

Underutilized Features in SAP Business One

Web Client - Analytics:

The screenshot displays the SAP Business One Web Client Analytics dashboard. The interface includes a top navigation bar with the user name 'Daryl Goodman' and a 'Web Client' button. The dashboard is titled 'Standard' and features several key metrics and charts:

- Sales Amounts:** Net Sales (LC) of 50 M. A stacked bar chart shows sales from 2015 to 2025 across categories like Construction, Customers, Distributors, High Tech, Large Accounts, Production, and Small Accounts.
- Purchase Amounts:** Net Purchases (LC) of 42 M. A stacked bar chart shows purchases from 2015 to 2025 across categories like East Coast, General Supplies, Machinery, Office Supplies, and West Coast.
- Inventory Value:** A bar chart shows inventory value by item group by warehouse, with categories like West Cost Warehouse, General Warehouse, Consignment Warehouse, and Bin Warehouse.
- Sales Account Postings:** Total Credit Value of 14 M. A stacked bar chart shows account postings from 2015 to 2025 across categories like JB Printer Re..., Sales Revenues..., and Sales Revenues...
- Inventory Quantity Sold:** 131 k. A chart showing quantity sold by item group and year.
- Top 20 Selling Items:** A table listing top-selling items across the entire sales history.
- Gross Profit vs. Sales:** A chart showing gross profit versus sales by year.
- Available Inventory Quantity:** A chart showing available inventory quantity by warehouse and item group.

Item Description	Gross...
32GB Memory Server	4,064,076.120
PC Sat 1	2,701,084.

- Free and native real-time Analytics Platform
- Included for both SQL and HANA versions of B1
- Browser Based, OS and device form factor agnostic
- Modern UI

SAP Business One Automation Bots:

The screenshot displays the SAP Business Accelerator Hub interface. The URL in the browser is `hub.sap.com/build?filter=(Products:%5B"SAP%20Business%20One"%5D)`. The navigation bar includes "SAP Business Accelerator Hub", "Integrations", "Data Products", "SAP Build", "Analytics", and "Transformation". The main content area shows a list of automation bots, sorted by "Updated".

Bot Name	Category	Status
Return Request Process Automation (1R1)	Business Process	FREE, READY TO USE, TEMPLATE
Proof of Delivery Note Upload in the Outbound Delivery and the...	Task Automation	FREE, READY TO USE, TEMPLATE
Master Data Enrichment for Business Partner Identification...	Task Automation	FREE, READY TO USE, TEMPLATE
Activity Creation for Business Partners (2B1)	Task Automation	FREE, READY TO USE, TEMPLATE
Sales Order Creation from a Local Purchase Order (2C1)	Business Process	FREE, READY TO USE, TEMPLATE
Supplier Invoice Upload for Intelligent Invoice Scanning (2R1)	Task Automation	FREE, READY TO USE, TEMPLATE
Sales Order Creation from a Local Purchase Order (2C1)	Task Automation	FREE, TEMPLATE, READY TO USE, DEPRECATED

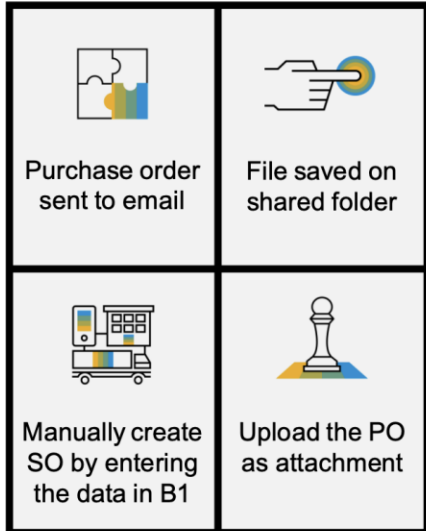
- SAP Business Technology Platform (BTP) based RPA Bots prebuilt for SAP Business One
- Bots are free but utilize a SAP BTP account to access the DOX service

SAP Business One Automation Bots:

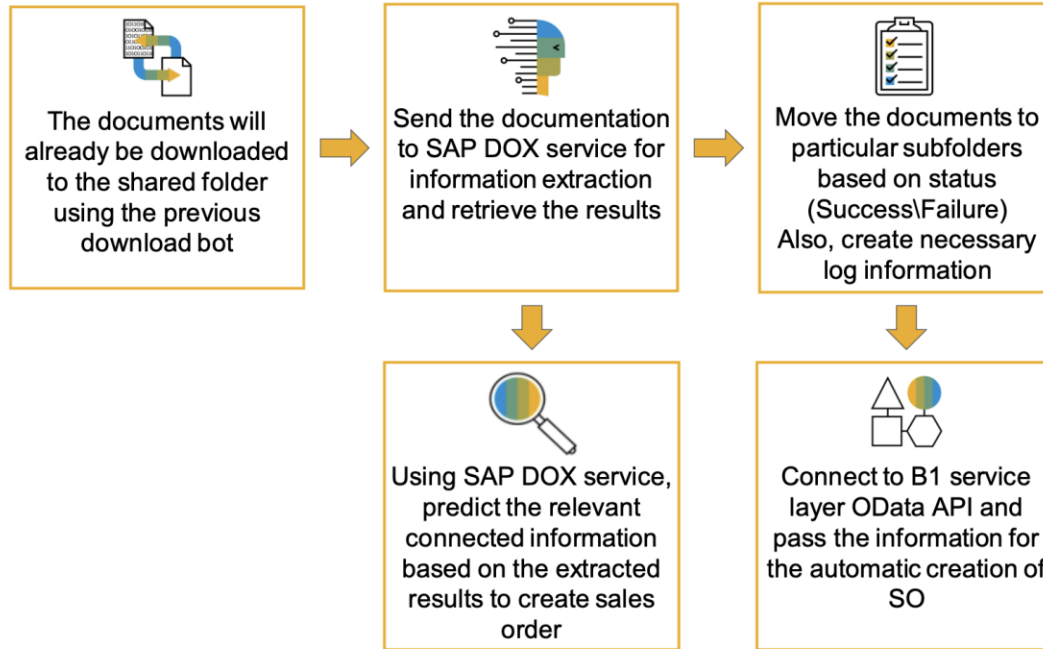
Connecting your bot to SAP Business One

Introducing the use case for extension: sales order creation from local purchase order

Current State

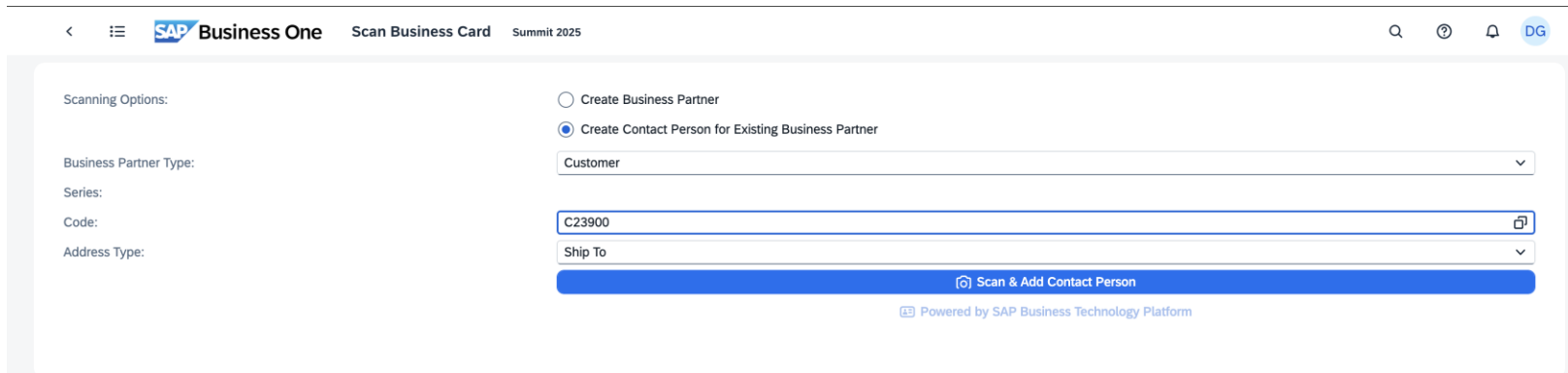
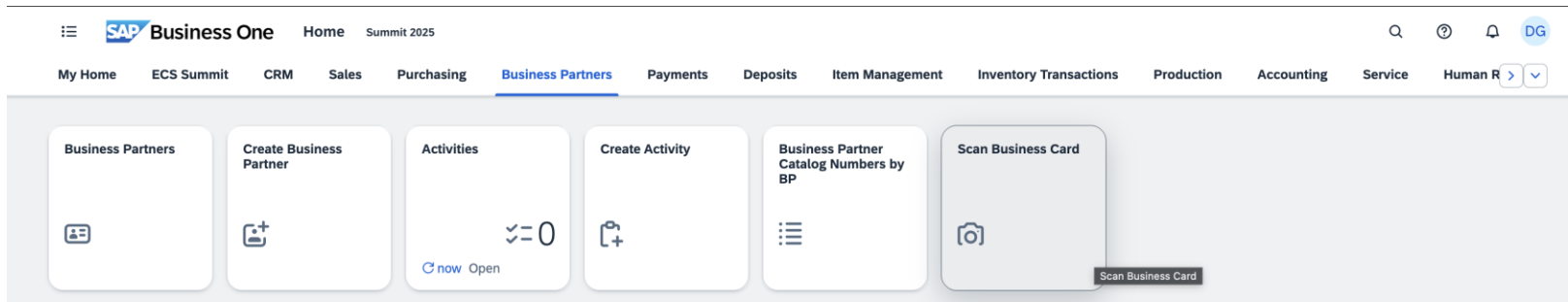


New Paradigm



- RPA bots can work with each other to create inputs and process outputs for enhanced workflow
- It is possible to create custom bots beyond the predefined solutions

Web Client – Scan Business Card:



- At a tradeshow or other networking event you can quickly create a new BP or a new Contact Person without manual data entry
- Can be from a phone or tablet with a camera

My Personal Settings:

The screenshot shows the SAP Business One 'Users - Setup' dialog box for user 'Daryl Goodman'. The dialog is split into two panes. The left pane shows the 'General' tab with various system settings, including checkboxes for 'Superuser', 'Mobile User', and 'Display Worklist When New Task Arrives'. The right pane shows the 'Display' tab with visual settings like 'Skin Style', 'Color', 'Language', 'Font', and 'Font Size'. A preview window shows the text 'AaBbYyZz - abcd' rendered in the selected font and size. The 'Font Size' dropdown is currently set to 14. The dialog includes a 'Restore Defaults' button and a footer with 'OK', 'Cancel', 'Copy Form Settings', 'Authorizations', and 'Licenses' buttons.

File Edit View Data Go To Modules Tools Window Help OEC Computers | Daryl Goodman

My Personal Settings...

Users - Setup

Superuser Mobile User

User Code: dgoodman

User Name: Daryl Goodman

Defaults:

General Services Display

At the Beginning of Each Session

Perform Data Check

Open Exchange Rates Table

Display Recurring Postings on Execution

Display Recurring Transactions on Execution

Send Alert for Activities Scheduled for Today

Display Inbox When New Message Arrives

Display Latest: 100 Messages/Alerts

Open Window for Credit Voucher Ref. Update

Display Worklist When New Task Arrives

Update Messages (Min.): 5

Screen Locking Time (Min.): 30

Open Postdated Credit Vouchers Window: No

Show License Information at Startup

Alternative Keyboard Usage

Use Numeric Keypad Enter Key as Tab Key

Use Numeric Keypad Period Key as Separator on Display Tab

Enable Document Operations by Mouse Only (Such as Add, Update, OK)

Microsoft 365 Account and Export Templates: [SAP Business One Microsoft 365 Integration](#)

Restore Defaults

OK Cancel Copy Form Settings Authorizations Licenses

Users - Setup

Superuser Mobile User

User Code: dgoodman

User Name: Daryl Goodman

Defaults:

General Services Display

Skin Style: [Dropdown]

Color: [Dropdown]

Language: [Dropdown]

Font: [Dropdown]

Font Size: 14 [Dropdown]

Preview: AaBbYyZz - abcd

Background: [Dropdown] ...

Image Display: [Dropdown]

Ext. Image Processing: [Dropdown]

Restore Defaults

OK Cancel Copy Form Settings Authorizations Licenses

- User level control of settings to override the ones from System Administration's General Settings

Live Collaboration:

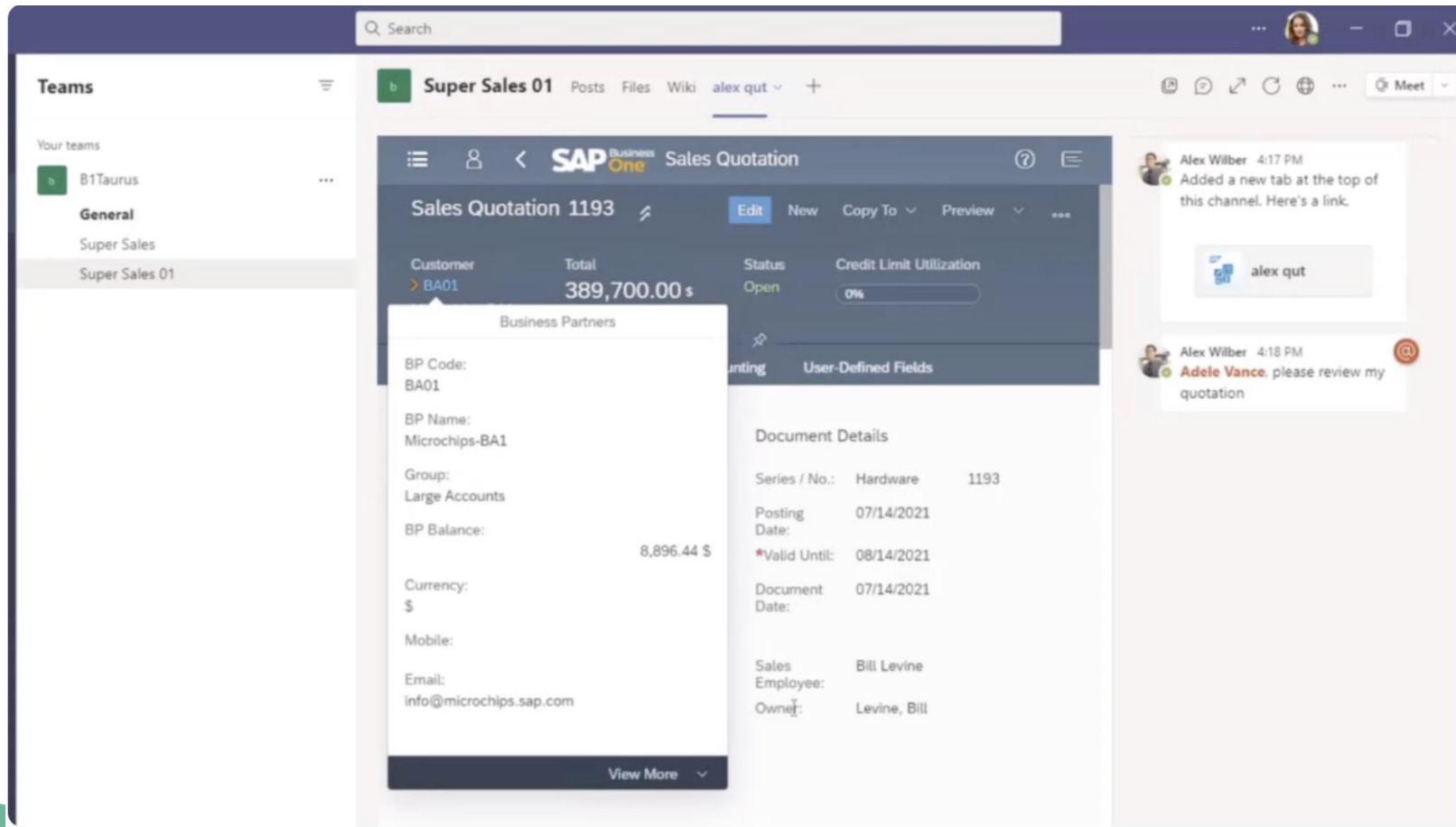
The screenshot displays a software interface with a dark blue header bar. The header contains a menu (File, Edit, View, Data, Go To, Modules, Tools, Window, Help) and the text "OEC Computers | Daryl Goodman". Below the header is a toolbar with various icons. A "Modules" bar is visible below the toolbar, with "Drag & Relate" and "My Personal Settings..." options.

The main interface is divided into two windows:

- User List:** A window titled "User List" showing a list of users. The user "Brad Thompson" is selected, and a tooltip "Brad Thompson" is visible next to his name. The list includes users like Alex Torras, Bill Levine, Bob Shone, Brad Thompson, Brayton, Carlos Andres, Christine Bowe, Christine Roblet, Dana Willy, darran, dmacferran, Donna Brown, Doris Labour, Elisa Messina, Emily Irwin, and Fred Buyer.
- Conversation:** A window titled "Conversation" showing a chat with "Brad Thompson". The chat content includes a message: "Hi Brad, Can you check this out?" and a "Share Data" section with the text: "This order from Parameter Technologies [Sales Orders_1486](#) is the same as the one I shipped last week [Deliveries_1337](#)".

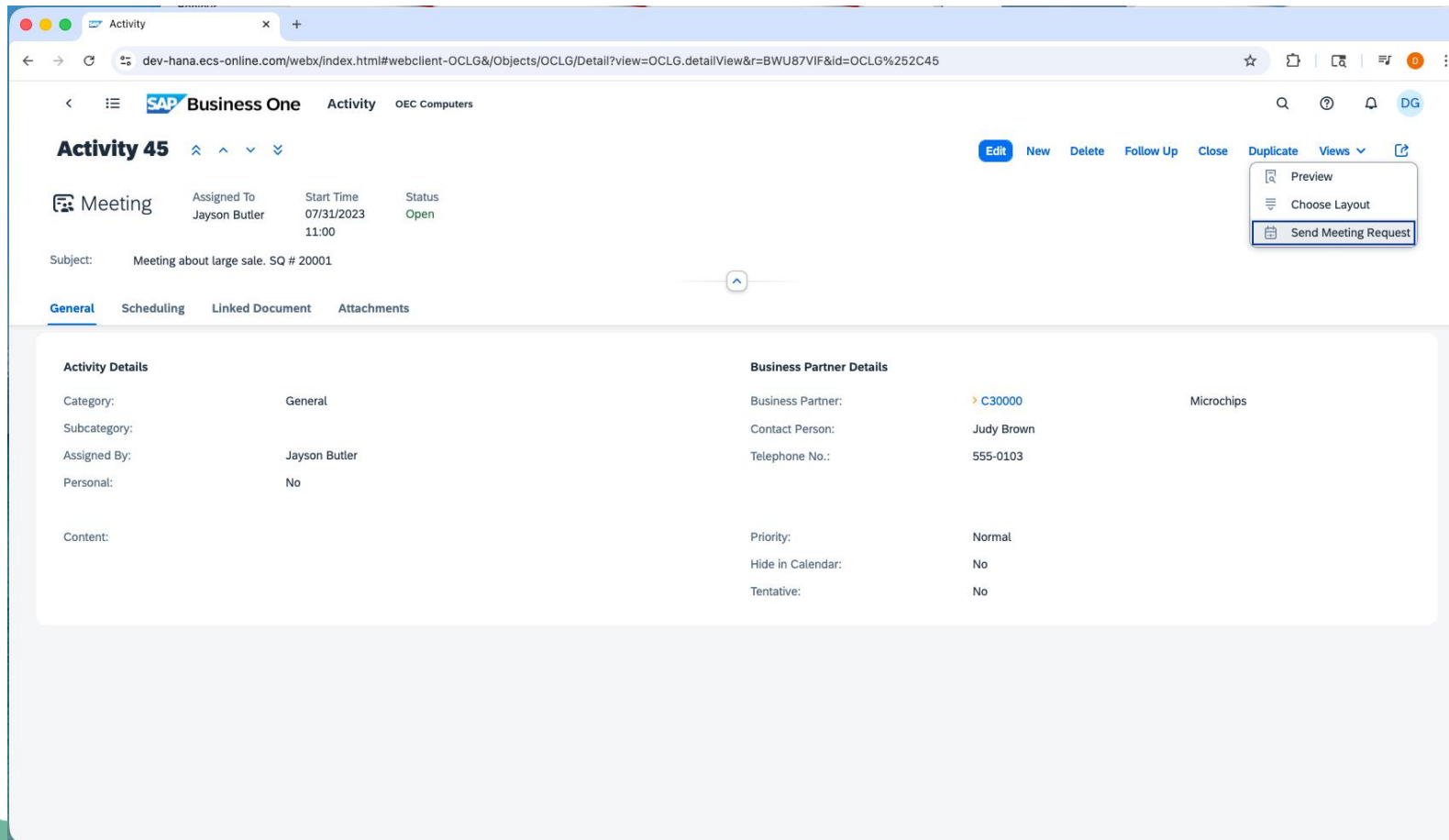
- Internal real time collaboration with the ability to link directly to documents
- Faster and easier than Activities

Microsoft Teams Integration:



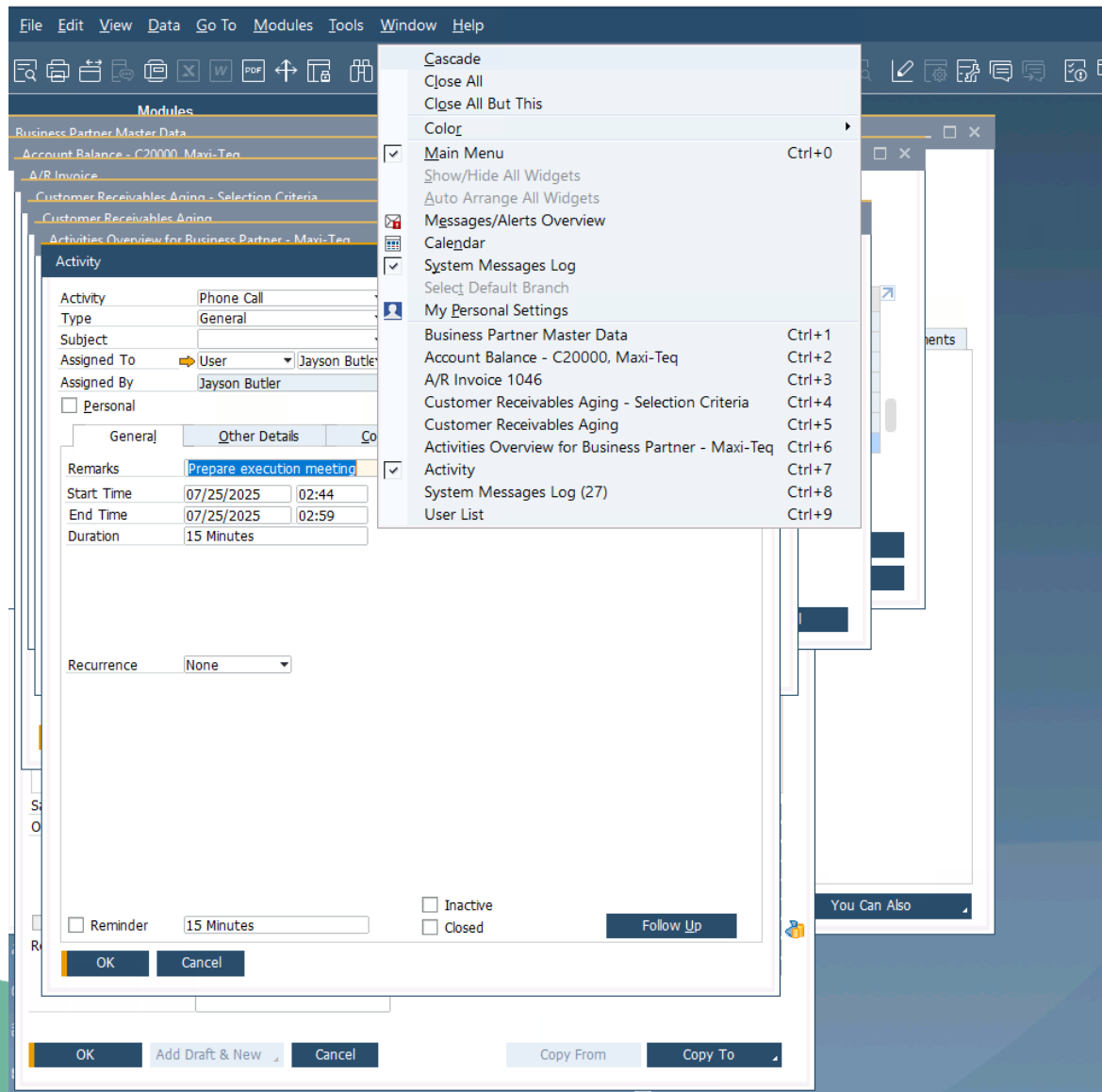
- If your company already uses Microsoft Teams as part of your Office 365 subscription, there is an app that allows the web client to be directly embedded

Sending an Outlook Meeting Request:



- Activities in SAP Business One can be sent as Meeting Requests directly to the attendees and it will show on Outlook Calendars

The Window toolbar:



- Many useful shortcuts and organizational options are found in the Window toolbar
 - Manage open windows with Cascade, or close all but this
 - See your breadcrumb trail and easily toggle between open windows with keyboard commands

Grid Controls:

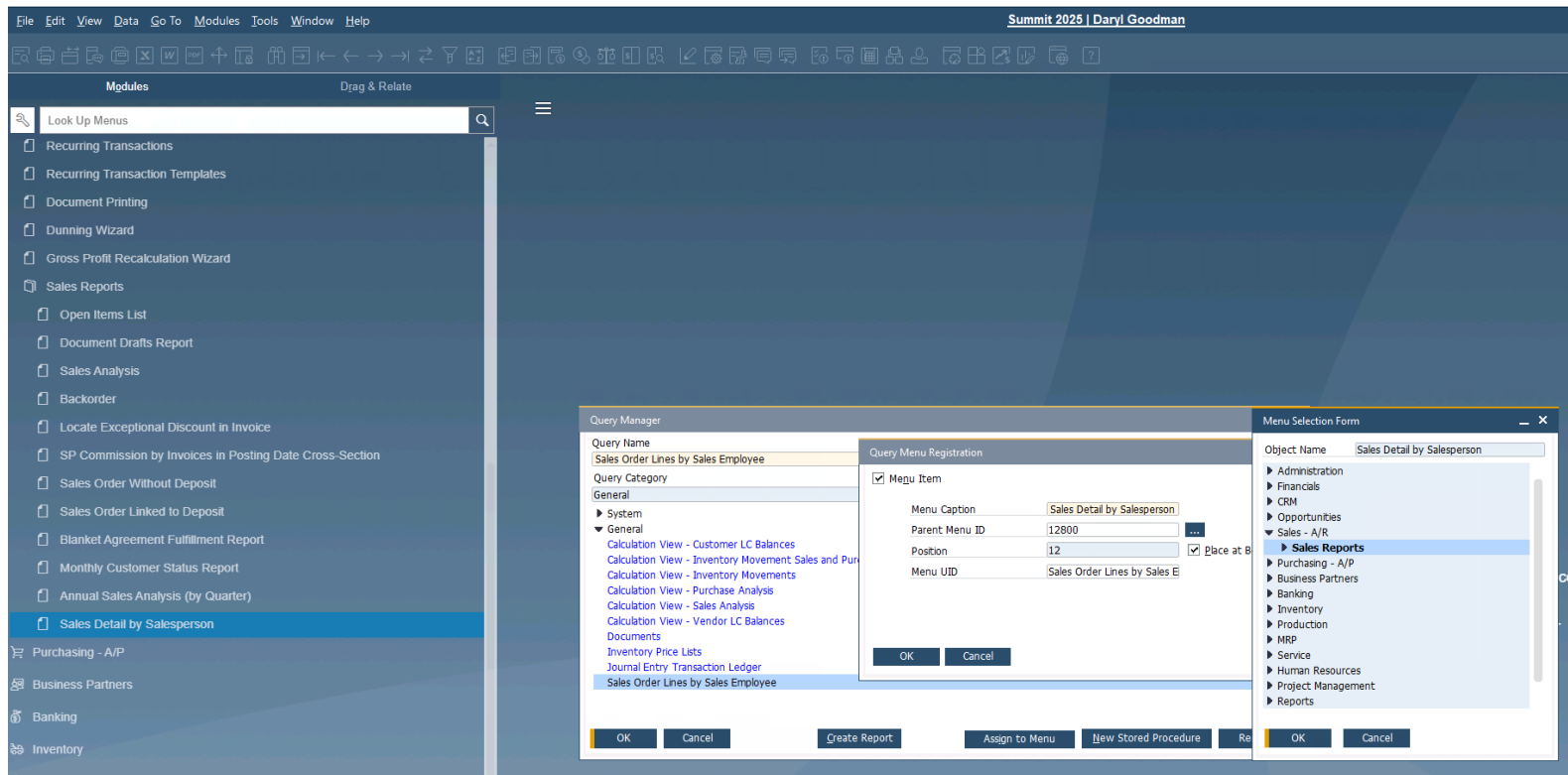
The screenshot displays a 'Sales Order' window with a grid of items. The grid has columns for Item No., Quantity, Unit Price, Discount %, Tax Code, Total (LC), and COGS Branch. The data is as follows:

#	Item No.	Quantity	Unit Price	Discount %	Tax Code	Total (LC)	COGS Branch
1	A00004	2	750.00 \$	0.000	PA	1,500.00 \$	
2	I00005	8	135.00 \$	0.000	PA	1,080.00 \$	
3	D00001	10	150.00 \$	0.000	PA	1,500.00 \$	
4	C00001	17	600.00 \$	0.000	PA	10,200.00 \$	
5	LM4029MC	20	75.00 \$	0.000	PA	1,500.00 \$	
6	D00002	7	150.00 \$	0.000	PA	1,050.00 \$	
7	C00013	15	75.00 \$	0.000	PA	1,125.00 \$	
8	LM4029MC	8	75.00 \$	0.000	PA	600.00 \$	
9				0.000			

The 'View' menu is open, showing options like 'User-Defined Fields', 'System Information', 'String Information', 'Pickers Display', 'Indicator Display', 'Show/Hide Toolbar', 'Restore Column Width', 'Fit Column Width', 'Legend', and 'Translated Values'. A secondary grid is visible in the background, showing a similar data set.

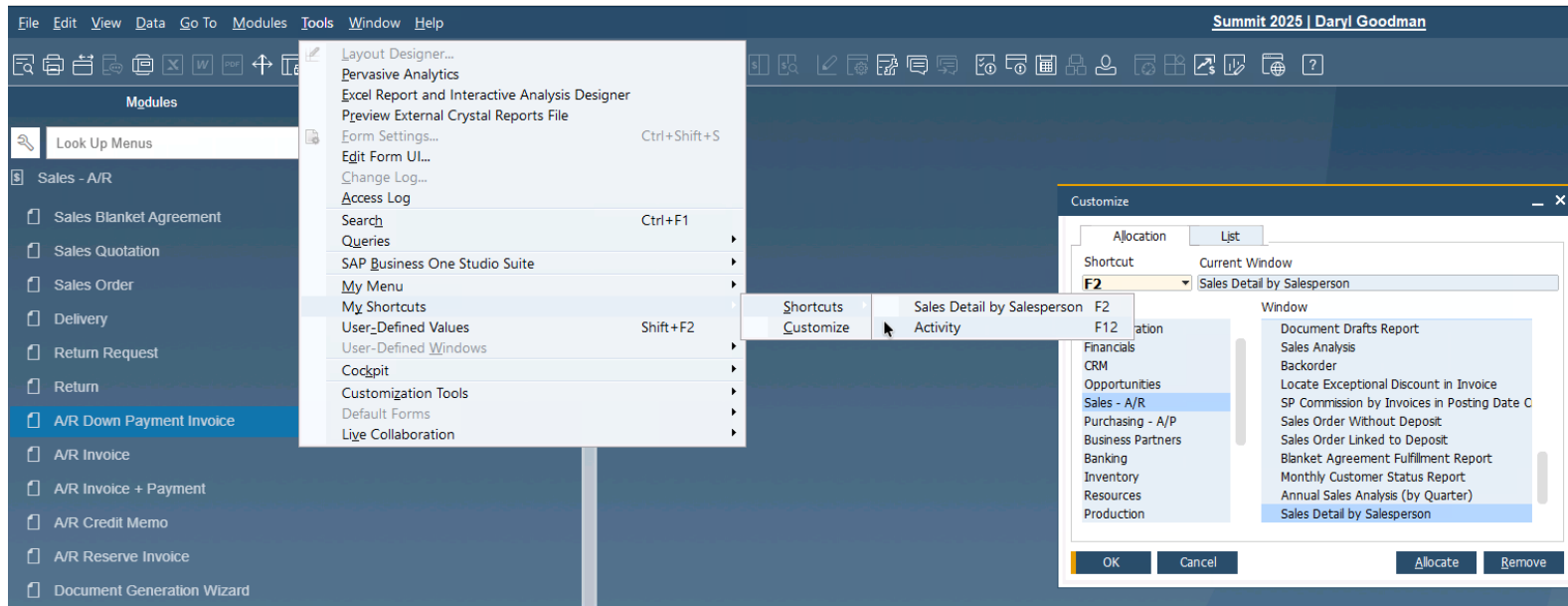
- Automatically adjust column width from the View Menu
- Maximize Grid view to see more lines
- Change Row Sequence to reorder data

Add a Query to the Main Menu:



- From the Query Manager you can assign a User Defined Query to the Main Menu, and even rename it

Allocate menu items to a shortcut key:



- Once something is on the Menu, it can be allocated to Shortcut Keys. This allows frequently used options to be at your fingertips

Reference Field Links:

The screenshot shows the SAP Reference Field Links configuration interface. The main window is titled "Reference Field Links - Setup" and contains a table with the following data:

Document	Subdocument	Ref. Links Status
A/R Invoices		Original
A/R Credit Memos		Original
Deliveries		Original
Returns		Original
A/P Invoices		Original
A/P Credit Memos		Original
Goods Receipt PO		Original
Goods Return		Original
Incoming Payments		Original
Outgoing Payments		Original
Goods Receipt		Original
Goods Issue		Original
Inventory Transfers		Original
Landed Costs		Original
Inventory Revaluation		Original

An open dialog box titled "Reference Field Links - Definition - A/R Invoices" shows a table with the following data:

#	Field Name	Field Value	Default Value
1	Reference 1 - Header	Document Number	Document Number
2	Reference 2 - Header	Customer Ref. No.	Customer Ref. No.
3	Reference 3 - Header	Not Defined	Not Defined
4	Remarks - Header	Not Defined	Journal Remarks
5	Reference 1 - BP Row	Customer/Vendor Code	Document Number
6	Reference 1 - Row	Customer/Vendor Name	Document Number
7	Reference 2 - BP Row	Contact Person	Customer Ref. No.
8	Reference 2 - Row	Customer Ref. No.	Customer Ref. No.
9	Reference 3 - BP Row	Series	Installment Number
10	Reference 3 - Row	Document Number	Not Defined
11	Remarks - BP Row	Document Owner	Journal Remarks
12	Remarks - Row	Sales Employee	Journal Remarks

- Allows modification of the data that is copied into the three reference fields from a document
- Useful in reconciliations and reporting.

User Groups:

Name: Finance

Description: Finance

Group Type: Authorization

Active From: Authorization

Cockpit Template: UI Configuration Templates

Group Type: Authorization

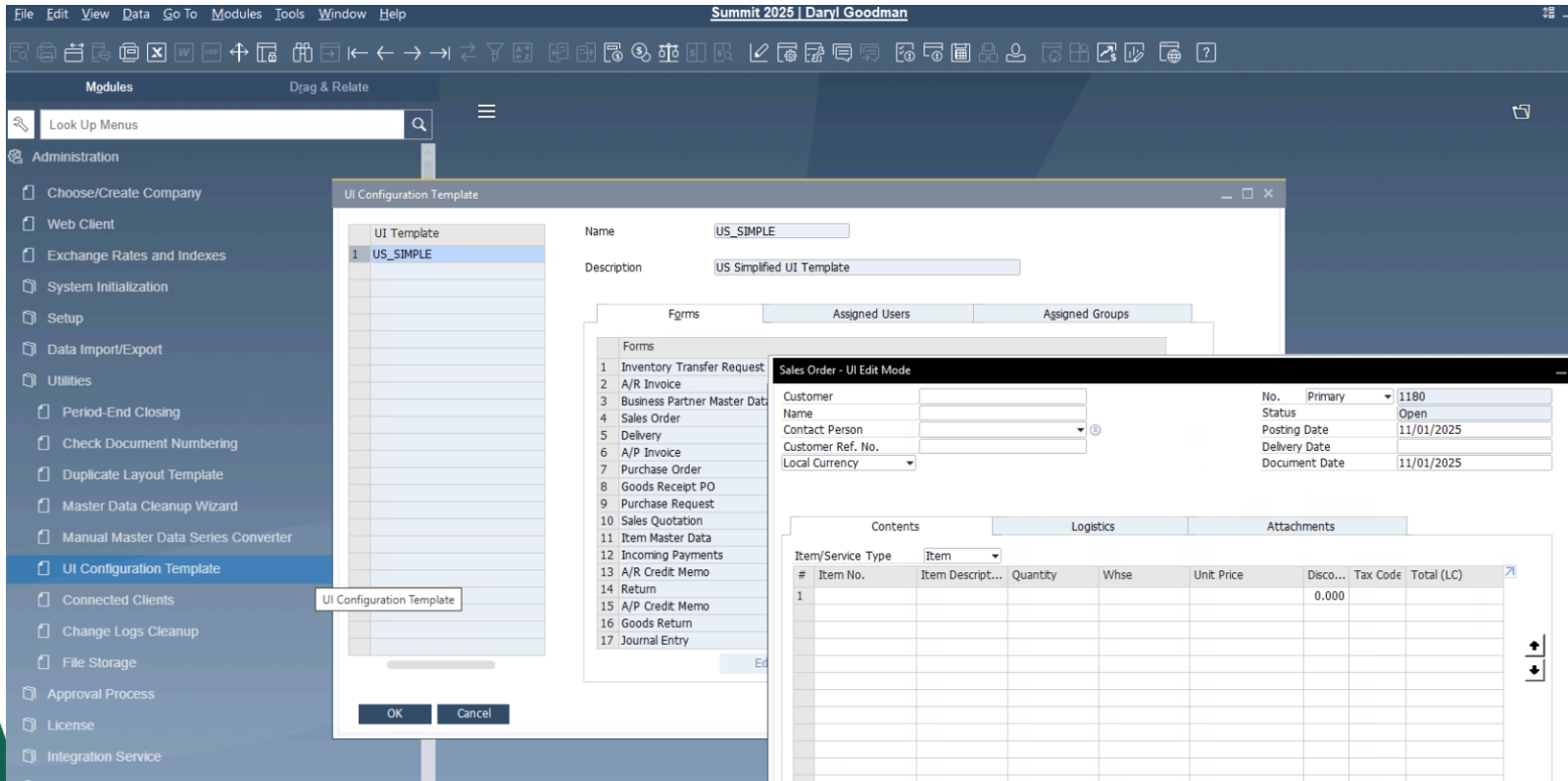
Group Name
1 Finance
2 Sales
3 Purchase
4 Inventory

#	User Code	User Name	Department	From	To
1	donna	Donna Brown	Accounting		
2	elisa	Elisa Messina	Accounting		
3	leo	Leo Laporte	Accounting		
4	maria	Maria Bridi	Accounting		
5	tom	Tom Brady	Accounting		
6					

Update Cancel Create Group

- Improves administration of SAP Business One users
 - Control Authorizations
 - Manage UI Configuration Options

UI Configuration Templates:



- Improves administration of SAP Business One screens
 - Hide or make fields Read Only (Disabled)
 - Rearrange forms
 - Select Columns in Form Settings

Document Form Settings:

The screenshot shows the SAP Sales Order form with the 'Form Settings - Sales Order' dialog box open. The dialog box has a 'Select UI Template' dropdown menu with 'Quick Entry' selected. Below this, there are tabs for 'Table Format' and 'Table'. The 'Table' tab is active, showing various settings for the sales order form, including 'Sales Employee' (Brad Thompson), 'Commission %' (5.000), 'Discount %' (0.000), 'G/L Account', 'Distr. Rule', 'COGS Account', 'COGS Distr. Rule', 'Project', 'Warehouse' (01 - General Warehouse), 'Delivery Date', and 'Price List' (Regular Sales Price). The 'Form Settings' dialog also has 'OK', 'Cancel', and 'Restore Default' buttons.

Sales Order Header:

- Customer: C23900
- Name: Parameter Technology
- Contact Person: Daniel Brown
- Customer Ref. No.:
- Delivery Date: 09/05/2025
- Sales Employee: Brad Thompson
- No.: Primary 1178
- Status: Open
- Ship To: 743 Filbert St, Philadelphia PA 19106 USA
- Main WH:

Contents Table:

#	Item No.	Item Description	Whse	UoM Code	Quantity	Unit Price	Total (LC)
1	A00004	Rainbow Color Printer 5.0	01	Manual	2	750.00 \$	1,500.00 \$
2	I00005	J.B. Laptop Batteries X1 series	01	Manual	8	135.00 \$	1,080.00 \$
3	D00001	Portable Hard Disk 1TB	01	Manual	10	150.00 \$	1,500.00 \$
4	C00001	Motherboard BTX	01	Manual	17	600.00 \$	10,200.00 \$
5	LM4029MC	Memory Chip	01	Manual	20	75.00 \$	1,500.00 \$
6	D00002	Portable Hard Disk 2TB	01	Manual	7	150.00 \$	1,050.00 \$
7	C00013	1 TB disk for external HD	01	Manual	15	75.00 \$	1,125.00 \$
8	LM4029MC	Memory Chip	01	Manual	8	75.00 \$	600.00 \$
9							

Remarks: Based On Sales Quotations 1174.

Summary:

- Freight:
- Tax: 1,113.30 \$
- Total: 19,668.30 \$

- While Form Setting is among the most used features of SAP Business One, many use it only to select columns. However, you can easily toggle between UI Templates, update Warehouses, Change the Price List, etc.

Price List Rounding:

Price Lists

Update Entire Price List
 Update by Selection

#	Price List Name	Multiple Base Price Lists or Factors	Default Base Price List	Default Factor	Rounding Method	Rounding Rule	Ending/Interval	Authorization Group	Gross Price	Primary Curre...
	Last Evaluated Price								<input type="checkbox"/>	
	Last Purchase Price								<input type="checkbox"/>	
1	Base Price	No	Base Price	1	No Rounding	Round to Closest		Price List - Group No. 1	<input type="checkbox"/>	\$
2	Discount Purchase Price	No	Base Price	0.5	Fixed Ending	Round Down	x.97	Price List - Group No. 1	<input type="checkbox"/>	\$
3	Regular Purchase Price	No	Base Price	0.75	No Rounding	Round to Closest		Price List - Group No. 1	<input type="checkbox"/>	\$
4	Distributor Sales Price	No	Base Price	1.25	No Rounding	Round to Closest		Price List - Group No. 1	<input type="checkbox"/>	\$
5	Regular Sales Price	No	Base Price	1.5	Round to Full Amount	Round Up		Price List - Group No. 1	<input type="checkbox"/>	\$
6	Small Account Sales Price	No	Base Price	1.75	Fixed Interval	Round to Closest	0.05	Price List - Group No. 1	<input type="checkbox"/>	\$

OK Cancel Prices Update Wizard

- When setting up relative price lists using Base Price Lists, Rounding can be setup to control Unit Prices with both Rounding Methods and Ending/Intervals

Price Report:

Sales Quotation

Customer: C26000
Name: River Inc
Contact Person: Lewis Beerman
Customer Ref. No.:
Local Currency:

No. Hardware: 1183
Status: Open
Posting Date: 08/07/2025
Valid Until: 09/06/2025
Document Date: 08/07/2025

Contents

#	Item No.	Item Description
1	I00004	USB Flashdrive 256GB
2	P10003	PC Set 1
3	MRP_Item5	MRP_Item5
4	I00002	Blu-Ray DL Disc 10-Pack
5	D00002	Portable Hard Disk 2TB
6	C00005	WLAN Card
7	I00005	J.B. Laptop Batteries X1 series
8		

Price Report

#	Source of Price	Item No.	Item Description	Primary ...	Discount %	UoM	Quantity	Active	Valid From	Valid To	Display L...
1	Last Evaluated Price	I00004	USB Flashdrive 25			Manual					
2	Last Purchase Price	I00004	USB Flashdrive 25		22.50 \$	Manual					
3	Base Price	I00004	USB Flashdrive 25		30.00 \$	Manual		Y			
4	Discount Purchase Price	I00004	USB Flashdrive 25		14.97 \$	Manual		Y			
5	Regular Purchase Price	I00004	USB Flashdrive 25		22.50 \$	Manual		Y			
6	Distributor Sales Price	I00004	USB Flashdrive 25		37.50 \$	Manual		Y			
7	Regular Sales Price	I00004	USB Flashdrive 25		45.00 \$	Manual		Y			
8	Small Account Sales Price	I00004	USB Flashdrive 25		52.50 \$	Manual		Y			

OK

Total Before Discount: 32,370.00 \$
Freight:
Tax: 2,670.53 \$
Total: 35,040.53 \$

- Similar to accessing the Last Prices report, from a document line you can right click on the unit price field to see current pricing and select a price

Delivery Schedule Management:

The screenshot displays the SAP Business One interface for Delivery Schedule Management. The main window shows a sales order for item C00013 (1 TB disk for extern) at warehouse 01 - General Warehouse. The target document is Sales Order No.1091 / Line1, with a quantity of 19. The delivery schedule is sorted by Delivery Date in ascending order. The schedule shows two scheduled deliveries: one on 05/04/2016 (quantity 7) and another on 06/18/2016 (quantity 12) with a 45-day delay. A table below lists the document details for five sales orders, including business partners, quantities, confirmed status, and delivery dates.

Document	Business Partner	Qty (Inv. UoM)	Confirmed	Unconfirmed	Delivery Date
1 → Sales Order No.1331 / Line1	C40000 Earthshaker Corporation	19	19 / 19		10/02/2025
2 → Sales Order No.1178 / Line6	C23900 Parameter Technology	15	15 / 15		09/05/2016
3 → Sales Order No.1171 / Line6	C23900 Parameter Technology	16	16 / 16		09/05/2016
4 → Sales Order No.1131 / Line4	C99998 Web Customer	17	17 / 17		07/22/2016
5 → Sales Order No.1104 / Line5	C25000 Star Company	5	5 / 5		06/17/2016

- A feature of SAP Business One Advanced Available to Promise (ATP)
- Allows manual or automated delivery proposal with availability check in Delivery Schedule Details
- Enforcement of inventory allocation is possible based on Confirmation settings in Checking Rules

Pick Pack and Production Criteria:

Pick Pack and Production Manager - Selection Criteria

Selection Criteria Name: [Text Field]

Status: Open | Group By: None

Manage: Sales Orders | Production Orders

From: [Text Field]

Sales Order No. | Posting Date | Required Date | Delivery/Due Date | Customer | Fulfillment % | Shipping Type

Warehouses

	Location	Whse Code	Whse Name
<input checked="" type="checkbox"/>		04	Customer Owned
<input checked="" type="checkbox"/>		G/L	G/L Account Set Up
<input checked="" type="checkbox"/>	Florida		
<input checked="" type="checkbox"/>		05	Road Inventory
<input checked="" type="checkbox"/>	Los Angeles		

Sort By: Delivery/Due Date

Set To Release Value Manually

OK | Cancel | Save

List of Reports - Selection Criteria

Find: [Text Field]

#	Filter Name
1	Best Way - Assign Carrier
2	FedEX EM Complete Availability

Choose | Cancel

- Adding and Saving different Criteria (Filter Selections, Grouping, Document Types) allows consistency in managing the Warehouse workflow, saves time and reduces errors.

Getting More Information – Help portal:

https://help.sap.com/docs/SAP_BUSINESS_ONE_PRODUCT_LINE

- SAP's help.sap.com portal contains information about each of the different versions of Business One and the Web Client (as well as Mobile applications)
- The Use > Application Help documentation can showcase functionality and explain its use
- New: The Online Help can be automatically translated into multiple languages

[Customer Success Summit](#)

The screenshot shows the SAP Business One Product Line help page. The browser address bar displays the URL https://help.sap.com/docs/SAP_BUSINESS_ONE_PRODUCT_LINE. The page header includes the SAP logo, navigation links for 'Help Portal', 'Products', 'SAP Learning Journeys', and 'What's New', and a search bar. The main content area is titled 'SAP Business One Product Line' with a language selector set to 'English'. A note states: 'Find all products that belong to the SAP Business One product line. Note: If you are an SAP Business One customer, log on with your S-user account to access documents that are not available to the public. If you don't have an S-user account, contact your SAP Business One partner.' Below this, there are two main sections: 'SAP Business One' and 'SAP Business One Mobile'. The 'SAP Business One' section lists three products: 'SAP Business One' (runs on Microsoft SQL database), 'SAP Business One, version for SAP HANA' (runs on SAP HANA database), and 'SAP Business One analytics powered by SAP HANA' (analytics based on SAP HANA database, side-by-side with a transactional Microsoft SQL server). The 'SAP Business One Cloud' section notes it runs on both Microsoft SQL and SAP HANA databases. The 'SAP Business One Mobile' section lists four products: 'SAP Business One for iOS', 'SAP Business One for Android', 'SAP Business One Sales for iOS', and 'SAP Business One Service for Android'.

SAP Business One

[SAP Business One](#) >
This product runs on Microsoft SQL database.

[SAP Business One, version for SAP HANA](#) >
This product runs on SAP HANA database.

[SAP Business One analytics powered by SAP HANA](#) >
Analytics based on SAP HANA database, side-by-side with a transactional Microsoft SQL server.

[SAP Business One Cloud](#) >
This product runs on both Microsoft SQL and SAP HANA databases.

SAP Business One Mobile

[SAP Business One for iOS](#) >

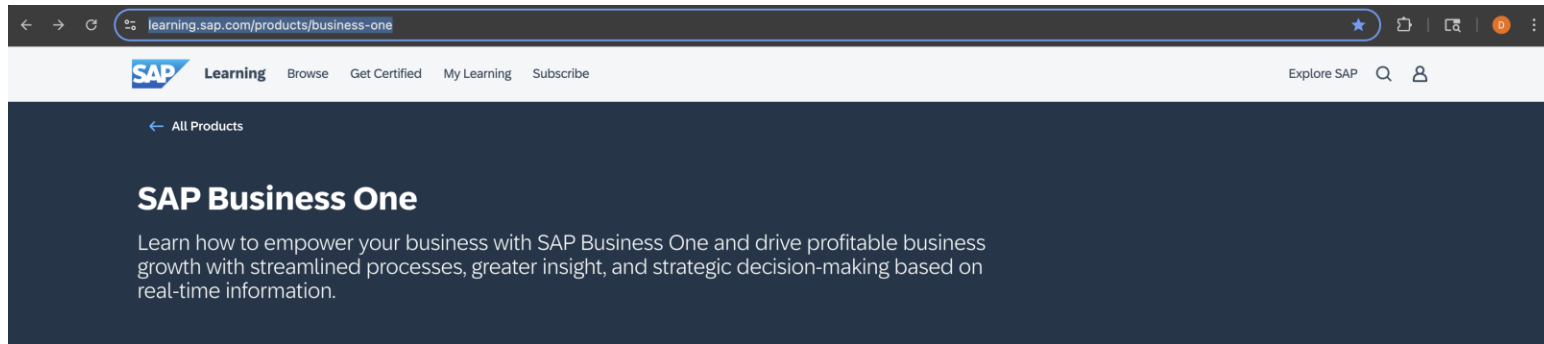
[SAP Business One for Android](#) >

[SAP Business One Sales for iOS](#) >

[SAP Business One Service for Android](#) >

Getting More Information – Learning Hub:

<https://learning.sap.com/products/business-one>



What's it all about?

SAP Business One provides an all-in-one solution for complete business visibility and control. It captures essential data for quick decision-making across the organization.

With built-in analytics and reporting, you gain access to accurate and up-to-date information for fast decisions. The solution is flexible, deployable on-premise or in the cloud, and compatible with SAP HANA® or Microsoft SQL servers.

Easy to use, it can be customized and extended as your business evolves. For global growth, SAP Business One supports 28 languages and 50 country-specific versions, backed by over 850 local partners.

Explore SAP Business One, Web client capabilities

- SAP's learning.sap.com portal contains guided online courses about Business One, the Web Client
- The curriculums are targeting both business users and developers
- There is also information about the RPA bots SAP BTP