



## 15 Minute Tip Talk – March 1, 2018

### Up Your Productivity With B1UP

*This example available starting version 9.1*

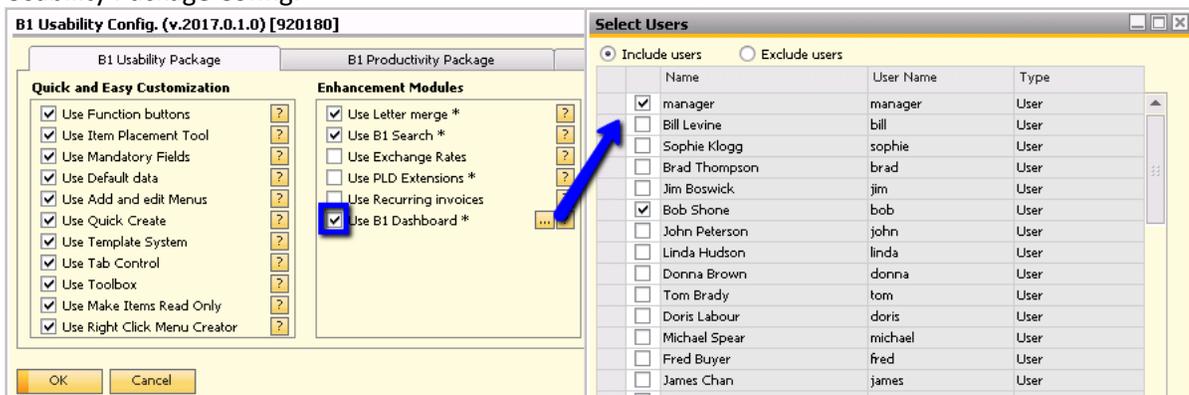
#### Background

B1 Usability Package is an award-winning add-on which aims to enhance SAP Business One's convenience, functionality, and flexibility. The add-on allows users to redesign SAP Business One's interface and workflows to more closely fit their unique business practices. Among the more recent features are the B1UP dashboards, which provide overviews of critical business areas and easy access to information.

#### Prerequisites

In order for the B1UP dashboards to work properly, you must ensure the following:

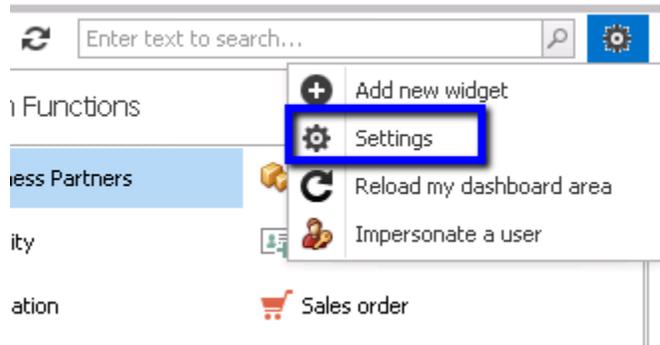
1. Your SAP Business One is version 9.1 PL06 or higher
2. Your SAP Business One Cockpit is disabled
3. You have enabled Dashboards and assigned the authorization to the appropriate users in your B1 Usability Package Configuration under Administration > Add-Ons > B1 Usability Package > B1 Usability Package Config.



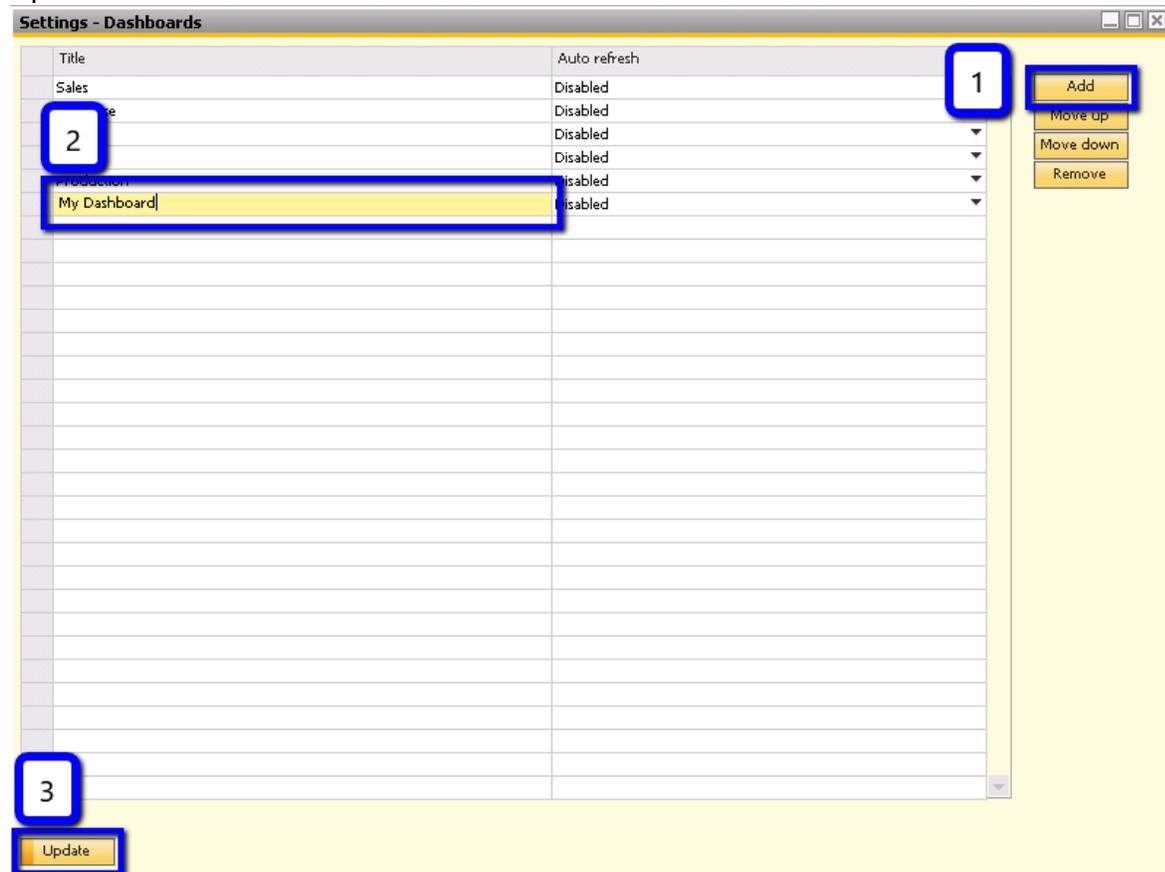
#### Dashboards

The B1 Usability Package comes with five out-of-the-box dashboards: Sales, Purchase, Finance, Service, and Production. In addition to these five dashboards, you may also create your own.

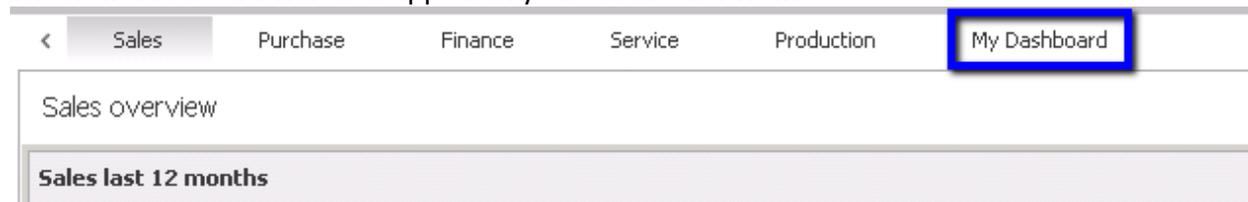
To create your own dashboard, go to Settings:



In the Dashboard Settings page, click Add, enter the name of your new dashboard, and click Update.



The new dashboard will then appear in your dashboard view:

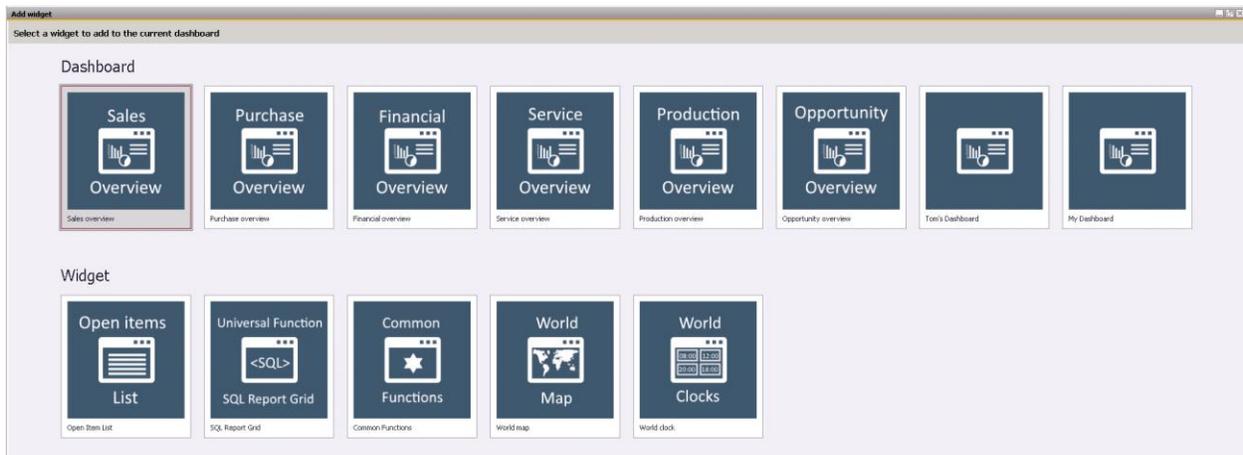


*Adding New Widgets*

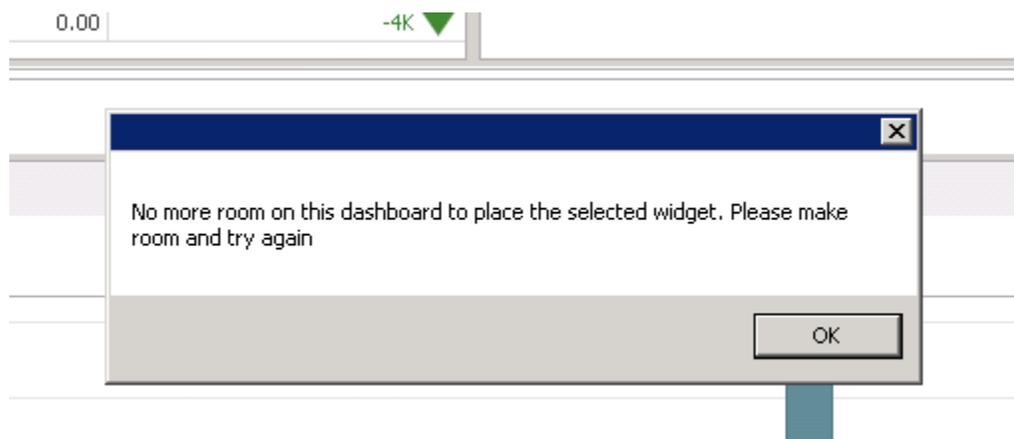
Upon adding the new dashboard, it will initially be empty. However, you may add new graphics and reports by selecting Add New Widget:



You will be able to choose, among others, dashboard overview widgets used in other dashboards or create your own custom universal function SQL report grid.



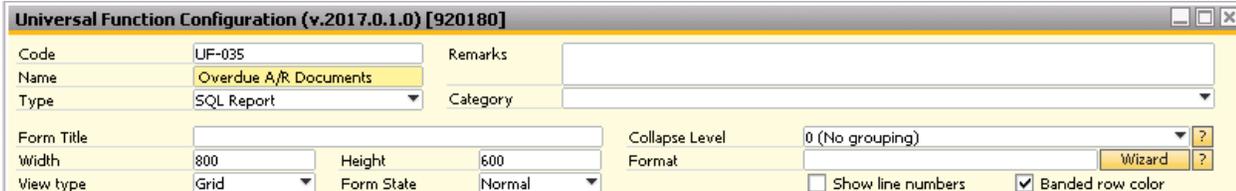
You can add as many widgets to your dashboard as you like, so long as you have enough room. When the system detects that you no longer have sufficient space, it will show you the following notification:



## SQL Reports

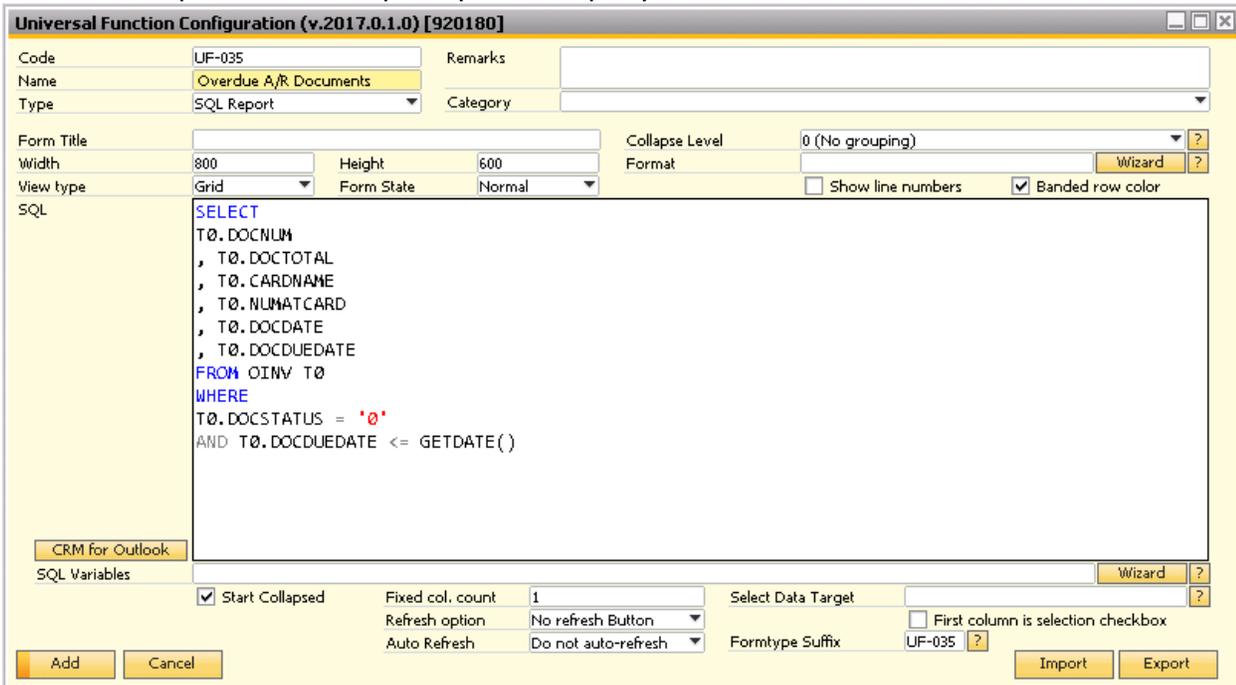
If you are comfortable scripting in SQL, you may want to use SQL reports as a dashboard. You must first create the SQL report as a Universal Function Configuration. You can access the Universal Function Configuration page by navigating to Administration > Add-Ons > B1 Usability Package > Module Configuration > Universal Function > Universal Function Configuration.

In the Universal Function Configuration screen, ensure you are in Add mode and select SQL Report as the type:



The screenshot shows the 'Universal Function Configuration (v.2017.0.1.0) [920180]' window. The 'Type' is set to 'SQL Report'. The 'Name' is 'Overdue A/R Documents'. The 'Form Title' is empty. The 'Width' is 800 and 'Height' is 600. The 'View type' is 'Grid' and 'Form State' is 'Normal'. The 'Collapse Level' is '0 (No grouping)'. The 'Format' is empty. There are checkboxes for 'Show line numbers' (unchecked) and 'Banded row color' (checked). A 'Wizard' button is visible.

You can then proceed to complete your SQL query and click Add:

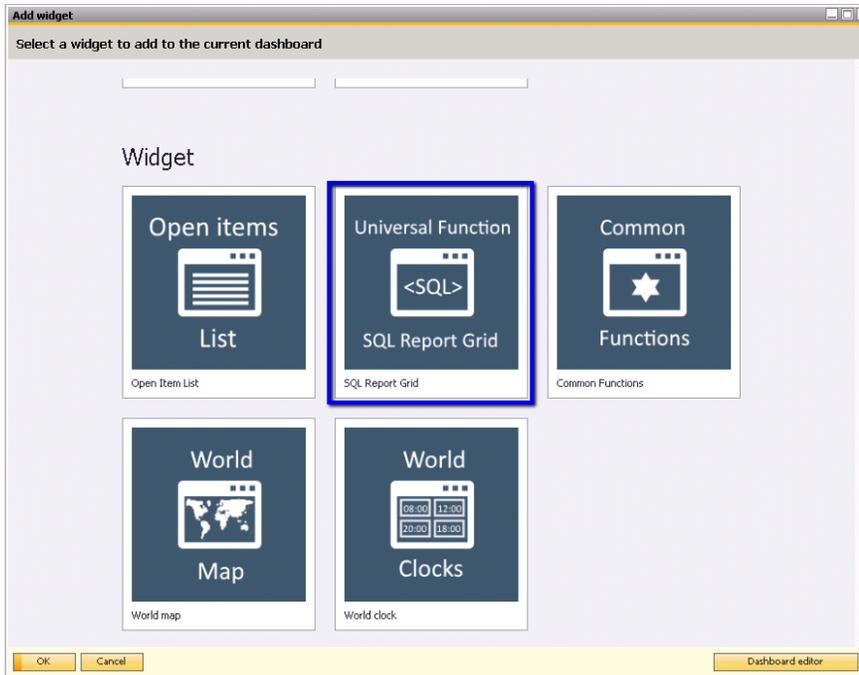


The screenshot shows the same 'Universal Function Configuration' window, but with an SQL query entered in the 'SQL' field. The query is: 

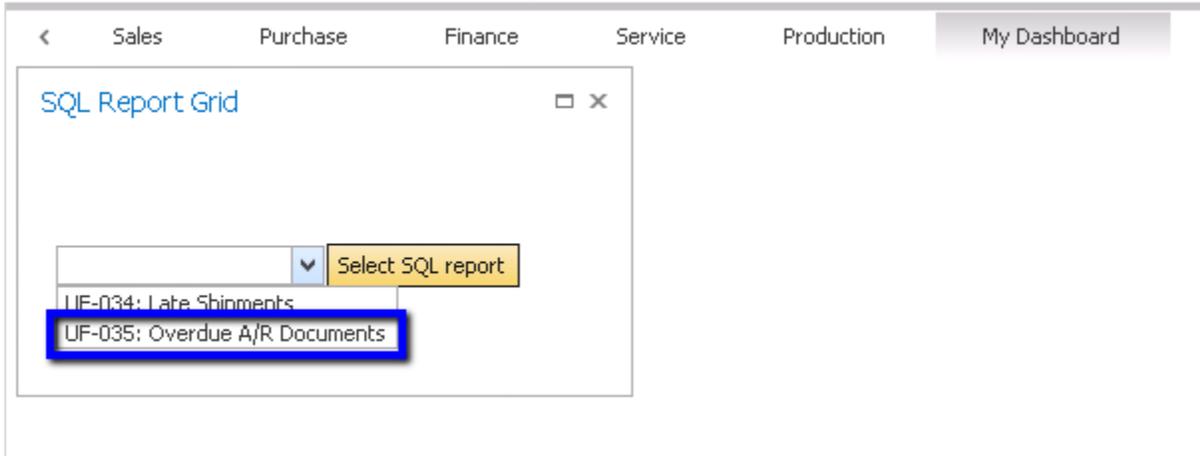
```
SELECT
T0.DOCNUM
, T0.DOCSTOTAL
, T0.CARDNAME
, T0.NUMATCARD
, T0.DOCDATE
, T0.DOCDUEDATE
FROM OINV T0
WHERE
T0.DOCSTATUS = '0'
AND T0.DOCDUEDATE <= GETDATE()
```

 Below the query field, there are 'CRM for Outlook' and 'SQL Variables' buttons. At the bottom, there are 'Add', 'Cancel', 'Import', and 'Export' buttons. The 'Start Collapsed' checkbox is checked. The 'Fixed col. count' is 1. The 'Refresh option' is 'No refresh Button'. The 'Auto Refresh' is 'Do not auto-refresh'. The 'Formtype Suffix' is 'UF-035'.

Once you have added the SQL Report as a Universal Function, you can select SQL Report Grid in the Add New Widget page:



You will then have the choice of selecting the SQL report you created:



The results of the SQL report you created will then appear as a widget:

My Dashboard Example

DOCNUM	CARDNAME	NUMATCARD	DOCTOTAL	DOCDUEDATE
332	ADA Technologies		1,828.50	8/1/2012
334	Mashina Corporation		12,024.38	10/23/2012
335	Maxi-Teq		954.00	11/12/2012
336	SG Electronics		22.50	11/7/2012
337	Aquent Systems		38.50	11/12/2012
338	Mashina Corporation		159.00	12/3/2012
339	Mashina Corporation		4,425.50	12/10/2012
340	MICROCHIPS		5,250.13	11/12/2012
341	Maxi-Teq		13,093.65	12/3/2012
342	Maxi-Teq		2,703.00	9/6/2012
343	Aquent Systems		1,921.50	12/12/2012
344	SG Electronics		11,430.00	10/26/2012
345	Aquent Systems		122.50	9/5/2012
346	Maxi-Teq		12,076.05	9/6/2012
347	MICROCHIPS		2,165.00	9/13/2012
348	Mashina Corporation		19.88	8/29/2012
349	Earthshaker Corporation		4,700.63	11/26/2012
350	SG Electronics		1,050.00	1/7/2013
351	Earthshaker Corporation		1,090.00	1/7/2013
352	Earthshaker Corporation		408.75	11/7/2016
353	Maxi-Teq		600.00	2/3/2017
355	Parameter Technology		3,835.08	2/9/2017
356	Maxi-Teq		216.00	2/13/2017
358	Maxi-Teq		400.00	1/30/2017
359	Maxi-Teq		400.00	1/31/2017

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