



Long Business Systems, Inc. (LBSi)

LBSi is a technology services firm that understands technology is a tool that enables you to grow profitably, outpace the competition, and provide better service to your customers.

Cleveland – Columbus – Cincinnati – Toledo - Pittsburgh – Philadelphia - Indianapolis

THE BEST-RUN BUSINESSES RUN SAP



Tips and Tricks

Agenda:

- ❖ Keyboard Shortcuts
- ❖ How to Delete or Clear a Link UDF
- ❖ Update Description in Marketing Document Rows
- ❖ Total columns on screens and queries
- ❖ Misc. Screen/Document Tips
- ❖ Recurring Postings for Monthly Payments

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 in a document	Type letters in name or description field * Tab
Select multiple items	Hold down Ctrl or Shift 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 window)	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	any key but a number 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
Open a window from the main menu	Enter
Close the current window	Esc

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
Copy from cell above	Ctrl + ↑

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 <i>Remarks</i> 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
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
Open <i>Item By Warehouse</i> report	Ctrl + Tab in <i>Whse</i> field

Delete Attachments / Images from UDF

- ❑ Alt + Double Click (hold the alt key down and left double click) in the field where the link is.
- ❑ Link will be removed.
- ❑ Click Update to save.

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 and click (hold the control key down and click on tab) on column to total

Recurring Postings for Monthly Payments

- ❑ Create reoccurring posting to BP code for the reoccurring payments
 - ❑ Ctrl + Tab (hold the control key down and click on tab) in the GL Acct/BP Code field and select business partner
- ❑ Execute recurring posting as scheduled
- ❑ Run payment wizard and include manual journal entries.
- ❑ Recurring posting will appear on the aging report.
- ❑ Issue check thru normal process.



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Associate

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Next Meetings:

- Tuesday, May 10, 2011
 - “SAP Cockpit”
- Tuesday, June 21, 2011
 - TBD





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

Please take a few minutes to respond to our survey and 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?





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