

Users: All
Skills: Beginners

SAP Business One Tutorials for Beginners

CONS^{NSUS} | SAP[®] Business
One



Finding What You Are Looking For Within a Document

SAP Business One provides you with extensive support for searching for objects (sales and purchasing documents, and business partner and item master records in documents). The two main methods are discussed below: looking up business partners and items from a Choose from List and using the toolbar arrows to scroll through documents or master data records of a certain type.

Looking Up Business Partners and Items

SAP Business One makes it easy to look up business partner and item information while you are entering sales and purchasing documents. Figure 2-16 demonstrates how to use the selection lists.

The screenshot shows the SAP Business One Sales Order form. At the top, the Customer field is set to 'C26000' with a 'Choose From List' icon. Below this, the Customer details are shown: Name 'River Inc', Contact Person 'Lewis Beerman', and BP Currency '\$'. To the right, document details include No. '1183', Status 'Open', Posting Date '02/24/2021', Delivery Date, and Document Date '02/24/2021'. The main table has columns for Item No., Quantity, Unit Price, Disc., Tax C., Total (LC), Summary Type, and No Summary. Row 1 shows Item No. 'A00004', Quantity '1', Unit Price '750.00 \$', Disc. '0.000', Tax C. 'NY', Total (LC) '750.00 \$', and Summary Type 'Manual'. At the bottom, Sales Employee 'Sales Manager' and Owner 'Buyer, Fred' are listed. Summary fields include Total Before Discount '750.00 \$', Discount, Freight, Rounding '0.00 \$', Tax '61.88 \$', and Total '811.88 \$'. A Remarks field is at the bottom left. Buttons for 'Add & New', 'Cancel', 'Copy From', and 'Copy To' are at the bottom.

To locate an existing customer or item master data, click the Choose From List button

.... or press Tab in a blank field. A selection list appears in a separate window

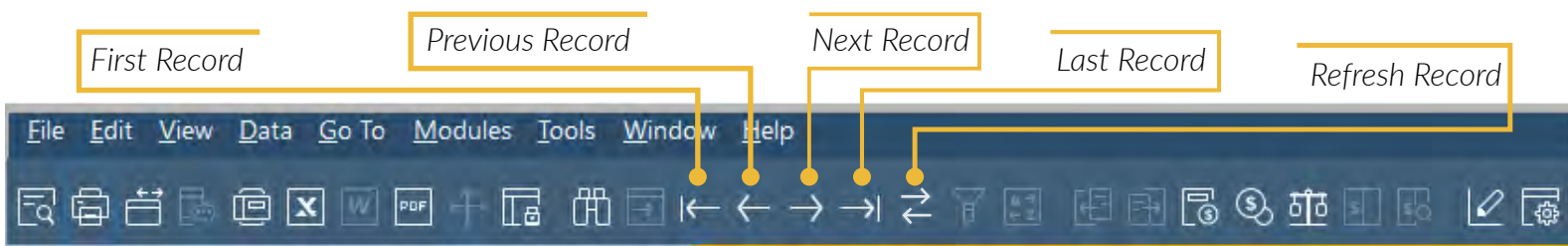
After you press the selection list icon, a selection list appears in a separate window. You can move through the list quickly by typing the first character of the business partner code or item number; the selection list scrolls as you type. You can sort the selection list, by double clicking the column header. Now you can type in the beginning of the value you are looking for, and the system will search in the sorted column. If you are more familiar with customer names and item descriptions than with their codes, you can use a "wildcard" to search. For example, to display a selection list of customers whose names begin with "Ch," go to the *Name* field, type **Ch** , and then press **Tab** to display the list. If you know that the name contain **Ch** , type the wildcard character "*" first (***Ch**).

If you know that only one customer name starts with "E," for example, simply type **E** in the *Name* field and press **Tab** . SAP Business One fills in the information for that customer in the sales order. The *Item Description* field works the same way for finding item information. If you have already enabled *SAP Business One Suggest (General Settings, Display tab)*, start typing the Business Partner code in the document header, or the Item code in the document rows, and SAP Business One will display a list like you'd find in a search engine to help you more quickly find what you're looking for. The same search methods are available in the master data windows as well. The only difference is that instead of pressing the Tab key, you press **Enter** or the Find button at the bottom of the window.

Using Toolbar Arrows to Find Documents

One easy way to scroll through documents or master data of a particular type is to use the arrows on the SAP Business One toolbar (see Figure 2-17). If you display a purchase order (by selecting *Purchase Order* from the SAP Business One Main Menu), you can use the arrow icons to scroll quickly through all the *purchase orders* you have. This works for any type of document in SAP Business One, such as sales orders, A/R invoices, as well as item and business partner master data records.

Click the double arrows to move to the first or last document; click the single arrows to move to the next or previous document. Next and previous are determined by document number. To see the last few purchase orders you entered, for example, in the *Purchase Order* window, click the right double arrow to go to the last purchase order and then click the left single arrow to move to previous ones.



Refresh Record: Whenever you make a change in a certain record and want to see the result instantaneously, press Refresh Record to display the changes in a sales or purchasing document. Refresh Record is also available for master data (Business Partners, Items, etc.).



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