



PUBLIC

How to Customize Lists in SAP Business One

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How to Customize Lists

Introduction

SAP Business One displays lists of records in *List of...* windows. Some common examples are the *List of Business Partners* window and the *List of Items* window.

Users can perform their jobs more efficiently if the *List of...* windows are customized according to the way they work. For example, when users see only the fields that they actually use, and can sort and display these fields based on their needs, they can quickly find the information they are looking for.

Superusers, and users with full authorizations, can customize *List of...* windows. These changes then take effect for all users who work with that company (that is, all users who are logged onto that database). For more information about authorizations, see the document *How to Define Authorizations in Releases 2007 A and 2007 B* in the documentation area of SAP Business One Customer Portal (<http://service.sap.com/smb/sbocustomer/documentation>).

About This Guide

This guide is divided into two parts: general information about lists in SAP Business One and business examples.

The general information is a review for all users. It explains how to work with lists in SAP Business One.





The business examples are for superusers and for users with full authorizations in SAP Business One; they show the *List of...* windows that are most often customized. The SAP Business One *List of...* windows and the data shown in them may be different in your application. However, after reading the examples, you will be able to apply the concepts explained in this document to suit specific business needs.

General Information About Lists in SAP Business One

This section is intended for users who are new to SAP Business One and those who need a quick review of lists. It discusses the following topics:

- The list icons used in SAP Business One
- What the list icons mean and when they are displayed
- How to use a typical *List of...* window

List Icons

By default, the *Choose From List Fields*  indicator, the *List Selection*  icon, the *Choose from List*  icon or *Arrow down*  icon displays if a field or column is, or can be, populated with a value from a list. The *Delivery* window below shows examples of the three icon types. Clicking any of these displays the corresponding *List of...* window.

Delivery
☐ ☐ ✕

Customer

Name

Contact Person

Customer Ref. No.

Local Currency

No.

Status

Posting Date

Delivery Date

Document Date

Contents

Logistics

Accounting

Item/Service Type Summary Type

#	Item No.	Quantity	Unit Price	Disc...	Tax ...	Total (LC)
1				0.000		

Sales Employee

Owner

Remarks

Total Before Discount

Discount %





Freight

Rounding

Tax

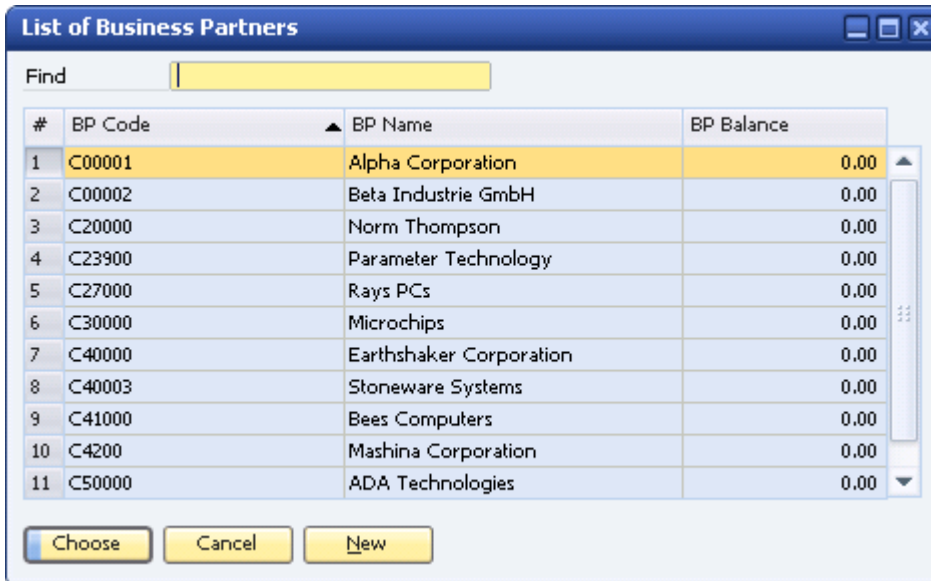
Total

The following table explains how to use the SAP Business One list icons.

Icon	Description	To hide/show the icon
List Selection 	The field can be populated from a list, and you can currently select a value from the list. Clicking the icon opens a separate window.	From the menu bar, choose <i>View → Pickers Display → List Selection</i> . This setting is user-specific and does not affect other database users. You can display <i>List of...</i> windows by pressing the TAB key in the selected field.
Choose From List Fields 	The field can be populated from a list, but you cannot currently select a value from the list as the field is not currently active.	From the menu bar, choose <i>View → Indicator Display → Choose From List Fields</i> . This setting is user-specific and does not affect other database users. You can display <i>List of...</i> windows by pressing the TAB key in the selected field.
Choose from List 	The field can be populated from a list, and you can currently select a value from the list. Clicking the icon opens a separate window. It is also possible to select a value for this field from a dropdown list.	Always shown
Arrow down 	You can choose a value from a dropdown list without opening a separate window.	Always shown

Using a *List of... Window*

The options explained below are common to all *List of...* windows. The *List of Business Partners* window serves as an example.



Use the options in the *List of Business Partners* window as follows:

To...	Do This...
Quickly locate a business partner from the list using the <i>Find</i> field	<p>Specify a letter or number in the <i>Find</i> field. The application automatically displays values from the list that begin with the character(s) you specified.</p> <p>In the window above, the <i>BP Code</i> field is the active sort column (indicated by the black triangle). Assume the BP code you are seeking is C58373. You might specify C58 in the <i>Find</i> field. The application would display all records beginning with C58, and C58373 would appear near the top of the list.</p> <p>Depending on the information in the active sort column, the values are sorted alphabetically, numerically, or both. The window above is an example of both alphabetical and numerical sorting. A <i>BP Code</i> that begins with C appears before those that begin with D, and C00001 appears before C00002, and so on.</p>
Change the <i>Find</i> field sort criterion and sort direction	<p>Double-click a column heading. A black triangle appears indicating the column is the active sort column for the values you specify in the <i>Find</i> field.</p> <p>Double-click the active column heading to make the sort ascending or descending. The black arrow changes to indicate the direction of the sort.</p>

To...	Do This...
Select a value from the list	<p>Highlight the appropriate value in the list and choose the <i>Choose</i> button or double-click on the value.</p> <p>The <i>List of...</i> window closes automatically and the selected value appears in the field from which you displayed the list.</p>
Exit without choosing a value from a list	Choose the <i>Cancel</i> button. The <i>List of...</i> window closes automatically.
Create a new value from a <i>List of...</i> window	<p>Choose the <i>New</i> button.</p> <p>Assume you are in the <i>List of Business Partners</i> window. Choosing the <i>New</i> button displays the <i>Business Partner Master Data</i> window. Use it to create a new business partner record. When you save the new business partner's information, the new business partner appears in the field from which you displayed the list. In addition, the next time you display the <i>List of Business Partners</i> window, the new business partner appears in the list.</p>

Business Examples

The following business examples show superusers and users with full authorizations how to customize common *List of...* windows in SAP Business One. You can apply these sample procedures when customizing other lists you use regularly.



CAUTION

Changes you make to *List of...* windows affect all users who work with this company.


All the business examples use the *List of – Settings* window to customize the active *List of...* window. The checkboxes, buttons, and sort field in the *List of – Settings* window are standard, but each window looks different, depending on how it has been used to customize the active *List of...* window.

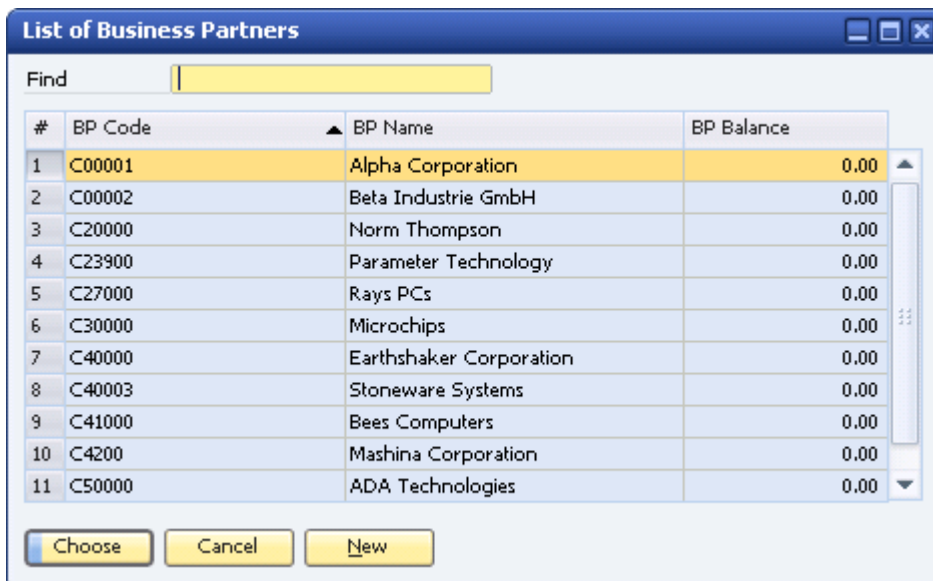
Each business example shows you how to use different options in the *List of – Settings* window. Read all the examples to ensure you know how to use all the options.

Replacing Fields in a *List of...* Window

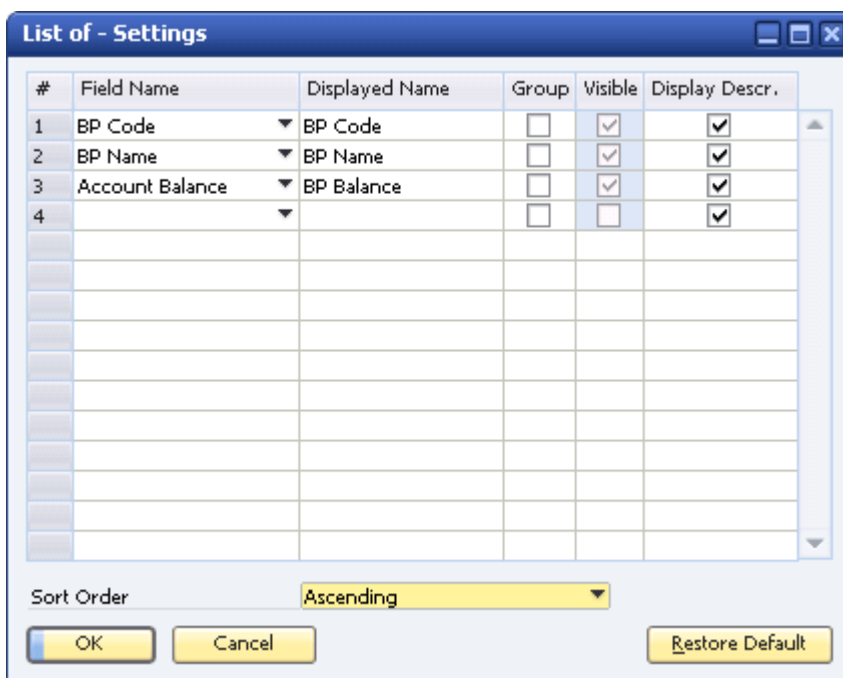
In this scenario, the users regularly access the *List of Business Partners* window and need to see the contact person at the business partner, but not the balance on the business partner's account. By default, the window shows the fields *BP Code*, *BP Name*, and *BP Balance*.

Procedure

- From the SAP Business One *Main Menu*, choose *Sales A/R → Delivery*.
The *Delivery* window appears.
- In the *Customer* field on this *Delivery* window, click the *List Selection*  icon.
The *List of Business Partners* window appears.



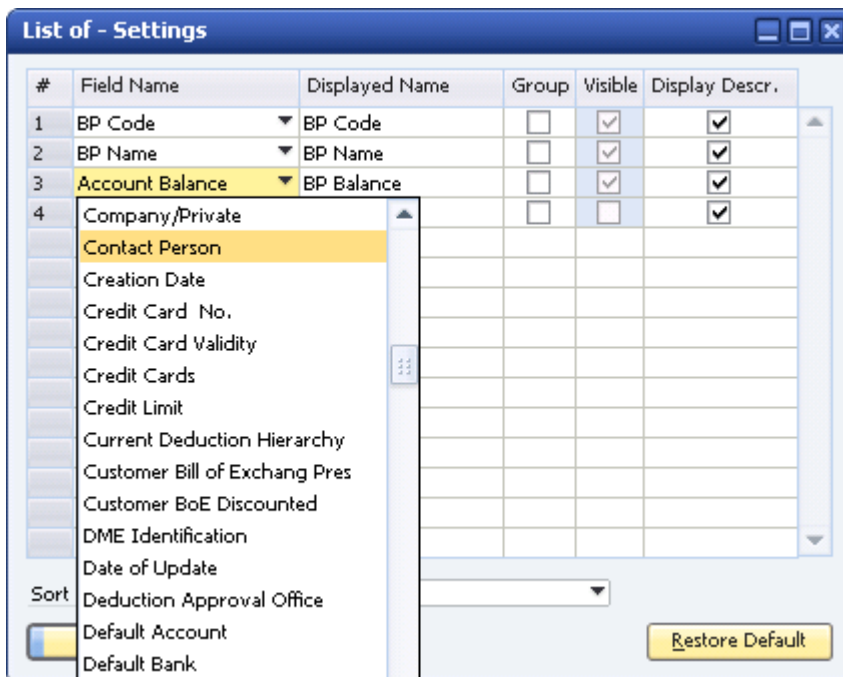
- Choose *Tools* → *Form Settings* in the menu bar or click *Form Settings* in the toolbar. The *List of – Settings* window appears. The window shows the settings for the fields that currently appear in the *List of Business Partners* window.



Note

These are the default fields for the *List of Business Partners* window. You can restore these defaults (if you remove or change them) by choosing the *Restore Default* button.

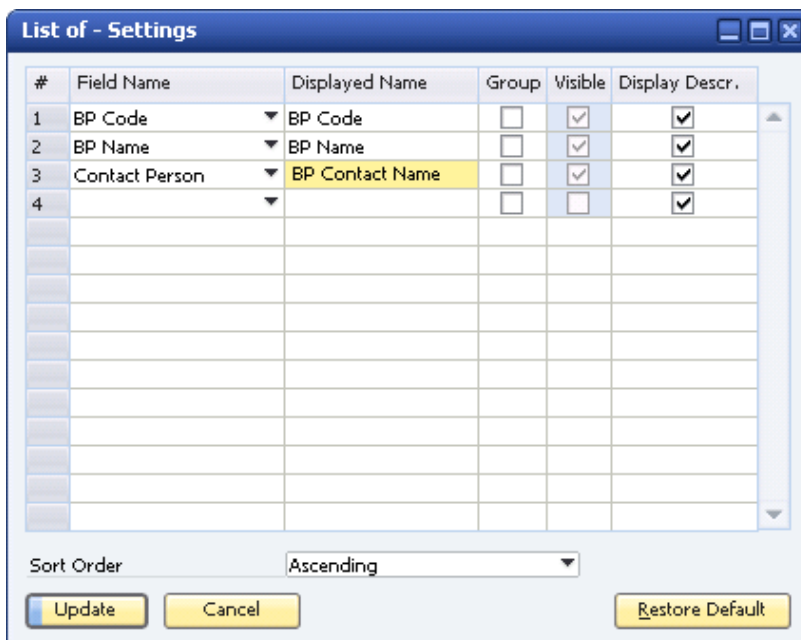
- To display the business partner's contact person instead of the account balance, click *Account Balance* and choose *Contact Person* from the dropdown list.



Contact Person replaces *Account Balance*.

- To see a column heading other than *Contact Person* in the *List of Business Partners* window, specify a new name in the *Displayed Name* field.

When you replace or add a new field in the *Field Name* column, you have the option to specify a different name for the field in the *Displayed Name* column. Use a name that is meaningful to your company’s users and consistent with the other fields in the window. For this example, enter **BP Contact Name**.



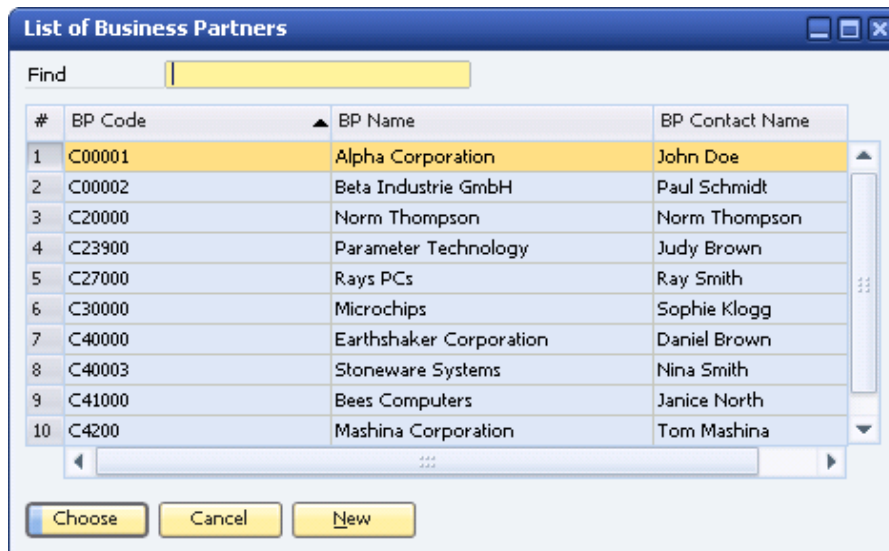
If the text in the *Field Name* column is what you want the users to see in the *List of Business Partners* window, skip this step.

- Choose the *Update* button, and then choose the *OK* button.

The *List of – Settings* window closes and you are returned to the *List of Business Partners* window.

- To see your updates, close this window and reopen it.

You now see the business partner contact person's name.



#	BP Code	BP Name	BP Contact Name
1	C00001	Alpha Corporation	John Doe
2	C00002	Beta Industrie GmbH	Paul Schmidt
3	C20000	Norm Thompson	Norm Thompson
4	C23900	Parameter Technology	Judy Brown
5	C27000	Rays PCs	Ray Smith
6	C30000	Microchips	Sophie Klogg
7	C40000	Earthshaker Corporation	Daniel Brown
8	C40003	Stoneware Systems	Nina Smith
9	C41000	Bees Computers	Janice North
10	C4200	Mashina Corporation	Tom Mashina


Result

The *List of Business Partners* window displays the business partner contact information for **all** users who are logged on to this company, **regardless** of how the window is accessed in SAP Business One.

Adding and Grouping Fields in a *List of...* Window

In this scenario, to display item details, the users access the *List of Items* window, which displays thousands of item records. To reduce search time, users would prefer to search the *List of Items* window by item group and initially see only this field, with the option to drill down to display the item number and number of items in stock. To help identify items, users also want to see an item property, but, again, only by drilling down to see it. By default, the *List of Items* window shows the fields *Item No.*, *Item Description*, and *In Stock* (the number of items in stock).

Procedure

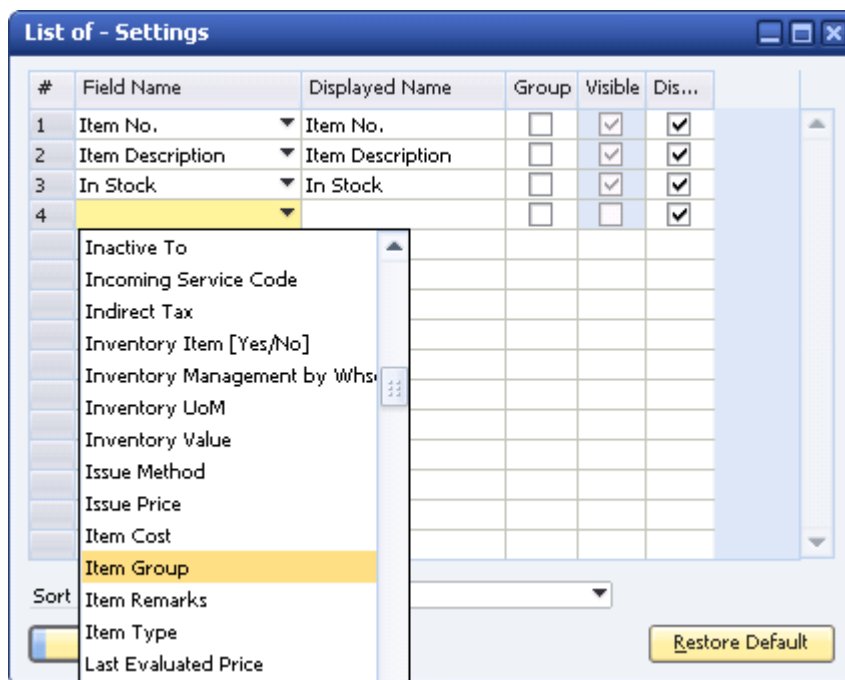
- From the SAP Business One *Main Menu*, choose *Sales A/R* → *Delivery*.
The *Delivery* window appears.
- In the *Customer* field, choose a business partner.
- Click the first row in the *Item No.* column and choose the *List Selection*  icon.

The *List of Items* window appears.

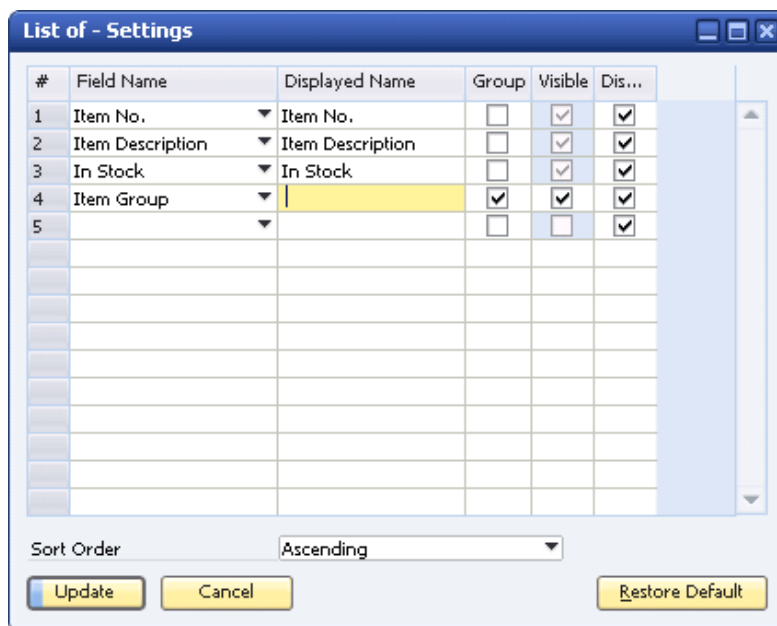
#	Item No.	Item Description	In Stock
1	A00001	IBM BladeCenter Server	3,000
2	A00002	IBM Infoprint 1312	5,000
3	A00003	IBM Infoprint 1222	2,000
4	A00004	IBM Infoprint 1226	2,000
5	A00005	HP Color LaserJet 5	5,000
6	A00006	HP Color LaserJet 4	3,000
7	A00007	HP 600 Series Ink	100,000
8	A00008	HP 10 Premium Paper	100,000
9	A00009	HP LJ Address Label 100	100,000
10	A00010	Printer Pack 100 for home use	200,000
11	A00011	Tape Backup 1920	10,000

- To display the *List of – Settings* window, choose *Tools → Form Settings* from the menu bar or click *Form Settings* in the toolbar.
The *List of – Settings* window appears.

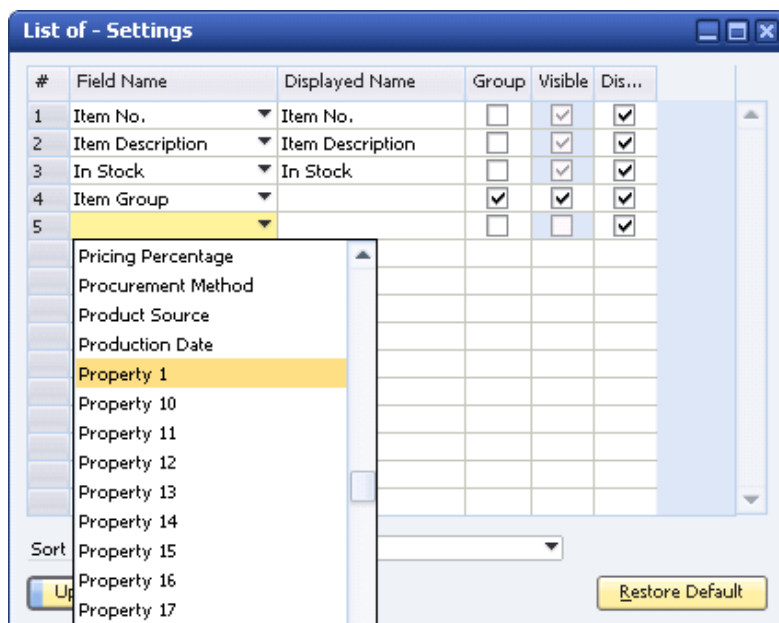
- In the *Field Name* column, click the blank field below *In Stock* and choose *Item Group*.



- To see a column heading other than *Item Group* in the *List of Items* window, specify a new name in the *Displayed Name* field.

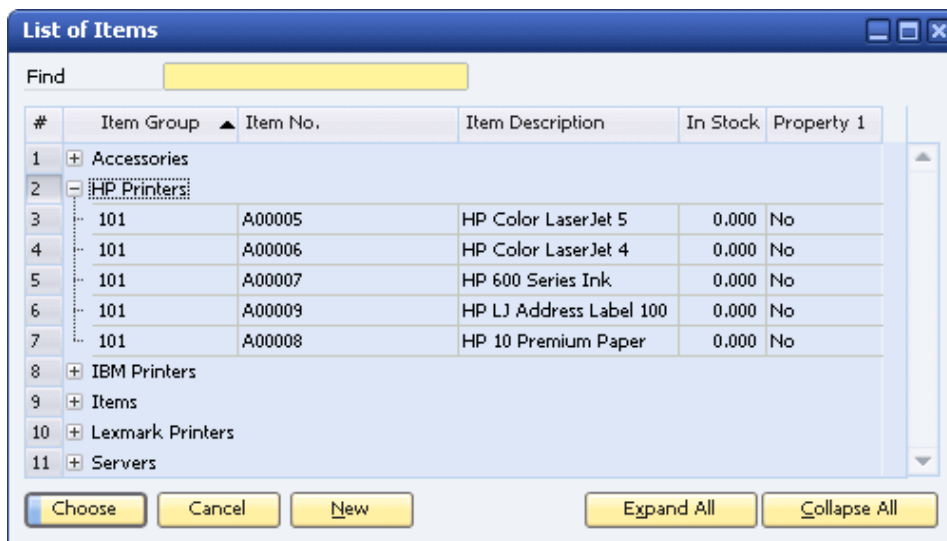


- To ensure that *Item Group* (or the *Displayed Name*, if you specified one) is the only field initially visible in the *List of Items* window, select the *Group* and *Visible* checkboxes in the *Item Group* row. This causes all the other fields in the *List of Items* window to be grouped under *Item Group*. You can expand the group to see the other fields in the window.
- In the *Field Name* column, click the blank field below *Item Group* and choose *Property 1*.



9. For each field in the *List of – Settings window*, use one or more of the following options, as required:
 - Select the *Group* checkbox for one field as shown above, or select it for more than one field to create a tree structure. The hierarchy for multiple grouped fields is the order in which they appear in the *List of – Settings window*. For example, if you selected the *Group* checkbox for the first three fields in the window above, *Item No.* would be the top node on the *List of Items* window, *Item Description* the second, and so on.
 - If you select the *Group* checkbox for a field, you also can select the *Visible* checkbox to display the *Field Name* (or *Displayed Name*, if one has been specified) as a column heading in the *List of...* window. If you deselect the *Visible* checkbox, the *Field Name* (or *Displayed Name*) no longer displays in the *List of...* window; however the data for that field still displays.
 - Select the *Display Descr.* checkbox to display the full field value description rather than the internal value for fields that have an internal value. For example, if you select the *Display Descr.* checkbox for the *Property 1* field, the values *Yes* or *No* display instead of *Y* or *N*. If you select this checkbox for the *BP Type* field, *Customer* or *Vendor* or *Lead* displays instead of *C* or *S* or *L*.
- Note**
- The fields that have internal values depend on the structure of your database, which may have been altered after SAP Business One was installed. Check with your database administrator if you have questions about which fields have internal values.
- Set the sort order of the *List of Items* window. In the screenshot for this example, the item groups are sorted alphabetically, in ascending order (A before B and so on).
10. Choose the *Update* button, and then choose the *OK* button. The *List of – Settings window* closes and the *List of Items* window appears.
 11. Work with the list as follows:
 - a. To see your updates, close the *List of Items* window and reopen it.
 - b. To see the grouped field information, click the + (*plus*) sign in front of an item group.

- c. To simultaneously open or close all the item information, choose the *Expand All* or *Collapse All* button, respectively.



Result

When opened, the *List of Items* window shows only the item group, but lets users display additional item details, including *Property*, when necessary.

Inserting Fields in a *List of...* Window

The *Copy From* function lets you create documents, such as sales orders, based on an existing document. If users access the *Copy From* function regularly, you can customize the list of source documents, enabling all users to quickly identify a document and copy its information to another document.

In this scenario, there are several open sales orders for a business partner, with several items in each order that are on back-order. When items on back-order arrive at your warehouse, users regularly copy the item information from the business partner's existing sales orders to create delivery documents. You want to make sure that sales orders that are nearing their cancellation date are taken as the basis for deliveries first, before more recent sales orders. Therefore, you need to insert the *Cancellation Date* field into a quickly identifiable position on the *List of Sales Orders* window.

Procedure

1. From the SAP Business One *Main Menu*, choose *Sales A/R* → *Delivery*.
The *Delivery* window appears.
2. In the *Customer* field, specify a business partner with existing sales orders.

Delivery

Customer: C4003
 Name: Stoneware Systems
 Contact Person: Nina Smith
 Customer Ref. No.:
 Local Currency:

No.: Primary 1
 Status: Open
 Posting Date: 05/21/09
 Delivery Date: 05/21/09
 Document Date: 05/21/09

Contents | Logistics | Accounting

Item/Service Type: Item Summary Type: No Summary

#	Item No.	Quantity	Unit Price	Disc...	Tax C...	Total (LC)
1	A00005	1	\$ 550.00	0.000	NY	\$ 550.00
2				0.000		

Sales Employee: 1
 Owner: Downs, Mark

Remarks: Based On Sales Orders 1.

Total Before Discount: \$ 550.00
 Discount: %
 Rounding: \$ 0.00
 Tax: \$ 23.38
 Total: \$ 573.38

Buttons: Add, Cancel, Copy From, Copy To

3. Choose the *Copy From* button and choose *Sales Orders*.

The *List of Sales Orders* window appears:

List of Sales Orders

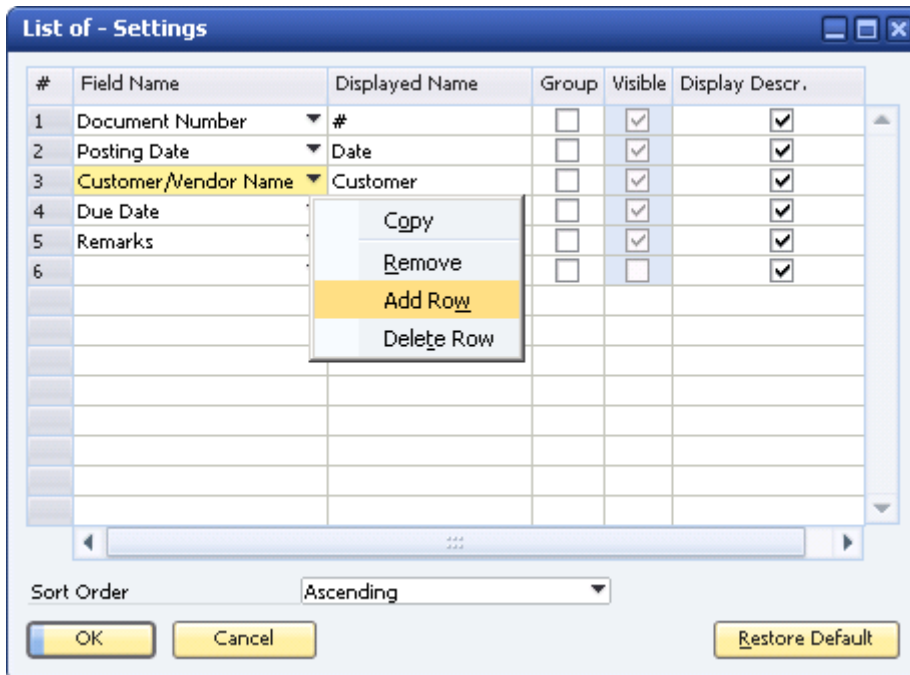
Find: |

#	#	Date	Customer	Remarks	Due Date
1	1	05/21/09	Stoneware Systems		05/21/09
2	2	05/21/09	Stoneware Systems		05/22/09
3	3	05/21/09	Stoneware Systems		05/28/09

Buttons: Choose, Cancel

4. Choose *Tools* → *Form Settings* from the menu bar or click *Form Settings* in the toolbar.

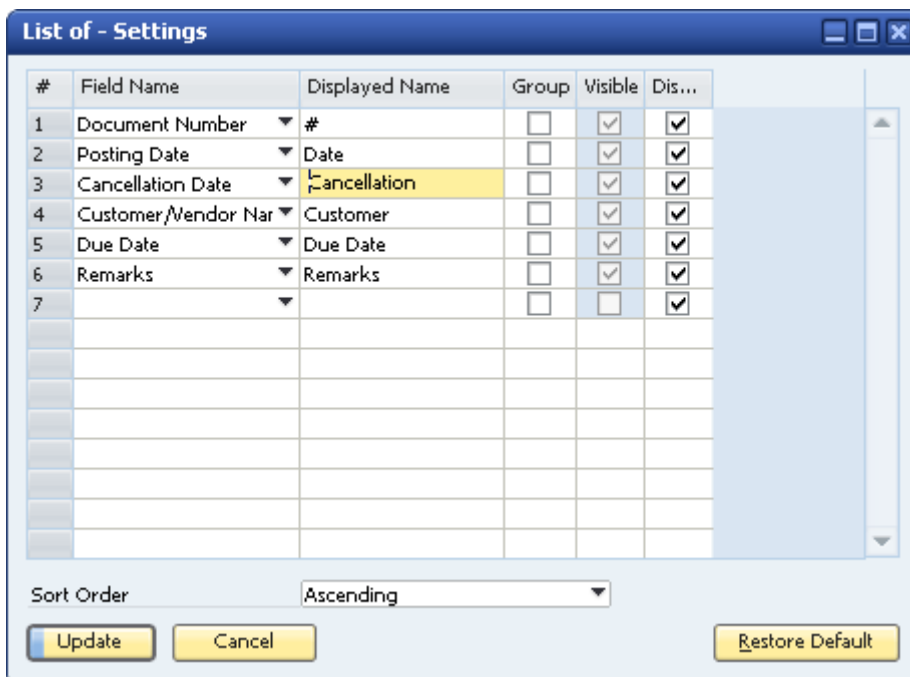
The *List of – Settings* window appears.



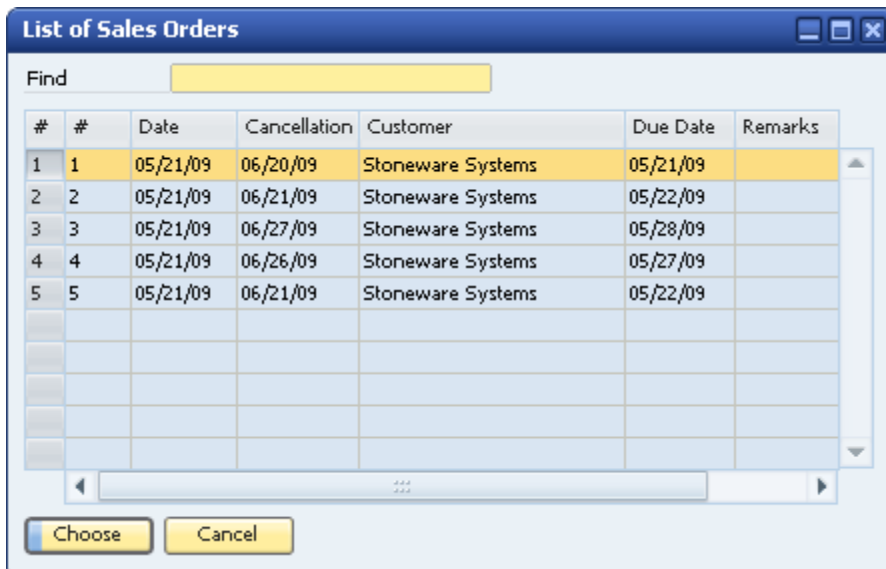
- To add a blank row for the cancellation date field, right-click the *Customer/Vendor Name* field and choose *Add Row*. The new row is inserted above the field you selected.

In this business example, users typically search for sales orders by their numbers and dates. Users must now also check the cancellation date. Therefore, row 3 is a suitable place for the new field.

- From the dropdown list of the new row, in the *Field Name* column, select *Cancellation Date*.
- To see a column heading other than *Cancellation Date* in the *List of Sales Orders* window, specify a new name, such as *Cancellation*, in the *Displayed Name* field.



8. Choose the *Update* button, and then choose the *OK* button. The *List of – Settings window* closes and the *List of Sales Orders* window appears.
9. To see your updates, close the *List of Sales Orders* window and reopen it.
10. To continue with the *Copy From* process, highlight a sales order nearing its cancellation date and choose the *Choose* button.



#	#	Date	Cancellation	Customer	Due Date	Remarks
1	1	05/21/09	06/20/09	Stoneware Systems	05/21/09	
2	2	05/21/09	06/21/09	Stoneware Systems	05/22/09	
3	3	05/21/09	06/27/09	Stoneware Systems	05/28/09	
4	4	05/21/09	06/26/09	Stoneware Systems	05/27/09	
5	5	05/21/09	06/21/09	Stoneware Systems	05/22/09	

11. Complete the copying process in the draw document wizard. For more information about this wizard, see the online help for SAP Business One.

Result

The *List of Sales Orders* window now displays the sales order cancellation date. Users can use this information to decide whether or not to copy information from a sales order to another sales document, such as a delivery.

Authorizations

For information about the authorizations required for customizing lists, see the online help as well as the document *How to Define Authorizations*, which you can download from the documentation area of SAP Business One Customer Portal at <http://service.sap.com/smb/sbocustomer/documentation>.

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