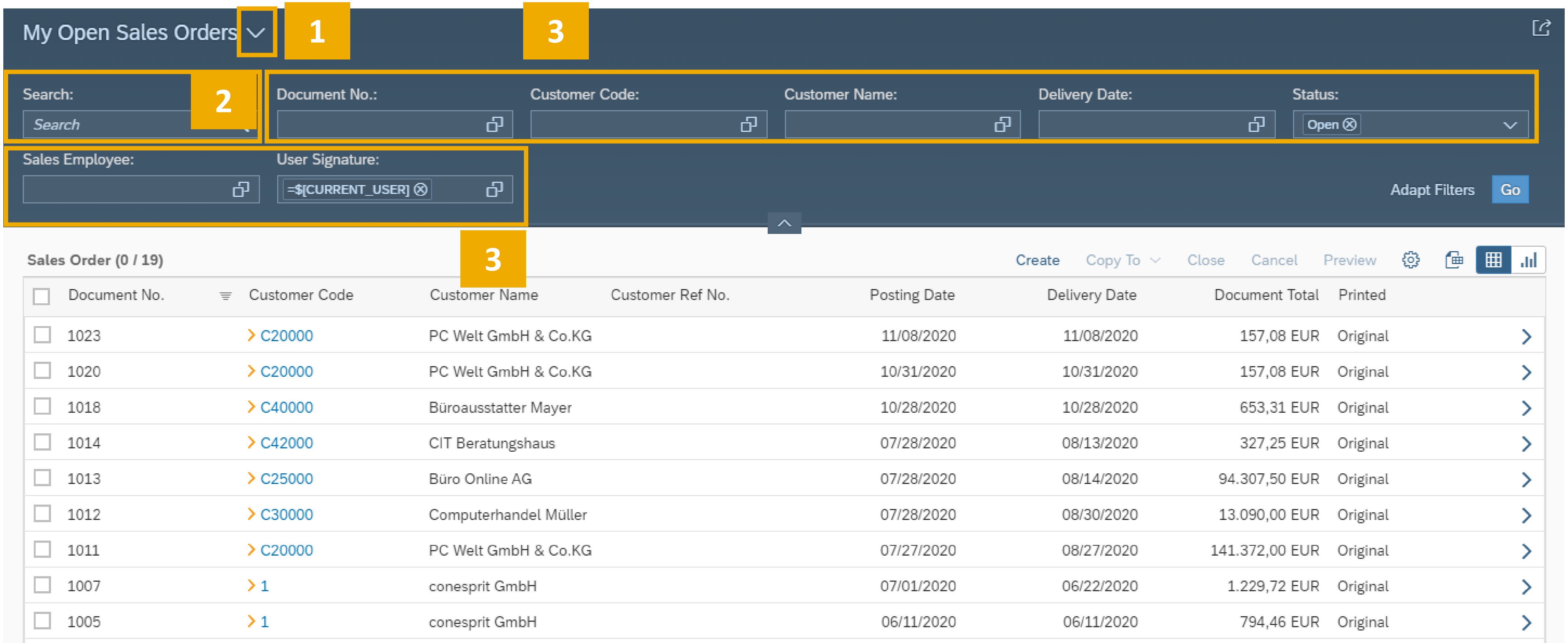
View, search and filter documents

Here we will look at the sales order document as an example.

The sales order list can be accessed via the tile on the start page, the main menu, the search function in the main menu or via the Enterprise Search.

Using the arrow to the right of the “My Open Sales Orders” heading, the following sales order views are available: My Open Sales Orders, All Sales Orders (all employees), My Sales Orders (open and closed), Open Sales Orders, Sales Orders Backorder (all employees) (1).

The search (2) and filter function (3) can be used to edit and evaluate sales orders.

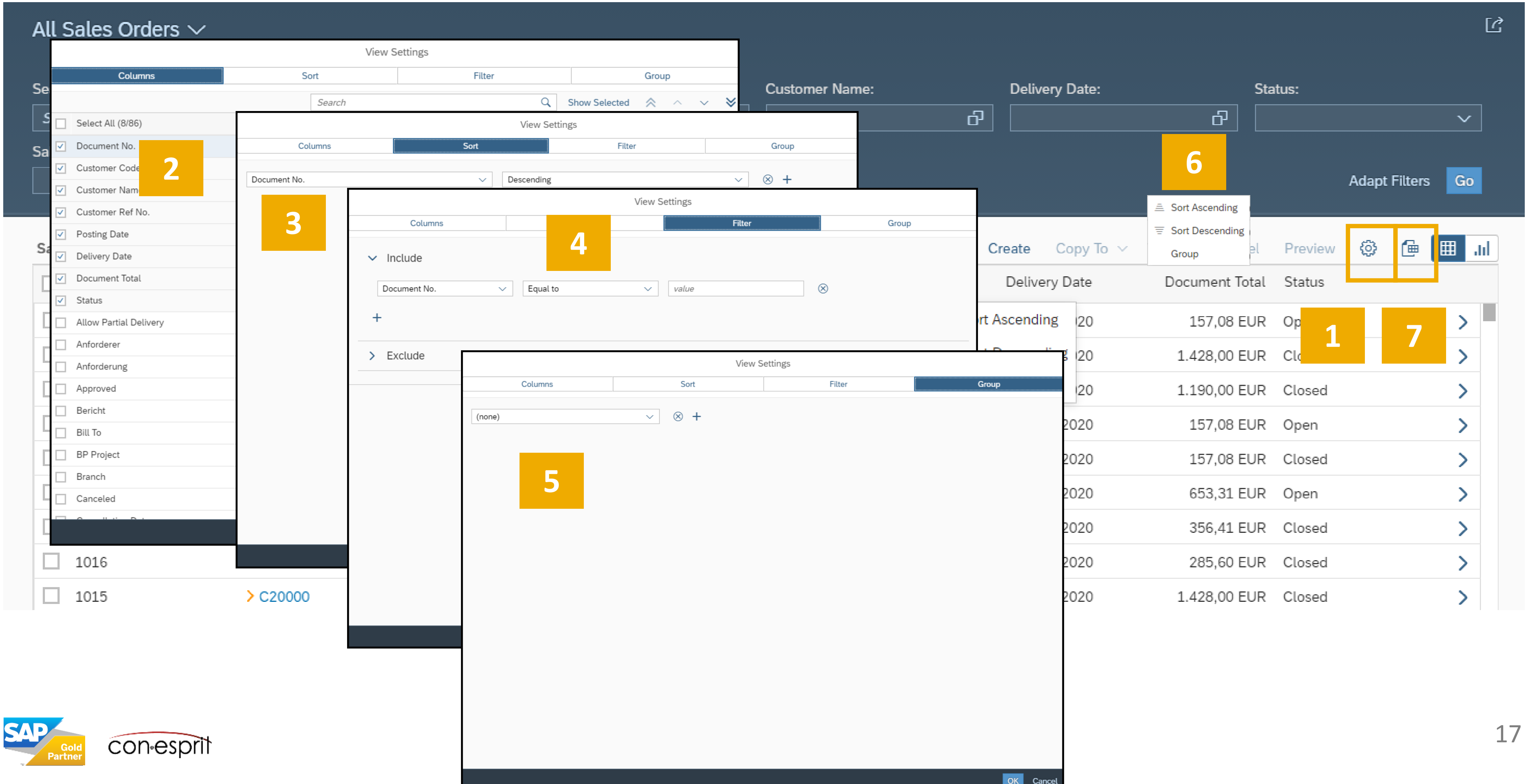


Extend, sort, filter, group and export document list to Excel

Here we will look at the sales order document as an example.

Using the cog at the top right of the document list (1), columns can be added and removed (2), the list can be sorted (3), the contents can be filtered (4) and the contents can be grouped (5). The Sort and Group functions can also be called by clicking on a column header of the list (6).

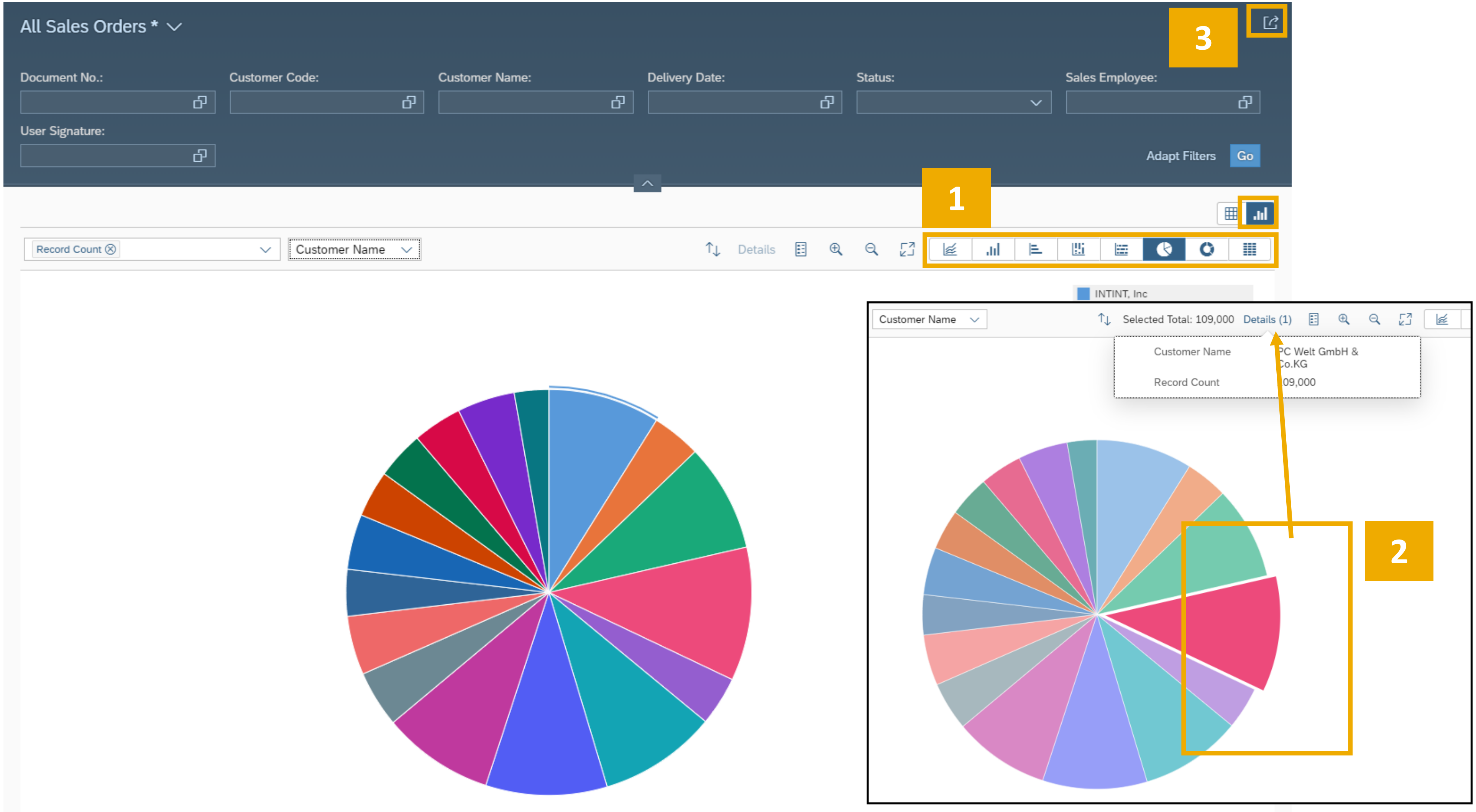
The Excel export icon (located next to the cog icon) allows the list to be exported to Excel for further processing (7).



Analyze documents

Here we will look at the sales order document as an example.

Sales orders can be evaluated in respect to many fields. Line, column, bar, stacked column, pie and ring charts as well as a heat maps are available for analysis purposes (1). The details below the chart can be made visible by clicking on data segments (2). If the analysis is used regularly, it can be placed as a tile on the start page (3).

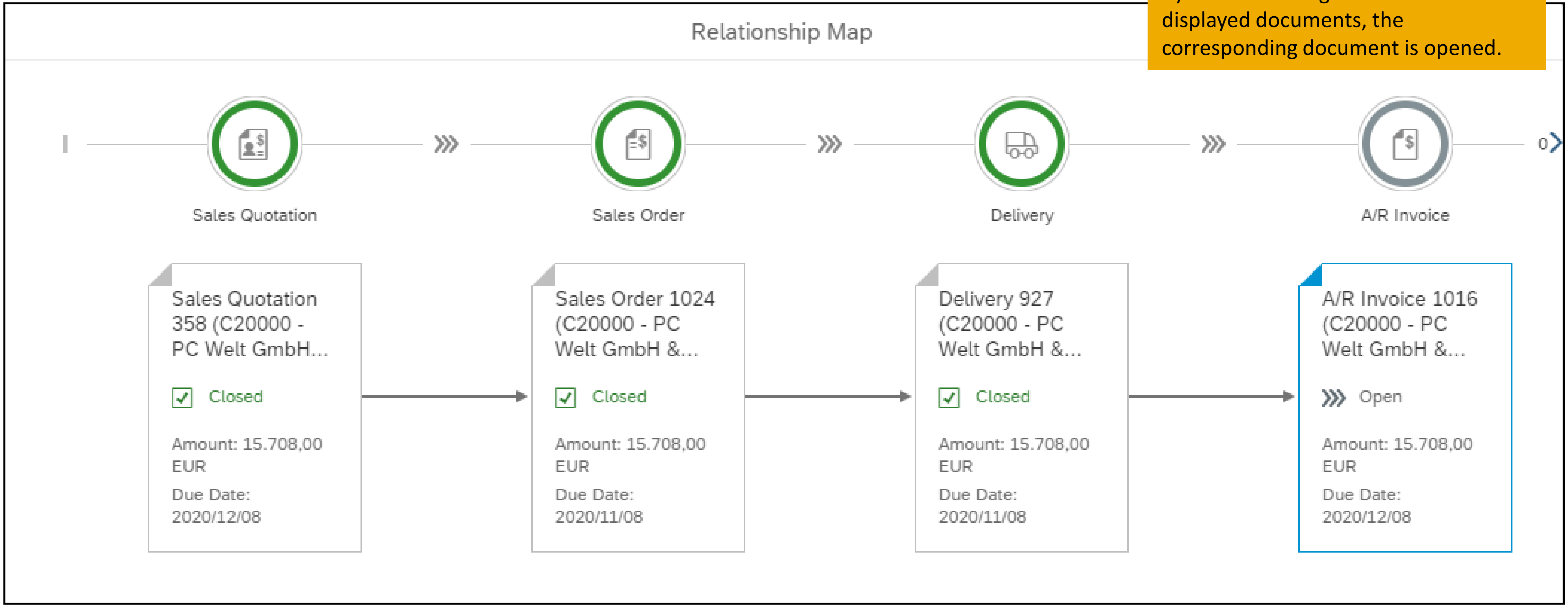


Sales process: From quotation to outgoing invoice

Example:
1. A quotation is created for 100 printers
2. A sales order is created based on the quotation using the "Copy To" function
3. A delivery is created based on the sales order using the "Copy To" function
4. Based on the delivery, an A/R invoice for 100 printers is created using the "Copy To" function

The Relationship Map is called via:
E.g. tile A/R invoice > open single invoice > relationship map

By double clicking on one of the displayed documents, the corresponding document is opened.



Note:
Returns and sales credits are only available in the Web Client in read-only mode.
Not every document in the relationship map needs to be created in the sales process. For example, the delivery can be left out, in which case the A/R invoice is created directly from the sales order by "Copy to".

Purchasing process

The target group of the SAP Business One Web Client are: sales representatives, internal sales representatives and managers.
For this reason, purchasing documents are only available read-only and cannot be created in the Web Client.

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