

SAP B1 Tips and Tricks: Enhancing User Experience

1. Keyboard Shortcuts:

Within SAP Business One, a user may use keyboard shortcuts to increase productivity when working in the system. Although SAP B1 offers plenty of keyboard shortcuts, the ones listed below are some of our favorite when working within marketing documents!

Shortcut	Task
CTRL+ A	Change marketing document to add mode
CTRL+ F	Change marketing document to find mode
CTRL+ Left/Right Arrow keys	Left/Right Arrow keys enables you to move to previous/next saved document
CTRL+ I	To insert a line item above current line
CTRL+M	To duplicate a line item
CTRL+K	To remove a line item

2. Inputting Date – Shortcuts:

a. Auto input current system dates rather than selecting it on the calendar icon. It is as simple as entering any letter on the keyboard and then pressing the Tab key.

The screenshot shows a form with the following fields: No. (Primary), 2019; Status (Open); Posting Date (07/17/2020); Delivery Date (A); Document Date (07/17/2020). The 'Delivery Date' field is highlighted in blue, and a small 'A' character is visible in the input area, indicating the auto-input process.

The screenshot shows the same form as above, but now the 'Delivery Date' field contains the date '07/17/2020', indicating that the auto-input process has completed.

b. Auto input unique dates rather than selecting it on the calendar icon. For example, if you wanted to input a date a week from today, you would enter '+7' and press the Tab key.

No.	Primary	2019
Status	Open	
Posting Date	07/17/2020	
Delivery Date	+7	
Document Date	07/17/2020	

No.	Primary	2019
Status	Open	
Posting Date	07/17/2020	
Delivery Date	07/24/2020	
Document Date	07/17/2020	

3. Function Keys:

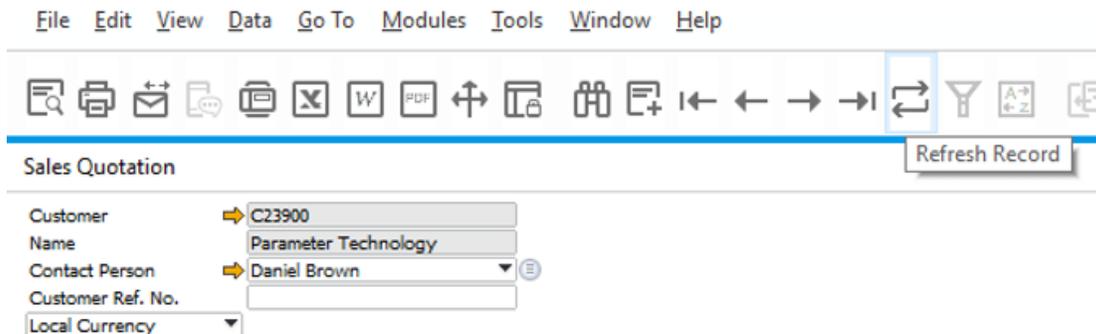
SAP B1 offers a tool that allows users to customize their function keys, given that the user has a keyboard with these keys. The user can map each key to open a specific window from any module rather than using the menu screen and drilling into each module to find a window.

a. Toolbar → My Shortcuts → Customize

Customize	
Allocation	
Shortcut	F2
Current Window	Sales Order
Module	Sales - A/R
Window	Sales Order

4. Screen Data Refresh:

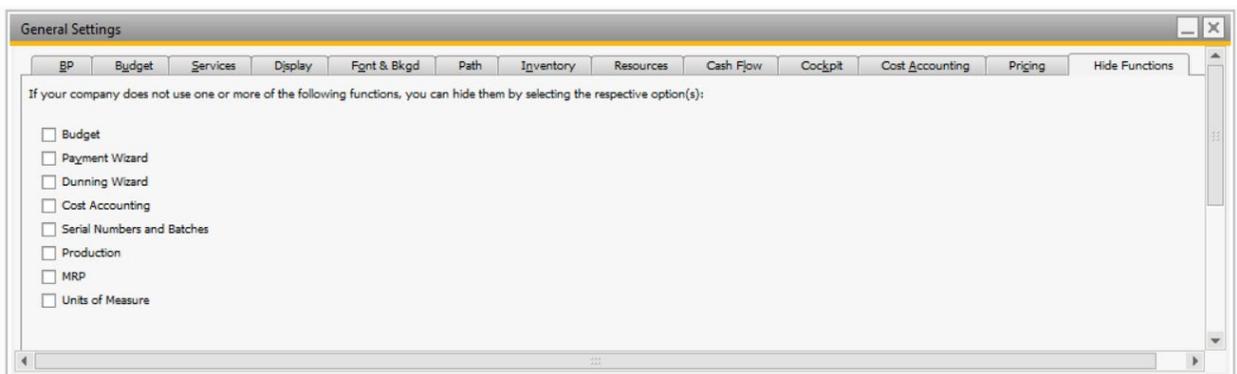
If several users happen to be updating a document at the same time, a common habit that users have is pressing the left and right arrow buttons to leave the record and enter back into it. A more efficient and quick way to refresh the information is pressing the refresh button in the tool bar slightly right to the arrow keys.



5. Hide Menu Items:

The menu selection can be a bit too extensive for one's preference especially if a user only uses specific modules/sub-modules. SAP allows users to customize their menu selection by hiding a few of them. The menu items can be unhidden by simply unchecking the box and updating the screen.

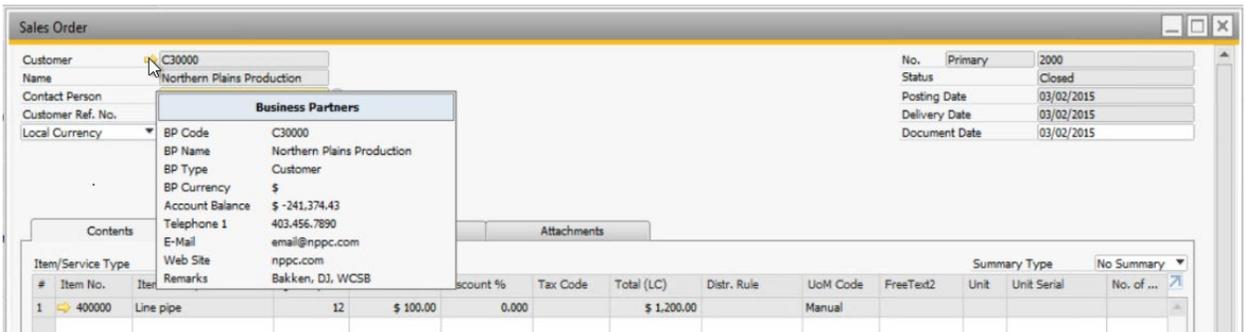
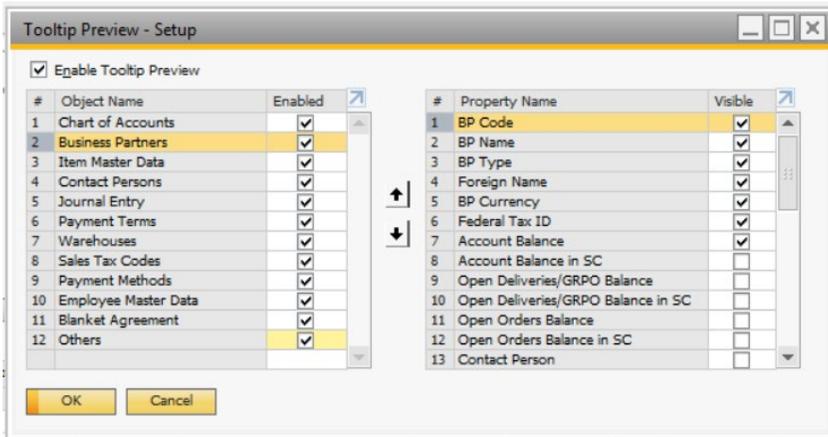
a. Administration → System Initialization → General Settings → Hide Functions tab.



6. Tool Tip Preview:

The user can enable the golden arrows to show additional details when hovering the mouse over them. This feature must be enabled per user. Therefore, enabling this feature in one user's account will not update the change company-wide.

a. Administration → System Initialization → Tooltip Preview



7. Case Sensitive When Creating New Users (SAP HANA)

Within SAP HANA when creating a new user, it is important to know that this version of SAP is case sensitive. For example, 'Bob' and 'bob' will be registered as two different users. This detail is mostly important for companies who utilize multiple databases as SAP will determine that they are registered as two different people.

Users - Setup

Superuser Mobile User

User Code

Bind with Microsoft Windows Account

User Name

Employee ⓘ

E-Mail

Mobile Phone

Mobile Device ID

Fax

Defaults

Branch

Department

Authorization Groups ...

Language

Password ...

Password Never Expires

Change Password at Next Logon

Locked