

Long Business Systems, Inc

Management Software Solutions

We help businesses manage for success

Cleveland – Cincinnati – Pittsburgh – South Bend



LBSi Monthly Webinar Series: March 2017 Tips and Tricks

Presented by: Martha Konzelman, Senior Consultant LBSi

Agenda:

- Keyboard Shortcuts
- Update Description in Marketing Document Rows
- Misc. Screen/Document Tips
- My Menu
- Drag & relate



Keyboard Shortcuts

General Shortcuts

Task	Shortcut
Display the SAP Business One main menu	Ctrl + 0 (zero, not the letter O)
Print the current document or record	Ctrl + P
Display transaction journal	Ctrl + J
Exit SAP Business One	Ctrl + Q
Undo	Ctrl + Z
Redo	Ctrl + Shift + Z
Cut	Ctrl + X
Copy	Ctrl + C
Paste	Ctrl + V
Find customers or items that start with a certain letter	Type letters in name or description field * Tab
Select multiple items	Hold down Ctrl and click all desired items
View user-defined fields	Ctrl + Shift + U
View the next record or document	Ctrl + right arrow
View the previous document or record	Ctrl + left arrow
Change to add mode (if displaying document or master data, opens a blank document or master data screen)	Ctrl + A
Change to find mode	Ctrl + F
Change a field name	Ctrl and double-click field name
Enter today's date in a date field	* and Tab
Enter a date in the current month	Day of month and Tab
Enter a date in the current year	Day and month and Tab
Close all windows except the SAP Business One main menu	Shift and click X in window's upper right corner



Keyboard Shortcuts

Table Shortcuts

Task	Shortcut
Add a row	Ctrl + I
Duplicate a row	Ctrl + M
Delete a row	Ctrl + K
Sort table by column in ascending order	Double-click column header
Sort table by column in descending order	Alt + double-click column header
Display detailed information about a row	Ctrl + L
Go to the first row	Ctrl + H
Go to the last row	Ctrl + E



Keyboard Shortcuts

Sales & Purchasing Shortcuts

Task	Shortcut
Calculate gross profit	Ctrl + G
Specify a payment method	Ctrl + Y
Calculate volume and weight	Ctrl + W
Open base document	Ctrl + N
Open target document	Ctrl + T
Go to business partner code field	Ctrl + U
Go to the Remarks field	Ctrl + R
Choose a serial number for an item	Ctrl + Tab in <i>Item Quantity</i> field
Check the latest prices	Ctrl + Tab in <i>Item Price</i> field
Display alternate items	Ctrl + Tab in <i>Item No.</i> field
Display all warehouses and quantities	Ctrl + Tab in <i>Warehouse</i> field
Copy an amount when entering a payment	After clicking the moneybag icon to specify an incoming payment, press Ctrl + B to copy the amount into the document



Update Description in Marketing Document Rows

- Click in the description field on the row.
- Enter the updated description for the item.
- Ctrl + Tab (hold the control key down and click on tab) to exit the description field.
- Updated description is now recorded in the field.



Misc. Screen/Document Tips

- Use down arrow for fast entry in marketing documents.
- View last prices for an item.
 - Right Click in Unit Price field and select “Last Prices”
- View batch / serial numbers selected for an item.
 - Right click on Quantity field and select “Batch/Serial Number Transaction Report”
- Display column totals in queries
 - Ctrl (hold key down) and click on header of column to total
- Sort column in queries
 - Double click on the header of the column
- Filter Table in queries
 - Right click in query Filter Table



Creating a Personalized Menu

Adding a Window to the Personalized Menu

1. *Open the window you want to add to your menu.*
2. *Open the Add to My Menu window, choose – Tools > My Menu > Add to My Menu*
3. *Select the folder to which you want to add this window and choose Add.*

Adding a Query to the Personalized Menu

1. *Open the Query Manager window, choose – Tools > Queries > Query Manager*
2. *Choose the query you want to add to your user menu.*
3. *Open the Add to My Menu window, choose – Tools > My Menu > Add to My Menu*
4. *Select the folder to which you want to add this query and choose Add.*



Organizing the Personalized Menu

Modifying the objects in the Personalized Menu

1. *Open the Organize My Menu window – Tools > My Menu > Organize*
2. *Choose one of the following activities:*

Activity	Procedure
To change an object:	Select the required object and use:
	• Level: To change the menu option hierarchy level
	• Folder: To move the menu option to a different parent folder
	• Loc in Folder: To change the menu option location within a folder
To rename an item:	Choose Rename and enter the new name in the Data Entry window
To delete an item:	Choose Delete

Creating New Folders

1. *From the Add to My Menu window or in the Organize My Menu window, choose New Folder. The Data entry window appears.*
2. *In the Enter a new folder name field, specify a name and choose OK. The new folder is added to the list of folders*
3. *Select the folder to which you want to add this window and choose Add.*



Drag and Relate

Use *Drag & Relate* to quickly produce reports and access information in SAP Business One.

- From the SAP Business One Main Menu, choose the Drag & Relate tab.
- Click the folder icons to open the relevant menu.
- Double-click the item you wish to start with for example Business Partners
- Place the mouse cursor on the field you wish to search on, hold the left mouse button until a black rectangle appears, drag onto the menu item you wish to find out more information on and release the mouse button.



Tip of the Day

- Tooltip Preview
- Go to: Administration > System Initialization > Tooltip Preview

The screenshot shows two SAP windows. The top window is 'Sales Order' for customer C40000 (Earthshaker Corporation). A tooltip for 'Business Partners' is displayed over the 'Customer Ref. No.' field, showing details like BP Code, BP Name, BP Type, BP Currency, Account Balance, Telephone 1, E-Mail, Web Site, and User Defined Field (VIP). The bottom window is 'Tooltip Preview - Setup', which allows users to enable or disable tooltips for various objects and properties. The 'Enable Tooltip Preview' checkbox is checked. The 'Business Partners' object is highlighted in the list, and the 'User Defined Field' property is highlighted in the right-hand list.

#	Object Name	Enabled
1	Chart of Accounts	<input checked="" type="checkbox"/>
2	Business Partners	<input checked="" type="checkbox"/>
3	Item Master Data	<input checked="" type="checkbox"/>
4	Contact Persons	<input checked="" type="checkbox"/>
5	Journal Entry	<input checked="" type="checkbox"/>
6	Payment Terms	<input checked="" type="checkbox"/>
7	Warehouses	<input checked="" type="checkbox"/>
8	Sales Tax Codes	<input checked="" type="checkbox"/>
9	Payment Methods	<input checked="" type="checkbox"/>
10	Employee Master Data	<input checked="" type="checkbox"/>
11	Blanket Agreement	<input checked="" type="checkbox"/>
12	Others	<input checked="" type="checkbox"/>

#	Property Name	Visible
11	Open Orders Balance	<input type="checkbox"/>
12	Open Orders Balance in SC	<input type="checkbox"/>
13	Contact Person	<input type="checkbox"/>
14	ID No. 2	<input type="checkbox"/>
15	Telephone 1	<input checked="" type="checkbox"/>
16	Telephone 2	<input type="checkbox"/>
17	Mobile Phone	<input checked="" type="checkbox"/>
18	Fax Number	<input type="checkbox"/>
19	E-Mail	<input checked="" type="checkbox"/>
20	Web Site	<input checked="" type="checkbox"/>
21	Business Partner Type	<input type="checkbox"/>
22	Remarks	<input type="checkbox"/>
23	User Defined Field	<input checked="" type="checkbox"/>



Long Business Systems, Inc. (LBSi)

- **Next Meetings:**

- Tuesday, Apr. 11, 2017

- Budgets

- Tuesday, May 9, 2017

- Queries Part 3

- Biz.Net (SAP User group)

- October 23-25, 2017: Hyatt Regency Orange Co., CA



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Thank you for taking time to participate in the SAP Business One User Group Meeting.

Please take a few minutes to provide us with feedback and suggestions going forward.

- We are always looking for new clients to work with. And we would like to find more clients and partners like you – companies that are engaged, smart, and focused on their future.
- Can you help us out by referring LBSi to someone who could benefit from our services?

