

Users: All
Skills: Beginners

SAP Business One Tutorials for Beginners

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Knowing Where You Are Prt.2

Key Performance Indicators

This exciting widget allows you to create KPIs that describe different aspects of your company, and its status. For example, you can compare gross profit of this month to last month, or expenses of this month, compare to the same month last year. The options are limitless. KPIs are based on queries you create, so for any area that is interesting for you, you can create a KPI to evaluate it.

The KPIs show the overall amount, the target for the selected period and the trend compared to a previous period.

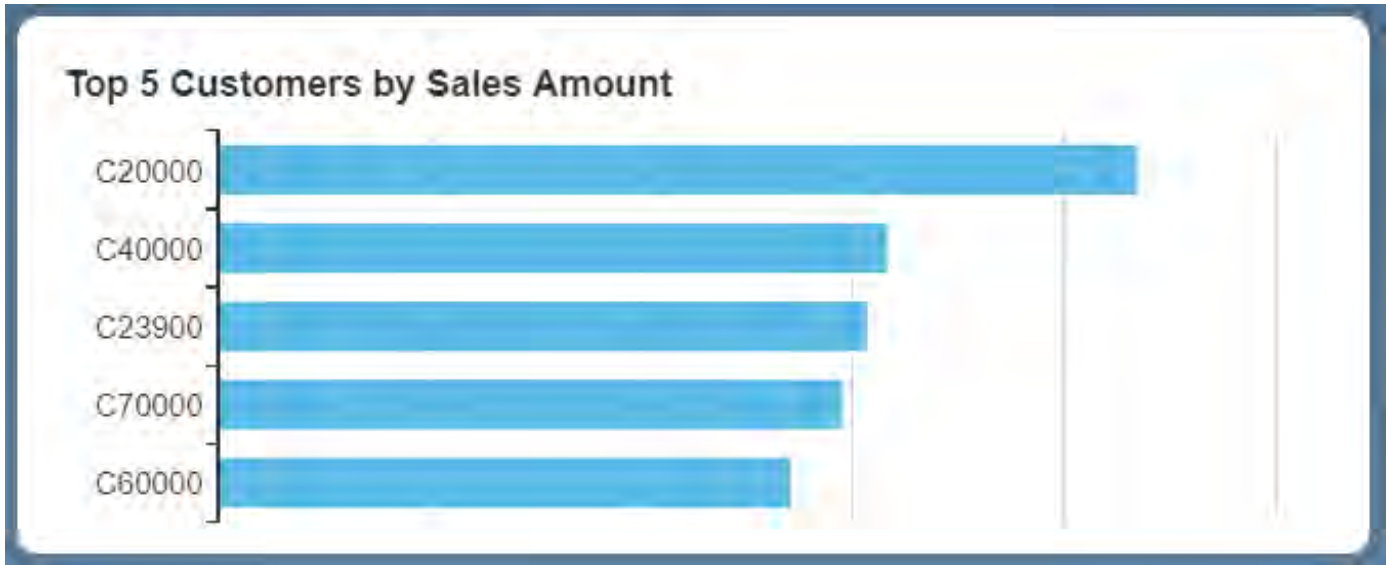


KPI for Total Assets

Dashboards

Dashboards are visualized reports that grab a large amount of data and present it in a way that is easy to read. There are two types of dashboards in SAP Business One version for SAP HANA: pervasive dashboards and advanced dashboards. SAP delivers a large number of pervasive dashboards and you can easily create your own.

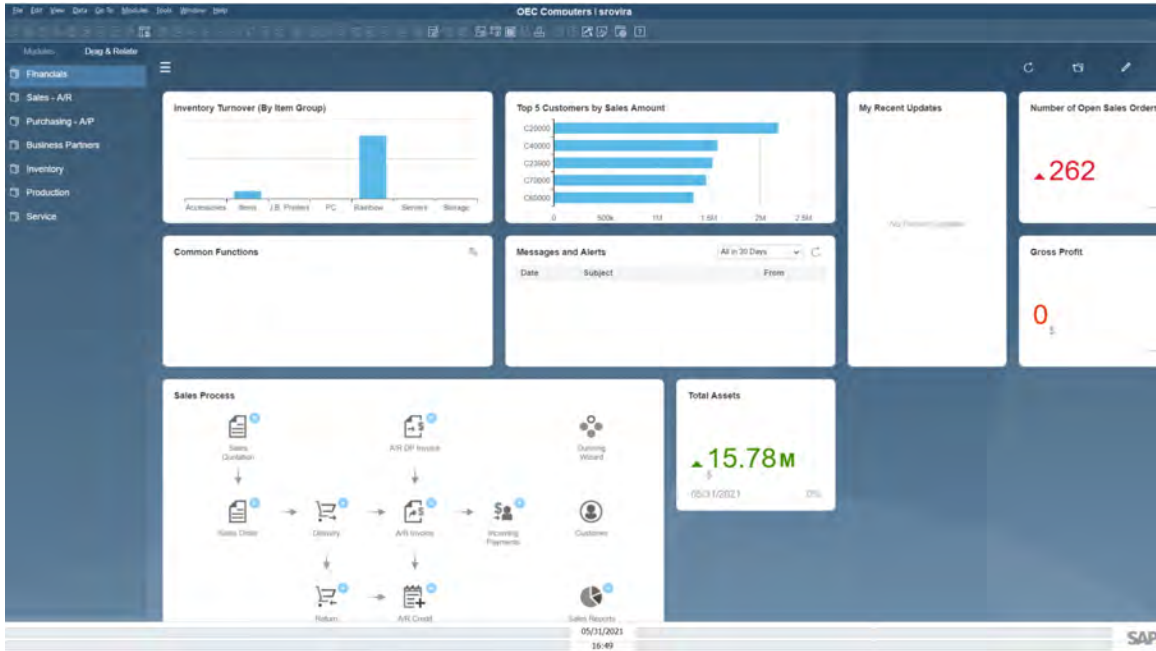
For example, you can use a pervasive dashboard that displays the 5 top customers or a dashboard showing expenses versus budget. You can have as many dashboards as you wish in your cockpit based on what interests you.



Pervasive Dashboard

One nice feature of pervasive dashboards is that they can have context menus that launch additional actions. In the Figure above, we see a dashboard that can open an advanced dashboard for sales statistics, open a master data window for customer information, or use the Enterprise Search to find customer information. We call this ability "Insight to Action" – you start from a simple dashboard, and are easily able to retrieve all possible information you may need about this item. You can also include a pervasive dashboard as an extension to a master data window or document.

Advanced dashboards are another innovation in SAP Business One version for SAP HANA. Advanced dashboards act like supplementary cockpits that can open from your pervasive dashboards. For example, you want to know all your customer's information involving sales, order fulfillments, receivables and more. An advanced dashboard can have multiple pages. In above, we see a pre-delivered dashboard with four pages: Users can toggle between the pages. Note that the advance dashboard is filtered for a specific customer. If needed, you can replace the customer account using the filter icon on the top right area.



Advanced Dashboard

Workbench

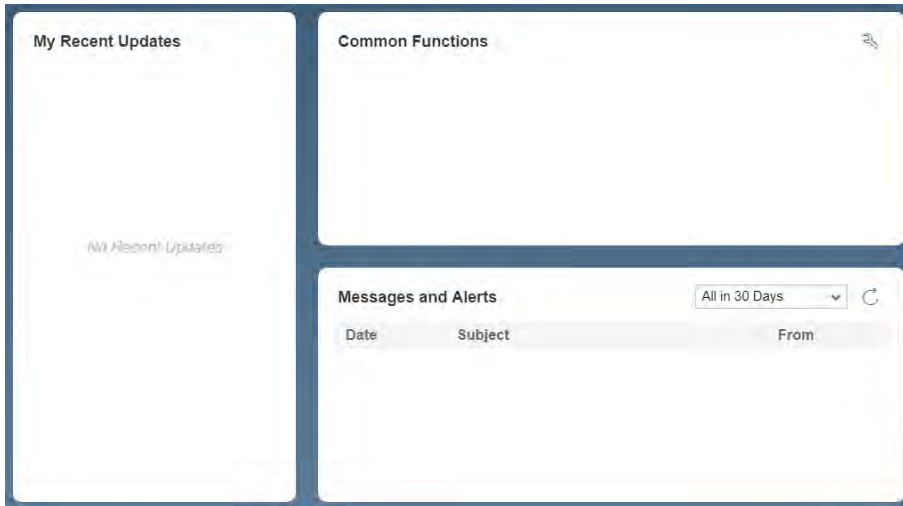
A workbench is composed of all documents and reports relating to a business process. This widget gives you quick and clear access to windows without the need to use the main menu. SAP Business One provides 4 workbenches: sales, purchasing, inventory and financials. By clicking the dropdown indicator, you can launch a report related to that business step.



Purchasing Workbench

Others

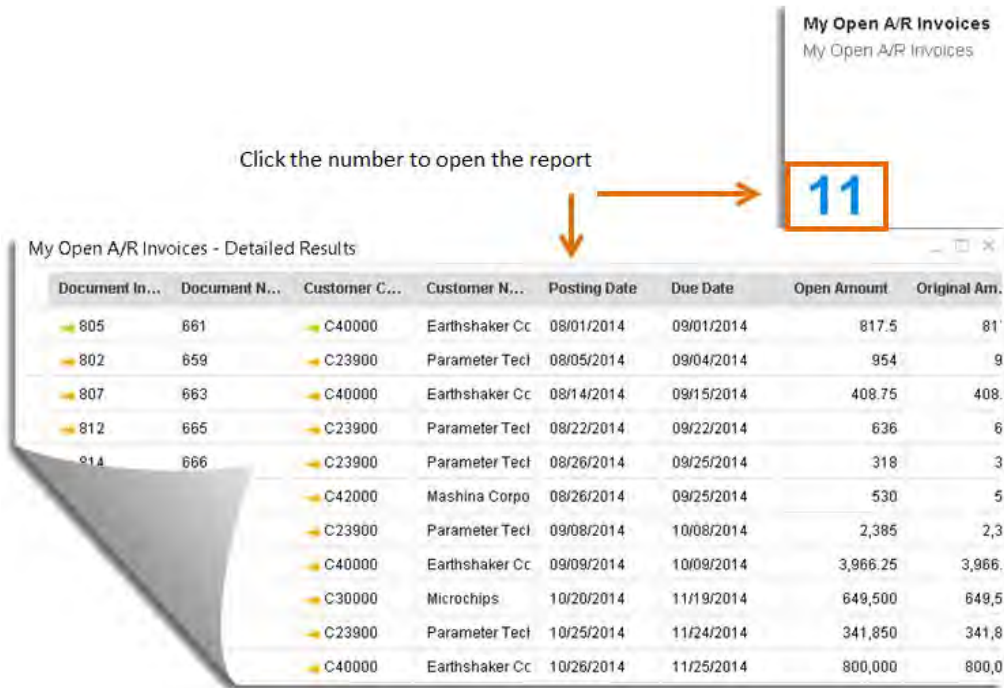
There are four additional types of widgets: My Recent Updates, Common Functions, Messages and Alerts and Browser. My Recent Updates contains information on your newly added or updated objects. The Common Functions widget allows you to organize your frequently used transactions and access them with one click. The Messages and Alerts widget clearly displays urgent info in an easy-to-read way. You can add a browser window to a website or an app from Tools → Cockpit → Browser Widget Setup



My Recent Updates, Common Functions and Message and Alerts

Business Object Count Widget

This widget shows you the result of a query as a number. It can count the number of activities that you created or are assigned to. For example, it could display the number of all your open sales quotations or invoices. From the widget, you can drill down on the number to get a list of the documents that are included in the total. To create new count widget go to.



My Open A/R Invoices

Customizing your cockpit: you can change the arrangement of the widgets or choose additional widgets for your cockpit. Use the pencil icon to edit the cockpit. Click the plus sign, to add widgets. To remove a widget, click it, hold down the mouse and drag it to the trash can located in the bottom right. To create new KPI's, dashboards and advanced dashboards, use the Pervasive Analytics icon located in the tool bar. You can save different flavors of the cockpit, as templates. Once you are done with the changes, click the pencil icon, and choose to save it for yourself, overwrite an existing template, or save as a new template.

Document Windows

Now that you have the big picture of the main window, it's time to explain some of the general rules of the SAP Business One user interface.

Window Operation Modes

There are four possible window operation modes in SAP Business One:

- Add: Add a new record or document
- Find: Search for existing records or documents

- View: View an existing record or document
- Update: Modify the data of an existing record or document

Windows in SAP Business One have a default mode, which can be either “add” or “find,” depending on the context of what you’re doing. For example, when you choose the Business Partner Master Data or the Item Master Data window, it opens automatically in find mode because you will most often want to display information that has already been entered. When you want to process a sales order or purchase order, on the other hand, the window opens automatically in add mode because you usually want to add a new purchase order. How do you know what mode you’re in? The button in the bottom-left corner of the window changes to Add, Find, OK (for view mode), or Update according to the current mode of the window.

You can switch between operation modes in several ways:

- To add a new object (such as a document or master data record), use the add function. There are several ways to activate the add function, such as the following:

- o From the menu bar, choose Data → Add
- o Press Ctrl + A on the keyboard
- o From the toolbar, choose the add icon

To find an existing object (such as a document or master data record), use the find function. SAP Business One displays the object in find mode, with the Find button at the bottom-left corner of the window. There are several ways to activate the find function, including the following:

- o From the menu bar, choose Data → Find
- o Press Ctrl + F on the keyboard
- o From the toolbar, choose the find icon

· When you enter or change data in an existing object, SAP Business One automatically switches to update mode, causing the Update button to appear at the bottom-left corner of the window. Click on the Update button to save data you entered or changed; click on the Cancel button if you don't want to save or update data.

Switching operation modes alert. You cannot always change data in a document or a master data record once it has been added. At certain points, documents become read-only if the business process related to the document has progressed beyond a certain stage or when one document has been copied to another. Data that cannot be changed is usually grayed out.

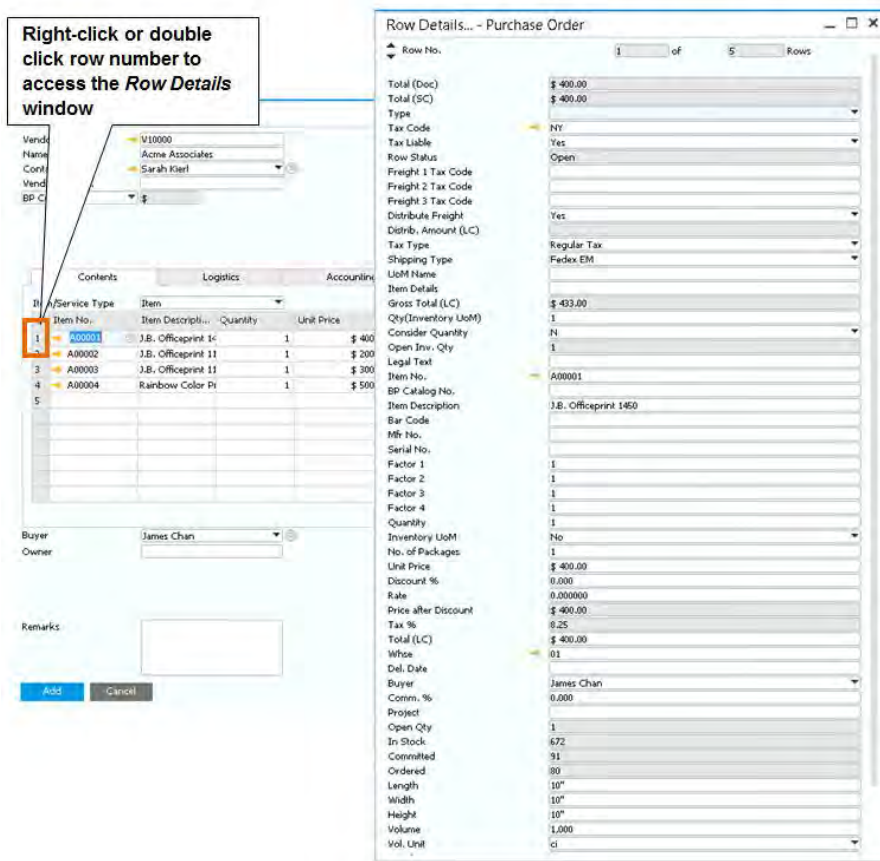
Context Menu

When you are working in any window, you can click the right mouse button to open a context menu that provides access to the most commonly used functions for that section of the window. Because these functions are context-sensitive, the options change depending on the area of the screen you click on.

Row Details

Sales and purchasing documents include tables that provide information about quantities, prices, and descriptions. To work with these tables easily and extend the view available on the screen, you can open the Row Details window. This window allows you to view or edit rows in a table, such as that found in the Contents tab of a sales document. The Row Details window shown in the Figure below can be opened by right-clicking the row number of the required item, by double clicking the row number, pressing Ctrl + L , or by selecting Row Details from the menu bar's Goto menu.

Some fields are “read only” and appear in gray. If a field is editable, once you enter the new data, the field updates automatically—that is, there is no OK or Update button in this window.



Accessing the Row Details window

Maximizing the Grid

If you have a large number of items to enter into a document, you can enlarge the grid on the Contents tab. Select Maximize/Restore Grid from the context menu to enlarge the Contents table area. This allows you to focus on the items, while you enter them. Once you are done, right click again to select the same option to restore the grid to its original size.



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