



Coffee Break & Learn: Tip of the Week – July 6, 2017

Three Quick Tips for Business One Success

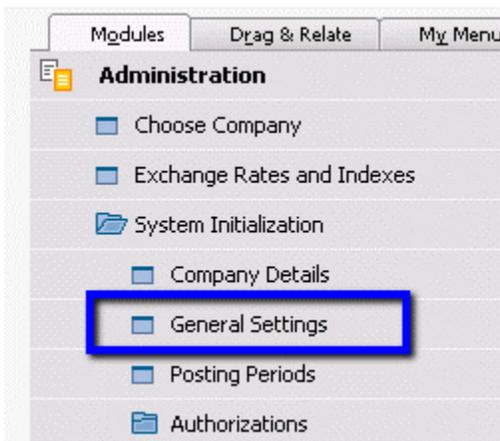
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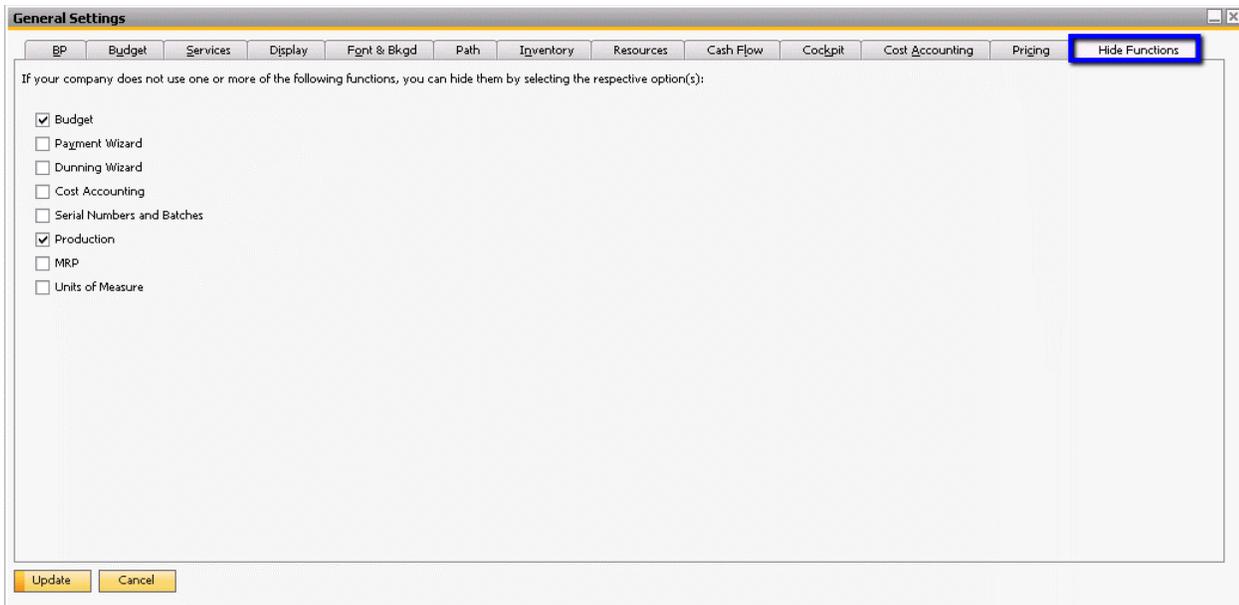
SAP Business One is an ERP system which boasts a wealth of features. For this same reason, users may require shortcuts and tricks to make navigating the application smoother and more time-efficient. The following will cover tips related to the Hide Functions feature, the Alerts/Messages Overview, and the Journal Entry Preview.

Hide Functions

You may find that Business One offers modules and features which you do not need. For example, if your company specializes in product distribution, you may find that you do not need the Production module. If your company has only a few vendors whose payments you want to control manually, you may not want to use the Payment Wizard.

Starting on version 9.1, SAP Business One offers the option to hide unused functions in order to streamline the menus and provide increased simplicity. The option to hide functions can be found in Administration > System Initialization > General Settings and going to the Hide Functions tab.



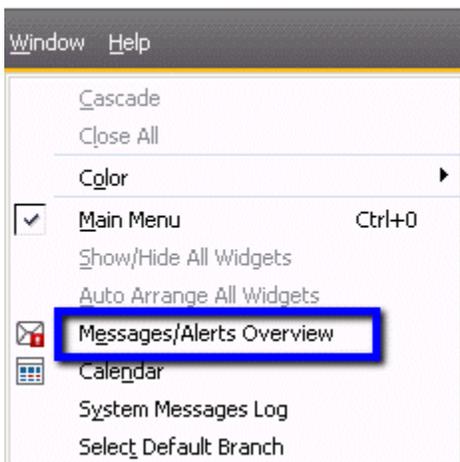


Select the function you would like to hide and click Update.

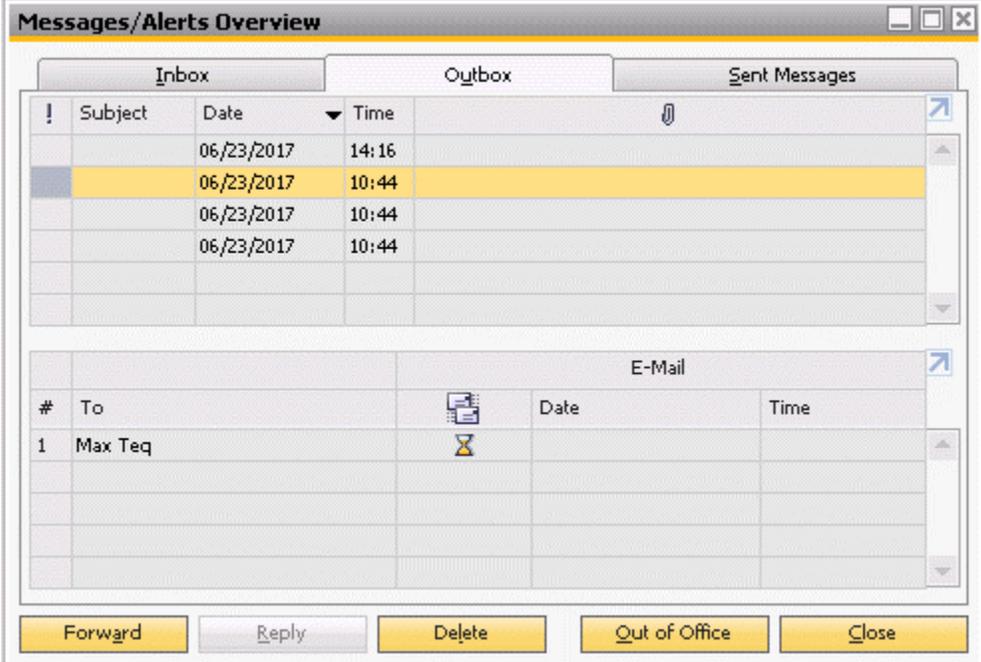
If you find that you need to start using one of the functions that has been hidden, simply go back to the General Settings and deselect the function you would like to start using. Keep in mind that all users (including non-superusers) with full authorization to General Settings will be able to use the Hide Functions feature.

Messages/Alerts Overview

Have you ever sent an invoice through SAP and found that the recipient never received it? Or maybe you remember sending it but cannot recall whether you attached the PDF? You can use the Alerts/Messages Overview window to view the details of messages you sent through Business One. You can access this screen by going to Window > Messages/Alerts Overview:



In the Messages/Alerts Overview box, there are three tabs: Inbox, Outbox, and Sent Messages. All messages that have been successfully sent can be found under the Sent Messages tab. The ones that are still pending will remain in the Outbox. The paperclip icon in the rows indicates whether an attachment was sent with the message.



Journal Entry Preview

The journal entry preview is an excellent tool for both previewing the journal impact of adding documents and checking for errors. Before adding a document that creates a journal entry, you can right click and select Journal Entry Preview in order to see the journal entries that will be created:

A/R Invoice

Customer
 Name
 Contact Person
 Customer Ref. No.
 BP Currency
 Branch

Item/Service Type		Item	Quantity	Unit Price	Discount %	Tax Code	Total (LC)	Bin Location Allocated
1	A00001	J.B. Officeprint 1420	1	400.00 \$	6.250	Exempt	375.00 \$	1
2					0.000			

Sales Employee
 Owner

- B1 Usability Package
- Add B1 Validation configuration
- Add function buttons to this window
- Edit Item Placement Tool configuration
- Create new tab
- Toolbox: Configuration
- Make Items Read Only...
- Add Right-Click Menus to this window
- Row Details...
- New Activity
- Payment Means...
- Gross Profit...
- Volume and Weight Calculation...
- Packing Slip
- Opening and Closing Remarks
- Transaction Journal...
- Journal Entry Preview**
- Save as Draft

Journal Entry Preview

Series Number Posting Date Due Date Doc. Date Remarks
 Origin Origin No. Trans. No. Template Type Template Indicat
 Trans. Code Ref. 1 Ref. 2 Ref. 3

Blanket Agreement

▶ Expand Editing Mode

#	G/L Acct/BP Code	G/L Acct/BP Name	Debit	Credit	Ref. 3
1	C20000	Maxi-Teq	375.00 \$		1
2	4110000-01-001-01	JB Printer Revenues (HO, USA, C		375.00 \$	
3	1340000-01-001-01	Inventory - Finished Goods (HC		400.00 \$	
4	5110000-02-001-01	COGS - Domestic (HO, USA, GA	400.00 \$		
			775.00 \$	775.00 \$	

In addition to previewing the journal entries, the Journal Entry Preview feature can be used to check for errors in documents before adding them. Because the Journal Entry Preview acts as a transaction simulation, any errors that will be generated upon adding or updating the document will be displayed:

A/R Invoice

Customer → C20000
 Name Maxi-Teq
 Contact Person → Max Teq
 Customer Ref. No.
 BP Currency \$

Branch Main

Contents Logistics Accounting Attachments

Item/Service Type Item

#	Item No.	Item Description	Quantity	Unit Price	Discount %	Tax Code	Total (LC)	Bin Location Allocation
1	→ A00001	J.B. Officeprint 1420	1	400.00 \$	6.250	→ Exempt	375.00 \$	→ 1
2					0.000			

Sales Employee Sales Manager
 Owner → Butler, Jayson

Payment Order Run

Remarks

Add Cancel

06/23/2017

G/L account is missing (1) [Message 131-46]

This becomes especially useful when you want to see whether a transaction will be successful without actually adding the document.

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